Russia's War Against Ukraine and the West: The First Year

Maria Engqvist and Emil Wannheden (eds.)

Johan Engvall, Carl Michael Gräns, Tobias Junerfält, Ismail Khan, Jonas Kjellén, Tomas Malmlöf, Kristina Melin, Johan Norberg and Carolina Vendil Pallin

FOI-R--5479--SE

June 2023

FOI

Russia's War Against Ukraine and the West: The First Year

Maria Engqvist and Emil Wannheden (eds.)

Johan Engvall, Carl Michael Gräns, Tobias Junerfält, Ismail Khan, Jonas Kjellén, Tomas Malmlöf, Kristina Melin, Johan Norberg and Carolina Vendil Pallin

Title	Russia's War Against Ukraine and the West: The First Year
Titel	Rysslands krig mot Ukraina och Väst: det första året
Report No.	FOI-R--5479--SE
Month	June
Year	2023
Pages	120
ISSN	1650-1942
Customer	Försvarsdepartementet/Ministry of Defence
Research Area	8. Säkerhetspolitik/8. Security Policy
Project No.	A12311
Approved by	Johannes Malminen
Division	Försvarsanalys/Defence Analysis

Cover: Ukrainian soldiers fire in the recently retaken city of Kupiansk, in the Kharkiv region, Ukraine, on Sept. 23, 2022. A series of embarrassing military losses for Moscow in recent weeks has presented a growing challenge for prominent hosts of Russian news and political talk shows scrambling to find ways to paint Kyiv's gains in a way that is still favorable to the Kremlin. (AP Photo/Kostiantyn Liberov, File)

Abstract

Russia's decision to invade Ukraine in 2022 marks a turning point, not only for Ukraine, Russia and their relations with the rest of the world, but also for global security in a long-term perspective. This anthology is an attempt to identify the most important political, economic and military consequences of the first year of Russia's full-scale war against Ukraine. The focus is on the consequences for Russia, its neighbouring countries and international security.

Three main observations can be made about the first year of war. The first is that the invasion had less to do with Ukraine's political development, but more so with the Russian political leadership's perception of Russia as a great power. The second observation regards the risk of escalation. So far, the war has been fought under the assumptions that a direct conflict between Russia and NATO should be avoided, and that nuclear weapons should not be used. If either of these are called into question, there is a substantial risk of escalation – both geographically and in terms of the intensity of the conflict. The third observation is, that regardless of how the war in Ukraine develops, Russia's confrontation with the West is of a long-term nature.

Keywords: Russia, Ukraine, West, security policy, military expenditure, defence industry, Central Asia, Caucasus, Armed Forces

Sammanfattning

Rysslands invasion av Ukraina är en vändpunkt, inte bara för Ukraina och Ryssland och deras relationer med resten av världen, utan också för den globala säkerheten i ett långsiktigt perspektiv. Denna antologi är ett försök att identifiera de viktigaste politiska, ekonomiska, och militära konsekvenserna av den ryska invasionens första år. Fokus ligger på konsekvenserna för Ryssland, dess grannländer, och internationell säkerhet.

Denna antologi gör tre huvudsakliga observationer under det första krigsåret. Den första är att anledningarna bakom Rysslands fullskaliga invasion av Ukraina har mindre att göra med Ukrainas politiska utveckling, utan handlar mer om den ryska politiska ledningens uppfattning om Ryssland som stormakt. Den andra observationen gäller risken för eskalering. Hittills har kriget utkämpats under premisserna att en direkt konflikt mellan Ryssland och Nato bör undvikas, och att kärnvapen inte ska användas. Om någon av dessa ifrågasätts uppstår en betydande risk för eskalering – både geografiskt, och vad gäller konfliktens intensitet. Den tredje observationen är att oavsett hur kriget i Ukraina utvecklas, kommer Rysslands konfrontation med Väst att bli långvarig.

Nyckelord: Ryssland, Ukraina, Väst, säkerhetspolitik, försvarsutgifter, försvarsindustri, Centralasien, Kaukasus, Väpnade styrkorna

Acknowledgements

Since 1999, a series of studies on Russian military capability, called “Russian Military Capability in a Ten-Year Perspective,” have been published by researchers at the Russia- and Eurasia Studies Programme at FOI. At the earliest stages of the Russo-Ukrainian war, it soon became evident to the researchers at the programme that it would not be possible to produce a report on Russian military capability in 2022 as had been done before. Instead, this anthology will reflect on plausible lessons and consequences after one year of war. This anthology was commissioned by the Swedish Ministry of Defence, which also provided support during the research process.

A number of people have contributed their knowledge and expertise to improving the anthology. Our colleague Gudrun Persson (Deputy Research Director at the Russia- and Eurasia Studies Programme, FOI) has provided us with insightful comments during the whole process. Her support has been vital to us. Mattias Waldenvik, (Deputy Research Director at FOI’s Department for Nuclear Related Issues) has facilitated fruitful discussions within his area of expertise. Aron Lund (Analyst at FOI’s Middle Eastern Programme) has contributed with detailed and valuable thought-provoking texts and comments to this anthology. Andreas Johnson (Analyst at FOI’s Department for Defence Economics) provided comments on the chapter on Russia’s economy. We owe them our deep gratitude.

We would also like to offer our warmest thanks to our reviewers. In April 2023, the final drafts of the chapters were reviewed during a seminar series with external experts, in order to secure the quality of the product. Researchers contributing to this effort are:

Andreas Umland, analyst at the Stockholm Centre for Eastern and European Studies (SCEEUS) at the Swedish Institute for International Affairs and Associate Professor of Political Science at the University of Kyiv-Mohyla Academy; Charles K. Bartles, analyst and Russian linguist at the Foreign Military Studies Office at Fort Leavenworth, Kansas; Jakob Hedenskog, Analyst at Stockholm Centre for Eastern European Studies (SCEEUS) at the Swedish Institute for International Affairs; Ruth Deyermond, senior lecturer in Post-Soviet Security at the Department of War Studies, King’s College, London; Cecilie Sendstad, Chief scientist at the Norwegian Defence Research Establishment (FFI), Oslo; Julian Cooper, Professor Emeritus of Russian Economic Studies, University of Birmingham, and Clinton Reach, International Defence Researcher at RAND Corporation, Santa Monica.

The making of this report would not have been possible without the assistance of the following: Per Wikström, Researcher at FOI, designed our maps – a work which he has faithfully assisted us with not only for this study, but for many years. Richard Langlais is another hidden hero in the saga of this study – he has language-edited and copy-edited all of our texts with the greatest patience and enthusiasm. Karin Blext, Administrator at FOI, has provided excellent administrative support, as well as providing for the layout of the report.

For all of their efforts, they deserve our heartfelt gratitude. Any remaining errors are our own.

Stockholm, June 2023
Maria Engqvist and Emil Wannheden, co-editors
Russia- and Eurasia Studies Programme

Abbreviations

Ant-AC	Anti-Corruption Action Center
ASEAN	Association of Southeast Asian Nations
AShM	Anti-Ship Missile
BAF	Belarusian Armed Forces
BTG	Battalion Tactical Group
C2	Command and Control
CAA	Combined Arms Army
CBR	Central Bank of Russia
CIS	Commonwealth of Independent States
COIN	Countrer Insurgency Operations
CSTO	Collective Security Cooperation Organisation
DNR	Donetsk People's Republic
EAEU	Eurasian Economic Union
EEAS	European External Action Service
EU	European Union
EU-AA	European Union Association Agreement
EUMA	EU Mission in Armenia
FSB	Federal Security Service (*Federalnaia sluzbha bezopasnosti*)
FSO	Federal Guard Service (*Federalnaia sluzhba okhrany*)
G7	The Group of Seven
GBP	British pound sterling
GDP	Gross Domestic Product
GOF	Group of Forces
GOZ	State Defence Order (*Gosudarstvennyi oboronnyi zakaz*)
GPV	State Armament Programme (*Gosudarstvennaia programma vooruzhenii*)
GSUAF	General Staff of the Armed Forces of Ukraine
HR/VP	High Representative/Vice President (EEAS)
IMF	International Monetary Fund
IT	Information Technology
JCC	Joint Control Commission
KIA	Killed in Action
LACM	Land-Attack Cruise Missile
LNG	Liquified Natural Gas
LNR	Luhansk People's Republic
MBT	Main Battle Tank

MD	Military District
MIA	Missing in Action
MoD	Ministry fo Defence
N4	Normandy Format Group
NATO	North Atlantic Treaty Organisation
NGO	Non-Government Organisation
NSDC	(Ukraine's) National Security and Defence Conuncil
OGRF	Operational Group of Russian Forces
OSCE	Organisation for Security and Cooperation in Europé
POW	Prisoner of War
RUB	Russian Rouble
SIPRI	Stockholm International Peace Research Institute
SSM	Surface-to-Surface Missile
SVR	Foreign Intelligence Service (*Sluzhba vneshnei razvedki*)
SWIFT	Society for Worldwide Interbank Financial Telecommunications
TB2	Bayraktar TB2 Unmanned Aerial Vehicle
TCG	Trilateral Contact Group
TV	War theatre (*Teatr voiny*)
TVD	Theatre of military actions (*Teatr voennykh deistvii*)
UAF	Ukraine's Armed Forces
UAV	Unmanned Aerial Vehicle
UK	United Kingdom
UN	United Nations
UNGA	United Nations General Assembly
US	United States
USD	United States dollar
VPN	Virtual Private Network
WIA	Wounded in Action

Table of Contents

List of Figures

List of Tables

List of Maps

List of Appendices

1. Introduction

Maria Engqvist and Emil Wannheden

Russia's decision to invade Ukraine in 2022 marks a turning point, not only for Ukraine, Russia and their relations with the rest of the world, but also for global security in a long-term perspective. Most evidently, the Russian decision to invade has inflicted massive suffering and damage on Ukraine. But the full-scale war has also started to change Russia itself, and it is important to understand these changes – not least for those countries in Russia's vicinity whose national security is affected by Russia.

To an outside observer, the decision to invade appears to have been a rash and impulsive gamble, but, in retrospect, it is evident that it was carefully calculated and timed by the Russian leadership. During Vladimir Putin's long presidency, Russia's political leadership has gradually come to regard the West as an enemy and its values as an existential threat, not only to Russian culture and civilization, but also to its ambitions of hegemony over its neighbouring countries. The mere idea that Ukraine, once part of the Russian Empire and later a founding member of the Soviet Union, would diverge from Russia and turn towards the West was unacceptable to the Russian political leadership.

Under Presidents Petro Poroshenko and Volodymyr Zelenskyi, Ukraine underwent a considerable degree of reform and consolidation, with support from Western countries, despite the ongoing war in Donbas. Russia's leaders gradually realised that Ukraine would not submit to Russian demands. During the course of 2021, the Russian leadership and security services therefore took steps to prepare the ground for a "special military operation" against Ukraine. A large agent network and accompanying support apparatus was recruited, with the aim of helping the invading forces take swift control of the whole country.[1] From the perspective of Russia's political leadership and its security services, the stars were aligned, and it was time to take action before the moment was lost. However, Russia's gamble proved a monumental misjudgement of Ukraine's resilience and Western political unity in support of Ukraine. Russia failed to achieve its aim of controlling Ukraine, and it is now stuck in a large-scale war that is lasting much longer and costing much more than the political leadership originally planned for.

During the first year of the war, several studies analysing different aspects and consequences of the Russo-Ukrainian war have been published; RUSI (*Royal United Services Institute*), CNA (*Center for Naval Analysis*), SWP (*Stiftung Wissenschaft und Politik*), DGAP (*Deutsche Gesellschaft für Auswärtige Politik*), OSW (*Ośrodek Studiów Wschodnich*), FFI (*Norwegian Defence Research Establishment*), FIIA (*Finnish Institute of International Affairs*), and ICDS (*International Centre for Defence and Security*), to mention only a few institutions, have all deepened the understanding of the implications of the war. The Swedish Defence Research Agency (FOI) has, since the late 1990s, produced in-depth analyses of Russia's Armed Forces, security policy, economy and defence industry, in reports entitled *Russian Military Capability in a Ten-Year Perspective.* The last such report was published in 2019.[2] As the title suggests, the purpose of FOI's reports was to assess the possible evolution of Russia's military capability in a long term perspective. However, the war has highlighted the difficulty of predicting the future; indeed, when it comes to Russia, the fog of war has made assessing the present situation more difficult than it used to be. This study is an attempt to identify, from the perspective of the areas of study conducted at the Russia and Eurasia Studies progamme at FOI, the most important lessons and consequences of the first year of Russia's full-scale war against Ukraine.

1.1 Objectives and limitations

The purpose of this study is to contribute to the discussion on the most important initial lessons and consequences of Russia's war against Ukraine. The words, "war" and "invasion," are used throughout the report to indicate the expanded war that has taken place since 24 February 2022, even though Russia has waged war on Ukraine since 2014, when it annexed Crimea and attacked and intervened in the Donbas.

This study focuses on the political, economic and military consequences of the war. Its analytical approach rests on the observation that it is not possible to understand these spheres in separation, but only by studying them together. In each chapter, delimitations have been applied, so as to focus on aspects deemed more important or relevant at the time of writing. Much has been written on the events of the war itself; this report is not an analysis of the events on the battlefield, but presents a larger view of the implications of the war. The focus here is on the consequences for Russia, its neighbouring countries and international security, but its purpose is not to assess the degree of destruction and suffering that Russia has inflicted on Ukraine, including through war crimes.

The time frame for this study is one year, starting from 24 February 2022, in other words, the first year of the war. The nature of the war and the elevated pace of events means that some observations may already be out of date soon after publication. The report, consequently, can be viewed as a snapshot of the situation in spring 2023. The one exception is the chapter on Ukraine, which examines Ukraine's political developments from 2014 up until Russia's renewed invasion. Ukraine's transformation from then on and the possibility that it will commence membership negotiations with the EU merits a separate study.

1.2 Sources

The Russian information landscape as it has evolved in the 21st century is contradictive. Russian authorities have increasingly aimed at restricting information, whilst simultaneously implementing a policy of selective openness, with the stated purpose of curbing corruption, while leaving plenty of information in public, on the internet, on how the Russian Federation is governed. However, over the course of two decades, Russian authorities have shaped and restricted the information landscape in the public sphere in Russia, especially regarding information that relates not only to Russia's Armed Forces and the defence industry, but also to research and development (R&D) and the domestic-policy domain. The invasion of Ukraine has only accelerated this development; federal laws forbid journalists from speaking to foreigners, and previously public databases have been geoblocked, to restrict an international audience. Statistical and economic data is not available to the same degree as before, and some data may have been manipulated by the Russian authorities; this type of data is difficult to verify. Censorship prevails in most parts of Russian public life and the unpreendented level of repression further compounds the problem as it probably leads to increased self-censorship. The evolving culture of secrecy and state censorship inevitably affects Russia-focused researchers and analysts and, accordingly, also this study, which is based exclusively on open sources. On the other hand, the degree of corruption and bureaucratic inefficiency in Russia also means that there have been a number of leaks which have been examined by investigative journalists.

Subsequently, it has become increasingly difficult to assess thoroughly how Russia is developing, in particular in the military domain. In contrast, however, the war has produced a tragic wealth of data about the actions of Russia's Armed Forces, which has facilitated more clear observation of Russian military performance than at any time before the war. The general development has, however, increased the level of ambiguity of the assumptions and deductions on which the analysis in this report in part relies. The situation regarding Ukrainian open-source material is afflicted with similar problems, but for different reasons. Throughout this study, the authors have tried, to the best of their abilities, to address especially the accuracy and tendencies of each source, whether primary or secondary, with regard to these problems.

1.3 Organisation of the report

This report is organised in six chapters. In Chapter 2, Ismail Khan analyses the evolution of Ukraine's security policy, from 2014 to 24 February 2022. He finds that this period was important for Ukraine's political and military consolidation. Ukraine's Armed Forces grew in both quantitative and qualitative terms and Ukraine's integration with Europe and NATO accelerated. The chapter provides the reader with a solid understanding of Ukraine's political situation on the eve of the invasion, and serves as a background for the other chapters, which focus more on the consequences of the invasion itself.

In Chapter 3, Carolina Vendil Pallin, Maria Engqvist and Carl Michael Gräns examine how the war has affected Russia's security policy, in a broad sense, as the holistic approach to security is charachteristic to Russia. They analyse Russia's current political development, including its domestic, security and foreign policies, and trace its roots. The authors provide a picture of a Russia that has closed its window towards Europe and instead turned towards the East. The authors find that Russia's entire security policy is inseparable from its wish to control Ukraine, and that Russia is preparing for a long-term confrontation with the West.

In Chapter 4, Kristina Melin, Johan Engvall and Ismail Khan examine the effects of the war on the security policy of some of Russia's neighbouring countries, namely Belarus, Moldova, Georgia, Armenia, Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. They conclude that Russia's invasion has had profound effects on the countries' security relation with Russia. As Russia's influence in these regions wanes, the balance of power is shifting, creating opportunities not only for other actors, such as China and Turkey, to step in, but also for the region's states to seek greater agency for themselves. Here, Belarus is the only exception, as it thus far remains close to Russia in all regards.

In Chapter 5, Johan Norberg, Ismail Khan and Jonas Kjellén assess how the losses of personnel and equipment in the war affected Russia's warfighting potential. They find that the first year of the war destroyed around half of the pre-war warfighting potential of Russia's land forces. Air, naval and nuclear forces were much less affected.

In Chapter 6, Emil Wannheden and Tobias Junerfält analyse the consequences of the war on Russia's political economy and its economic outlook. The authors provide a picture of a Russia that, at the same time as it faces serious economic challenges in the years to come, will not experience an economic collapse in the near term.

In Chapter 7, Tomas Malmlöf provides a background and context for Russia's military industrial complex, including its ability to resupply Russia's Armed Forces with tanks and artillery ammunition. The analysis in Chapter 7 aims to contribute to a comprehensive understanding of the dynamics of Russia's military equipment portfolio in the short and medium term, rather than providing a fully detailed analysis.

In the final chapter, overarching conclusions are presented, together with a summary of the chapters. This concluding discussion also presents some of the key variables that will be critical to the development of Russia's confrontation with the West. ■

Endnotes

1 Jack Watling, Oleksandr V. Danylyuk, and Nick Reynolds, *Preliminary Lessons from Russia's Unconventional Operations During the Russo-Ukrainian War, February 2022–February 2023,* RUSI Special Report, 29 March 2023, *https://rusi.org/explore-our-research/publications/special-resources/preliminary-lessons-russias-unconventional-operations-during-russo-ukrainian-war-february-2022*.

2 See Fredrik Westerlund and Susanne Oxenstierna (eds.), *Russian Military Capability in a Ten-Year Perspective – 2019*, FOI-R--4758--SE (Stockholm: Swedish Defence Research Agency), 2019.

2. Consolidating Ukraine 2014–2021

Ismail Khan

This chapter examines how Ukraine's foreign and security policy evolved from 2014 to 2022. The aim is twofold. First, to shed light on the political events that led Ukraine to decisively turn away from Russia and instead pursue European and Euro-Atlantic integration. Second, to illustrate the process of political and military consolidation that took place in Ukraine and that created the necessary preconditions for it to resist the Russian invasion of February 2022.

Russia's full-scale invasion of its neighbour, Ukraine, is a continuation of the aggression it unleashed against it in 2014, when it annexed Crimea and invaded Ukraine's industrial east. Former President (2010–2014) Viktor Yanukovych's decision, in late 2013, to suspend the anticipated signing of the EU Association Agreement (EU-AA), which sought to deepen and integrate Ukraine's political and economic association with the EU, led to major protests in Kyiv's central square (*Maidan Nezalezhnosti*, in Ukrainian), commonly known as the Euromaidan. But the acceptance of pro-Western rhetoric and long-standing grievances against corruption had permeated Ukrainian society, especially within nongovernmental organisations, to such an extent that it had made it difficult for Yanukovych's administration to justify the suspension of the signing.[1] Violent demonstrations escalated, following the adoption of a range of laws enacted by the Yanukovych government, prohibiting the freedom of the press and assembly.[2] Dozens of protestors were killed.[3]

The protests received the name, "Euromaidan," through frequent reference to it in a variety of social media, as the pretext was related to the EU-AA, and driven by calls to transform the mode of governance to a modern European one, with less corruption and abuse of power, underpinned by accountability.[4] Yanukovych fled on 22 February 2014, due to the implosion of his inner circle. Ukraine's civil society, along with independent civic actors, filled the void, notably by maintaining administrative order in several cities.[5]

The rest of this chapter is organised as follows. The next section details the presidency of Petro Poroshenko, from 2014 to 2019. During this period, Ukraine had to manage a local war in its east. The Minsk agreements were created, and Ukrainian civil society started playing an increasingly important role in driving domestic political developments with direct bearing on the country's foreign and security policy. The subsequent section describes the presidency of Volodymyr Zelenskyi, from his election in 2019 up until the invasion in February 2022. This period was marked by the definitive failure of the Minsk agreements, a hardening position in Kyiv with respect to Russia and an increased focus on European and Euro-Atlantic integration. The last section presents the conclusions.

2.1 The presidency of Petro Poroshenko 2014–2019

Following the Russian annexation of Crimea, pro-Russian rallies emerged in Kharkiv, Dnipro, and Odesa, with varying degrees of violent outcomes. While they attracted little support – local authorities remained loyal to the pro-EU interim administration in Kyiv – the developments in Donbas, eastern Ukraine, differed. This was the electoral base of Yanukovych and his political party: the Party of Regions. In the cities of Donetsk and Luhansk, there were fears of the new government in Kyiv among sections of the population. There was a strong regional identity, especially where criminal gangs, pro-Russian politicians from the political periphery, and local business elites with interests in Russia were present, as were armed formations set up by Russian intelligence services, including former veterans of the Russian Armed Forces.[6] These formations were staffed with people brought from Russia and by local supporters of the pro-Russian course. The formations were then structured into "armies" commanded by Russian officers and supported by regular Russian units. In April 2014, pro-Russian irregular formations seized Sloviansk and Kramatorsk, in Donetsk oblast, leading to the creation of the so-called "Donetsk People's Republic" (DNR) and, later, the "Luhansk People's Republic" (LNR). Staged referendums were held in the DNR and LNR that May, after which both claimed independence.[7]

Donbas 2014–2019

In the aftermath of the Euromaidan, Yanukovych fled Kyiv. Moscow's goal at this juncture was to force Kyiv to negotiate directly with the Russian-backed separatists, through a re-configuration of the Ukrainian constitution that would grant the separatists significant regional autonomy. The federalisation would not single out Russia as a party to the conflict, even if it was, and would give the separatists a say against Ukraine's Westward orientation. But, weak coordination among the separatists, as well as Kyiv's decision to launch an "Anti-Terrorist Operation" on 13 April 2014, almost enabled the Ukrainian side to regain the initiative, nearly forcing the separatists to disband. The Anti-Terrorist Operation was comprised of privately funded volunteer battalions and irregular militias; at the time, the Ukrainian ground forces included approximately 5 000 combat-ready troops.[8]

The emergence of a geopolitical Ukrainian civil society

Following the Euromaidan, as state institutions were weak, civic activists from a variety of civil-society organisations stepped up to fill many of the functions of the state. Civil-society organisations (CSO) that took on important functions included human-rights organisations, youth and student organisations, environmental groups, trade unions, business associations, charitable organisations, think tanks, and research institutes. Activists were empowered by the central government to ensure transparent voting procedures and combat pro-Russian propaganda. Critics questioned the utility of their outsized role and accused oligarchs of funding and misusing civil society to advance their own political and economic interests.[9] Ukraine's civil society increasingly began to engage in areas beyond its traditional activities, namely those with geopolitical dynamics.[10] Thus, it increased its interaction with Ukraine's Western partners and presented views and opinions on why a Westward orientation remained vital for Ukraine's future. Since 2014, this has become part of their political toolbox.[11] Activists also organised improvised volunteer battalions.[12] They thereby became informal security providers and also delivered logistical and medical services along the front lines. This further blurred the distinction between civil society and the regular army.[13]

The birth of the Minsk agreements

The Organisation for Security and Cooperation in Europe (OSCE) deployed a Special Monitoring Mission to Ukraine, in March 2014. The mission was mandated to report on the situation along the line of contact in Donbas. Meanwhile, Petro Poroshenko, one of Ukraine's most high-profile business tycoons, as well as Minister of Trade and Economic Development during part of Yanukovych's presidency, was elected President on 25 May. He won the first ballot with unprecedented support across all regions in Ukraine.[14] Far-right parties scored much lower than expected, thus denting the Kremlin narrative that Ukraine was run by far-right extremists. Poroshenko signed the EU-AA, including the Deep and Comprehensive Free Trade Area, which entered into force in 2017.[15] These agreements remain among the most wide-ranging that the EU has signed with any third country and highlight a comprehensive path to EU membership-candidacy status. They also act as legal frameworks that align Ukraine with EU legislation, laying out a roadmap of political, economic, judicial, and social reforms.[16]

To resolve the then ongoing crisis in Donbas, the Normandy Format group (N4), comprised of France, Germany, Russia and Ukraine, was established on 6 June 2014, on the margins of the events commemorating the 70th anniversary of the D-Day landings in France, in 1944. The Trilateral Contact Group (TCG), tasked to deal with conflict management and resolution, was also formed within this format, along with other subgroups focusing on political, security, economic, and humanitarian issues. It consisted of Russia, Ukraine, and the OSCE. Representatives from the separatists also joined the TCG format, due to Russian pressure.[17]

Ukraine's Anti-Terrorist Operation continued under Poroshenko, who had issued a 15-point peace plan, in June 2014, laying out a road map to resolve the crisis. Poroshenko would not enter into direct dialogue with the separatists. The plan envisaged, among other things, a 10-kilometre buffer zone along the Russian-Ukrainian border and the protection of the use of the Russian language. Elections would also be held in the region, in line with Ukraine's decentralisation reform, but without Ukraine's having to federalise.[18] At the same time, in September 2014, with Ukraine making gains, Russia intervened militarily, with up to 6 500 troops. The separatists regained the initiative following the battle of Illovaisk, in eastern Ukraine. Poroshenko, anticipating additional losses, sued for an immediate ceasefire. This led to the first Minsk agreement (the Minsk Protocol), signed in Minsk, on 5 September. Although not legally recognised, representatives from DNR and LNR also signed the agreement. France and Germany mediated. Nonetheless, in complete violation of the first Minsk agreement, elections were held in DNR and LNR. Largely reflecting Poroshenko's earlier plan, to varying degrees the Minsk agreement froze the conflict, detailing a path to de-escalation where, among other things, heavy weapons would be withdrawn from the line of contact.

The subsequent battle of Debaltseve, in eastern Ukraine, in February 2015, where several thousands of Ukrainian soldiers were trapped in an encirclement, led to Minsk II.[19] Developed under emergency negotiations, with Ukrainian, Russian, OSCE and DNR and LNR signatures, through the supervision of Germany and France, the second Minsk agreement was also supported by the UN Security Council (resolution 2202), on 15 February.[20]

The Minsk agreements reflected two incompatible views concerning Ukraine's sovereignty and, following 24 February 2022, they can also be viewed as Russia's failed attempts to counteract Ukraine's Westward orientation. In Moscow's view, elections were to be held *before* Ukraine would regain control of the entirety of areas occupied by the separatists supported by Russia. Ukraine's constitution would include a special-status clause, granting them increased autonomy. This would have allowed Russia to maintain an influence over the two Russian-backed breakaway republics, which in theory could have vetoed Ukraine's Westward orientation. Ukraine, on the other hand, viewed the agreements as a way to re-establish control over Donbas. "Foreign armed formations and mercenaries" would *first* withdraw and elections would thereafter commence under OSCE standards. Ukraine promoted the decentralisation reform launched in 2014, which aimed to strengthen Ukraine's bid for EU candidacy status, and wherein power would trickle down to local communities to ensure efficient local governance, under the principles of the European Charter of Local Self-Government.[21] This was contrary not only to Moscow's push for federalisation, but also its aim to keep Ukraine outside the EU. In hindsight, the decentralisation reform enhanced the powers and financial authority of local communities, especially by generating more taxes and spending on developing infrastructure.[22]

While the Minsk agreements ended the fighting phase of the 10-month conflict, they were never fully implemented. In 2017, Ukraine severed economic and social ties with DNR and LNR.[23] Possibly, Kyiv hoped to encourage the residents to move to Ukrainian-controlled territory.[24] The agreements failed to outline the sequencing of the steps to be taken; nor did they mention Russia's involvement in Donbas, but merely referred to Moscow's role as a mediator in arbitration, in what the Kremlin called an "internal Ukrainian crisis." Crimea was not mentioned. Meanwhile, Russia remained an active participant in the conflict. Important sections of Ukraine's civil society considered attempts to legitimise any direct dialogue with the separatists as unacceptable. Still, a group of Ukrainian and international CSO signed a statement, in March 2020, underlining the importance of maintaining people-to-people ties across the line of contact.[25]

The incompatible views on the Minsk agreements, regarding how to resolve the conflict in Donbas, whether first through security measures (withdrawal of troops), or politically (elections), probably contributed to Russia's decision to launch a full-scale invasion in 2022. As Chapter 3 details, Russia's insistence on a sphere of interest and its view of Ukraine as a key part of this ambition played a decisive role in the decision to invade.

Foreign and security policy reforms under President Poroshenko

The continued Russian military aggression made the strengthening of Ukraine's Armed Forces (UAF) a high priority for Poroshenko, who launched a review of Ukraine's national security and military defence in Donbas.[26] This resulted in reforms that, among other things, addressed command and control, operations planning, medical issues, and logistics. The reforms were reinforced by the Barack Obama administration's Assistance Package, in 2014, of approximately USD 291 million. Total US assistance by the end of 2021 amounted to USD 2.7 billion, in training and equipment.[27] The budget of the UAF increased from USD 2.4 billion, in 2013, to USD 3.7 billion, in 2018; from 2014 to 2018, the number of combat units of the UAF increased from 99 to 143. From 2013 to 2018, the level of manning increased from 168 000 to 255 000. According to a poll conducted by the Democratic Initiatives Foundation and the Razumkov Centre, the population's level of trust in the army increased from 21 to 61 percent, in 2013–2019.[28] In addition, in this period, the UAF built several fortifications and lines of defence along the line of contact, in Donbas, that the UAF continues to use to this day. In 2018, the nature of the combat operations in the east changed, as well, from having previously been labelled as an Anti-Terrorist Operation to now being referred to as a Joint Forces Operation, thus recognising that hostilities were not against "terrorists," but regular Russian forces. The overall operational command therefore shifted, along with the assumption of responsibility, from the Security Service of Ukraine to the General Staff.[29]

In a bid to further align the UAF with NATO standards by 2020, senior advisers from the US, Canada, United Kingdom, Lithuania, and Germany were invited to provide training. The defence reforms also sought to increase the level of professionalisation, create new units and reform the General Staff in line with NATO's J-structure of Joint Staffs.[30] Integrating volunteer units was another aim, with 15 000 volunteers, in approximately 50 units, with roots in the Euromaidan, supporting the UAF during the hostilities in Donbas. Another aim of the defence reform was to reinvigorate the Ukrainian defence-industrial complex. A sizeable part of Ukraine's defence-industrial capacity was lost between 2014 and 2015, since these facilities were based in the temporarily occupied areas. With the active engagement of civil society and the public sector, the role of establishing parliamentary oversight of the UAF also commenced. The Law on National Security, adopted in 2018, more clearly defined the role of nonmilitary civil servants in the Ministry of Defence, and strengthened their position vis-à-vis the General Staff.[31]

The Euromaidan was driven by the call to implement a European model of governance: raising the standard of living, limiting presidential power, and taking on corruption.[32] The EU-AA and the Deep and Comprehensive Free Trade Area encompassed a range of reforms linked to the judicial and anti-corruption sphere. Reforming the judicial system, in particular, was heavily promoted by civil society and implemented by Poroshenko, to varying degrees. During this period, civil society exerted pressure on the government to push through pro-EU reform packages. Although a special anti-corruption court was established, Poroshenko continued to be criticised by civil society, for wavering in his commitment to strengthen Ukraine's anti-corruption institutions.[33] A key element in the anti-corruption agenda, at that time, involved the electronic-asset declarations of public officials and their family members. This initiative was heavily promoted by one nongovernmental organisation (NGO) in particular, the Anti-Corruption Action Center, in Kyiv.[34]

Establishing a visa-free travel regime marked deeper integration between Ukraine and the EU, while highlighting that a further step away from the "Russian world" had been taken.[35] Another significant development was Poroshenko's signing of constitutional amendments, in February 2019, committing Ukraine to NATO and EU membership. This was a significant foreign- and security-policy development. Highlighting a further split from Russia, an independent Ukrainian Orthodox Church was formed, in 2019, formalising its separation from the Moscow Patriarchate, with which it had had ties reaching back to 1686.[36] The Russian Orthodox Church has supported Moscow's information operations towards Ukraine, with statements and views that align with Russian interests, along with efforts to influence public opinion abroad. Prior to the Russian invasion in 2022, moreover, priests were recruited and managed by the Russian intelligence services.[37]

Ukraine's European and Euro-Atlantic integration accelerated under Poroshenko, introducing a range of reform packages, despite the situation in Donbas. But his bid for a second term failed, in spring 2019.[38] At the end of his presidency, he enjoyed the trust of only 20 percent of the population.[39] In the run-off Volodmyr Zelenskyi secured a landslide victory. Zelenskyi, a popular comedian, actor, and businessman, had previously, in the satirical television series, *Servant of the People*, played a teacher who accidentally becomes president.[40]

2.2 The presidency of Volodymyr Zelenskyi

The main issues on the agenda in the 2019 elections were corruption and governance. Poroshenko and his political party, "European Solidarity," regarded Zelenskyi and his party, "Servant of the People," as inexperienced and feared that Ukraine could very well return to Russia's orbit of influence.[41] Advocating for reconciliation and returning the power to the people, Zelenskyi's candidacy also resonated with voters, due to his pledge to combat corruption and the old vested interests that had been hallmarks of Ukrainian politics, resulting in cronyism and economic stagnation.[42] These were the very same ideas that drove the Euromaidan protests in 2013–2014. Zelenskyi's election campaign also blurred the lines between pro-European and pro-Russian sentiments, given his background as a Russian-speaking Jew from south-eastern Ukraine. He was detached from traditional Ukrainian politics and had lived and worked in Moscow. Lacking an ideological base, his informal style of candidacy avoided identity politics, emphasising instead three messages: peace in Donbas; good governance, with an end to corruption; and improving the well-being of ordinary Ukrainians.[43] Zelenskyi did not concretely explain, however, how he would achieve all the goals promised in the campaign.

The new party, Servant of the People, secured 43 percent of the vote in early parliamentary elections the same year, winning 254 seats of 447, resulting in a parliamentary majority in the Rada.[44] With a relatively inexperienced, but pro-reform-oriented administration, President Zelenskyi's first months in office were characterised by passing long-anticipated reforms, at speed. These reforms concerned, among other things, ending parliamentary immunity for Rada deputies, laying out a mechanism for presidential impeachment, and appointing a prosecutor general. These actions won plaudits from civil society and anti-corruption activists in Ukraine. However, during spring 2020, civil-society representatives started to raise questions about Zelenskyi's commitment to maintaining the reform agenda.[45] There were fears that reforms had stalled, following a broad government reshuffle, in which the prime minister and the prosecutor general were replaced. Civil-society organisations scrutinised his inner circle, style of management and ties to the oligarchy, particularly to Ihor Kolomoisky, who had allegedly sponsored Zelenskyi's election campaign. In December 2016, Kolomoiskyi's bank, Privatbank, was nationalised, as part of a clean-up of the banking system, a reform initiative supported by the International Monetary Fund (IMF). These links added fuel to concerns that members of the old guard, allegedly linked to corruption, had replaced pro-reform bureaucrats and were now returning to the halls of power.

Josep Borell, the High Representative of the European Union for Foreign Affairs and Security Policy/Vice-President of the European Commission (HR/VP), noted, while visiting Kyiv, in September 2020, that the reshuffle of the Ukrainian government, which led to the dismissal of several pro-Western government ministers, had stalled on the rule of law and anti-corruption. He highlighted, in particular, the necessity to ensure a merit-based and depoliticised selection of the anti-corruption authorities.[46] With a mixed track record on anti-corruption and EU integration, Zelenskyi turned his attention to rebooting talks with Russia, within the framework of the Minsk Agreements.[47]

Resolving the conflict in Donbas – To Minsk or not to Minsk?

In June 2019, during a visit to NATO headquarters, in Brussels, Zelenskyi stated, "We are ready to negotiate with Russia. We are ready to implement the Minsk agreement."[48] In September 2019, Russia and Ukraine secured a landmark prisoner exchange, whereby 24 Ukrainian sailors were exchanged, after having been illegally detained by Russia in the Kerch Strait, in November 2018.[49] In October 2019, Zelenskyi stated his willingness to meet President Putin directly. However, when he announced Ukraine's readiness to sign the so-called Steinmeier Formula, an initiative envisaging a simplified version of the Minsk agreements, Zelenskyi found himself embroiled in a domestic political crisis. Named after Germany's president, Frank-Walter Steinmeier, the initiative sought to break the deadlock in the Minsk format by proposing elections in separatist-held territories, under the supervision of the OSCE. If assessed as free and fair, the territories would receive a special self-governing status and be returned to Ukraine.[50] Zelenskyi's adherence to the Steinmeier Formula emphasised a different sequence: elections would be held *after* the withdrawal of Russian troops and proxy forces.[51] But the opposition, large sections of civil society, and far-right activists deemed his step as akin to a capitulation, and questioned the meaning of a special self-governing status. In their view, the formula contained too many concessions to Russia and would legitimise separatist forces, a move they felt would be tantamount to violating Ukraine's sovereignty.[52] While Poroshenko equated it to "Putin's formula," Dmitri Peskov, Putin's spokesman, praised the Steinmeier Formula.[53]

Six months after his inauguration, in December 2019, Zelenskyi attended his only N4 meeting, in Paris. At the meeting, Ukraine and Russia agreed on another prisoner exchange and on establishing a ceasefire.[54] Prior to the meeting, Ukraine had also disengaged troops in three separate directions, near the line of contact.[55] While there were no breakthroughs in the meetings, it appeared that both countries had found a common language. Putin observed that the relationship with Ukraine had "thawed from a deep freeze." However, Russia's insistence on special status for DNR and LNR in the Ukrainian constitution remained intact. For the opposition and civil society, federalising Ukraine was not an option.[56] At the joint press-conference, Zelenskyi noted that "foreign military formations must withdraw," while referring to the Steinmeier formula. Mentioning the special status, Zelenskyi underscored that Ukraine would not "allow influence on its political orientation" and that it would "not federalise." Putin, on the other hand, stressed the "need to fully implement the Minsk agreements and initiate a direct dialogue," noting as well that a "political reform was needed in Ukraine, envisaged by the Minsk agreements."[57] In his remarks to the media, following the N4 Foreign Ministers video-conference, on 30 April 2020, Russian Foreign Minister Sergei Lavrov reiterated that a special status remained a "key provision" of the Minsk agreements.[58]

There were fears among civil society and the political opposition that a federal solution would augment the conflict, rather than reverse it, given the strong regional, political and economic divergences present throughout eastern Ukraine. Thus, federalism, combined with separatism, from 2014, would possibly have amplified the conflict. Another possible concession, which was unacceptable to the opposition and civil society, appeared in March 2020, when news was leaked to Ukrainian media that, in Minsk, both Russia and Ukraine might have agreed on creating a "Consultative Council" within the TCG.[59] Ukraine's Chief Negotiator and Head of the Presidential Office, Andriy Yermak, had tentatively agreed with Dmitry Kozak, Deputy Chief of Staff of the Russian Presidential Administration, that Ukraine would enter in direct dialogue with DNR and LNR, under the OSCE's mediation. If implemented, the new format would have underscored Russia's preferred official position, as an impartial observer. It would, furthermore, have promoted Russia's narrative that the conflict in Donbas was strictly internal.

In almost initiating a direct dialogue with the separatists, Zelenskyi would have signed off on the creation of an entity that would have highly likely hindered Ukraine's Westward orientation. The two regions would have been able to use political leverage and veto decisions emanating from Kyiv. The opposition and civil society accused Zelenskyi of betrayal, for tentatively agreeing on establishing the "Consultative Council," while highlighting once more the new administration's recurring unilateral propensity in acquiescing to Moscow's demands.[60] This again reflected the geopolitical and influential role of civil society, exerting pressure on the government on matters that, traditionally, prior to Maidan, during 2013–2014, had not been within its remit.

The turning point – A hardened position in Kyiv

A ceasefire along the line of contact, in Donbas, was nonetheless implemented on 27 July 2020, but growing intransigence from the Russian side and strong domestic opposition in Ukraine, on perceived concessions to Russia, prevented further breakthroughs in the Minsk format.[61] The "Wagner Affair" also came to light two days after the ceasefire, unveiling a Ukrainian special operation that sought, under false pretences, to recruit 33 alleged mercenaries from the Wagner Group, of whom some had fought for pro-Russian separatists in Donbas. Concocted by the Main Intelligence Directorate of the Ministry of Defence of Ukraine, with support from the Security Service of Ukraine, the plan sought to recruit citizens from Russia, Belarus, and Ukraine to a fictitious private military company that offered work in Venezuela. The mercenaries would first be brought to Minsk and then later to Istanbul. While flying to Istanbul, an emergency would be faked, resulting in an emergency landing in Kyiv and leading to the detention of the mercenaries.[62] The opposition and several journalists accused members within the Office of the President of Ukraine of treason and of sabotaging the operation, to avoid tensions with Moscow.[63]

At the same time, Zelenskyi began to increase the pace of Ukraine's Westward foreign- and security-policy orientation, especially by increasing military-technical cooperation with the United Kingdom and the US. The National Security and Defence Council (NSDC) became, in late 2020, the principal decision-making instrument, where major decisions concerning domestic, security, and foreign policy were implemented and then later legally enforced through a presidential decree.[64]

In terms of official Ukrainian rhetoric, Russia was now referred to as a "participant in the conflict."[65] In September 2020, after a lengthy delay, Zelenskyi approved the new national security strategy. This was its fourth iteration, updating the previous one from 2015, identifying Russia as an aggressor and frequently mentioning EU and NATO membership as key national security objectives.[66] The wording in the 2015 version was ambiguous, concerning NATO membership, possibly reflecting the previous administration's hopes of achieving a bilateral settlement with Russia. The new national security strategy noted, instead, that such a settlement should be reached with OSCE and EU mediation.[67]

Unlike Zelenskyi's policy during his first months in office, the national security strategy no longer endorsed bilateral dialogues with Russia. In August 2020, Zelenskyi announced the creation of the Crimea Platform, elevating Ukraine's priority of consolidating "international non-recognition on Russia's occupation of Crimea and to strengthen sanctions against Russia." On 21 March 2021, Ukraine issued a decree on a "Strategy for De-occupation and Reintegration of the Temporarily Occupied Territory of the Autonomous Republic of Crimea and the City of Sevastopol."[68] This was followed up by an international summit, attended by 14 heads of state and delegations from 42 countries, in Kyiv, in August 2021. The format revived global attention to Russia's occupation of Crimea, and made it clear that Ukraine's aim was to restore Ukraine's sovereignty over the peninsula. Zelenskyi stated that: "For the first time, Russia is being recognised as an occupying power on international level." All 42 states and four international organisations that were present signed the official declaration, calling on Russia "to engage constructively in the activities of the International Crimea Platform aimed at ending the temporary occupation."[69] Russia's Minister for Foreign Affairs, Sergei Lavrov, criticised the Crimean Platform as anti-Russian in nature and a threat to Russia's territorial integrity.[70]

A defence-planning document, "On the Strategy of Ukraine's Military Security," approved on 25 March 2021, outlined priorities and goals within the sphere of defence and national security and highlighted, again, Russia's role as an occupier and military adversary of Ukraine.[71] The strategy noted, however, that Ukraine did not intend to achieve military parity with Russia.[72] The document also outlined priorities envisaging further NATO integration. In July, Ukraine unveiled its first-ever Foreign Policy Strategy. Its key goals concerned EU and NATO integration, while referring again to Russia as an aggressor. Ukraine's Foreign Minister, Dmytro Kuleba, remarked that the strategy envisaged Ukraine's becoming a "strong and authoritative state in Europe."[73]

Meanwhile, Russia increased its economic integration with the separatist regions, offering Ukrainian citizens Russian passports. Negotiations over the Minsk agreements remained in deadlock. Under the Russian occupation, the DNR and LNR had de-industrialised since 2014 and were in a dire economic state. They were now increasingly being economically and politically de-coupled from Ukraine. Opening access for goods manufactured in DNR and LNR was a response, the Kremlin reasoned, to Ukraine's "failure" to comply with the Minsk agreements.[74] Russia refused to attend N4 meetings, as long as it was referred to as a party to the conflict. The "passportisation" was also a tool of Russia's extraterritorial governance over Donbas, making the implementation of the Minsk agreements unlikely. It also established a pretext for the full-scale invasion, as being conducted to "protect citizens."[75] Zelenskyi's party performed poorly during the local elections in autumn 2020, and Viktor Medvedchuk's party, "Opposition Party for Life," managed to score gains in six regions.[76] The party is the successor party to Yanukovych's "Party of Regions." Medvedchuk, its leader, was sanctioned by the US, in March 2014, and can be described as the Russian government's main voice in Ukrainian domestic politics.[77] The fragmented political landscape was also compounded that autumn by a constitutional crisis, which threatened to dismantle the foundation of the anti-corruption framework established in 2014.[78] These events undermined Zelenskyi's credibility as a reformer and led to a fall in his ratings, but they also paved the way for a change in addressing Russia and the frozen conflict in Donbas.[79]

Pro-Russian disinformation in Ukraine

In February 2021, Zelenskyi banned three Medvedchuk-affiliated television channels, without a court decision.[80] Ukraine had previously, in 2014, also blocked fourteen Russian television channels.[81] Russian propaganda was projecting the necessity to support and protect the Russian-speaking population, and the presence of an East-West divide, whereas Ukraine was depicted as a failed state and pro-European reforms following the "illegal" Euromaidan had led to economic ruin. The war in Donbas, according to this propaganda, was a "civil war," and the only way out was to restore relations with Russia.[82] Other disinformation narratives highlighted Kyiv's alleged inability to fulfil the Minsk agreement.[83] Zelenskyi also sanctioned Taras Kozak, a member of parliament linked to the "Opposition Party for Life," and a close associate to Medvedchuk, for alleged business ties with separatists. The crackdown was popular in Ukraine. According to the CSO New Europe Center, it "qualified as the most significant response to Russian hybrid warfare in Ukraine's entire history as an independent state."[84]

Zelenskyi takes on pro-Russian elements in Ukraine: Moscow's reactions

As these domestic developments were taking place, Russia began to amass several thousands of troops in areas adjacent to the Ukrainian border, for "combat readiness checks," during March and April 2021. While partially withdrawn by June 2021, Russia had moved up to almost 40000 troops.[85] Medvedchuk, who had previously mediated between Kyiv and the separatists, was placed in house arrest, in May 2021. This prompted Putin to devote the majority of his public opening speech in the Russian Security Council meeting on 14 May to defending Medvedchuk, stating how Ukraine was "purging its political environment" and developing "into an antipode of Russia."[86] Medvedchuk's house arrest threatened to curb Russia's influence in Ukraine and had, as Putin reasoned, become a matter of concern for Russian national security.

Moscow's aggressive rhetoric then escalated: a succession of acerbic articles was released by Putin and other representatives of the political leadership.[87] As Chapter 3 further details, an article by Putin, heavy on historical revisionism, openly questioned the legitimacy of Ukraine's border, arguing that modern-day Ukraine occupies "historically Russian lands," while stating that "I am confident that true sovereignty of Ukraine is possible only in partnership with Russia." Considerable anger was also noted in Moscow when the Rada passed the bill "On the Indigenous Peoples of Ukraine," where Russians were not included in the official list. The bill itself was adopted just a month before the Crimean Platform Summit.[88] Putin compared the bill to "the theory and practice of Nazi Germany" and accused Kyiv of "pursuing a policy of segregation and dividing the inhabitants of Ukraine into different sorts," also comparing it to "some kind of weapon of mass destruction; this is a serious matter."[89]

There was no ideological metamorphosis prompting Zelenskyi to take the foreign and security policy decisions described above. They were circumstantial, forcing him to address critical questions on how to balance domestic political considerations, while attempting to resolve the conflict in Donbas. This mirrored a similar development faced by Poroshenko, who tried to resolve the conflict, only to later change the approach. Establishing the Crimea Platform was also unprecedented: returning Crimea became one of the central goals in Zelenskyi's foreign policy.[90] This had not been the case under Poroshenko. Zelenskyi, while unaware of the political difficulties, or simply believing that he could construct a new path to resolving the conflict, understood the structural difficulties in implementing the Minsk agreement, while balancing domestic blowback towards his initial approach in dealing with Russia's political leadership. The role of civil society and, to an extent, the political opposition, should not be discounted as having influenced Zelenskyi's political calculus. Both remained strong undercurrents, given the pressure exerted on Zelenskyi in changing the course of policy, and heavily affecting his ratings. Zelenskyi himself acknowledged the importance of civil society, stating that "an authoritarian regime would be impossible in Ukraine, as the country's strong civil society would not let that happen."[91]

European and Euro-Atlantic reforms under the Zelenskyi administration

In June 2020, NATO recognised Ukraine as an Enhanced Opportunities Partner (EOP), whereby Ukraine joined other EOP, such as Australia, Finland, Georgia, Jordan, and Sweden. As an EOP, Ukraine would receive greater opportunities for sectoral interoperability with NATO and participate in the planning of NATO operations, as well as receive access to NATO exercises, while participating with NATO in exchanging intelligence.[92] Ukraine's insistence on receiving the coveted Membership Action Plan increased under Zelenskyi.[93] The landmark visit to London, in October 2020, resulted in the signing of a bilateral agreement on cooperation concerning trade, security and other areas, and on a Memorandum on Military and Defence Construction and Cooperation, worth approximately GBP 1.25 billion. Ukraine secured the planned production of naval cruisers in line with NATO standards. Ukraine and Britain also signed a comprehensive Political, Free Trade, and Strategic Partnership Agreement, backed by GBP 2.5 billion.[94] In 2021, both parties also signed a deal on a Memorandum of Implementation on Naval Arms, a GBP 1.7 billion loan agreement, emphasising the joint production of missile boats, and other naval assets, for Ukraine. The Joe Biden administration also provided Ukraine with USD 60 million in military equipment, including additional Javelin anti-tank guided missiles. In August 2021, the US and Ukraine signed a Strategic Defence Framework, which among other things envisaged a deepening of Black Sea cooperation; Ukraine's implementation of defence-sector reforms, in line with NATO standards and principles; and a closer partnership between defence intelligence communities in support of military planning and defensive operations.[95]

A Charter on Strategic Partnership was also signed, in November 2021. The US reaffirmed its relationship with Ukraine, based on common and shared values, highlighting areas for cooperation based on security and defence.[96] The charter promoted Ukraine's NATO interoperability and its "right to decide its future foreign policy free from outside interference."[97] Ukraine also commenced defence production with Turkey, a deal in which Kyiv secured the licensed production of tactical Bayraktar TB2 drones, which Azerbaijan had successfully used in the 2020 Nagorno-Karabakh war against Armenia. Ukraine's Navy received TB2s in July 2021, and, in October 2021, conducted the first-ever TB2 strike on separatists in Donbas, prompting significant reactions within the breakaway separatist territories. A representative from the LNR remarked that the strike was "a spit" on the Minsk agreements, emphasising that the agreements included a ban on the use of military aircraft and drones. Therefore, the reasoning went, the strike had freed the breakaway republics from the obligation to implement the agreements.[98] The separatists saw the use of the TB2 as a sign that Ukraine was preparing to retake the Donbas with force.[99]

These developments demonstrate that the UAF continued to increase the combat capabilities, readiness, and skills they lacked in 2014. This also included extended and accelerated programs of bilateral and multilateral security and defence cooperation and assistance, which in 2021 reached USD 450 million.[100] A notable trend concerns the increase in the number of young commanding officers on rotation, fostering a new generation of Ukrainian officers with no experience from Soviet times.[101] Establishing the UAF under one single command, while empowering mid-level commanders, was another notable achievement.[102] The number of combat-experienced veterans strengthened the capacity of the UAF, and the cooperation between the Ministry of Defence and the General Staff was improved. This would later help the UAF to withstand the initial phase of the full-scale invasion.[103] The National Resistance Act also went into effect, in January 2022, establishing a structure for the Territorial Defence Forces, which were integrated alongside the Ground Forces. The Territorial Defence Forces were instrumental in foiling the initial phase of the full-scale invasion. Citizens were only required to present identity cards to join.[104]

Autumn and winter 2021: Domestic turbulence coinciding with Russia's second military build-up

If Russia justified the first build-up as "snap combat-readiness check," the second one, in December 2021, was underpinned by vague red lines, coinciding, as well, with significant escalation and ceasefire violations in Donbas.[105] Russia deployed a third of its military battalion tactical groups near the border area and in southern Belarus. Compared to the much publicised build-up in the spring, Russia made a concerted effort to hide and obfuscate troop movements and logistics. The build-up departed from normal Russian behaviour and rhetoric. Its force posture was unprecedented, pointing to a ground invasion: an entire combined arms army was deployed from Siberia, along with elements from the Eastern Russian Military District, to Belarus.[106] Unlike in the spring, Russia also issued public demands to the US and NATO, demanding "legally binding security guarantees" and the rollback of NATO's infrastructure expansion to the 1997 positions; limits to the deployment of intermediate- and short-range missiles; and an end to Ukraine's integration with NATO. Russia's Defence Minister, Sergei Shoigu, clarified their concerns: NATO's involvement of Ukraine in its military activities posed a security threat, notably in the deepening defence ties between the US and Ukraine.[107] Russia denied having plans to invade Ukraine, but would react with a "military-technical response," were these demands not met.[108] The US rejected a large part of these demands, ruling out Ukraine's joining NATO, and offered Russia a "serious diplomatic path."[109]

While the build-up pointed to an invasion of Ukraine, during November 2021 Zelenskyi was caught up in a political and energy crisis: his ratings had slipped to an all-time low, of 27 percent, in December 2021.[110] Ukrainian voters were disenchanted with his failure to implement the very election promises that had brought him to power. Zelenskyi had also sanctioned several oligarchs and during the autumn had accused one of Ukraine's most influential oligarchs, Rinat Akhmetov, of attempting to oust him in a coup.[111] Moreover, Poroshenko was accused of treason and supporting terrorism, due to alleged business links with separatists, and almost detained.[112]

While the Russian build-up continued, Zelenskyi received intelligence from the US concerning an imminent "full-fledged invasion." He appeared unmoved, claiming this news would sow internal panic.[113] Also, as many as 53 percent of Ukrainians did not believe that Zelenskyi would be able to function as commander-in-chief in the event of an invasion.[114] However, a poll from 15 February showed that 58 percent of Ukrainians were ready to offer resistance to any occupation, while 37 percent would be willing to take up arms.[115] As tensions increased, and in a bid to avert a further escalation, high-level diplomatic engagement recommenced. The N4 was reactivated: representatives from France, Germany, Russia, and Ukraine met in Paris, in January 2022, and then in Berlin, in February, but failed to agree on how the Minsk agreements would be implemented.[116] Ten days later, Putin recognised the independence of the DNR and LNR, while underscoring that Ukraine remained "historically part of Russia's culture, history, and spiritual space."[117] The Minsk agreements thus ceased to exist, given Russia's unprecedented way of violating an agreement that it had spent the past seven years blaming Ukraine for not fulfilling.

2.3 Conclusions

If the policies enacted under Poroshenko placed Ukraine on a European and Euro-Atlantic path, developments under Zelenskyi cemented this trajectory. Throughout the timeframe assessed, the conflict in Donbas went through three stages: a high-intensity phase, in 2014–2015; a low-intensity phase, 2015–2019; and relative stagnation, with violent flare-ups, from 2019 to 2021.[118] Ukraine, meanwhile, continued its integration with the EU and NATO. The Ukrainian army was also growing, in both qualitative and quantitative terms, following the first Minsk agreement.

Russia's initial dialogue with Zelenskyi, in 2019–2020, contained seeds of hope for resolving the conflict. Local ceasefires were achieved, but a comprehensive resolution never materialised. With the talks concerning the Minsk agreements in deadlock, the wait-and-see attitude towards the new administration in Kyiv came to an end. It became increasingly clear to the Kremlin, in late 2020, that Zelenskyi had reoriented Ukraine's foreign and security policy in such an unprecedented way that it not only challenged the Kremlin's credibility, but produced a trend that undermined Russian interests.

Had Ukraine declared neutrality, in November/December 2021, and given in to the fragile political environment fraught with political infighting, amid the second Russian military build-up, nationwide protests would likely have taken place. This would have possibly served as a pretext for a Russian invasion to halt "far right extremists from taking power." If the Russian internal destabilisation effort had been successful, it remains plausible that Putin would have elevated Medvedchuk, or reinstated Yanukovych, to a leading role in a "movement of peace."[119]

The fact that Ukraine officially addressed Russia as an adversary in official documents and strategies, such as in its first-ever Foreign Policy Strategy, remains an important shift to take into account. Other shifts assessed in this chapter, whether they concern the deepening defence cooperation with NATO, increased political integration with the EU, or constitutional amendments under Poroshenko, were all part of Ukraine's nation-building effort, after Euromaidan. Detaining Medvedchuk and banning his pro-Russian media outlets remains one of the foreign and security policy shifts that, in the Kremlin's view, damaged its interests in Ukraine. The Russian military build-ups were thus attempts to deter an increasingly pro-Western Ukrainian trajectory.

Apart from setting in motion Ukraine's efforts to strengthen its military, Russia's aggression from 2013 to 2014 created a geopolitical Ukrainian civil society. Instrumental as a factor throughout these eight years, it acted as an undercurrent in advancing Ukraine's European and Euro-Atlantic trajectory, leading to a change in its foreign and security policy. Poroshenko and Zelenskyi were sandwiched between Ukraine's civil society and its Western partners. This also influenced how Zelenskyi perceived the Minsk agreements: from being seen, in 2019–20, as a basis for negotiations, to being viewed, in 2021, as a format that was simply untenable, given the risks to Ukrainian statehood.

After Euromaidan, in 2014, reforms were initiated, from the worst possible baseline, in a fragile political state. However, eight years of consolidation and reforms created the resilience that so surprised the West when Ukraine managed to limit Russia's full-scale invasion.[120] ■

Endnotes

1 BBC, "Ukraine protests after Yanukovych EU deal rejection," 30 November 2013, *https://www.bbc.com/news/world-europe-25162563*.

2 EURACTIV, "Ukraine's Yanukovych enacts 'dictatorship' laws," 21 January 2014, *https://www.euractiv.com/section/europe-s-east/news/ukraine-s-yanukovich-enacts-dictatorship-laws.*

3 Allan Duncan, "The Minsk Conundrum: Western Policy and Russia's War in Eastern Ukraine," *Chatham House*, 22 May 2020, https://www.chathamhouse.org/2020/05/minsk-conundrum-western-policy-and-russias-war-eastern-ukraine-0/minsk-2-agreement

4 Dennis Soltys, "Why Poroshenko lost," Atlantic Council, *UkraineAlert* blog, 23 April 2019, *https://www.atlanticcouncil.org/blogs/ukrainealert/why-poroshenko-lost/#:~:text=History%20may%20remember%20Poroshenko%20well%20for%20a%20long,cultural%20rebirth%20for%20ethnic%20Ukrainians%20without%20alienating%20others.*

5 Mikhail Minakov, "Corrupting Civil Society in Post-Maidan Ukraine?" *Carnegie Endowment for International Peace*, 4 November 2015, *https://carnegiemoscow.org/commentary/59749.*

6 For example, the Russian national and former officer of the Russian Federation Security Service (FSB), Igor Girkin, played a key role in destabilising Donbas, having also been linked to the downing of the airliner, MH-17, in 2014. For more details, please see: Halya Coynash, "Russian who brought war to Donbas admits it has turned into 'a dump' worse than Ukraine or Russia," *Kharkiv Human Rights* Protection Group, 11 October 2021, *https://khpg.org/en/1608809608*

7 Duncan, "The Minsk Conundrum."

8 By employing the term, "Anti-Terrorist Operation," and not "war," the Ukrainian Security Services, and not the military high command, technically remained in charge. This has also raised concern, as the technicality marked the lack of parliamentary oversight. For more details, please see: Valeriy, Akimenko, "Ukraine's Toughest Fight: The Challenge of Military Reform," *Carnegie Endowment for International Peace*, 22 February 2018, *https://carnegieendowment.org/2018/02/22/ukraine-s-toughest-fight-challenge-of-military-reform-pub-75609*.

9 Kateryna Zarembo, "Civic Activism against Geopolitics: The Case of Ukraine," in *Global Civil Society in a Geopolitical Age: How Civic Activism Is Being Reshaped by Great Power Competition*, ed. Richard Youngs, 30 November 2022, *https://carnegieendowment.org/files/Global_Civil_Society_in_a_Geopolitical_Age3.pdf*, 55–61.

10 184 Ukrainian organisations belong to the EU's Eastern Partnership Civil Society Forum.

11 The greater part of its content concerns Ukraine's European integration, notably elements linked to the rule of law.

12 Among these were several far-right movements.

13 Kateryna Zarembo, "Civic Activism against Geopolitics: The Case of Ukraine," in *Global Civil Society in a Geopolitical Age: How Civic Activism Is Being Reshaped by Great Power Competition*, ed. Richard Youngs, 30 November 2022, *https://carnegieendowment.org/files/Global_Civil_Society_in_a_Geopolitical_Age3.pdf*, 55–61.

14 Steven Pifer, "Ukraine's Zelenskiy ran on a reform platform – Is he delivering?" *Brookings Institute,* 7 July 2022, *https://www.brookings.edu/blog/order-from-chaos/2020/07/22/ukraines-zelenskiy-ran-on-a-reform-platform-is-he-delivering/*.

15 This eliminates most tariffs on trade in goods, including legal and regulatory approximation: Ukraine would transfer EU law into its own legislation. For more details, see Duncan, "The Minsk Conundrum."

16 Implementing the AA and DCFTA would threaten the established modes of enrichment of Ukraine's ruling elite and their vested interests. For more details, see David Herszenhorn, "Poroshenko warns against revenge of oligarch forces," *Politico*, 19 May 2019, *https://www.politico.eu/article/petro-poroshenko-warns-ukraine-volodymyr-zelenskiy-against-revenge-of-oligarch-forces/*.

17 Anders Åslund, "*Is Putin preparing a new Ukraine strategy?*" Atlantic Council, *UkraineAlert*, blog, 27 January 2020, *https://www.atlanticcouncil.org/blogs/ukrainealert/is-putin-preparing-a-new-ukraine-strategy*.

18 Richard Balmforth, Lidia Kelly, "Poroshenko's Ukraine peace plan gets limited support from Putin," *Reuters*, 22 June 2014, *https://www.reuters.com/article/us-ukraine-crisis-idUSKBN0EW0EH20140622* .

19 Duncan, "The Minsk Conundrum."

20 Previously referred to as the Package of Measures for the Implementation of the Minsk Agreements.

21 Government of Ukraine, *Decentralization Reform*, accessed 2 February 2023, *https://www.kmu.gov.ua/en/reformi/efektivne-vryaduvannya/reforma-decentralizaciyi*.

22 Balmforth and Kelly, "Poroshenko's Ukraine peace plan."

23 "Poroshenko: Lifting economic blockade on Donbas would be a betrayal on Ukraine's interests," *UAWIRE*, 6 June 2019, *https://www.uawire.org/poroshenko-lifting-economic-blockade-on-donbas-would-be-a-betrayal-of-ukraine-s-interests.*

24 Tetyana Malyarenko and Tetyana, Borys Kormych, "Russian policy towards the economy of occupied Ukrainian territories: crawling de-modernization," *Eurasian Geography and Economics,* 1 January 2023, *https://rsa.tandfonline.com/doi/pdf/10.1080/15387216.2023.2167097*.

25 "Statement of the international civil society platform," *CivilM+*, 24 March 2020, *https://civilmplus.org/en/statement/civil-society-organizations-from-ukraine-russia-and-the-eu-suggest-establishing-an-independent-group-of-civic-consultations-for-the-minsk-talks-on-donbas*.

26 Valeriy Akimenko, "Ukraine's Toughest Fight: The Challenge of Military Reform," *Carnegie Endowment for International Peace*, 22 February 2018, *https://carnegieendowment.org/2018/02/22/ukraine-s-toughest-fight-challenge-of-military-reform-pub-75609*.

27 Liam Collins, "In 2014, the 'decrepit' Ukrainian army hit the refresh button. Eight years later, it's paying off," *The Conversation*, 8 March 2022, *https://theconversation.com/in-2014-the-decrepit-ukrainian-army-hit-the-refresh-button-eight-years-later-its-paying-off-177881.*

28 Anastasia Zanuda and Vitaly Chervonenko, "5 let Poroshenko v tsifrakh i faktakh: kakuiu stranu ostavliaiet president," *BBC Ukraine,* 19 April 2019, *https://www.bbc.com/ukrainian/features-russian-48037562*

29 "Old war, new rules: What comes next as ATO ends and a new operation starts in Donbas?" *Ukraine Crisis Media Center,* 4 May 2018, https://uacrisis.org/en/66558-joint-forces-operation.

30 Liam Collins, "In 2014, the 'decrepit' Ukrainian army hit the refresh button. Eight years later, it's paying off," *The*

Conversation, 8 March 2022, https://theconversation.com/in-2014-the-decrepit-ukrainian-army-hit-the-refresh-button-eight-years-later-its-paying-off-177881.

31 Andriy Zagorodnyuk, Alina Frolova, Hans Petter Midtunn, and Oleksii Pavliuchyk, "Is Ukraine's reformed military ready to repel a new Russian invasion?" Atlantic Council, *UkraineAlert* blog, 23 December 2021, https://www.atlanticcouncil.org/blogs/ukrainealert/is-ukraines-reformed-military-ready-to-repel-a-new-russian-invasion/

32 Dmytro Bobrytsky, "Is Zelenskyy's presidency a rollback of Euromaidan values or their continuation?" *EuroMaidanPress*, 23 November 2021. https://euromaidanpress.com/2021/11/23/is-zelenskyys-presidency-a-rollback-of-euromaidan-values-or-their-continuation/.

33 Petro Poroshenko, "Opinion: My goal is to defeat corruption in Ukraine," *Washington Pos*t, 21 February 2023. https://www.washingtonpost.com/news/democracy-post/wp/2018/06/18/my-goal-is-to-defeat-corruption-in-ukraine/?noredirect=on; Daria Kaleniuk & Melinda Haring, "The Spirit of reform lives on in Ukraine – But not because of the president," *Washington Post,* 27 June 2018, https://www.washingtonpost.com/news/democracy-post/wp/2018/06/27/the-spirit-of-reform-lives-on-in-ukraine-but-not-because-of-the-president/; Judy Dempsy, "Judy Asks: Can Poroshenko Reform Ukraine?" *Carnegie Europe*, 11 May 2014, https://carnegieeurope.eu/strategiceurope/57135.

34 Josh Cohen, "E-Declaration – and Ukraine's Anti-Corruption Strategy – in Jeopardy," Atlantic Council, *UkraineAlert* blog, 29 August 2016, https://www.atlanticcouncil.org/blogs/ukrainealert/e-declaration-and-ukraine-s-anti-corruption-strategy-in-jeopardy.

35 European Union External Action Service, "Visa-free travel for Ukrainians comes into force," 11 June 2017, https://www.eeas.europa.eu/node/27990_en.

36 Ayse Wieting, Zeynep Bilginsoy, "Ukrainian Orthodox Church breaks away from Russian influence," *APNews*, 5 January 2019, https://apnews.com/article/petro-poroshenko-europe-religion-turkey-moscow-d423817b8e2048d581cf7916401aa58f .

37 Jack Watling, Oleksandr V Danylyuk, Nick Reynolds, "Preliminary Lessons from Russia's Unconventional Operations During the Russo-Ukrainian War, February 2022–February 2023," Royal United Services Institute for Defence and Security Studies (RUSI), 29 March 2023, https://www.rusi.org/explore-our-research/publications/special-resources/preliminary-lessons-russias-unconventional-operations-during-russo-ukrainian-war-february-2022, 11.

38 Steven Pifer, "Ukraine's Zelenskiy ran on a reform platform — Is he delivering?" *Brookings Institute*, 7 July 2022, https://www.brookings.edu/blog/order-from-chaos/2020/07/22/ukraines-zelenskiy-ran-on-a-reform-platform-is-he-delivering /.

39 Mykhailo Minakov, "Zelensky's Presidency at the Two-Year Mark. Focus Ukraine. A Blog of the Kennan Institute," *Wilson Center*, 3 June 2021, https://www.wilsoncenter.org/blog-post/zelenskys-presidency-two-year-mark.

40 "Ukraine election: Comedian Zelensky wins presidency by landslide," BBC, 22 April 2019, https://www.bbc.com/news/world-europe-48007487.

41 BBC, "Ukraine election."

42 Dennis Soltys, "Why Poroshenko lost," Atlantic Council, *UkraineAlert* blog, 23 April 2019, https://www.atlanticcouncil.org/blogs/ukrainealert/why-poroshenko-lost/.

43 Minakov, "Zelensky's Presidency."

44 Tadeusz Iwański, , Konończuk Wojciech, "Ukraine: Servant of the People wins an outright majority," Centre for Eastern Studies (OSW), 22 July 2019, https://www.osw.waw.pl/en/publikacje/analyses/2019-07-22/ukraine-servant-people-wins-outright-majority.

45 Steven Pifer, "Zelenskyy's first year: New beginning or false dawn?" Atlantic Council, *UkraineAlert* blog, 18 May 2020, https://www.atlanticcouncil.org/blogs/ukrainealert/zelenskyys-first-year-new-beginning-or-false-dawn/.

46 Josep Borell, "Ukraine: Reforms must continue," European External Action Service, 23 September 2020, https://www.eeas.europa.eu/eeas/ukraine-reforms-must-continue_en.

47 Andrew Roth, "Ukrainian president removes PM in government reshuffle," *Guardian*, 4 March 2020, https://www.theguardian.com/world/2020/mar/04/ukrainian-president-removes-pm-government-reshuffle-volodymyr-zelenskiy.

48 Jakob Hedenskog, "Ukraine: 'The new president calls for snap elections, but will they change anything?'" Swedish Defence Research Agency (FOI), June 2019, RUFS Briefing No. 45, FOI Memo 6774.

49 At the same time, Ukraine handed over Volodymyr Tsemakh, a person of interest in the downing of the Malaysian Airlines Flight MH17. For more details, please see: "Ukraine and Russia exchange prisoners in landmark deal," *BBC*, 7 September 2019, https://www.bbc.com/news/world-europe-49610107.

50 Christopher, Miller, "Explainer: 'What Is The Steinmeier Formula – And Did Zelenskiy Just Capitulate To Moscow?" *RadioFreeEurope/RadioLiberty,* 2 October 2019, https://www.rferl.org/a/what-is-the-steinmeier-formula-and-did-zelenskiy-just-capitulate-to-moscow-/30195593.html.

51 Steven Pifer, "Did Zelenskyy give in to Moscow? We don't know yet," Atlantic Council, *UkraineAlert* blog, 8 October 2019, https://www.atlanticcouncil.org/blogs/ukrainealert/did-zelenskyy-give-in-to-moscow-we-dont-know-yet/.

52 Andrew Kramer, "Zelensky's Opponents Fear He Is Ready to Capitulate to Russia," *New York Times,* 5 December 2019, https://www.nytimes.com/2019/12/05/world/europe/zelensky-ukraine-russia.html.

53 Natalia Leonova, Mariia Prus, Pete Cobus, "Steinmeier Deal Sparks Protests in Ukraine, Praise in Moscow," *Voice of America*, 2 October 2019, https://www.voanews.com/a/europe_steinmeier-deal-sparks-protests-ukraine-praise-moscow/6176932.html

54 "Putin and Zelenskiy, in First Talks, Agree to Exchange Prisoners," *The Moscow Times,* 10 December 2019, https://www.themoscowtimes.com/2019/12/10/putin-and-zelenskiy-in-first-talks-agree-to-exchange-prisoners-a68533.

55 Andrew Kramer, "Ukraine's President Seeks Face-to-Face Meeting with Putin," *New York Times*, 12 November 2019, https://www.nytimes.com/2019/11/12/world/europe/ukraine-zelensky-putin.html.

56 Andrew Higgins, "In First Meeting with Putin, Zelensky Plays to a Draw despite a Bad Hand," *New York Times,* 9 December 2019, https://www.nytimes.com/2019/12/09/world/europe/putin-zelensky-paris-ukraine.html.

57 Kremlin, "News conference following the Normandy Format Summit," *YouTube*, 10 December 2019, https://www.youtube.com/watch?v=0KO_JFoSpJ4.

58 The Ministry of Foreign Affairs of the Russian Federation, "Foreign Minister Sergey Lavrov's remarks and answers to media questions at a news conference following the Normandy format videoconference meeting of foreign ministers," 30 April 2020, *https://archive.mid.ru/en/foreign_policy/news/-/asset_publisher/cKNonkJE02Bw/content/id/4109746.*

59 Vladimir Socor, "Kozak-Yermak Plan on Donbas: The Fine Print," *Eurasia Daily Monitor*, Volume 17, Issue 40, 26 March 2020, *https://jamestown.org/program/kozak-yermak-plan-on-donbas-the-fine-print*.

60 Warsaw Institute - Russia Monitor, "Kozak-Yermak Plan on Donbas: A Trap for Ukraine," 31 March 2020, *https://warsawinstitute.org/kozak-yermak-plan-donbas-trap-ukraine*.

61 Organisation for Security and Co-operation in Europe (OSCE). Press Statement of Special Representative Grau after the regular Meeting of Trilateral Contact Group on 22 July 2020. 23 July 2020, *https://www.osce.org/chairmanship/457885*.

62 Mil.In.Ua, "Wagnergate: Bellingcat released its investigation of the operation of Ukrainian GUR MOU," 19 November 2021, *https://mil.in.ua/en/news/wagnergate-bellingcat-released-its-investigation-of-the-operation-of-ukrainian-gur-mou*.

63 Sergey Sukhankin, "The 'Wagner Affair' in Belarus and Its Implications for Ukraine," Eurasia Daily Monitor Volume: 18 Issue: 22, 9 February 2021. *https://jamestown.org/program/the-wagner-affair-in-belarus-and-its-implications-for-ukraine*.

64 This style of decision-making bypassed the Ukrainian parliament and the Cabinet of Ministers, despite Ukraine's being a parliamentary-presidential republic. For more details, please see: Mykhailo Minakov, "The Three Ages of Zelensky's Presidency." Wilson Center. Focus Ukraine. A blog of the Kennan Institute. 9 June 2022. *https://www.wilsoncenter.org/blog-post/three-ages-zelenskys-presidency*.

65 Chernenko and Solovyov, "Action-packed foreign policy."

66 NATO is mentioned 11 times in the national security strategy and highlights particular steps, such as Ukraine's receiving a NATO Membership Action Plan (MAP).

67 Alyona Getmanchuk, "Russia as aggressor, NATO as objective: Ukraine's new National Security Strategy," *Atlantic Council. UkraineAlert*, 30 September 2020, *https://www.atlanticcouncil.org/blogs/ukrainealert/russia-as-aggressor-nato-as-objective-ukraines-new-national-security-strategy*.

68 , "Zelensky enacts strategy for de-occupation and reintegration of Crimea," *UKRINFORM*, 24 March 2021, *https://www.ukrinform.net/rubric-polytics/3214479-zelensky-enacts-strategy-for-deoccupation-and-reintegration-of-crimea.html*.

69 Adam Reichhardt, "The Crimea Platform as a new approach to a seven-year-old problem," *New Eastern Europe*, 24 August 2021, *https://neweasterneurope.eu/2021/08/24/the-crimea-platform-as-a-new-approach-to-a-seven-year-old-problem*.

70 "In Ukraine, concerning 'hysterical reaction' of Russia to the 'Crimean platform,'" *Lenta.Ru,* 25 August 2021, *https://lenta.ru/news/2021/08/25/peremoga/*.

71 Office of the President of Ukraine, "The President approved the Military Security Strategy of Ukraine," 25 March 2021, accessed 3 May 2023, *https://www.president.gov.ua/ru/news/prezident-zatverdiv-strategiyu-voyennoyi-bezpeki-ukrayini-67361* .

72 Office of the President of Ukraine, *Decree No*. 121/2021, 25 March 2021, accessed 3 May 2023, *https://www.president.gov.ua/documents/1212021-37661*.

73 "A Strong Country Rushing to NATO and the EU: The Foreign Policy Strategy of Ukraine was Adopted," Glavred, 30 July 2021, *https://glavred.info/politics/kurs-v-nato-i-borba-s-agressiey-rossii-ukraina-prinyala-novuyu-strategiyu-vneshney-politiki-10291800.html*.

74 Stated by one of the main representatives from the Russian side, Ambassador Boris Gryzlov. For more details, please see Chernenko and Solovyov, "Action-packed foreign policy."

75 Fabian Burkhardt, Maryna Rabinobych, Cindy Wittke, and Elia Bescotti, "New TCUP Report on the Donbas," Ukrainian Research Institute, Harvard University, 19 January 2022, *https://huri.harvard.edu/news/new-tcup-report-passportization-diminished-citizenship-rights-and-donbas-vote-russia's*.

76 "Ukraine's Zelensky suffers setback in local elections," *France24*, 25 October 2020, *https://www.france24.com/en/live-news/20201025-ukraine-s-zelensky-suffers-setback-in-local-elections*.

77 Andrew Roth, "Who is Viktor Medvedchuk and why does his arrest matter to the Kremlin?" *Guardian*, 13 April 2022, *https://www.theguardian.com/world/2022/apr/13/viktor-medvedchuk-arrest-matter-to-kremlin*.

78 Alya Shandra, "Ukraine ponders ways to stop 'legal terrorists' in Constitutional Court," *EUROMAIDANPRESS*, 5 November 2020, *https://euromaidanpress.com/2020/11/05/ukraine-ponders-ways-to-stop-legal-terrorists-in-constitutional-court*.

79 Anders Åslund, "Zelenskyy vows to thwart Kremlin counter-revolution," Atlantic Council, *UkraineAlert* blog, 1 November 2020, *https://www.atlanticcouncil.org/blogs/ukrainealert/zelenskyy-vows-to-thwart-kremlin-counter-revolution/*.

80 Kommersant and Moskovsky Komsomolets and their digital outlets were also blocked in Ukraine during August 2021.

81 Jakob Hedenskog, Mattias Hjelm, "Propaganda by Proxy: Ukrainian oligarchs, TV and Russia's influence," Swedish Defence Research Agency (FOI), RUFS Briefing No. 48, FOI Memo: 7312, October 2020.

82 Ilya Zhegulev "How Putin Came to Hate Ukraine – An investigation into the president on how the Russian came to think about a war with Ukraine," *Verstka*, 25 April 2023, https://verstka.media/kak-putin-pridumal-voynu.

83 Hedenskog and Hjelm, "Propaganda by Proxy."

84 Peter Dickinson, "Analysis: Ukraine bans Kremlin-linked TV channels," Atlantic Council, *UkraineAlert* blog, 5 February 2021, *https://www.atlanticcouncil.org/blogs/ukrainealert/analysis-ukraine-bans-kremlin-linked-tv-channels.*

85 Barbara Starr, Jennifer Hansler, and Oren Liebermann, "US and other NATO members pledge support to Ukraine while walking fine line with Russia," *CNN*, 14 April 2021, *https://edition.cnn.com/2021/04/14/politics/us-nato-ukraine-russia/index.html;* Zahra Ullah, Anna Chernova, and Eliza Mackintosh, "Russia pulls back troops after massive build up near Ukraine border," CNN, 23 April 2021. *https://edition.cnn.com/2021/04/22/europe/russia-military-ukraine-border-exercises-intl/index.html.*

86 "Vladimir Putin raised Medvedchuk – At a meeting of the Security Council, he found words of support for a house prisoner," *Kommersant*, 14 May 2021, *https://www.kommersant.ru/doc/481481*.

87 Dmitri Medvedev, "Why contacts with the current Ukrainian leadership are meaningless – Five short polemical theses," *Kommersant*, 11 October 2021, *https://www.kommersant.ru/*

doc/5028300; President of Russia, Vladimir Putin's essay 'On the Historical Unity Between Russians and Ukrainians' (Statia Vladimira Putina "Ob istoritjeskom jedinstve russkich i Ukraintsev"), 12 July 2021, *http://kremlin.ru/events/president/news/66181*.

88 "Why Ukraine's legislation on 'indigenous peoples' doesn't include Russians," *Meduza*, 9 July 2021, *https://meduza.io/en/cards/why-ukraine-s-legislation-on-indigenous-peoples-doesn-t-include-russians*.

89 Under Zelenskyi, other laws, such as the Law on Secondary Education, also contained controversial elements that minimised not only the use of the Russian language, but also Hungarian and Bulgarian, also drawing criticism from the Venice Commission – a legal advisory body to the Council of Europe. For more details, please see: Rob Lee, "Moscow's Compellence Strategy," *Foreign Policy Research Institute Eurasia Program,* 18 January 2022, *https://www.fpri.org/article/2022/01/moscows-compellence-strategy*.

90 Mykhailo Minakov, "The Three Ages of Zelensky's Presidency," Wilson Center, *Focus Ukraine blog*, 09 June 2022. *https://www.wilsoncenter.org/blog-post/three-ages-zelenskys-presidency*.

91 , "Civil society so strong no 'dragon' can emerge there – Zelensky," *UKRINFORM*, 3 September 2021, *www.ukrinform.net/rubric-polytics/3309315-sivil-society so-strong-no-dragon-can-emerge-there-zelensky.html*.

92 , "Ukraine becomes a NATO Enhanced Opportunities Partner," *EuroMaidanPress* 13 June 2020.

93 "Zelensky asks U.S. for clarity on NATO MAP," *UNIAN*, 14 June 2021, *https://www.unian.info/politics/zelenskiy-asks-u-s-for-clarity-on-nato-map-media-11453296.html*.

94 Tom C. Bate, "Britain and Ukraine unveil new strategic partnership," Atlantic Council, *UkraineAlert* blog, 13 October 2020, *https://www.atlanticcouncil.org/blogs/ukrainealert/britain-and-ukraine-unveil-new-strategic-partnership/*.

95 US Department of Defense, Fact Sheet – U.S.-*Ukraine Strategic Defense Framework*, 31 August 2021, *https://media.defense.gov/2021/Aug/31/2002844632/-1/-1/0/US-UKRAINE-STRATEGIC-DEFENSE-FRAMEWORK.PDF.*

96 Cognisant of increasing the role of the US in resolving the conflict in Donbas, Zelenskyi's relationship with the White House received a turbulent start: President Trump had allegedly pressed President Zelenskyi in opening investigations into the business dealings of President Biden's son, in return for securing concessions and involvement in resolving the frozen conflict in Donbas.

97 US Department of State, "U.S.-Ukraine Charter on Strategic Partnership,",10 November 2021, *https://www.state.gov/u-s-ukraine-charter-on-strategic-partnership* .

98 Angelina Milchenko, "Spitting into the Minsk Agreements," *Gazeta.Ru*, 27 October 2021, *https://www.gazeta.ru/army/2021/10/26/14138311.shtml*.

99 "Changes the military balance in the region. Why Russia is worried about Ukrainian Bayraktars," *New Voice of Ukraine*, 17 January 2022, *https://nv.ua/world/geopolitics/rossiya-obespokoena-bayraktarami-v-vsu-washington-post-50209144.html*.

100 Illia Ponomarenko, "Ukraine receives $450 million in foreign defense aid in 2021," T*he Kyiv Independent*, 11 January 2022, https://kyivindependent.com/ukraine-receives-450-million-in-foreign-defense-aid-in-2021/.

101 Zagorodnyuk et al, "Is Ukraine's reformed military ready".

102 Jakob Hedenskog, "Explaining Ukrainian Resilience", Stockholm Centre For Eastern European Studies (SCEEUS), 5 April, 2023. *https://sceeus.se/en/publications/explaining-ukrainian-resilience/*.

103 Illia Ponomarenko, "Even if Russia attacks, Ukraine's fall is not predestined", *The Kyiv Independent*, 15 February 2022, *https://kyivindependent.com/illia-ponomarenko-even-if-russia-attacks-ukraines-fall-is-not-predestined/*.

104 Mykola Bielieskov, "Ukraine's Territorial Defence Forces: The War So Far and Future Prospects", *The Royal United Services Institute (RUSI)*, 11 May 2023, *https://rusi.org/explore-our-research/publications/commentary/ukraines-territorial-defence-forces-war-so-far-and-future-prospects*.

105 OSCE, *OSCE Special Monitoring Mission to Ukraine (SMM) Daily Report 42/2022*, 23 February 2022, *https://www.osce.org/special-monitoring-mission-to-ukraine/512872*.

106 Rob Lee, "Moscow's Compellence Strategy," *Foreign Policy Research Institute. Eurasia Program*, 18 January 2022, *https://www.fpri.org/article/2022/01/moscows-compellence-strategy*.

107 Chernenko and Solovyov, "Action-packed foreign policy".

108 TASS, "Security guarantees and the most modern nuclear triad. Results of the Board of the Ministry of Defense," 21 December 2021, *https://tass.ru/armiya-i-opk /13260955*.

109 "Ukraine crisis: Don't create panic, Zelensky tells West," *BBC*, 18 January 2022, *https://www.bbc.com/news/world-europe-60174684.*

110 Yuri Panchenko, "Zelensky's Approval Ratings Soar amid War – Ukrainians are united behind their president, but corruption scandals may affect their support," *Institute for War & Peace Reporting*, 2 February 2023, *https://iwpr.net/global-voices/zelenskys-approval-ratings-soar-amid-war*.

111 Lily Hyde, "Ukraine's president alleges coup attempt involving country's richest man – There's years of bad blood between President Volodymyr Zelenskiy and Rinat Akhmetov," Politico, 27 November 2021, *https://www.politico.eu/article/ukraine-zelenskiy-coup-akhmetov-russia*.

112 Andrew Kramer, "Court in Ukraine Declines Request to Arrest Former President," *New York Times*, 19 January 2022, *https://www.nytimes.com/2022/01/19/world/europe/ukraine-poroshenko-zelensky.html*.

113 BBC, "Ukraine crisis."

114 This is according to a study conducted by the Kyiv International Institute of Sociology, during January 2022. See "More than half of Ukrainians do not believe that Zelensky will protect Ukraine," *Ukrainska Pravda*, 24 January 2022, *https://www.pravda.com.ua/news/2022/01/24/7321508*.

115 Ponomarenko, "Even if Russia attacks."

116 , "Normandy Four meets in Berlin: Ukraine benefits as advisors fail to agree," *Ukraine Crisis Media Center,* 11 February 2022, *https://uacrisis.org/en/normandy-four-meets-in-berlin-ukraine-benefits-as-advisors-fail-to-agreehttps://uacrisis.org/en/normandy-four-meets-in-berlin-ukraine-benefits-as-advisors-fail-to-agree*.

117 , "Vladimir Putin recognises Ukrainian separatist regions, in escalation of tensions," *Euronews*, 21 February 2022, *https://www.euronews.com/2022/02/21/putin-dangles-donbas-recognition-as-tensions-in-eastern-ukraine-continue-to-rise*.

118 Tetyana Malyarenko, Borys Kormych, "Russian policy towards the economy of occupied Ukrainian territories: crawling de-modernization," Eurasian Geography and Economics, 1 January 2023, *https://rsa.tandfonline.com/doi/pdf/10.1080/15387216.2023.2167097*.

119 Watling et al, "'Preliminary Lessons.'"

120 Resilience refers in this context to "both the process and the outcome of successfully adapting to difficult and challenging life experiences." For more details, please see: Jakob Hedenskog, E*xplaining Ukrainian Resilience,* Stockholm Centre For Eastern European Studies (SCEEUS), 5 April 2023, *https://sceeus.se/en/publications/explaining-ukrainian-resilience/*.

3. Russia's national security: fighting the West for regional hegemony

Carolina Vendil Pallin, Maria Engqvist and Carl Michael Gräns

In the FOI report "Russian Military Capability in a Ten-Year Perspective – 2019", one of the conclusions was that Russia's security policy choices would decide its military development towards 2029.[1] Events in 2022 confirmed the centrality of Moscow's security policy choices as a determinant for everything from its economic development to its military power. The Russian decision to launch a full-scale invasion against Ukraine has had profound consequences not only for Russia's military capability but also for its room for security policy manoeuvre. In order to understand what future security policy decisions might come into play, it is necessary to examine what the decision to go to war against Ukraine tells us about Russian security policy and how the war will influence its goals and ambitions in the near future.

Russia's security policy encompasses everything from foreign relations to domestic policy. This is evident from its main security documents, which define what Russia's political leadership regards as national security and its interests.[2] As is evident below, there is a strong interconnection between Moscow's foreign and domestic security goals; they interact and reinforce each other. As a former land empire, the border between the Russian imperial core and its periphery was always difficult to define and this goes some way in explaining the key role of Ukraine in Russia's thinking about its own future.[3]

This chapter focuses on major changes rather than on details, as it tries to identify the most important lessons from events in, especially, 2022. The first section identifies the changes in Russia's security policy, not least against the backdrop of its National Security Strategy, from 2021. The second section analyses Russia's foreign policy, both in terms of its overall outlook and towards individual countries and regions. The third section focuses on how the decision to invade Ukraine came about and how Moscow's decision-making evolved as the war progressed, while the fourth section looks more closely at the militarisation of society. Developments in Russian domestic security are examined in Section Five under the heading "With Us or Against Us". The final section draws conclusions as to what the consequences are for Russia, a year after its renewed invasion of Ukraine.

3.1 The West as the dimensioning enemy

In early July 2021, the Russian Security Council adopted a renewed National Security Strategy. Russia was bracing itself for a prolonged conflict with the West. According to the strategy, the West was trying to preserve world dominance and therefore was also determined to hold back and undermine an emerging, strong Russia. In particular, the strategy points to attempts to use socioeconomic problems to undermine Russian societal unity and stability. Consequently, the new strategy devoted more space than the previous National Security Strategy, from 2015, to domestic political and societal security and the need to preserve the political system established under Vladimir Putin, with its ability to withstand influence from abroad.[4] Overall, however, this was a difference in degree, not in kind, compared to the previous edition.[5] In 2021, the need to balance national security goals with socioeconomic development was still present. According to the new National Security Strategy, Russia was to achieve economic growth through a technological leap.[6]

About a week after the release of the strategy, Putin published an essay on the "historical unity between Russians and Ukrainians." The essay presented Putin's view of Ukraine's history and ended by concluding that Ukraine had come into existence through an administrative error, in the Soviet era. According to the essay, Ukraine was not a real state and had become a tool and an arena for the West's anti-Russia project. Putin claimed that Ukraine could only be truly sovereign when in partnership with Russia and that a genocide was ongoing against the Russian population in Donbas.[7]

The National Security Strategy maintains that the West must respect Russia's demand for an exclusive sphere of interest, but this is mainly expressed in terms of the need to strengthen integration within the Commonwealth of Independent States (CIS) and protect the rights of compatriots living outside Russia.[8] There is only one explicit reference to Ukraine, and then about strengthening the 'brotherly ties' with all of the Slavic peoples of Russia, Belarus and Ukraine.[9] Putin's article, however, takes Russia's policy towards Ukraine several steps further. He claims that Russians and Ukrainians are really one people.[10] As tensions between the West and Russia increased, in 2021, Putin's essay became the main ideological document behind the war. The essay gained widespread attention, both in Russia and abroad, while the National Security Strategy receded into the background, almost becoming an appendix rather than the main document.

The new Foreign Policy Concept adopted in late March 2023 does not really mention Ukraine; it only does so in passing when it states that Western actions have forced Russia "to defend vital interests in the Ukrainian direction."[11] As Russia's war came to dimension its national security policy as a whole, its foreign policy followed suit. Russia defined all states that took hostile measures against it, especially those that joined Western sanctions in 2022, as "unfriendly countries."[12] Against these countries, Moscow produced threats of military violence, including weapons of mass destruction, a policy that has been termed a "diplomacy of force."[13] In Moscow's worldview, every state belongs to a side, in a worldwide ideological conflict, similar to the Soviet dichotomy of the Cold War.

Russia challenges the current rules-based order and the functioning of international law. In the Foreign Policy Concept, from 2023, Russia claims to support international law, but at the same time demands that its national constitution takes priority.[14] Instead of democratisation of states, Russia stresses the need for equal relations *between* states, regardless of democratic status *within* the states. This fits well into a Russian idea of "sovereign democracy."[15] Smaller countries, by definition, cannot be truly sovereign, according to this view of international relations. They are merely arenas for the influence of competing great powers and will ultimately belong to one side in the overall ideological conflict and geopolitical configuration of the world order.

Moscow has two main objections to the international rules-based system: first, it claims that it has been created on American terms, to promote its national interests; second, the US itself breaks these rules.[16] Furthermore, the EU is a representative of "collective unilateralism," favouring a world order biased towards Western overrepresentation and serving the West's interests.[17] By its invasion of Ukraine, Russia has challenged the framework of the Organization for Security and Cooperation in Europe (OSCE).[18] For Putin, the West is responsible for the war, and uses Ukraine as a platform for an anti-Russia project.[19]

Moscow does not consider its security borders to be along its national territorial borders, but along countries in a Russian sphere of interest.[20] The Kremlin opposes attempts by these countries to turn to the West and liberal democratic values. It tends to interpret any moves towards political and economic integration with the US-led democratic "West" as steppingstones towards EU and NATO accession. Russia claims to have the right to interfere in neighbouring states, denying them the right of taking sovereign national decisions. In the 2023 Foreign Policy Concept, this is codified as a "zone of responsibility," or even jurisdiction.[21] The draft agreement and letters sent to NATO and all EU capitals in December 2021, in which Russia demanded a return to the NATO borders of 1997, would have rendered null and void the national security policy decisions taken by the sovereign countries that had joined NATO since then.[22]

Despite Russia's propagating a "multi-polar" world, it tends to focus on a bi-polar comparison with the US.[23] Europe's countries have become weak satellite states of Washington, according to Moscow.[24] In his speech to the Federal Assembly on 21 February 2023, Putin described the Western goal as "the strategic defeat of Russia" and continued that the West aimed "to finish us off once and for all."[25] This logic has a civilisational dimension, where Russia has a mission to stop the expansion of Western values: Russia is at war with the idea of the West. It is a civilisational war fought with energy, trade and economic measures, as well as military force. To Moscow, American and European deliveries of military equipment to Ukraine constitute a proof of its being at war with the West, not with Ukraine. Turning this into a civilisational war with the West allows the Russian leadership to demand sacrifices from its population, while insisting that it is only conducting a special military operation. From 2022 Russia was thus fighting an ideational war by military means.

3.2 Building relations with the non-West

Since Russia has become estranged from the Western world, due to its war against Ukraine, it has been reaching out to the rest of the world to counterbalance alleged US world hegemony and widen its own network of friendly nations. Russia's efforts to build up a front of allies have had varied success, since its resource-consuming war and economic sanctions have weakened it. Countries such as China, India, Turkey and Iran have neither come out as unconditional allies nor condemned Russia's invasion. They have clear advantages, however, in sitting on the fence.

Russia considers China the most important force of counterbalance to the unipolar world dominance of the US. Russia has therefore intensified its efforts to secure continued diplomatic support from China. Their shared hostility towards the US has pushed them ever closer.[26] So has the personal friendship between Putin and his Chinese counterpart Xi Jinping. They have met close to forty times since Xi became president, in 2013.[27]

Putin visited Beijing on 4 February 2022, only three weeks before the invasion of Ukraine. As a result, Russia and China issued a joint declaration of "no limits" and "no forbidden areas" in their strategic partnership.[28]

China has not condemned the Russian invasion of Ukraine and it opposes Western sanctions. In February 2023, China presented a peace plan for Ukraine and Xi paid a three-day visit to Moscow a month later.[29] Ukraine was less impressed and Beijing had not planned a visit to Kyiv. On the other hand, China has neither recognised the Russian annexation of four additional Ukrainian regions, in 2022, nor of Crimea in 2014.[30] Consequently, although Russia's political leadership knows it can count on China's support regarding domestic regime stability, it is also aware that China will follow its own interests. Beijing will have the upper hand in their strategic partnership in the years to come, due to its superior economic development.[31]

Contrary to China, India was a close ally to the Soviet Union during the Cold War. India, however, has liberalised its economy and turned more towards the US and Europe. Officially, the two countries maintain cordial relations and in December 2021, when Putin visited India, they restated a commitment to their "special and privileged strategic relation."[32] India has criticised but not condemned the Russian invasion of Ukraine.[33] It has, however, taken advantage of the economic sanctions by increasing its oil import from Russia, at reduced prices.[34] Since the Russian invasion of Ukraine, the relationship has shifted to Delhi's favour and India is increasingly representing an ambition to be a civilisation in its own right.

Russia's bilateral relation with Turkey has been characterised by pragmatism.[35] President Putin has defined Turkey as a "reliable, but difficult partner."[36] Turkey, as a NATO member, has sent military equipment to Ukraine and participated in NATO activities against Russia in the Black Sea.[37] However, Turkey has not introduced economic sanctions against Russia and has become a hub for the transit of sanctioned goods to Russia. The US and Europe pressured Turkey, in March 2023, to stop this trade (also see Chapter 6).[38] Russo-Turkish relations are largely transactional, but, after 24 February 2022, Moscow has become more dependent on Ankara than was previously the case.[39] Turkey remains the only NATO ally not included on Russia's list of "unfriendly countries."

Both Iran and Russia face severe Western sanctions and regard the US as their main antagonist. Putin's trip to Teheran in July 2022 was his first outside of the post-Soviet area after the invasion of Ukraine.[40] Moscow has used Iranian-provided drones to strike against both civilian and military targets, with devastating but not decisive effects in Ukraine.[41] In return, Russia agreed to launch an Iranian satellite into orbit in August 2022 and there are suspicions that Iran could import and re-sell Russian oil in breach of Western sanctions.[42]

Russia has intensified its efforts to reach out to other countries in Asia, Africa and South America to counterbalance Western influence. It uses an anti-colonial rhetoric to gain public support. In Africa, Russia's political leadership sees an arena where it can play a geopolitical game against the West, not least against former colonial powers such as Great Britain and France.[43] This also provides an opportunity for Russia to obtain access to natural resources and to avoid international sanctions.[44] Russia has equally cherished the BRICS forum (Brazil, Russia, India, China and South Africa), and has been favourable to letting more countries join this forum.[45] So far, the result has been mixed. During 2022, in the UN General Assembly, Russia lost four of the resolution votes related to its invasion of Ukraine, even though a number of countries abstained from voting.

After the dissolution of the Soviet Union, Russia hoped that organisations like the Commonwealth of Independent States (CIS), the Collective Security Treaty Organisation (CSTO) and the Eurasian Economic Union (EAEU) would serve as reintegration vehicles to ensure Moscow's power in the region (for an overview of the membership in these organisations, see Chapter 4). The Baltic countries never joined and several former member states have dropped out from the CIS. Russia's position within these organisations has further decreased because of the war in Ukraine. Belarus has come out as the only reliable partner and has strategic importance for Moscow's military operations in Ukraine. Other states have distanced themselves from the Russian invasion of Ukraine.[46] Contrary to the official position of deeper future cooperation, Putin's decision to invade a former Soviet Republic has weakened Russia's influence in the Commonwealth of Independent States (CIS), Collective Security Treaty Organisation (CSTO) and Eurasian Economic Union (EAEU) (see also Chapter 4).[47]

3.3 The decision to go to war

The decision to launch a full-scale invasion of Ukraine on 24 February 2022 was not about conquering a few additional Ukrainian regions. Russia's goal was to control all of Ukraine politically and to push back the West in Eastern Europe: annexing territory was a steppingstone to achieving this final goal in Russian thinking. Ukraine had come to occupy a central place in Russian strategic thinking as the most important brick in a Russian version of a domino theory: if Ukraine can choose the West over Moscow, then the other countries in Russia's sphere of interest and perhaps even Russians could follow Ukraine's example. The question put to all members of the Russian Security Council on 21 February 2022 was whether to recognise the so-called People's Republics of Donetsk and Luhansk as independent states, but the end goal was always to keep all of Ukraine under Russian control.

Moreover, Russia had decided to push its position on Ukraine well before February 2022. Its military build-up along the Russian border started in 2021; the decision to do so was probably in place no later than autumn of 2020. For example, Russia-aligned hacker groups were preparing attacks from at least March 2021, by pre-positioning malign code and establishing presence in Ukrainian computer networks.[48] In addition, agent networks inside Ukraine intensified their activities in preparing for the invasion, well before 2022.[49]

In his address on the morning of 24 February 2022, Putin enumerated the crimes and betrayals that the West was guilty of and pronounced the collective West an "empire of lies." Putin's resentment against the West ran throughout the speech. He stated that Washington and its satellites had crossed a red line by turning Ukraine into an "anti-Russia." Moscow stood before an existential threat because of Western support to Ukraine's ultranationalists and neo-Fascists, claimed Putin. Just as he had done previously in his speeches, he accused Ukraine of committing genocide against Russians in Donbas, an accusation that is baseless and only served as an attempt to justify the invasion.[50] Putin would allow no one to meddle "in our affairs, into our relations."[51] Within Russia's sphere of interest, Ukraine could only exist as part of a united whole, with Russia.

By 2021, reports were in circulation of Vladimir Putin's having secluded himself during the Covid-19 pandemic.[52] The meeting in the Security Council on 21 February 2022, however, brought home the extent of this isolation: even though the president was meeting with those who should have been his closest advisers, none of them sat closer than six metres from him, while he treated some of them as if they were misbehaving schoolchildren. Add to this the tendency of autocratic systems to foster a culture where officials dread challenging their leaders with unfavourable information.[53] Russia's strategic planning was in disarray, as key security documents were not updated, or delivered later than scheduled, notably the Foreign Policy Concept and Putin's annual address to parliament. According to Russian law, there is a drafting process and timetable for all of these strategic documents. Russia's decision-making system has always revolved around the president. By 2022, however, all competing centres of power concentrated on divining what Putin wanted. As a result, something of a vacuum emerged in much of the policy-making machinery where he did not engage, and then especially in areas that did not concern the war directly.[54]

The plan to invade was conceived by the security services and the presidential administration, with support from the Ministry of Defence.[55] Personal relationships between key players in these institutions were crucial in the decision-making processes leading up to the invasion. The insular view of information, and different parties' incitements to restrict it at all levels of decision-making, shaped the Russian theory of victory, which consequently built on erroneous assumptions about both civilian and military conditions in Ukraine, as well as the actual capabilities of the Russian Armed Forces.[56] The assumption that this would be yet another short and victorious war probably explains why it went under the headline of being a "special military operation," rather than the full-scale invasion it amounted to. Russia quickly found itself in a war that demanded considerable resources and sacrifices. The expected military advances simply did not happen. As long as possible, Putin appears to have feared the domestic consequences of mobilising Russia's men for the war against Ukraine. In September 2022, however, Russia could no longer wage its war in Ukraine without announcing a mobilisation, albeit launched as a "partial mobilisation." This decision did more to bring home to Russia's population that Russia was at war than any statement Putin had made.

Over a decade's reform of the Russian Armed Forces was intended to increase efficiency and operational military capability. This involved shifting from the Soviet mass-mobilisation system to a high-readiness defence as well as upgrading weapons and equipment. The relative successes and lessons learned from Russia's limited operations in 2008–2015 further boosted political confidence in the military instrument. However, the Armed Forces were not designed to fight the type of war it ended up facing in Ukraine.[57] Again, Putin and those of his closest advisors who were behind the decision to try to take all of Ukraine were convinced that the full-scale invasion would be swift and successful.

It soon became clear that Russia would not be able to subjugate Ukraine according to plan. Repeatedly, Moscow had to produce plans for conducting referendums in occupied regions so as to annex further territory. The annexation of four additional Ukrainian regions, Donetsk, Luhansk, Kherson and Zaporizhzhia oblasts, on 30 September 2022, did little to mollify the feelings of anxiety among the Russian population. Although opinion polls still suggested a strong support for Russia's military operation in Ukraine, the news of mobilisation generated fear and a new wave of exodus of hundreds of thousands of Russia's young men.[58] By November, anxiety was again returning to the levels before Putin's speech on mobilisation on 21 September, but the share of respondents who believed that the war would be over within a six months had diminished to 17 percent compared to 37 percent in May.[59] This was not going to be a short and victorious military operation like Russia's first invasion of Ukraine, in 2014, on the Crimean Peninsula. The structural weaknesses of Russia's Armed Forces had become obvious on the battlefield (see Chapter 5).

So far, it is a war by conventional means, but it is taking place under the Russian nuclear umbrella. The decision to launch the invasion has tied most of the Armed Forces and resources to Ukraine and devalued Russia's conventional deterrence as there have been few successes on the battlefield. From the very start, Russia's political leadership invoked a nuclear threat to deter Western interference, and it has had an effect on what help the West has been prepared to supply.[60] As this nuclear rhetoric continued, a renewed international discussion of Russia's intentions and red lines ensued.

Russia's nuclear arsenal remains the largest on par with that of the United States and modernising it remains a priority.[61] Russian doctrine gives nuclear deterrence a strategic role in global and regional conflicts. The basic conditions for nuclear use remain those of the doctrine from 2020.[62] So far, however, there have been no indications in available open sources of Russia taking actual steps towards readying its nuclear weapons. The nuclear arsenal thus remains a vital part of Russia's deterrence towards the West.[63] Even before 2022, public officials on various levels, including the president, have referred to the country's nuclear capabilities and the conditions for their use as an integral part of the Russian escalation-management framework.[64] Worth noting, however, are the trends where domestic propaganda has normalised nuclear threats and made into a source of national pride in tandem with a Russian sense that its "coercive potential needs a recharge."[65]

During Putin's presidency, the international arms control system has successively been dismantled, in a race to the bottom, where the US and Russia blame each other. At the time of the Russian invasion of Ukraine, only the New Strategic Arms Reduction Treaty (New START) was still in place. On 21 February 2023, however, President Putin announced Russia's suspension of its active participation in the New START treaty until further notice.[66] Subsequent Russian statements made Western concessions in Ukraine a condition for returning to New START.[67] This represents a departure from earlier practice observed both in Washington and Moscow of keeping strategic nuclear talks separate from other security issues. Now, all bilateral arms control agreements between the US and Russia from the end of the Cold War have either been suspended or terminated.[68] Non-strategic nuclear arms are not subject to arms control. Russia's decision to deploy non-strategic missiles on Belarusian territory is taking place in this context, to deter the West and to tie Belarus closer to Russia (also see Chapter 5).

3.4 Militarising society

The aggressive foreign policy of Russia today reflects the growing repression and militarisation of Russian society as a whole.[69] Under Putin, Russia's political leadership has let its own interpretation of the past guide its security policy.[70] Any threats to this interpretation of history equate to questioning the foundation and existence of the Russian state in its present form and, thus, the political leadership itself. Russia's political logic has gradually translated into military goals, in order to change the world order by force, on its own initiative.[71]

By cherry-picking from different epochs in history, a vision of Russia as a contemporary great power has been created, one where its imperial past merges with its Soviet heritage.[72] Consequently, Russia under Putin continues to be the "gendarme of Europe," a defender of traditional values against a degenerated West.[73] The Russian Orthodox Church further augments the idea of Russia's special path and role in the world order, infusing sacrality to Putin's state-building, the armed forces, and the war itself.[74]

The ecosystem of state propaganda is adapting to the political logic in its efforts to gather public support for the war. By repeating, amplifying and distorting political statements, taking them to their logical extremes, images of the enemy are established and communicated to the public.[75] Since early 2022, it has been illegal to criticise the Armed Forces and the "special military operation" in Ukraine.[76] Opinion polls suggest that the support for Russia's military operation is strong, but, taking into account the increased repression, it is impossible to determine just how strong. Public figures who enjoy the protection (*krysha*) of the political leadership have, however, criticised Russia's Armed Forces without being prosecuted.[77]

The Russian Ministry of Defence, the Armed Forces, other ministries and governmental organisations, as well as the Russian Orthodox Church, play critical roles in the implementation of the government's policies.[78] Patriotic education, where children and young adults are specific target groups, has long been emphasised in central strategic-planning documents. Military training, for example, has been re-introduced in the upper secondary-school curriculum.[79]

Many of the mechanisms that government authorities used in 2022 to silence the last remnants of civil society and political opposition were already in place beforehand. Government authorities have used numerous pretences, from claiming that opponents are guilty of everything from disturbing public order to justifying terrorism or extremism, to repress civil society and freedom of speech.[80] The passing of laws prohibiting false information and public action that discredits the Armed Forces was yet another way of silencing the opposition.[81] Almost 20 000 people were detained for anti-war demonstrations or statements in 2022, mostly in February and March. Although the number of people taken to court for spreading false information was low (139), the consequences were severe, with some defendants facing long prison sentences.[82] In 2022, even defence lawyers came under pressure and informal censorship became more widespread even within the cultural sector.[83]

3.5 With us or against us – the ramifications of domestic security

The few remaining pockets of independent journalism and media were shut down or left Russia after 24 February 2022.[84] Censorship became almost total, especially with the new laws that only permitted distribution of government information about the "special military operation." This was in line with how independent information had become a national security threat in Russia.[85] In 2022, state propaganda became obviously militaristic, and opinion polls showed a correlation between support for the war and having national television as the main source of news.[86] The same year, whatever freedom still existed on the internet more or less disappeared. Platforms such as Facebook, Instagram and Twitter were blocked, while state control over indigenous search engines and social networks, most importantly VK, became almost total. Merely clicking "like," or sharing a post, could have devastating consequences for a Russian internet user.[87] Also in 2022, Russia became the leading country when it came to downloading VPN (virtual private network), which indicates that Russian internet users were attempting to find ways of getting access to blocked websites as well as avoiding legal prosecution from Russian authorities.[88]

The Russian non-government organisation, Net Freedom Project (*Setevye svobody*), concluded in 2023 that two separate Russian segments of the internet had emerged in 2022: one segment where information distribution was largely controlled by Russian authorities, and one based abroad, but catering to a Russian audience. The only bridges between the two internets were YouTube and the messaging service, Telegram, both of which were still allowed in Russia in May 2023.[89] In parallel with restricting the freedom of expression and media, Russian authorities have intensified efforts to promote a state ideology, the right way of thinking about Russia and the war against Ukraine. The younger generation, especially, is the target of such indoctrination. From 2022, schoolchildren have been expected to attend lessons that promote traditional Russian values and worldview under the topic, "Conversations about important matters."[90] In July 2022, Putin signed a law creating an organisation for children and youth modelled on the Soviet Young Pioneers movement, "Movement for the First."[91] Moreover, a presidential directive has been issued to develop a compulsory course for all students of higher education, "Bases of Russian statehood," by 1 September 2023.[92] The aim is to promote "a Russian worldview" among students and to give the course an air of scientific legitimacy.[93]

Because of the amendments to the Russian Constitution in 2020, Vladimir Putin will be able to seek re-election in the presidential elections in 2024. The political system is constructed to avoid having any candidates who might be realistic alternatives to the sitting president. This makes it difficult, together with repression, the state's dominance of the media and Vladimir Putin's strong position in opinion polls, to see that a political challenge will emerge before the 2024 elections. At the same time, the question of succession continues to haunt the Russian political system. The fact that Putin will turn 72 in 2024 is perhaps not a major problem, but the average age of the permanent members of the Russian Security Council and its top staff indicates that a broader question about succession is imminent for Russia's political system.[94] Furthermore, Putin has built his political position on promoting stability. This is something he will find hard to deliver, as a result of his decision regarding 24 February 2022. Instead, the propaganda of an eternal war with the West has become all-important as a motivation and justification for the high level of repression, as well as the need for cohesion inside Russia and securing his election in 2024. Lacking, however, is the formulation of a positive vision of the future, the hope for a young generation that something brighter will follow upon the sacrifices that the state is demanding from its population.[95]

The pandemic and the invasion have been the main driving factors for the tilting of the balance of power between the centre and the regions even further towards Moscow. Governors and heads of regions carry out few political initiatives of significance independently from Moscow, and authorities systematically push regional political rebels back, especially if they try to interfere with the mobilisation or express anti-war sentiments. Since the invasion, responsibility for mounting resources for the war has increasingly become a task for regional administrations.[96] Military administration offices (*voenkomaty*) implement the draft for the "special military operation." The majority of the troops who have gone to fight in Ukraine are not from Russia's two centres of gravity, Moscow and Saint Petersburg, but from Russia's regions, especially the most destitute ones. There is also a clear asymmetry in terms of population density and the distribution of confirmed Russian casualties, which are particularly high from regions such as Sverdlovsk, Cheliabinsk, Bashkortostan, Buriatia and Dagestan.[97] Another asymmetry is visible in the issue of how to deal with the recently annexed regions of Donetsk, Kherson, Luhansk and Zaporizhzhia. Russia insists that its legislation extends to the entirety of the regions, even though it does not control them militarily (not to mention that the international community does not recognise the regions as Russian). No less, Russia's political leadership has announced ambitious plans for these regions. In Putin's annual address to parliament, it became evident that the regions were to be included in Russia's domestic policy projects and programmes.[98] In fact, Russia's federative system has become even more asymmetric, incoherent and, potentially, unstable.

3.6 Conclusions

In 2022, the war against Ukraine came to define and dominate Russian security policy to the degree that socioeconomic development became a second-tier goal, achieved perhaps in a distant future, or only on paper, with skewed statistics. Controlling Ukraine, its domestic and foreign policy choices, emerged as an existential security policy matter for Russia's political leadership. In Moscow's version of a domino theory, Ukraine had not only become the brick defining Russia's possibilities for having a sphere of interest, but also for controlling society in Russia proper. In Russian security thinking, the future of Ukraine is, at the same time, foreign policy, military security and domestic stability. If Ukraine can turn to the West, then so can the rump states of the CIS and eventually Russia itself.

Russia is at war with the West in Ukraine, with the West as an idea and the values that it represents. The West has become an archenemy in Russian thinking, an enemy that Russia has fought through the centuries and against which it will always be waging battle. The West, in Moscow's view, is an empire of lies that has humiliated Russia. Meanwhile, the Russian political leadership has not been able to communicate an end goal to its population, only a perpetual war, one of resentment that will require all of society to engage in it. The Russian political system, the economy, society and population as a whole are being prepared for a long war. These preparations, in combination with repression and massive propaganda, in an exclusive Russian information sphere, are also the main preparations for Russia's 2024 presidential election. Russia's political leadership will feel at their weakest during a presidential election that really only postpones the succession dilemma. One of Putin's challenges will be to galvanize Russian society and the different regions, as well as different age and ethnic groups. Moreover, the election will be taking place when a supposedly short military operation may already have been going on for two years.

One of Russia's most important tools of security policy, its conventional military power, has not delivered in Ukraine. Taking a large country such as Ukraine with the force Russia was able to muster, not quite 200 000 men, was always going to be a huge gamble. More importantly, the war has revealed a number of weaknesses in Russia's Armed Forces and, in the process, undermined its reputation as a formidable military power to be reckoned with. While Russia's political goals for the war have remained constant, the military-operational goals have been in flux and difficult to grasp. If the war is perpetual, and the main adversary is the West and everything the West stands for, how does one define a military victory in this war? Moreover, the war has tied up much of Russia's conventional military assets in and around Ukraine. Ultimately, this has made Russia more dependent on nuclear arms as its main deterrent.

After a long period of deteriorating political relations between the West and Russia, the full-scale invasion on 24 February 2022 signified a complete rift in just about all exchanges: trade, cultural, technological and scientific cooperation, tourism, investments and even transport links. Russia designated Western countries as "unfriendly" and turned to the rest of the world to compensate. Consequently, Russia has cultivated relations with Asian countries and the African and Latin American continents, as well as with emerging major powers such as China, India and Turkey. This does not signify that Russia has become stronger and more influential, only that its attention has turned to these countries in order to avoid isolation. It is, moreover, a weakened Russia in need of friends internationally that is now on the diplomatic offensive in African countries and in Latin America. Russia's relations with China are strong, but the war in Ukraine has made Moscow even more the junior partner, especially in economic terms, and countries such as India and Turkey have proven adept in reaping benefits from Russia's weakened position.

At the time of writing, more than a year after the full-scale invasion, on 24 February 2022, Russia is further from its original goals than before. Instead of forcing NATO to retreat in Europe, the alliance has rediscovered its sense of mission and is strengthening its military presence as well accepting new allies: Finland acceded in April 2023, while Sweden is waiting for its application to be ratified. Ukraine is more of a solidified nation-state now than before the full-scale invasion and, as Russia's military assets are increasingly tied up in the war, other countries in what Russia sees as its sphere of interest have found an opportunity to explore ways of balancing their dependence on Moscow. Russia's flagship projects to institutionalise a sphere of interest, the CIS, the CSTO and EAEU, are under serious strain, as Russia needs its economic and military resources in its war against Ukraine. In spite of this, Russia's political leadership displays no signs of being prepared to retreat from its original goals. On the contrary, it signals preparations for enduring a long confrontation with the West. ■

Endnotes

1 Fredrik Westerlund, "Russian Military Capability in a Ten-Year Perspective," in *Russian Military Capability in a Ten-Year Perspective – 2019*, ed. Fredrik Westerlund and Susanne Oxenstierna, FOI-R-4758-SE (Stockholm: Swedish Defence Research Agency), 2019, 143.

2 President of Russia, *National Security Strategy of the Russian Federation* (Natsionalnaia strategiia bezopasnosti Rossiiskoi Federatsii), adopted by Presidential Decree No. 400, 2 July 2021, *http://kremlin.ru/acts/bank/47046*, § 5.

3 For a discussion of this, see for example, Samir Puri, *Russia's Road to War with Ukraine: Invasion Amidst the Ashes of Empire*, London: Biteback Publishing.

4 President of Russia, *National Security Strategy of the Russian Federation* (Natsionalnaia strategiia bezopasnosti Rossiiskoi Federatsii). President of Russia, *Concept for humanitarian politics abroad (Kontseptsia gumanitarnoi politiki Rossiiskoi Federatsii za rubezhom)* 5 September 2022, §11, 3. *http://static.kremlin.ru/media/events/files/ru/G3CkAuMhZXio8AzNaweT3wTGTaEA16OU.pdf.*

5 President of Russia, *National Security Strategy of the Russian Federation* (Natsionalnaia strategiia bezopasnosti Rossiiskoi Federatsii); Gudrun Persson and Carolina Vendil Pallin, "Tillbaka till framtiden – Rysslands nationella säkerhetsstrategi 2021," 19 July 2021, *Royal Swedish Academy of War Sciences, https://kkrva.se/tillbaka-till-framtiden-rysslands-nationella-sakerhetsstrategi-2021/*.

6 This goal was also present in the renewed Foreign Policy Concept, in late March 2023, albeit as one of several national security interests (number seven of a total nine), President of Russia, *Foreign Policy Concept of the Russian Federation* (Kontseptsiia vneshnei politiki Rossiiskoi Federatsii), No. 229, 31 March 2023, *http://kremlin.ru/events/president/news/70811*, §15:7.

7 President of Russia, *Vladimir Putin's essay 'On the Historical Unity Between Russians and Ukrainians'* (Statia Vladimira Putina "Ob istoritjeskom jedinstve russkich i Ukraintsev"), 12 July 2021, *http://kremlin.ru/events/president/news/66181*.

8 President of Russia, *National Security Strategy of the Russian Federation,* 2021, §§17, 32, 40:6, 101:5-6 and 19.

9 President of Russia, *National Security Strategy of the Russian Federation,* 2021, §101:20.

10 President of Russia, 'Statia Vladimira Putina "Ob istoritjeskom jedinstve russkich i Ukraintsev."'

11 President of Russia, *Foreign Policy Concept,* §13.

12 The U.S. and Czechia were the first to be included in this list in July 2021. In 2022, fifty countries were on the list, including all EU countries and Ukraine, *Kommersant*, "Kak rasshirialsia spisok nedruzhestvennykh Rossii stran," 22 July 2022, *https://www.kommersant.ru/doc/5479042*.

13 Maren Garberg Bredesen and Karsten Friis, "Missiles, Vessels and Active Defence – What Potential Threat Do the Russian Armed Forces Represent?" *RUSI Journal,* vol. 165, issue 5-6 (September 2020): 71; Margarete Klein and Nils Holger Schreiber, "Der Angriff auf die Ukraine und die Militarisierung der russischen Außen- und Innenpolitik – Stresstest für Militärreform und Regimelegitimation," *SWP-Aktuell,* nr. 76 (December 2022) 1.

14 President of Russia, Foreign Policy Concept, §§ 21 and 23.

15 Gudrun Persson, "On War and Peace: Russian, Security Policy and Military-strategic Thinking," in *Putin's Russia – Economy, Defence and Foreign Policy,* ed. Steven Rosefielde (Singapore: World Scientific, 2021) 354; Viatcheslav Morozov, "Identity and Hegemony in EU-Russia Relations," in *EU-Russia relations in crisis – Understanding diverging perceptions*, ed. Tom Casier and Joan DeBardeleben (New York: Routledge, 2018) 41.

16 The cases of Kosovo, Libya and Iraq are commonly quoted; President of Russia, *Speech to the Federal Assembly (Poslanie Prezidenta Federalnomu Sobraniiu)*, 21 February 2023, 2-4, *http://kremlin.ru/events/president/news/70565*.

17 Tom Casier, "The EU and Russia in a Multilateral Setting," in *EU-Russia relations in crisis – Understanding diverging perceptions,* 204.

18 Helsinki Act 1975, Paris Charter 1990, Budapest Memorandum 1994.

19 President of Russia, *Speech to the Federal Assembly*, 5.

20 President of Russia, *National Security Strategy* § 101.11.

21 President of Russia, *Foreign Policy Concept*, §§ 23.6 and 25.

22 Ministry for Foreign Affairs of Russia, *Soglashenie o merakh obespecheniia bezopasnosti Rossiiskoi Federatsii i gosudarstv-chlenov Organizatsii Serevoatlanticheskogo dogovora*, 17 December 2021, *https://mid.ru/ru/foreign_policy/rso/nato/1790803/?lang=ru*.

23 Multipolarism was introduced by Yevgenii Primakov; President of Russia, *National Security Strategy Strategy,* §100; President of Russia, *Foreign Policy Concept (Kontseptsiia vneshnei politiki Rossiiskoi Federatsii)*, 30 November 2016, *http://www.scrf.gov.ru/security/international/document25/*, §4.

24 President of Russia, *Foreign Policy Concept*, §13.

25 President of Russia, *Speech to the Federal Assembly*, 7.

26 Lindsay Maizland, *China and Russia: Exploring Ties Between Two Authoritarian Powers*, Council on Foreign Relations, 14 June 2022, *https://www.cfr.org/backgrounder/china-russia-relationship-xi-putin-taiwan-ukraine*; Gregory O. Hall, *Examining US-China-Russia Foreign Relations – Great Power Politics in a Post-Obama Era*, (New York: eBook Routledge, 2023), 18-20.

27 Christopher Weidacher Hsiung, *China's perspective on Russia – Assessing how Beijing views and values its relationship with Moscow now and later*, FOI-R--5267--SE (Stockholm: Swedish Defence Research Agency, October 2022), 13.

28 President of Russia, "Joint Statement of the Russian Federation and the People's Republic of China on the International Relations Entering a New Era and the Global Sustainable Development," 4 February 2022, *http://www.en.kremlin.ru/supplement/5770*.

29 Alexander Gabuev, *Inside China's Peace Plan for Ukraine*, Carnegie Endowment for International Peace, 1 March 2023, *https://carnegieendowment.org/politika/89172*.

30 Signing of the agreements on the acceptance of DNR, LNR, Zaporozhe and Kherson oblasts into Russia *(Podpisanie dogovorov o priniatii DNR, LNR, Zaporozhskoi i Khersonskoi oblastei v sostav Rossii)*, 30 September 2022, *http://www.kremlin.ru/events/president/news/69465*.

31 Valentina Romei and Martin Arnold, "China becomes top exporter to Russia as sanctions hit Moscow's trade with EU," *Financial Times*, 7 November 2022, *https://www.ft.com/content/c6d20177-f734-4db9-81e1-76e5cd70ec72*.

32 President of Russia, Meeting with Prime Minister Modi at SCO Summit *(Vstrecha s Premer-ministrom Indii Narendoi Modi),* 16 September 2022, *http://kremlin.ru/events/president/news/69362*.

33 Jason Wahlang, *The 22nd Summit of the Shanghai Cooperation Organisation*, MP-IDSA, 14 November 2021, *https://idsa.in/backgrounder/the-22-summit-of-the-shanghai-cooperation-organisation-jwahlang-141122*; G7 Leaders' Communiqué, Elmau, 28 June 2022, *https://www.g7germany.de/resource/blob/974430/2062292/fbdb2c7e996205aee402386aae057c5e/2022-07-14-leaders-communique-data.pdf?download=1*.

34 Shruti Menon, "Ukraine crisis: Who is buying Russian Oil and Gas?" BBC, 6 December 2022. According to the article, Indian imports of oil rose from practically zero in February 2022 to 900000 barrels per day in November 2022. *https://www.bbc.com/news/world-asia-india-60783874*.

35 Patricia Cohen, "Turkey is strengthening its energy ties with Russia," *New York Times*, 9 December 2022, *https://www.nytimes.com/2022/12/09/business/turkey-erdogan-energy-russia.html*.

36 President of Russia, *Valdai International Discussion Club Meeting, (Zasedanie Mezhdunarodnogo diskussionnogo kluba 'Valdai')*, 27 October 2022, *http://kremlin.ru/events/president/transcripts/69695*.

37 Burak Ege Bekdil, "Turkey sends 50 mine-resistant vehicles to Ukraine, with more expected," *DefenseNews*, 22 August 2022, *https://www.defensenews.com/land/2022/08/22/turkey-sends-50-mine-resistant-vehicles-to-ukraine-with-more-expected*.

38 Gabriel Gavin, "Russian oil finds 'wide open' back door to Europe, critics say," *Politico*, 21 March 2023, *https://www.politico.eu/article/russia-oil-vladimir-putin-ukraine-war-wide-open-back-door-to-europe-critics-say/*.

39 Stefanie Glinski, "Turkey's Balancing Act Between Putin and the West," *Foreign Policy*, 6 March 2023, *https://foreignpolicy.com/2023/03/06/turkey-elections-russia-erdogan-putin-nato/*.

40 Faezeh Foroutan, *Suspicious bind: Iran's relationship with Russia,* European Council on Foreign Affairs, 2 September 2022, *https://ecfr.eu/article/suspicious-bind-irans-relationship-with-russia/*.

41 Dina Esfandiary, "Axis of Convenience – Why Iran's Partnership With Russia Endures," *Foreign Affairs*, 17 February 2023, *https://www.foreignaffairs.com/russian-federation/axis-convenience*. More than 80 Iranian-made drones launched by the Russian military were shot down over Ukraine in 48 hours, according to the Ukrainian President Volodomyr Zelenskyi, see Robbie Gramer and Amy Mackinnon, "Iran and Russia Are Closer Than Ever Before," *Foreign Policy*, 5 January 2023, *https://foreignpolicy.com/2023/01/05/iran-russia-drones-ukraine-war-military-cooperation/*.

42 Matthew Karnitschnig, "Russia eyes Iran as sanctions-busting backdoor for oil sales," *Politico*, 23 August 2022, *https://www.politico.eu/article/russia-eyes-iran-as-sanctions-busting-backdoor-for-oil-sales/*.

43 Peter Fabricius, *Sergei Lavrov back to Africa with a vengeance*, Institute for Security Studies (ISS), 20 January 2023, *https://issafrica.org/iss-today/sergey-lavrov-back-to-africa-with-a-vengeance*.

44 Karolina Lindén, *Russia's relations with Africa – Small, military and with destabilising effects*, FOI memo: 8090 (Stockholm: Swedish Defence Research Agency), January 2023, 6-8.

45 President of Russia, *Foreign Policy Concept*, §19.4.

46 Wilder A. Sánchez, "Kazakhstan continues to break ranks with Russia," *The Diploma*t, 23 September 2022, *https://thediplomat.com/2022/09/kazakhstan-continues-to-break-ranks-with-russia/*.

47 Erica Marat and Johan Engvall, "Former Soviet States Are Distancing Themselves From Their Old Imperial Master," *Foreign Policy*, 10 May 2022, *https://foreignpolicy.com/2022/05/10/soviet-imperialism-colonialism-ukraine-kazakhstan-georgia-moldova/*; President of Russia, National Security Strategy, §101.5.

48 Microsoft Digital Security Unit, "An overview of Russia's cyberattack activity in Ukraine," *Special Report: Ukraine*, 27 April 2022, *https://query.prod.cms.rt.microsoft.com/cms/api/am/binary/RE4Vwwd*.

49 Jack Watling, Oleksandr V. Danylyuk, and Nick Reynolds, *Preliminary Lessons from Russia's Unconventional Operations During the Russo-Ukrainian War, February 2022–February 2023,* RUSI Special Report, 29 March 2023, *https://rusi.org/explore-our-research/publications/special-resources/preliminary-lessons-russias-unconventional-operations-during-russo-ukrainian-war-february-2022*.

50 Alexander Hinton, "Putin's claims that Ukraine is committing genocide are baseless, but not unprecedented," *The Conversation,* 25 February 2022, *https://theconversation.com/putins-claims-that-ukraine-is-committing-genocide-are-baseless-but-not-unprecedented-177511*.

51 President of Russia, "Address by the President of the Russian Federation" (Obrashchenie Prezidenta Rossiiskoi Federatsii), 24 February 2022, *http://kremlin.ru/events/president/news/67843*.

52 Owen Matthews, *Overreach: The Inside Story of Putin's War Against Ukraine* (London: Mudlark, 2022), 173–177.

53 Lawrence Freedman, "Why War Fails: Russia's Invasion and the Limits of Military Power," *Foreign Affairs*, vol. 101, no. 4 (July/August 2022). See, also, Georgy Egorov and Konstantin Sonin, "Dictators and Their Viziers: Endogenizing the Loyalty-competence Trade-off," *Journal of the European Economic Association*, vol. 9, no. 5 (8 October 2009), 903–930.

54 Andrei Pertsev, "Obmen mneniiami. Kak rossiiskaia vlast iz-za voiny poteriala tsentry priniatiia reshenii," Carnegie Politika, 7 February 2023, *https://carnegieendowment.org/politika/88956*.

55 Jack Watling, Oleksandr V. Danylyuk, and Nick Reynolds, *Preliminary Lessons from Russia's Unconventional Operations During the Russo-Ukrainian War,* 4, 12.

56 Mykhaylo Zabrodskyi, Jack Watling, Oleksandr V. Danylyuk, and Nick Reynolds, *Preliminary Lessons in Conventional Warfighting from Russia's Invasion of Ukraine: February–July 2022*, RUSI, 30 November 2022, *https://static.rusi.org/359-SR-Ukraine-Preliminary-Lessons-Feb-July-2022-web-final.pdf*, 7.

57 Mykhaylo Zabrodskyi, Jack Watling, Oleksandr V. Danylyuk, and Nick Reynolds, *Preliminary Lessons in Conventional Warfighting from Russia's Invasion of Ukraine: February–July*

2022; Jonas Kjellén, *Bringing The Soldier Back In,* FOI-R--5461--SE (Stockholm: Swedish Defence Research Agency, 2023).

58 Levada Center, "Conflict with Ukraine: Estimates in January 2023," (Konflikt s Ukrainoi: Otsenki janvaria 2023 goda), 2 February 2023, *https://www.levada.ru/2023/02/02/konflikt-s-ukrainoj-otsenki-yanvarya-2023-goda/*; Chawryło, Katarzyna and Wiśniewska, Iwona, "Mobilisation in Russia: Society's reactions and the economic consequences," OSW Commentary, 20 January 2023, *https://www.osw.waw.pl/en/publikacje/osw-commentary/2023-01-20/mobilisation-russia-societys-reactions-and-economic*.

59 Levada Center, "Conflict with Ukraine."

60 President of Russia, "Address by the President," 24 February 2022.

61 Hans M. Kristensen, Matt Korda and Eliana Reynolds, "Russian Nuclear Weapons, 2023", *Bulletin of the Atomic Scientists,* vol. 79, no. 3, 2023, (174–199) 178.

62 President of Russia, "On the Basis of State Policy of the Russian Federation in the Field of Nuclear Deterrence" (Ob Osnovakh gosudarstvennoi politiki Rossiiskoi Federatsii v oblasti iadernogo sderzhivaniia), Presidential Decree No. 355, 2 June 2020, *http://static.kremlin.ru/media/events/files/ru/IluTKhAiabLzOBjIfBSvu4q3bcl7AXd7.pdf.*

63 Gudrun Persson, *Rysk kärnvapendoktrin – oförutsägbarheten stadfäst*, Memo 7332, 19 November 2020, (Stockholm: Swedish Defence Research Agency).

64 Fredrik Westerlund and Susanne Oxenstierna (eds), *Russian Military Capability in a Ten-Year Perspective – 2019*, FOI-R--4758--SE (Stockholm: Swedish Defence Research Agency), 2019, 89. See also Wachs, "The Role of Nuclear Weapons in Russia's Strategic Deterrence. Implications for European security and arms control," *SWP Comment No.68*, November 2022.

65 Dmitry Adamsky, "Russia's New Nuclear Normal", *Foreign Affairs*, 19 May 2023, *https://www.foreignaffairs.com/russian-federation/russias-new-nuclear-normal*.

66 President of Russia, *Speech to the Federal Assembly*, 36.

67 See for example dep.Sergei Ryabkov's statement, "Zamglavy MIDa Riabkov: dialog po DSNV vozmozhen tolka pri uslovii pdodvizheniia intresov Rossii", Kommersant, 25 April 2023, *https://www.kommersant.ru/doc/5953670*.

68 President of Russia, *Annual address of the President to the Federal Assembly*, 2.

69 Margarete Klein and Nils Holger Schreiber, "Der Angriff auf die Ukraine und die Militarisierung der russischen Außen- und Innenpolitik – Stresstest für Militärreform und Regimelegitimation," *SWP-Aktuell, nr. 76* (December 2022); Daniel Treisman, "Putin Unbound: How Repression at Home Presaged Belligerence Abroad," *Foreign Affairs*, vol. 101, issue 1 (December 2022): 40–53.

70 Jade McGlynn, *Memory Makers: The Politics of the Past in Putin's Russia* (London: Bloomsbury Academic, 2023), 31–32.

71 President of Russia, *Vladimir Putin's essay 'On the Historical Unity Between Russians and Ukrainians.'*

72 Marlene Laruelle, *Is Russia Fascist? Unravelling Propaganda East and West* (Ithaca: Cornell University Press, 2021), 84–88.

73 Igor Egorov, "Oni sovsem strakh poteriali?" *Rossiiskaia Gazeta*, 27 March 2023, *https://rg.ru/2023/03/27/oni-sovsem-strah-poteriali.html*.

74 Tunku Varadarajan, "The Patriarch Behind Vladimir Putin," *Wall Street Journa*l, 29 December 2022, *https://www.wsj.com/articles/vladimir-putin-the-patriarchs-altar-boy-kirill-russia-ukraine-war-invasion-theology-orthodox-church-11672345937*.

75 Julian E. Barnes, "Russia Intensifies Its Propaganda Campaign Against Ukraine," *New York Times*, 26 October 2022, *https://www.nytimes.com/2022/10/26/us/politics/russia-propaganda-dirty-bomb.html*.

76 Anton Troianovski and Valeriia Safronova, "Russia Takes Censorship to New Extremes, Stifling War Coverage," *New York Times,* 4 March 2022, *https://www.nytimes.com/2022/03/04/world/europe/russia-censorship-media-crackdown.html*.

77 Andrei Soldatov and Irina Borogan, "Russia's Halfway to Hell Strategy. Why Putin Has Not Yet Launched a Total War in Ukraine," *Economist*, 6 March 2023, *https://www.foreignaffairs.com/ukraine/russias-halfway-hell-strategy*. *Krysha* is the Russian word for "roof."

78 Gudrun Persson, "On War and Peace," 372.

79 Ministry of Defence (@DefenceHQ), "(1/4) In recent weeks, the Russian Ministry of Education has provided more detail on the rollout of the previously announced plan to include basic military training in Russia's secondary school curriculum." *Twitter*, 29 January 2023, 7:41 a.m. *https://twitter.com/DefenceHQ/status/1619586411232911360*.

80 OVD Info, *Summary of Russian wartime repression. One year since the full-scale invasion*, February 2022, *https://en.ovdinfo.org/summary-russian-wartime-repression-one-year-full-scale-invasion*.

81 OVD Info, *Summary of Russian wartime repression;* Mariana Torocheshnikova, "Voina – zaprescіennoe slovo," Radio Svoboda, 10 March 2022, *https://www.svoboda.org/a/31746559.html*.

82 OVD Info, *Summary of Russian wartime repression.* Irina Dolinina and Polina Uzhvak, "Protestov v Rossii net? A Roskomnadzor nashel!" *Vazhnye istorii*, 22 March 2023, *https://storage.googleapis.com/istories/stories/2023/03/22/protesty-v-rossii/index.html*.

83 OVD Info, *Summary of Russian wartime repression.*

84 Nicolas Camut, "Russian independent TV Rain gets license to broadcast from the Netherlands," *Politico*, 10 January 2023, *https://www.politico.eu/article/tv-channel-dozhd-russia-war-ukraine-netherlands-tv-rain-gets-license-broadcast/*.

85 President of Russia, *National Security Strategy*, §§44, 52.

86 *Levada Center*, "Konfikt s Ukrainoi; otsenki ianvaria 2023 goda," 2 February 2023, *https://www.levada.ru/2023/02/02/konflikt-s-ukrainoj-otsenki-yanvarya-2023-goda/*.

87 *Net Freedom Project,* "2022: Dva Runeta," 2023 (available at *https://drive.google.com/file/d/1RiYPt8dkQAOYW6Yz4cO9LP9oChbVeqSd/view?usp=sharing*), 7–8. See, also, Guzel Yusupova, "Silence Matters: Self-Censorship and War in Russia," PONARS Eurasia Policy Memo, no. 824 (January 2023), *https://www.ponarseurasia.org/silence-matters-self-censorship-and-war-in-russia/*.

88 *Freedom House*, "Freedom on the Net – Russia, 2022," *https://freedomhouse.org/country/russia/freedom-net/2022*.

89 *Net Freedom Projec*t, "2022: Dva Runeta," 2023, 23–24.

90 *Tsikl vneurochnykh zaniatii.* "Razgovory o vazhnom," *https://razgovor.edsoo.ru/*, accessed 27 April 2023.

91 Federal Law, *On the Russian Movement for Children and Youth* (O rossiiskom dvizhenii detei i molodezhi), No. 261-FZ, 14 July 2022, *http://publication.pravo.gov.ru/File/GetFile/0001202207140025?type=pdf*.

92 Presidential Directive, Pr-173GS, p.11 a, 2023-01-29, *http://kremlin.ru/acts/assignments/orders/70421*.

93 Aleksandr Kharichev and Andrei Polosin, "DNK Rossii," *Vzgliad*, 8 February 2023, *https://vz.ru/politics/2023/2/8/1198356.html*.

94 In 2024, the average age among the permanent members of Russia's Security Council will be 66 and the median age 69.

95 Andrei Yakovlev, "How to think about a post-Putin future?" *Russia.Post,* 31 March 2023, *https://russiapost.info/politics/post-putin_future*.

96 Mikhail Vinogradov, "Pereferiia na pereferii. Kak ukhodiashchii god izmenil regionalnuiu politiki v Rossii." *Carnegie Politika*, 27 December 2022, *https://carnegieendowment.org/politika/88704*.

97 Mediazona, "Russian casualties in Ukraine," accessed 2 March 2023, *https://en.zona.media/article/2022/05/20/casualties_eng* .

98 President of Russia, *Annual address of the President to the Federal Assembly.*

4. Shifting balances: the war and Russia's neighbours

Kristina Melin, Johan Engvall, Ismail Khan

For Russia's political leadership, dominance of Russia's "near abroad" serves as a marker of the great-power status that lies at the heart of Russian national identity and guides its foreign and security policy.[1] However, Russia's full-scale invasion of Ukraine has created shockwaves across the whole neighbourhood with far-reaching consequences for the countries at hand and for Russia itself. This chapter explores how Belarus, Moldova, Georgia, Armenia, Azerbaijan, Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan have reacted to Russia's invasion. The aim is to identify how these states view their own security and Russia's role in it after the outbreak of war, and to draw conclusions about Russia's continuing influence. Specifically, how has the war and its political ramifications affected the foreign and security policies of these countries?

These countries are widely different beyond their shared experience of a Soviet and imperial-Russian past. Yet for the purposes of this study, they are brought together by Russia's enduring ambition for regional influence. To capture our analytical focus, we describe them as a neighbourhood, while also acknowledging their distinct differences.

Russian influence in the neighbourhood has long relied on its role as a security guarantor, where military presence and security cooperation have been important tools. While bilateral relations have taken centre stage, Russia has also sought to tie the states to Moscow through regional integration projects.[2] The Collective Security Treaty Organisation (CSTO) has served as a vessel for Russian influence but also provided participant countries with preferential conditions for arms sales and training, and commitments of collective self-defence.[3] The Eurasian Economic Union (EAEU) and the Commonwealth of Independent States (CIS) have been key instruments to promote economic and political integration on Russian terms. But beyond cooperation, Russia has also resorted to coercion and aggression to promote its interests, not least when countries have opted for a Western course. Russia's military and political support to irredentist provinces in the region has provided Moscow with a security footprint, which countries have had to take into account when making foreign policy choices.[4] The level of cooperation with Russia varies across the neighbourhood (Table 4.1).

Each country analysis gravitates towards separate aspects of security and foreign policy, and relations with Russia. The aim here is to bring forward the most significant policy shifts in each country, not to provide an exhaustive account. Domestic and economic developments, as well as Russian policies, are considered where they contribute to the analysis. The chapter discusses the countries one by one, except for the Central Asian states, which are presented together. The results are summarised and discussed in the conclusion. What emerges is the further fragmentation of what Russia claims as

Table 4.1 Membership in Moscow-led regional organisations

	Collective Security Treaty Organisation (CSTO)	Commonwealth of Independent States (CIS)	Eurasian Economic Union (EAEU)
Belarus	Member	Member	Member
Moldova		Member	
Georgia			
Armenia	Member	Member	Member
Azerbaijan		Member	
Kazakhstan	Member	Member	Member
Kyrgyzstan	Member	Member	Member
Uzbekistan		Member	
Tajikistan	Member	Member	
Turkmenistan		Associate member	

Remarks: Belarus is also part of the Union State of Russia and Belarus. Co-founder and associate member, Ukraine formally suspended participation in the CIS in 2018 and was never member of the CSTO or the EAEU.

its "near abroad", already long in progress. There is a rapid decline in Russian influence, although with some exceptions, while the footprint of other regional powers increases. The balance of power between Russia and its neighbours seems to be shifting.

4.1 Belarus uncomfortably in Russia's corner

The war has seen an accelerated political, economic and military integration between Belarus and Russia, enabled by Belarusian leader Aleksandr Lukashenko's dependence on the political leadership in the Kremlin after the 2020 political crises in Belarus. The Belarusian regime has increasingly conformed to Russian foreign and security policy priorities.[5] The results of this development have been on display during Russia's invasion. The Belarusian leadership has largely echoed Russian rhetoric on the war and on Western sanctions; Lukashenko has recognised Crimea, Luhansk and Donetsk as "de facto" Russian.[6] Belarus has also backed Russian positions in the UN General Assembly (UNGA). Often Moscow's man in the CSTO, Lukashenko has attempted to shore up support for Russian positions.[7]

Within the Union State between Russia and Belarus, integration is continuing at speed.[8] Progress is clearest in the military sphere, long a Russian priority. The new Union State military doctrine adopted in November 2021 emphasises confrontation with the West and NATO more clearly than the previous 2001 iteration. It also stands in stark contrast to the 2016 Belarusian military doctrine, which mentions NATO in cooperative terms. The update is significant in itself, as in 2018 the Belarusian regime still refused to sign the new doctrine, citing it did not reflect its own interests.[9] This turn underlines that Moscow defines and drives the new-found consensus.

Map 4.1 Belarus (Per Wikström, FOI).

The war has demonstrated that Belarus is part of a Russian security space. Russia has been able to use Belarusian territory at will to launch missile strikes, and for ground and air operations. Most of this activity occurred during spring 2022, in the south of the country and from airfields in Baranovichi, Lida and Luninets. Russia thus launched the Kyiv offensive partly from Belarus (Map 4.1).[10] Belarus has also provided the war effort with vital logistics such as repair, medical services, transport, and extensive training. This supporting function, provided to the Russian Armed Forces operating on Belarusian territory, falls largely in line with how the Belarusian Armed Forces (BAF) have been trained and equipped over the years.[11]

For the first time outside of joint Russian-Belarusian military exercises, the two military components of the Union State, the Regional Group of Forces and the Unified Regional Air-Defence System, were deployed, and a joint command formed, in October 2022.[12] As part of the deployment, thousands of Russian mobilised personnel have undergone training in Belarus.[13] Beyond the two Soviet-era military-technical facilities, since the prelude to the war, Russia has maintained a largely continuous military presence in the country. Approximately 10 000 Russian soldiers were reportedly present in Belarus by late 2022.[14] The planned "single defence space" of Russia and Belarus heralds closer joint defence planning and activities.[15] Further agreements on joint Russian-Belarusian combat-training centres will likewise deepen already close military-educational ties. Belarus is one of few countries still exporting military equipment to Russia, and the close defence-industrial cooperation is to expand.[16] The increased level of cooperation indicates that the Belarusian and Russian leaderships consider the Union State in a "period of direct threat of aggression," as defined in the new military doctrine.[17]

The announced future deployment of Russian non-strategic nuclear weapons to Belarus, formally at Minsk's request and remaining under Russian control, constitute a sharp reversal of independent Belarus's nuclear policy so far.[18] While the announced deployment is political and part of Moscow's wartime escalatory nuclear rhetoric directed at the West, it was likely already foreseen in the drafting of the new Belarusian constitution. Adopted in February 2022, it removed Belarus's neutrality and nuclear-weapons-free status. The potential deployment also falls in line with statements by Lukashenko since late 2021, framing it as a response to the increased threat from NATO.[19] If realised, the deployment will require a more permanent Russia military presence and tie Belarus even closer to Russia and its confrontation with the West. It will be unpopular in Belarus and likely undercut Lukashenko's own domestic standing.[20]

Lukashenko has expressed assurances that Belarus will not join the war with its own troops in Ukraine unless attacked first. While Belarusians remain divided on Russia's actions in Ukraine, an overwhelming majority of Belarusians would oppose direct involvement. There has been significant partisan activity directed at existing war contributions.[21] It is further doubtful whether the relatively small and badly equipped BAF would add much value. Aware of this, Lukashenko is likely trying his best to keep his promise. Indeed, his rhetoric on the invasion threat from NATO may serve this purpose, suggesting that the BAF is needed at home as a deterrent.[22] The risks to regime stability are likely also a restraining factor in Moscow's calculus on whether to pressure the Belarusian regime to commit troops. However, BAF exercises have intensified.

Uncomfortable with its lost flexibility, the Belarusian leadership is searching for alternatives. Lukashenko has shunned being named a co-aggressor and has called for peace. Early rounds of Russian-Ukrainian negotiations hosted by Belarus appeared to be attempts to replicate its role in facilitating the Minsk I and II Agreements. They provided neither peace nor a constructive role that Belarus could play.[23] Increasingly isolated, Belarus is deepening ties with China, with Lukashenko offering support to the Chinese "peace plan." Belarus has also unsuccessfully attempted to repair relations with the West.[24]

The war has exposed the Belarusian regime's heavy dependency on Russia, and its sovereignty echoes hollow. It is hard to see a way back to Belarus's traditional balanced approach in foreign relations, its trademark policy before 2020. However, if withholding Belarusian troops is indeed a result of some enduring room for manoeuvre, it might have shown the limit of that dependency. Increased military cooperation, not least in training and supplies, also makes Belarus more important to Russia.[25]

4.2 Moldova's Western path

For Moldova's pro-Western government, the war has reconfirmed that Russia is a security threat. Initial fears revolved around Russia's extending its invasion of Ukraine into Moldova through the breakaway region of Transnistria, where Russia stations around 1 100 troops of the Operational Group of Russian Forces (OGRF) and around 400 peacekeepers under the JCC, or Joint Control Commission (Map 4.2).[26] Concerns later centred on Russian attempts to destabilise Moldova, including with widespread disinformation campaigns, energy extortion, and plans for a coup d'état. According to Moldovan President Maia Sandu, the country faces a

Map 4.2 Moldova (Per Wikström, FOI).

Russian "hybrid war" aimed at halting Moldova's EU integration.[27] While the government was initially reluctant to take a strong stance against Moscow, likely due to security concerns, it has since condemned the Russian invasion and joined some Western sanctions regimes, with the intention of joining more.[28]

Russian efforts to destabilise Moldova underlines Moldova's many vulnerabilities, including its poor socio-economic situation, weak institutions and the effects of the war in neighbouring Ukraine. Moldova has been a major destination and transit hub for Ukrainian refugees. Protests in Chisinau since autumn 2022 have gathered thousands in demanding the government's resignation over record inflation and skyrocketing energy costs. While much dissent is rooted in domestic problems, Russia further foments and exploits it. The Chisinau protests were organised (and reportedly often paid for) by the Russia-backed populist party, Shor. Energy prices, in turn, were the result of Russian gas limitations. And even though a majority of Moldovans back the Ukrainian cause and support Moldova's bid for EU membership, only about half view Russia as a threat. Pro-Russian sentiment is, moreover, strong in the autonomous region of Gaugazia (Map 4.2).[29]

The war has accelerated Moldova's European integration. Moldova's application for EU membership, in March 2022, and subsequent candidate status, in June, were part of a long-standing objective of the current government. But the application was also a strategic response to the war to ensure national security. As described by President Sandu in September 2022, "this [EU membership application] was the only way for Moldova to grow a consolidated democracy in our part of the world, during these difficult times."[30] The EU's choice of granting candidate status to Moldova and Ukraine at the same time reciprocated the commitment. Simultaneously moving further from Russia, Moldova is distancing itself from the CIS, and maintains that EU integration ultimately means dispensing with membership altogether. The Moldovan government has also begun to rid the country of its hitherto almost exclusive dependency on Russian energy.[31]

The Moldovan leadership has underlined the need to strengthen national defence in cooperation with Western partners. The need is great for the small and under-equipped Moldovan Armed Forces, not least in air defence. Moldovan airspace has been repeatedly violated by Russian missiles aimed at Ukraine.[32] The EU has significantly increased its existing security footprint. The EU's announced support to the Moldovan Armed Forces under the European Peace Facility was by early May 2023 more than double the amount of Moldova's reported 2022 military expenditure.[33] Ties with NATO have deepened, with allies stepping up their support and Moldova's Minister of Foreign Affairs making a first-time appearance at a NATO Summit, in November 2022. While a discussion on Moldova's constitutional neutrality is brewing, the government has ruled out NATO membership for now.[34] Steps towards strengthening resilience include a temporary ban of several Russian news outlets.[35]

In the Transnistrian settlement process, the current Moldovan leadership has moved away from a wider negotiation format where Russia participated, which is deadlocked by the war, and is instead pursuing direct contacts with Transnistria's leaders.[36] The government has introduced laws against separatism which could target Transnistrian leaders, and has underlined that Moldova's EU integration will apply to its entire sovereign territory, including Transnistria. No special status for Transnistria is envisaged.[37] The tougher stance is contested by Moscow, which in turn has scrapped its commitments to resolve the Transnistria issue while retaining respect for Moldova's territorial integrity and made threatening statements.[38]

The war has accelerated Moldova's trajectory out of Russia's orbit. Cooperation with Western partners is at unprecedented levels. However, the Western path is tied to the policies of the current government. Other political factions, such as the socialists, under former President Igor Dodon, or the populist Shor Party, retain close ties with Russia. Ilan Shor, leader of the Shor party, has been subjected to US sanctions for destabilisation efforts.[39] A change of government in the next elections could hold far-reaching consequences for Moldova's EU integration. Russian subversion, Transnistria and the risk of reform fatigue also remain stumbling blocks.

4.3 Georgia, troubled by divisions

The Georgian government has condemned Russia's war, voting in favour of UNGA resolutions against Russia's actions in Ukraine and the illegal annexations of territories.[40] The war has evoked painful memories of the five-day Russo-Georgian war, in 2008, when Russia seized parts of Georgia's internationally recognised territory and acknowledged the independence of the breakaway republics, Abkhazia and South Ossetia (Map 4.3).[41] The invasion raised domestic fears that Georgia could be next, should Russia succeed in achieving its goals in Ukraine.[42] Moscow has reportedly redeployed troops from its military base in South Ossetia to Ukraine.[43]

Representatives of the current ruling party, Georgian Dream, have been cautious about openly criticising Moscow. A leading lawmaker has stated: "We live next to a volcano, the volcano just erupted, and it just happens that the lava is currently flowing down the other side of the mountain."[44] Georgia's cautious policy of maintaining bilateral relations with Russia dates back a decade. The Georgian Dream rose to power in 2012, launching a "normalisation" process with Russia to improve economic relations. Bidzina Ivanishvili, its main founder, amassed his fortune in Russia during the 1990s.[45] The Georgian opposition has accused him of maintaining a pro-Russian policy.[46]

Georgian authorities comply in principle with sanctions imposed on Russia and carry out border controls to prevent evasions.[47] Western sanctions have undoubtedly increased the importance of Georgia for

Map 4.3 Georgia (Per Wikström, FOI).

Russian trade routes, and Georgia has benefited economically. Between January and September 2022, remittances and tourism from Russia increased significantly, as did trade.[48] The Georgian currency has surged amid the massive influx of Russian citizens. Following 24 February, Georgia's GDP rose by 10 percent.[49] Georgia has also been marked out as an alternative transit corridor for energy from Azerbaijan to the EU.[50] Some 17 000 Russian companies have registered in Georgia. As a result of the heavy influx of Russian capital, the Fitch rating agency raised Georgia's credit rating to BB for the first time, elevating it to a positive outlook.[51] However, the desire for a harder stance against Russia has morphed into anger directed against Russian émigrés. A poll conducted by the International Republican Institute showed that 78 percent of Georgians oppose a visa-free regime for Russian citizens.[52]

The government's cautious approach has thus exposed divisions within the society.[53] Addressing remarks by members of the Georgian Dream about the West attempting to open "a second front" in Georgia, President Salome Zourabichvili, not a member of the ruling party, has accused the Georgian Dream of repeating Russian narratives.[54] Up to 30 000 Georgians took to the streets of Tbilisi on 24 February 2022, condemning the war and the cautiousness of the government's policy in support of Ukraine.[55] Discussions on resuming direct flights between Tbilisi and Moscow raised criticism from the EU and US, as servicing Russian airliners would violate Western sanctions. In March 2023, Ukraine recalled its ambassador, amid allegations that Georgian volunteers were hindered from traveling to Ukraine, and referred to Georgia's position on sanctions as "immoral."[56] Criticism goes beyond the response to the war; in February, Ukrainian President Volodymyr Zelenskyi condemned the detention of former Georgian President Mikheil Saakashvili.[57]

While the European Commission granted candidate status to Ukraine and Moldova in June 2022, Georgia failed to receive it. The Commission referred to outstanding areas of priority that the Georgian government should address, primarily with regard to strengthening the independence of the judicial system and rule of law.[58] The failure sparked the largest protests in Georgia since the 2003 Rose Revolution, which had enabled Saakashvili's rise to power.[59] Georgia is an Enhanced Opportunity Partner to NATO, but has yet to receive the Membership Action Plan. This impasse has persisted since the NATO Bucharest Summit, in 2008. While NATO allies have stepped up support to Georgia during the war in Ukraine, the path toward membership remains an arena for domestic contention. Prime

Minister Irakli Garibashvili's remark, in June 2022, that prior to joining NATO, Georgia should "solve its territorial conflicts," was interpreted by members of the opposition as a rejection of Georgia's NATO ambitions.[60] The lack of national consensus on Georgia's political trajectory remains notable.

While the war has renewed Georgian threat perception concerning Russia, it has not resulted in a clear turning point. More than anything, it has deepened internal political rifts and underlined the lack of domestic reforms, contributing to Georgia's failure to obtain EU candidate status. The future path of Georgia is uncertain. Russia will remain a threat but also an economic partner.

4.4 Armenia's deepened insecurity

Allied with and heavily dependent on Russia for its security, Armenia has pursued a cautious line on Russia's war against Ukraine. The Armenian government has refrained from criticising Russia but avoided overt alignment out of concern for its relations with the West. Armenian diplomats have abstained or absented themselves in UNGA votes on the war. However, a poll shows public support for Russia's war appears to be decreasing, down from 46 to 21 percent between April and December 2022.[61]

The trilateral statement by Armenia, Azerbaijan and Russia, which ended the 2020 Armenia-Azerbaijani war, established a Russian peacekeeping mission of some 2000 soldiers along the contact line in Nagorno-Karabakh and in the Lachin corridor, connecting Armenia to Nagorno-Karabakh (Map 4.4).[62] The Russian peacekeepers however failed to deter Azerbaijan from making further territorial advances in 2022, or from enacting a partial blockage of the Lachin corridor in December 2022. It has led the Armenian government to accuse Moscow of not fulfilling its commitments under the trilateral statement.[63] The Armenian political leadership has grown increasingly frustrated also with the CSTO's inaction since the 2020 conflict, and more so in 2022–2023 when the CSTO again refrained from taking sides. They have argued that CSTO passivity incentivises Azerbaijani aggression and creates a security threat for Armenia.[64]

As Russia concentrates its efforts on Ukraine, Armenia is left to fend for itself. Moscow appears unwilling to jeopardise its relationship with Azerbaijan and Azerbaijani ally Turkey, and is unable to divert military resources to the area. Indeed, Russia has reportedly decreased its peacekeeping force, instead transferring some of it to fight in Ukraine.[65] Russia's freedom of action has decreased.

Increasingly disenchanted, the government is re-evaluating Armenia's security architecture. At the November 2022 CSTO summit, Armenian Prime Minister Nikol Pashinyan refused to sign the final declaration and demanded that the defence pact clarify which areas it considers to be under its protection.[66] Armenia has declined to host CSTO's flagship military drills for 2023 and refused to take part in the bloc's leadership rotation.[67] Significantly, the Armenian government rejected a CSTO mission to the Armenian-Azerbaijani border in late 2022, opting for an EU mission instead. It reportedly feared that hosting a CSTO presence would offer no added security while harming ties to the United States and Europe. The EU Mission Armenia (EUMA) was established in January 2023. The small and unarmed EUMA does not enjoy the cooperation of Azerbaijan, a situation that will likely hamper its ability to play a role in the conflict.[68] Rhetoric aside, Armenia has not made any formal moves to leave the CSTO.

The Armenian leadership seems more content with the economic leg of Russia's integration projects.[69] Armenia has not aligned itself with Western sanctions on Russia, its most important trading partner. In fact, the country appears to have benefited from an influx of Russian capital and from its rising importance to Russia as a route for unsanctioned import and export. Armenia has also seen an uptick in the number of Russians arriving, with tens of thousands seemingly settling in the country.[70]

Armenian hopes of restoring minimal levels of national military deterrence have however run up against Moscow's inability to sustain military exports during the conflict in Ukraine. Pashinyan has claimed that hundreds of millions of dollars' worth of already paid for military equipment remained undelivered as of autumn 2022.[71] The Armenian government has instead sought to increase import of military equipment from India. The country is also rapidly developing ties with Iran, which shares some of Armenia's misgivings on Azerbaijan, and continues to normalise its relations with Turkey.[72]

For Armenia, Russian singlemindedness on Ukraine has created a security vacuum. The Armenian leadership is forced to consider options for ensuring national security. But the question remains whether any viable alternatives to Russia really exist: Which other regional actor would find it worthwhile taking on both Russia's ire at being pushed out, and the Azerbaijani and Turkish challenge?

4.5 Azerbaijan's emboldened stance

Just two days before the full-scale Russian invasion, Azerbaijani President Ilhan Aliyev signed a wide-ranging agreement with his Russian counterpart that brought, in Aliyev's words, Russian-Azerbaijani relations "to the level of an alliance."[73] This came on the back of closer

Map 4.4 Armenia and Azerbaijan (Per Wikström, FOI).

relations with Russia in recent years, albeit with persisting disagreements, not least on Nagorno-Karabakh. Rhetoric notwithstanding, the agreement did not shore up Azerbaijani support for Russia's positions on the war. Instead, the Azerbaijani government has maintained its traditional balanced approach in foreign relations, avoiding taking sides and sustaining close relations with both Russia and Ukraine, as well as with other partners. Its diplomats has been absent from UNGA votes on the war.[74]

Turkey remains Azerbaijan's most important ally and supporter. While the Azerbaijani government in Baku has not criticised Russia, it has aligned with Turkish calls for a diplomatic solution, expressing support for Ukraine's territorial integrity.[75] Azerbaijan has also maintained its close pre-war relations with Ukraine. Only the month before signing the agreement with Putin, Aliyev visited Kyiv. Indeed, the leaderships of Azerbaijan and Ukraine tend to draw parallels between the Russian occupation of Ukrainian territory and Armenian action in Nagorno-Karabakh.[76] Below the official threshold, the contours of further sympathies may be discerned: pro-Ukrainian coverage in the tightly controlled Azerbaijani media has caused irritation in Moscow.[77]

Azerbaijan has not aligned with Western sanctions, benefiting instead from the increased trade with Russia.[78] Overall, Russia's interest in the country as an economic link has increased, as trade with and through Europe has diminished. In September 2022, Azerbaijan, Russia, and Iran signed a declaration on what they termed the North-South Transport Corridor.[79] Azerbaijan has also benefited from Europe's rejection of Russian energy. Following the invasion of Ukraine, EU gas imports from Azerbaijan rose sharply, and, in July 2022, an EU-Azerbaijan agreement set the goal of doubling sales by 2027, to at least 20 billion cubic metres annually.[80]

As the stronger party in the conflict with Armenia, Azerbaijan has reaped the rewards of Russia's distraction and unwillingness to act in Armenia's defence. Azerbaijan has pushed its interests militarily. In September 2022, Azerbaijani troops seized control of strategic lands across the Armenian border.[81] This emboldened stance is developing in tandem with Moscow's increasing need to maintain close relations to Turkey and sustain trade routes through Azerbaijan's territory. Indeed, Moscow is constricted by Turkey's strengthened role in the region and its close ties with Azerbaijan. In 2021, Azerbaijan and Turkey signed the landmark Shusha Declaration, which for the first time described their relations as allied.[82] The Azerbaijani government seems to be increasingly challenging the Russian peacekeeping mission, which it has always seen as an unjust constraint. Pro-government media outlets have even described the peacekeepers as "occupiers" (Map 4.4).[83]

For the Azerbaijani leadership, the war in Ukraine has reconfirmed the importance of national military strength. Since the 2020 conflict, oil-wealthy Azerbaijan has increased its already substantial military spending by some 40 percent, notably by importing Turkish and Israeli drones and other high-end equipment.[84] Tensions with Iran are also sharply on the rise as Armenia and Iran draw closer, and amid Iranian objections to planned infrastructure connecting Azerbaijan with its exclave inside Armenia, Nakhchivan (Map 4.4). Iran has staged military exercises on the border, prompting Azerbaijan and Turkey to answer with their own drills.[85] In response, Azerbaijan is strengthening ties with Israel and has opened an embassy in Tel Aviv.[86]

The war has seen Azerbaijan continuing, if not strengthening, its traditional balanced foreign policy where Turkey is a key partner. Buoyed by international interest in its gas assets and unconstrained by Russia, it is pursuing a more independent course of action. The Azerbaijani leadership has seized the opportunity to strengthen its hand in the Nagorno-Karabakh conflict. With Armenia weak, Azerbaijan emboldened, and Russia looking away, the risk of renewed fighting has increased.

4.6 Central Asia at a crossroads

The five Central Asian countries, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan, are often lumped together as a homogeneous block. But they are becoming increasingly different from one another. The most obvious divide is between resource-rich and resource-poor countries. The countries also demonstrate

Map 4.5 Central Asia (Per Wikström, FOI).

varying degrees of political independence and different foreign policy approaches. Kazakhstan is very active on the international arena, while permanently neutral Turkmenistan shuns international engagement.

Their differences also apply to their relations with Russia and Moscow-led regional organisations. Three of the Central Asian states, Kazakhstan, Kyrgyzstan and Tajikistan, are members of the CSTO, and Russia has several military bases and installations on their territories (Map 4.5). Militarily non-aligned Turkmenistan and Uzbekistan prohibit any foreign military presence on their soil but maintain extensive connections with Russia's armed forces and intelligence services.

In the economic realm, Kazakhstan and Kyrgyzstan are members of the EAEU. Tajikistan and Uzbekistan have also been under Moscow's pressure to join the EAEU. In December 2021, Uzbekistan became an observer in the EAEU, leading to speculation about a pending membership. After Russia's invasion of Ukraine, however, debates within Tajikistan and Uzbekistan on the possible merits of accession have largely vanished, as the negative consequences of attaching their economies to an unreliable and internationally isolated Russia continue to unfold.[87]

Notwithstanding these differences, Russia's full-scale invasion of Ukraine raised fresh concerns among all Central Asian countries regarding Moscow's disrespect for the territorial integrity of the former Soviet republics. While the Central Asian governments have tried to distance themselves from Russia's war in Ukraine, they are at the same time exposed to Russian pressure and therefore cautious about openly criticising Moscow's actions.[88]

Kazakhstan has taken the boldest steps in rejecting Russia's war. In a meeting with Vladimir Putin at the St Petersburg economic forum in June 2022, President Kassym-Jomart Tokayev emphasised that Kazakhstan does not recognise "quasi-states," such as Donetsk and Luhansk.[89] In Uzbekistan, a country that has always been suspicious of Moscow's intentions in Central Asia, long-serving Foreign Minister Abdulaziz Kamilov took a stand relatively early in support of the territorial integrity of Ukraine, including Donetsk, Luhansk and Crimea.[90] Possibly due to political pressure from Russia, he was removed from his position in late April 2022.

Among the other states, only Kyrgyzstan has occasionally repeated that the crisis needs to be resolved exclusively by diplomatic means.[91] Tajikistan and Turkmenistan have refrained from commenting altogether. Despite staying silent on the war, Tajikistan's President Emomali Rahmon nonetheless used the Central Asia-Russia summit in Astana on October 14 to publicly demand greater respect and support from Moscow.[92]

In the Central Asian societies, Russian propaganda has a strong grip on the minds of many people. Television and traditional print media, on which many Central Asians rely for news and information, continue to be dominated by Russian suppliers. An opinion poll conducted in spring 2022 by the Bishkek-based Central Asia Barometer gave some hints of how Kazakh and Kyrgyz citizens perceive Russia's war in Ukraine. In Kazakhstan, 28 percent of respondents blamed Russia for the situation in Ukraine, while 19 percent and 10 percent blamed either Ukraine or the US. Among respondents in Kyrgyzstan, only 14 percent saw Russia as mainly responsible for the situation in Ukraine. Instead, 36 percent blamed Ukraine and 13 percent the US.[93] Likewise, according to a journalistic survey in Uzbekistan, a significant share of Uzbek citizens support Russia's view on its war in Ukraine.[94] There is nonetheless a growing divide between the old and young generations, with the former being more susceptible to affiliating their views with the Russian narrative and the latter increasingly uncomfortable with Russia's colonial approach to dealing with the region.

Addressing an emerging security vacuum

CSTO members Kazakhstan, Kyrgyzstan, and Tajikistan have all tried to steer the alliance away from potential involvement in Ukraine. When the leaders of the CSTO member states gathered in Moscow in mid-May 2022 for a summit, none of the presidents of Kazakhstan, Kyrgyzstan, or Tajikistan, mentioned the war in Ukraine. Instead, they all aired their concerns over the unstable situation in Afghanistan, where armed groups continue to operate and undermine security and stability in the region. Consequently, according to the Central Asian members, the CSTO should increase its focus on securing Central Asia's southern borders.[95] In reality, however, Russia has reportedly redirected resources from its military bases in Kyrgyzstan and Tajikistan to Ukraine, further eroding its military posture in the region.[96] Russia's invasion of Ukraine has thus confirmed that Moscow's primary security interests lie elsewhere than in Central Asia, casting doubt on Russia's commitment to the region's security.

The effectiveness of the CSTO as a military alliance guaranteeing the collective security of its members is increasingly questioned in the region. The violent clashes between the militaries of Kyrgyzstan and Tajikistan, both CSTO members, along the contested border in autumn 2022, leaving at least 134 people dead, did not provoke a strong response from Russia. For both states, Russia's image as the main guarantor of security in the region rings hollower now than ever before. Now viewing the Russian-led CSTO as a collective insecurity alliance, Kyrgyzstan and Tajikistan are looking beyond Russia to protect themselves against one another.[97] Kyrgyzstan is buying military drones from

Turkey, while Tajikistan's closer security cooperation with Iran includes a newly inaugurated Iranian drone factory in the Tajik capital, Dushanbe.[98]

The other countries have also declared that they need to strengthen their military capabilities in response to the deteriorating security environment. Uzbekistan's President Shavkat Mirziyoyev, in a speech on 31 August 2022, Independence Day, pledged that strengthening the country's armed forces would now receive the highest priority.[99] Kazakhstan decided to increase its defence spending and has updated its military doctrine to "adequately respond to new threats and risks."[100] The revised military doctrine pays particular attention to the need to protect the nation's borders with modern military equipment.[101] Kazakhstan's territorial integrity is especially precarious with 3.5 million ethnic Russians, approximately 20 percent of its population, living mainly near the vast border with Russia. In the past year, Kazakhstan's authorities have had to fend off verbal attacks directed at the country's territorial integrity and national identity from Russian politicians and journalists who are dissatisfied with the Kazakh government's refusal to support Russia's invasion of Ukraine. In Turkmenistan, new President Serdar Berdimuhamedov has called for increasing investments in defence, and China has pledged to help equip and train the Turkmen armed forces.[102]

To mitigate their insecurities, political incumbents in Central Asia are seeking closer ties to China. In mid-September 2022, President Xi Jinping visited Kazakhstan in his first foreign state visit since the COVID-19 pandemic. Most notable during the visit was Xi's statement on China's unwavering support for Kazakhstan's sovereignty. Beijing has officially backed all the Central Asian states' sovereignty and national independence.[103] Immediately after the March 2023 three-day meeting between Putin and Xi in Moscow, the Chinese leader announced a first China-Central Asia summit, for May 2023. As a weakened Russia becomes ever more dependent on China's support, this leverage enables Beijing to further expand its role in Central Asia.

Besides China, Turkey's geopolitical significance is growing in Central Asia. Ankara has intensified its security cooperation with the four Turkic-speaking countries, Kazakhstan, Kyrgyzstan, Turkmenistan, and Uzbekistan. Both Kazakhstan and Uzbekistan have elevated their relationships with Turkey to the level of "Comprehensive Strategic Partnership," with agreements to develop military cooperation, including education, exercises and intelligence-sharing. Turkey's defence industry is rapidly gaining a foothold in the Central Asian arms market. Turkey and Kazakhstan have agreed to produce the Anka drone in Kazakhstan, while Turkmenistan, as well as Kyrgyzstan, have purchased Bayraktar TB2 combat drones.[104]

Costs and opportunities of sanctions against Russia

After the invasion of Ukraine, Central Asia has taken on a renewed significance for Russia, as Moscow seeks to demonstrate an ability to continue projecting influence in its near abroad. In fact, during 2022, Putin made no less than five trips to the region and has held countless other meetings with Central Asian leaders. Moscow has pushed for some new cooperation formats in the region, including a proposed trilateral gas union between Russia, Kazakhstan, and Uzbekistan. Both Kazakhstan and Uzbekistan reacted hesitantly when the Kremlin first raised the proposal in late 2022, fearing that it would risk becoming a political tool and be used to circumvent sanctions. However, in the beginning of 2023, both Kazakhstan and Uzbekistan signed bilateral cooperation agreements, in the form of roadmaps, with Russia's Gazprom, indicating that Russia continues to pursue its energy agenda in Central Asia.[105]

But energy ties to Russia are also turning into a liability for the energy-exporting states in the region. For Kazakhstan, whose oil and gas sector represents about one-fifth of its GDP and close to 60 percent of exports, shipments through Russia remain vital, with around 80 percent of its oil exports transiting through Russian territory. The dominant route is the Chevron-led Caspian Pipeline Consortium pipeline, which was constructed in the early 1990s and runs through Russia to Russia's Black Sea port of Novorossiisk. Despite the US's exempting the Caspian Pipeline Consortium from its sanctions, Kazakhstan is finding it difficult to sell the oil it exports through pipelines that traverse Russia. Moscow has several times stopped Kazakh oil exports, citing technical and security reasons. The difficulties with exports via Russia have "pushed Kazakhstan to intensify its efforts to build the trans-Caspian corridor" by expanding cooperation with Azerbaijan in rerouting energy supplies to Europe.[106] There are hurdles to overcome, though. This corridor is a costlier and more complicated option, since tankers must first ship the oil to Azerbaijan's capital, Baku. Moreover, as a transport corridor, the Caspian Sea presents logistical challenges. Transport capacity is limited by shallow waters, reliance on old tankers that do not meet international standards and the availability of few ports.

In contrast, Turkmenistan, with the world's sixth largest natural gas reserves, is no longer dependent on Russian pipelines for its gas exports. Turkmenistan's gas exports to China are six or seven times more than those to Russia. To further diversify its export options, Turkmenistan has intensified discussions with Azerbaijan, Turkey, and the European Commission on supplying Turkmen gas via a Trans-Caspian pipeline to Europe.[107]

While the Central Asian governments have made it clear that they will not join Western sanctions against Russia, they have communicated to the West that they will not be used as a tool for Russia to evade economic sanctions. At the same time, trade between Russia and Central Asia has increased during the former's war against Ukraine.[108] This is largely a consequence of new trade patterns caused by sanctions, as well as the mass influx of Russians who fled to the Central Asian countries in 2022. For Russia, the Central Asian market is becoming one of the substitutes for advanced Western markets. Surges in certain export products from the EU to Central Asia have raised suspicions that some local companies are taking advantage of the situation and providing Russia with some products hit by sanctions. In 2023, officials from both the US and EU have increased their pressure on the countries to avoid assisting Russia's attempts to circumvent sanctions. As a result, Kazakhstan has declared that it will apply additional measures to ensure that it is not being used to circumvent sanctions.[109]

Moreover, seasonal labour migrants from Kyrgyzstan, Tajikistan and Uzbekistan have continued to arrive in Russia, defying early projections that remittance flows from Russia to Central Asia would contract due to the war and sanctions.[110] Russia's war in Ukraine has also had the unintended consequence of bringing an influx of Russians to all Central Asian countries, except isolated Turkmenistan. By the end of October 2022, Kazakh estimates put the total number of Russians entering the country during the year at close to half a million. Tens of thousands of them remain. In Kyrgyzstan, the authorities stated that 184 000 Russians had arrived in the country from January to September, while Uzbekistan's Interior Ministry reported that about 395 000 Russian citizens had arrived there during the first nine months of 2022. Neither Kyrgyzstan nor Uzbekistan specified how many of these migrants had left the country.[111] Tajikistan and Turkmenistan have not released any data on the matter, but the former has also been a destination for Russian citizens.

The risks associated with depending on an economically isolated Russia nonetheless push the Central Asian states to double down on their efforts to diversify their economic partnerships. China's economic role in Central Asia, which already surpasses Russia's, has only grown in the past year. According to Chinese customs statistics, trade between China and Central Asia hit a record high in 2022, exceeding USD 70 billion. Year-on-year, trade turnover between China and the five Central Asian countries increased by 45 percent.[112] The Central Asian states' efforts to find balance in their foreign relations likewise open up new opportunities for EU to play a larger role in the region. In a first EU-Central Asia summit, held in late October 2022, in the Kazakh capital, Astana, European Council President Charles Michel met with the leaders of all five countries. In a joint statement, they agreed "to continue building a strong diversified and forward-looking partnership" and reaffirmed their shared commitment to the UN Charter and the principles of independence, sovereignty and territorial integrity.[113] The greater engagement between Central Asia and EU continued shortly thereafter when High Representative/Vice President Josep Borell visited the region. Trade and energy and the potential of Central Asia to serve as transport corridor between Asia and Europe attracts particular attention in Brussels.

Despite the tense situation between Kyrgyzstan and Tajikistan, Kazakhstan and Uzbekistan are taking steps to strengthen regional collaboration. At a meeting in Tashkent just before the end of 2022, the two countries signed a host of agreements on economic cooperation in various spheres as well as on border demarcation. They also signed a treaty on allied relations, the first of its kind in Central Asia.[114] The rapprochement between Kazakhstan, the largest economy in the region, and Uzbekistan, the most populous country, could potentially have far-reaching implications, as it lays a foundation for building prosperity, stability and security from within the region, rather than by relying on external actors.

4.7 Conclusions

This chapter recounts how Russia's neighbours – former Soviet states with the exception of the Baltic countries and Ukraine itself – have reacted to Russia's full-scale invasion of Ukraine, especially regarding their own security and relations with Russia. Surveying their different reactions, it is evident that the "near abroad," as the region is often called in Russian strategic documents, is far from as integrated and tied to Russia as Moscow would have it. It is also clear that Russia's influence in the neighbourhood, built largely on military might and regional integration projects, is waning, albeit with important differences and some exceptions. The war and its consequences have confirmed that the notion of a unified post-Soviet region, based on a shared identity and Russia as centre of gravity, no longer holds relevance for describing states with widely different identities and interests.

The usefulness of Russian security guarantees for authoritarian regimes was demonstrated by the CSTO's intervention in Kazakhstan in January 2022.[115] But barring Belarus, only a year later Russia's role as a security provider has diminished. The CSTO's defence commitments have come under question, and CSTO members are far from united in their views on the war in Ukraine. Indeed, apart from Belarus, Russia is unable to shore up the support of its CSTO allies, despite it claiming to be fighting a defensive war. A reduced Russian military presence, both at its regional bases and in the Nagorno-Karabakh peacekeeping mission, has shown allies that Moscow's main security focus lies elsewhere. This appears to be devastating for Armenia, a CSTO member, while beneficial for Azerbaijan, a non-CSTO member. Both parties' dissatisfaction with the Russian peacekeeping mission, albeit for different reasons, raises doubts as to whether the peacekeeping mandate will be prolonged beyond its expiration, in 2025.

Many of Russia's neighbours are instead bolstering national defence and seeking security cooperation with other partners, such as China, Turkey, Iran, and the EU. In parallel, the foundation of Russia's regional influence, its military might, is being undermined in Ukraine (see Chapter 5). Weighed down by inaction, disunity on the war, and a split in its geographic focus, the future of the CSTO may be hanging in the balance.

Through international isolation and Western sanctions, Russia is becoming an increasingly burdensome partner. This shift is apparent in Kazakhstan. Even after the CSTO intervention in Kazakhstan in January 2022, which helped President Tokayev secure his hold on power, the Kazakh government has shown greater resistance to Moscow than expected. When the West introduced sanctions against Russia, Kazakhstan's authorities quickly declared its unwillingness to be "placed in the same basket" as Russia.[116] The appetite for the EAEU has diminished not only among members, but also among potential members Uzbekistan and Tajikistan. In parallel, Central Asia, the South Caucasus and Belarus are also becoming more economically important to Russia than before, as other trade routes have been closed off and redrawn.

The balance of power between Russia and many of its neighbours appears to be shifting in the latter's favour. Russia's freedom of action seems to have decreased, not least in the South Caucasus. But the neighbours' reduced appetite for Russia stands in stark contrast to Russia's enduring ambitions for influence. In fact, it is becoming ever more important for the Russian government, in its self-imposed war on the idea of the West, to claim the "near abroad" as its own (see Chapter 3). This will be a source of tension going forward.

The observed changes in foreign and security policy are often not new developments, but rather continuations of existing trends that have come to a head, or been accelerated, through the war. For those already viewing Russia as a threat, their concerns have been reinforced. For those invested in a multi-vector foreign policy, balancing their relations has become more important. For the Moldovan government, and for parts of Georgian society, the Western course has become even more urgent. In Central Asia, the double trend of Kazakh-Uzbek collaboration and deepened ties with China has continued. Belarus has fallen further under Russia's sway. The war has also exposed tensions in societies: between people and their government, as in Georgia and to some extent in Belarus, and between diverting views on Russia, as in Moldova. It reminds us that these countries remain vulnerable to Russian influence as Russia continues to contest any westward movement.

But while new regional political arrangements are emerging and the full implications are yet to be seen, relations with Russia run deep. Long-standing political, economic, military and not least cultural links will not disappear overnight. Despite having taken steps to diversify relations, the leaders of the five Central Asian states and Armenia, as well as Belarusian leader Lukashenko, joined the Russian president in celebrating Victory Day in Moscow on 9 May 2023, with a military parade imbued with Russian propaganda about Ukraine, the war and the West. The wide acceptance of Russian narratives, not only in Central Asian countries but also elsewhere, demonstrates that Russia retains influence in those societies. Economic ties between Russia and some neighbours have in fact increased.

Belarus stands out as the clear exception to Russia's waning influence. Belarus appears at Russia's disposal, militarily, save for the deployment of Belarusian troops to Ukraine. Already severely curbed, Belarus's independence is at risk, should current integration trends continue. But integration pressure also puts the regime and its relationship to Moscow under strain, and the country's future trajectory seems tied to the outcome of the war. Another exception is Turkmenistan, which appears less affected by the war than the rest, partly because it stands outside Russian regional integration projects.

The standoff between Russia and the West will likely put further pressure on countries in the neighbourhood to align with either part, not least when weighing trade with Russia against the risk of becoming a route for sanctions evasion. Central Asia, not least Kazakhstan, is currently navigating this terrain. The imperative to "choose sides" may increasingly also apply to security cooperation. Will Armenia be able to host an EU mission to the border with Azerbaijan while Russian peacekeepers operate in Nagorno-Karabakh? Can Kazakhstan remain a committed security partner to Russia while refusing to help Moscow evade sanctions? Can Georgia continue its rapprochement with Russia while simultaneously pursuing a policy of Euro-Atlantic integration? At the same time, countries will likely resist a binary choice and leverage the role of China, Turkey and Iran.

Importantly, it remains to be seen whether these developments are permanent changes, or just temporary adjustments. While the energy cooperation between Azerbaijan and the EU will likely persist, diverging views in government and among the people, as in Georgia or Belarus, may change trajectories. A key issue is what role the emerging Russian diaspora communities in Georgia, Armenia and Central Asia may play.[117] There may also be significant consequences if Russia is unable to sustain its regional security engagements. The frozen conflicts in Georgia or Moldova might reheat, as already in Nagorno-Karabakh, or else move towards settlement. These issues will be important for the whole neighbourhood, including for Russia itself.

Russia's war in Ukraine has revealed the diversity of what is too-often reduced to a "post-Soviet" space. Far from merely being Russia's near abroad, the countries navigate a shifting security landscape in pursuit of greater agency for themselves. There are opportunities for diversifying relations, but also risks of new dependencies, insecurities and conflict. Importantly, much still depends on the further development and outcome of the war. ■

Endnotes

1 President of Russia, *Foreign Policy Concept of the Russian Federation* [Kontseptsiia vneshnei politiki Rossiiskoi Federatsii], adopted by Presidential Decree No. 229, 31 March 2023, accessed 15 April 2023, http://kremlin.ru/events/president/news/70811, art. 49.

2 The Russian military bases scattered across the region are politically significant, but matter less militarily: nowhere did the personnel numbers on Russian military bases exceed 4000 in 2022. The Russian military presence in Belarus was, however, larger, but deployed outside the framework of any military base; IISS, "Chapter Five: Russia and Eurasia" in The Military Balance, vol. 123, no. 1 (2023), 197–8.

3 It has, however, not prevented recurrent armed conflicts between CSTO members Tajikistan and Kyrgyzstan.

4 Jakob Hedenskog and Gudrun Persson, "*Russian security policy," in Russian Military Capability in a Ten-Year Perspective – 2019*, FOI-R--4752--SE (Stockholm: Swedish Defence Research Agency, 2019).

5 Jakob Hedenskog, *Endgame Belarus? Union State Integration under Pressure*, FOI-R--5181--SE (Stockholm: Swedish Defence Research Agency, 2021).

6 "Prezident Belarusi: razgovory o priznanii ili neprizhanii LNR i DNR – eto vse boltovnia," *Belta*, 21 July 2022, accessed 24 February 2023, https://eng.belta.by/president/view/lukashenko-describes-talks-about-belarus-recognition-of-dpr-lpr-as-prate-151953-2022/.

7 Belarus is one of only four states that have voted against all resolutions condemning Russia's war, the others are North Korea, Syria and Russia itself; Mohammed Haddad, "Where does your country stand on the Russia-Ukraine war?" *Aljazeera English*, 16 February 2023, https://www.aljazeera.com/news/2023/2/16/mapping-where-every-country-stands-on-the-russia-ukraine-war; President of Belarus, "Vstrecha s Generalnym sekretarem Organizatsii Dogovora o kollektivnoi bezopsnosti Imangali Tasmarambetovym," 13 February 2023, accessed 14 February 2023, https://president.gov.by/ru/events/vstrecha-s-generalnym-sekretarem-organizacii-dogovora-o-kollektivnoy-bezopasnosti-imangali-tasmagambetovym.

8 The Treaty of Establishing the Union State was signed by Belarus and Russia in December 1999. Despite advanced economic and military integration, the Union State remained largely symbolic amid persistent disagreements on its constitutional outlook and functioning, as well irreconcilable views of Russia's and Belarus's community of interests; on further integration see: "Lavrov passkazal o podrobnostiakh vstrechi s Lukashenko," *Belta*, 19 January 2023, accessed 19 January 2023, https://youtu.be/WVhMLHdPAXc.

9 Anna Maria Dyner, "New Military Doctrine of the Union State of Belarus and Russia," in Dębski et al., *PISM Bulletin*, vol. 28 (1945), 15 February 2022, https://www.pism.pl/publications/new-military-doctrine-of-the-union-state-of-belarus-and-russia; Government of Belarus, *Military Doctrine 2016* [Zakon Respubliki Belarus 20 iiulia 2016 412-3 Ob utverzjdenii Voennoi doktriny Respubliki Belarus], Art. 14, accessed 20 April 2023, https://pravo.by/document/?guid=12551&p0=H11600412&p1=1; Union State Standing Committee, *Military Doctrine 2021* [Voennaia doktrina Soiuznogo rosudarstva utverzhdena postanovleniem Vysshego Gasudarstvennogo Soveta Soiuznogo gosudarstva ot 4 noiabria 2021 No. 5], Art. 13, accessed 20 April 2023, https://посткомсг.рф/documentation/document/1899/.

10 Belarusian assistance to the Russian full-scale invasion of Ukraine has been widely documented. For an overview, see Kamil Kłysiński, Piotr Żochowski and Andrzej Wilk, "The reluctant co-aggressor. Minsk's complicity in the war against Ukraine," *OSW Commentary*, no. 488, 10 February 2023, https://www.osw.waw.pl/en/publikacje/osw-commentary/2023-02-10/reluctant-co-aggressor-minsks-complicity-war-against-ukraine.

11 Andrzej Wilk, *Russia's Belarusian army: The practical aspects of Belarus and Russia's military integration* (Warsaw: Centre for Easern Studies 2021), 31–47.

12 President of Belarus, "Soveshchanie po voprosam besopasnosti," 10 October 2022, accessed 1 April 2023, https://president.gov.by/ru/events/soveshchanie-po-voprosam-bezopasnosti.

13 Artem Shraibman, "Novaja konstanta. Chevo zhdat ot perebroski rossiskikh voisk v Belarus," *Carnegie politika*, 18 October 2022), https://carnegieendowment.org/politika/88191.

14 IISS, "Chapter Five: Russia and Eurasia," in The Military Balance, vol. 123, no. 1 (2023), 197.

15 Anna Maria Dyner, "Belarus And Russia Move to The Next Stage of Integration," *PISM Bulletin* vol. 2, 2121 (The Polish Institute of International Relations, January 2023), https://pism.pl/publications/belarus-and-russia-move-to-the-next-stage-of-integration.

16 "Lukashenko odobril proekt soglasheniia o sozdanii s Rossiei uchebno-boevykh tsentrov podgotovki voennocluzhashchikh," *Belta*, 31 October 2022, accessed 20 April 2023, https://www.belta.by/president/view/lukashenko-odobril-proekt-soglashenija-o-sozdanii-s-rossiej-uchebno-boevyh-tsentrov-podgotovki-532468-2022/; "Pantus: Belarus, Russia step up cooperation in defense industry," *Belta*, 10 February 2023, accessed 22 February 2023, https://eng.belta.by/society/view/pantus-belarus-russia-step-up-cooperation-in-defense-industry-156608-2023.

17 Dyner, "New Military Doctrine;" Union State, Military Doctrine, art. 21.2 [period neposredstvennoi ugrozy agressii].

18 Like Ukraine and Kazakhstan, Belarus transferred Soviet nuclear weapons to Russia in return for security guarantees within the framework of the 1994 Budapest Memorandum. The Russian non-strategic nuclear weapons would likely be deployed on Belarusian SU-24 aircraft and possibly on the short-range ballistic missile system Iskander. See also, "Rossiia i Belorussia dogovorilis o razmeshchenii rossiiskogo takticheskogo iadernogo oruzhiia," *TASS*, 25 March 2023, accessed 25 March 2023, https://tass.ru/armiya-i-opk/17369429.

19 Government of Belarus, *Constitution of Belarus* [Konstitutsia Respubliki Belarusi 1994 goda (s izmeneniami i dopolneniami, priniatymi na respublikanskikh referendumakh 24 Noiabria 1996 g., 17 Oktiabria 2004 g. i 27 Fevralia 2022 g.)], 27 February 2022, accessed 4 April 2023, https://pravo.by/pravovaya-informatsiya/normativnye-dokumenty/konstitutsiya-respubliki-belarus/; President of Belarus, "Intervju mezhdunarodnomu informatsionnomu agenstrvu Rossiia segodnia," 30 November 2021, accessed 28 April 2023, https://president.gov.by/ru/events/intervyu-mezhdunarodnomu-informacionnomu-agentstvu-rossiya-segodnya.

20 Artyom Shraibman, "Hosting Russian Nuclear Weapons Will Have Far-Reaching Consequences for Belarus," *Carnegie politika*, 28 March 2023, https://carnegieendowment.org/politika/89394.

21 Kamil Kłysiński, *Belarusian citizens ambivalent about Russian aggression against Ukraine* (Warsaw: Centre for Eastern Studies, August 2022), https://www.osw.waw.pl/en/publikacje/analyses/2022-08-01/belarusian-citizens-ambivalent-about-russian-aggression-against.

22 Yauheni Preiherman, "Belarusian-Russian Cooperation Against the Backdrop of the Ukraine War," *Eurasia Daily Monitor*, vol. 19, no. 142 (Jamestown Foundation, September 2022), https://jamestown.org/program/belarusian-russian-cooperation-against-the-backdrop-of-the-ukraine-war/.

23 "Russia-Ukraine talks in Belarus. Outcome," *Belta*, 7 March 2022, accessed 20 March 2023, https://eng.belta.by/video/getRecord/1659/.

24 Grigory Ioffe, "Leaked Makei Letter Suggests Belarusian Efforts to Reach Out to the West," *Eurasia Daily Monitor*, vol. 19, no. 59 (Washington: Jamestown Foundation, April 2022), https://jamestown.org/program/leaked-makei-letter-suggests-belarusian-efforts-to-reach-out-to-the-west/; Michał Bogusz and Kamil Kłysiński, "Lukashenka is honoured with a grand reception in Beijing: China's message to Moscow," OSW Analyses (Warsaw: Centre for Eastern Studies, March 2023), https://www.osw.waw.pl/en/publikacje/analyses/2023-03-03/lukashenka-honoured-a-grand-reception-beijing-chinas-message-to.

25 Emily Ferris, *Could Russia's Reliance on Belarus be its Soft Underbelly? Defence, Politics and Logistics* (London: Royal United Services Institutes, 2022), 22–24.

26 The Russian peacekeepers (in Russian: peace-creating forces – mirotvorcheskie sily) are not deployed under UN auspices. Besides the Russian battalion, the JCC also comprises one battalion each from Moldova and Transnistria. The OGRF is the remnant of an earlier Soviet force based in Moldova, and it is set to guard the Soviet-era Cobasna ammunition stockpile. In reality, the difference between the peacekeepers and the OGRF is not clear-cut; see also Adriana Lins de Albuquerque and Jakob Hedenskog, *Moldova: A Defence Sector Reform Assessment*, FOI-R--4350--SE (Stockholm: Swedish Defence Research Agency, 2016).

27 President of Moldova, "Address by President Maia Sandu at the 3rd edition of Moldova Support Platform, Paris," 21 November 2022, https://www.presedinte.md/eng/discursuri/address-by-president-maia-sandu-at-the-3rd-edition-of-moldova-support-platform-paris.

28 "(VIDEO) Moldova mozhet prisoedinitsia k chasti sanktsii ES protiv Rossii," *Newsmaker*, 3 March 2023, https://newsmaker.md/rus/novosti/video-moldova-mozhet-prisoedinitsya-k-chasti-sanktsiy-es-protiv-rossii/.

29 Viorica Rusica, "CBS Research poll: 40% of Moldovans believe Russian Federation is to blame for provoking war in Ukraine Radio Moldova," *Radio Moldova*, 3 February 2023, https://radiomoldova.md/p/5234/cbs-research-poll-40-of-moldovans-believe-russian-federation-is-to-blame-for-provoking-war-in-ukraine; for Moldova's vulnerabilities and Russia's role see: Valeriu Pașa, Natalia Albu, Iurie Gotișan, Elena Mârzac, Alexandru Flenchea, Victor Parlicov, Sanda Sandu, Threats to the security of Moldova in the short and medium term (Chisinau 2022), 4–12, https://www.watchdog.md/2022/09/22/threats-to-the-security-of-the-republic-of-moldova-in-the-short-and-medium-term/.

30 President Moldova, "Statement by H.E. Maia Sandu, President of the Republic of Moldova, delivered at the General Debate of the 77th Session of the UN General Assembly," 21 September 2022, https://www.presedinte.md/eng/discursuri/declaratia-es-maia-sandu-presedinta-republicii-moldova-la-dezbaterea-generala-din-cadrul-celei-de-a-77-a-sesiuni-a-adunarii-generale-a-onu.

31 Grzegorz Kuczyński, "Moldova Is Becoming Independent of Russian Gas Flows," *Russia Monitor*, (Warsaw Institute, December 2022), available at https://warsawinstitute.org/moldova-is-becoming-independent-of-russian-gas-flows/; Paul Goble, "Moscow Working to Block Moldova from Leaving CIS," *Eurasia Daily Monitor*, vol. 19, no. 168 (Washington: Jamestown Foundation, November 2022), https://jamestown.org/program/moscow-working-to-block-moldova-from-leaving-cis/.

32 "Moldovan Defense Minister Confirms Chisinau Has Asked West For Air-Defense Systems," *Radio Free Europe/Radio Liberty Moldovan Service*, 24 January 2023, https://www.rferl.org/a/moldova-western-air-defense-nosatii-ukraine-russia/32237452.html.

33 Including measures adopted on 4 May 2023, EU assistance to Moldova through the European Peace Facility during the war amounted to 87 million euro. The EU SIPRI recorded Moldova's military expenditure in 2022 at USD 48 million; SIPRI Military Expenditure Database, "Changes in military expenditure in Europe, 2021–22," accessed 15 April 2023, https://www.sipri.org/visualizations/2023/changes-military-expenditure-europe-2021-22.

34 "Moldova Not Pursuing NATO Membership But Aims To Strengthen Cooperation With Alliance," *Radio Free Europe/Radio Liberty*, 30 November 2020, https://www.rferl.org/a/moldova-nato-membership-cooperation-alliance/32155800.html

35 "Moldovan Government Suspends Licenses Of Six TV Stations To 'Eliminate Propaganda,'Propaganda'," RFE/RL's Moldovan Service, 17 December 2023, https://www.rferl.org/a/moldova-ilan-shor-tv-stations-licenses-suspended-russia-war/32180842.html.

36 The so-called 5+2 format, where Moldova and the region of Transnistria, as well as Russia, Ukraine and the Organisation of Security and Cooperation in Europe participate.

37 Vladimir Socor, "Moldova Extricates From Russian-Dominated Process of Negotiations on Transnistria (Part One)," *Eurasia Daily Monitor*, vol. 20, no. 33 (Washington: Jamestown Foundation, February 2023).

38 Madalin Necsutu, "Russia's Change in Foreign Policy Spark[s] Concerns in Moldova," Balkan Insights, 22 February 2023, https://balkaninsight.com/2023/02/22/russias-change-in-foreign-policy-spark-concerns-in-moldova/; See, for example, Ministry of Foreign Affairs of Russia, "Zaiavlenie MID Rossii v sviazi s podgotovkoi kievskim rezhimom voennoi provokatsii v otnoshenii Pridnestrove," 24 February 2023, accessed 24 February 2023, https://www.mid.ru/ru/foreign_policy/news/1855478/.

39 U.S. Department of the Treasury, "Treasury Targets Corruption and the Kremlin's Malign Influence Operations in Moldova," 26 October 2022, https://home.treasury.gov/news/press-releases/jy1049.

40 Haddad, "Where does your country stand on the Russia-Ukraine war?"; Ministry of Foreign Affairs of Georgia (@MFAgovge), "GE Foreign Ministry strongly condemns so-called referenda held by Russia at the territory of UA & illegal annexation of these territories. Through this action, RU has once again manifestly violated fundamental principles of int'l law," *Twitter*, 1 October 2022; 07:08, https://twitter.com/MFAgovge/status/1576076599765610497.

41 Russia continues to occupy 20 percent of Georgia's territory, with thousands of troops stationed just 65 km away from Tbilisi, and has since 2011 systematically created what strikingly resembles a "creeping" border infrastructure on occupied Georgian territory. Russia has and continues to construct military camps and observation points in areas near the line of separation in South Ossetia. For more information, see: Masalkin Grigory, "Politics of Georgia: Between the West and Ukraine, on the one hand, and the Russian threat, on the other," *Russia Post*, 6 December 2022, https://www.russiapost.info/politica/georgias_tricky.

42 The Georgian air force remains technically and quantitatively outmatched, were we to compare it to the Russian counterpart; it also lacks, lacking sufficient air defence, and unmanned aerial vehicles. A Black Sea littoral state, Georgia lacks a navy and only has a coast guard.

43 The International Institute for Strategic Studies estimated Russian military presence in Abkhazia and South Ossetia at 7 000 in 2021, reducing it to 4000 in end of 2022; Zaal Anjaparidze, "Russia Redeploys Troops from its Bases in Georgia to Ukraine," *Eurasia Daily Monitor* vol.Volume 19, i ssue 42. 28 March 2022, *https://jamestown.org/program/russia-redeploys-troops-from-its-bases-in-georgia-to-ukraine/*.

44 Patrick, Kingsley, "Ukraine Reminds Georgia of Its Own War With Russia. That Creates a Dilemma," *New York Times*, 19 March 2022, https://www.nytimes.com/2022/03/19/world/europe/ukraine-georgia-war.html.

45 Olesya, Vartanyan, *In Ukraine, Georgia Sees Power and Worrying Parallels* (International Crisis Group, March 2022), https://www.crisisgroup.org/europe-central-asia/caucasus/georgia/ukraine-georgia-sees-powerful-and-worrying-parallels.

46 Will Cathcart, "Georgia's Ruling Party Is Tanking Its Own NATO Bid Accusing the U.S. ambassador of blackmail is just the start," *Foreign Policy*, 8 August 2022, https://foreignpolicy.com/2022/08/08/georgia-nato-eu-russia.

47 Zarina Burkadze, *How Russia's War against Ukraine Affects Georgia* (Italian Institute for International Political Studies, September 2022-09), https://www.ispionline.it/en/pubblicazione/how-russias-war-against-ukraine-affects-georgia-36058.

48 Eugene, Kogan, *The Georgian Perspective on Shifting Security Dynamics in the Caucasus* (The European Geopolitical Forum, January 2023), http://www.gpf-europe.com/upload/esd_1_2023_p_105_107_kogan_the_georgian_perspective_20230126.pdf.

49 Maria Katamadze, "Priamye reicy: priznak sblizhenia Rossii i Gruzii?" Deutsche Welle, 28 January 2023, *https://www.dw.com/ru/pramye-rejsy-priznak-sblizenia-rossii-i-gruzii/a-64539811*. Accessed February 2023.

50 Nini Gabritchidze, "Azerbaijan and Georgia eye electricity exports to Europe," *Eurasianet*, 4 November 2022, https://eurasianet.org/azerbaijan-and-georgia-eye-electricity-exports-to-europe.

51 Money transfers from Russia to Georgia grew by 1000% year to year in January; "Denezhnye perechisleniia iz RF v Gruziiu v ianvare vyrosli na 1000% god k godu," *Kommersant*, 16 February 2023,accessed 27 February 223, https://www.kommersant.ru/doc/5827273.

52 Beard. Nadia, "How the War in Ukraine Has Exposed Georgia's Fault Lines," *RadioFreeEurope – RadioLiberty*, 27 December 2022, https://www.rferl.org/a/georgia-ukraine-war-russia-fault-lines/32195659.html.

53 Amy Mackinnon and Jack Detsch, "Georgia Walks a Fine Line After Ukraine Invasion. Tbilisi has its own history with Moscow. So why the cold shoulder to Ukraine this time?" *Foreign Policy*, 11 March 2022, https://foreignpolicy.com/2022/03/11/georgia-ukraine-invasion-russia/.

54 "Georgian President Scolds Ruling Party for Anti-Western Rhetoric," *Civil Georgia*, 22 July 2022, https://civil.ge/archives/501694.

55 On 25 February 2022, the Prime Minister stated, "I want to state clearly and unambiguously, considering our national interests and interests of the people, Georgia does not plan to participate in the financial and economic sanctions, as this would only damage our country and populace more," For more details, see: Conor Sheils, "We are not our government': Georgians slam Ukraine war response. As the government takes a cautious approach to Russia, citizens say it is not doing enough to stand with Ukrainians," *Aljazeera*, 5 April 2022, https://www.aljazeera.com/features/2022/4/5/we-are-not-our-government-georgians-slam-ukraine-war-response.

56 Giorgi Lomsadze "Ukraine recalls ambassador from Georgia," *Eurasianet*, 1 March 2022, https://eurasianet.org/ukraine-recalls-ambassador-from-georgia; "Podolyak: Impossible to Reach Agreement with Authorities of Georgia, They're Living a Different Reality," Georgia Today, 12 January 2023, https://georgiatoday.ge/podolyak-impossible-to-reach-agreement-with-such-authorities-of-georgia-theyre-in-different-reality/.

57 Saakashvili, a Ukrainian citizen since 2015, had previously also held the governorship in Ukraine's Odesa region. Largely considered pro-Western, Saakashvili has remainedremains in Georgian detention since October 2021 for allegedly abusing power following his return to Georgia after his self-imposed exile. For more details, please see: Nicolas Camut. "Zelenskyy: Georgia's Saakashvili 'is being slowly killed," Politico, 2 February 2023, https://www.politico.eu/article/ukraine-volodymyr-zelenskyy-georgia-mikheil-saakashvili-is-being-slowly-killed-prison-tbilisi/.

58 Georgia has nevertheless a second chance of obtaining candidate status by the end of 2023. The EU will reassess whether Tbilisi has met the 12 prerequisites outlined in June 2022. For more details, please see: Vano Chkikvadze, "*Candidate Status – Georgia at the Crossroads*," *SCEEUS Guest Platform for Eastern Europe Policy*, no. 27 (Stockholm Centre for Eastern European Studies, February 2023), https://sceeus.se/en/publications/candidate-status-georgia-at-the-crossroads/.

59 Jorge Liboreiro, "Why was Georgia not granted EU candidate status?," *Euronews*, 24 June 2022, https://www.euronews.com/my-europe/2022/06/24/why-was-georgia-not-granted-eu-candidate-status.

60 "Georgian Prime Minister's NATO Remarks Stir Controversy," *Civil Georgia*, 21 June 2022, https://civil.ge/archives/497257.

61 Haddad, "Where does your country stand on the Russia-Ukraine war?"; "Vneshnepoloticheskie predpochteniia v Armenii: kak v obshchestve vosprinimaiut situatsiiu v Ukraine?," *Kavkazkii Uzel*, 3 January 2023, accessed 15 March 2023, https://www.kavkaz-uzel.eu/blogs/83781/posts/57420.

62 Since independence from the Soviet Union, Azerbaijan and Armenia remain locked in conflict over Nagorno-Karabakh, an Armenian-populated enclave inside Azerbaijani territory, as well as over other issues, including border delimitation. After the 2020 war, the conflict has largely revolved around border demarcations and the rights of the Armenian minority in Nagorno-Karabakh. See, also, Jakob Hedenskog, Aron

Lund, and Johan Norberg, *The End of the Second Karabakh War: New Realities in the South Caucasus*, FOI Memo 7405/ RUFS Briefing No. 49, (Stockholm: Swedish Defence Research Agency, 2020).

63 "Russian peacekeepers also don't implement obligation assumed by trilateral statement – PM," Armen Press, 22 December 2023, *https://armenpress.am/eng/news/1100274/*.

64 Emil Avdaliani, "Armenia Tries to Diversify Its Foreign Policy Away From Russia," *Eurasia Daily Monitor*, vol. 20, no. 24 (Jamestown Foundation, February 2023), *https://jamestown.org/program/armenia-tries-to-diversify-its-foreign-policy-away-from-russia*; Joshua Kucera, "Armenia refuses to host CSTO exercises," *Eurasianet*, 10 January 2023, https://eurasianet.org/armenia-refuses-to-host-csto-exercises.

65 Karolina Hird, Riley Bailey, Angela Howard, George Barros, Nicole Wolkov, Layne Philipson, and Frederick W. Kagan, *Russian Offensive Campaign Assessment*, March 16, 2023, (Washington: Institute for the Study of War, March 2023), https://www.understandingwar.org/backgrounder/russian-offensive-campaign-assessment-march-16-2023.

66 Prime Minister of Armenia, "The confirmation of the CSTO zone of responsibility in the Republic of Armenia is of fundamental importance for us. PM Pashinyan at the session of the CSTO Collective Security Council," 23 November 2022, accessed 2 March 2023, https://www.primeminister.am/en/statements-and-messages/item/2022/11/23/Nikol-Pashinyan-CSTO-meeting.

67 Arshaluis Mgdesyan, "Armenia further downgrades participation in CSTO," *Eurasianet*, 14 March 2023, https://eurasianet.org/armenia-further-downgrades-participation-in-csto.

68 "Averting a New War between Armenia and Azerbaijan," *Europe & Central Asia Report 266*, (International Crisis Group, January 2023), https://www.crisisgroup.org/europe-central-asia/caucasus/nagorno-karabakh-conflict/266-averting-new-war-between-armenia-and-azerbaijan 13–14.

69 Prime Minister of Armenia, "EAEU-Armenia trade turnover reached 2.8 billion USD in January-August 2022. The Prime Minister's speech at the session of the Eurasian Intergovernmental Council," 21 October 2022, accessed 23 March, https://www.primeminister.am/en/press-release/item/2022/10/21/Nikol-Pashinyan-Speech/.

70 "Trade between Armenia and Russia for the first time exceeds $5 bln in 2022 – official," *TASS*, 8 February 2023, accessed 20 February 2023, https://tass.com/economy/1573399; Ani Mejlumyan, "Russians flee conscription for another potential war zone: Armenia," *Eurasianet*, 14 October 2022, https://eurasianet.org/russians-flee-conscription-for-another-potential-war-zone-armenia.

71 Tigranuhi Martirosyan, "Diversifying Arms Markets: How Armenia Is Overcoming Dependence on Russia," *JAM News*, 4 October 2022, accessed 23 February 2023, https://jam-news.net/diversifying-arms-markets-how-armenia-is-overcoming-dependence-on-russia.

72 Aditya Bhan, "Armenia-India relations: Budding partnership benefits New Delhi," *Observer Research Foundation*, 16 December 2022, 23 February 2023, https://www.orfonline.org/expert-speak/armenia-india-relations; Amberin Zaman, "Turkey rises, Russia fades as Iran and Azerbaijan clash over Armenia," *Al-Monitor*, 31 January 2023, accessed 20 February 2023, https://www.al-monitor.com/originals/2023/01/turkey-rises-russia-fades-iran-and-azerbaijan-clash-over-armenia; Bayram Balci, *New Attempts at Normalisation Between Turkey and Armenia: Challenges and Obstacles* (Italian Institute for International Political Studies, November 2022), https://www.ispionline.it/en/publication/new-attempts-normalisation-between-turkey-and-armenia-challenges-and-obstacles-36642.

73 President of Azerbaijan, "Declaration on allied interaction between the Republic of Azerbaijan and the Russian Federation," 22 February 2022, accessed 20 March 2023, https://president.az/en/articles/view/55498

74 Haddad, "Where does your country stand on the Russia-Ukraine war?"; Vasif Huseynov, "The Russia–Ukraine War: Perspective of Azerbaijan," *Caucasus Strategic Perspectives*, vol. 3, no. 1 (Summer 2022), https://cspjournal.az/post/the-russiaukraine-war-perspective-of-azerbaijan-479.

75 Lamiya Adilgizi, "Azerbaijan's Balancing Act between Russia and Ukraine," *Institute for War & Peace Reporting*, 18 March 2022, https://iwpr.net/global-voices/azerbaijans-balancing-act-between-russia-and-ukraine.

76 Huseynov "Perspective of Azerbaijan," 95; Joshua Kucera, "Ukrainian officials support Azerbaijan in blockade of Karabakh," *Eurasianet*, 25 January 2023, https://eurasianet.org/ukrainian-officials-support-azerbaijan-in-blockade-of-karabakh; Rusif Huseynov, "Azerbaijani President's Visit to Kyiv During Ukraine Crisis: Motivations and Outcomes," *Eurasia Daily Monitor*. vol. 19, no. 16 (Washington: Jamestown Foundation, February 2022), https://jamestown.org/program/azerbaijani-presidents-visit-to-kyiv-during-ukraine-crisis-motivations-and-outcomes/.

77 Heydar Isayev, "Azerbaijani media supporting Ukraine, if quietly," *Eurasianet*, 10 March 2022, https://eurasianet.org/azerbaijani-media-supporting-ukraine-if-quietly.

78 "Azerbaijani-Russian trade turnover up almost 24% in 2022," *TASS*, 25 January 2023, accessed 20 February 2023, https://tass.com/economy/1566955.

79 For Russia, the North-South Transport Corridor offers overland access to Persian Gulf markets and Iranian ports on the Indian Ocean, as well as to India and other South Asian economies. See, also, Gunay Hajiyeva, "Azerbaijan, Russia, Iran Sign Declaration on North-South Transport Corridor," *Caspian News*, 11 September 2022, accessed 20 February 2023, https://caspiannews.com/news-detail/azerbaijan-russia-iran-sign-declaration-on-north-south-transport-corridor-2022-9-11-0.

80 "EU agrees deal with Azerbaijan to double gas exports by 2027 Access to the comments," *Euronews*, 19 July 2022, https://www.euronews.com/my-europe/2022/07/18/von-der-leyen-heads-to-azerbaijan-to-secure-new-gas-import-deal.

81 "Averting a New War," International Crisis Group, 7–8.

82 "Shusha Declaration on Allied Relations between the Republic of Azerbaijan and the Republic of Turkey," Azertag, 17 June 2021, https://azertag.az/en/xeber/Shusha_Declaration_on_Allied_Relations_between_the_Republic_of_Azerbaijan_and_the_Republic_of_Turkey-1809375.

83 Kirill Krivosheev, "Russian Peacekeepers Find Themselves Sidelined in Nagorno-Karabakh," *The Moscow Times*, 3 January 2023, accessed 20 March, https://www.themoscowtimes.com/2023/01/03/russian-peacekeepers-find-themselves-sidelined-in-nagorno-karabakh-a79868.

84 International Crisis Group, "Averting a New War" 9–10.

85 "FM: Comprehensive Iran-Russia agreement to be signed by late March," *Islamic Republic News Agency*, 19 October 2022, accessed 20 February 2023, https://en.irna.ir/news/84916016/

FM-Comprehensive-Iran-Russia-agreement-to-be-signed-by-late; Paul Goble, "Joint Azerbaijani-Turkish Military Exercises a Warning to Both Tehran and Moscow," *Eurasia Daily Monitor*, vol. 19, no. 184 (Washington: Jamestown Institute, December 2022), https://jamestown.org/program/joint-azerbaijani-turkish-military-exercises-a-warning-to-both-tehran-and-moscow; Baku has also accused Iran of the deadly bombing of the Azerbaijani embassy in January 2023: Heydar Isayev, "Azerbaijan's president blames Iran for embassy attack," *Eurasianet*, 21 February, https://eurasianet.org/azerbaijans-president-blames-iran-for-embassy-attack

86 Lazar Berman, "Azerbaijan and Israel tout strategic ties ahead of Tel Aviv embassy opening," The Times of Israel, 29 March 2023, https://www.timesofisrael.com/azerbaijan-and-israel-tout-strategic-ties-ahead-of-tel-aviv-embassy-opening/.

87 Erica Marat and Johan Engvall, "Former Soviet States are Distancing Themselves from their Old Imperial Master," *Foreign Policy*, 10 May 2022, https://foreignpolicy.com/2022/05/10/soviet-imperialism-colonialism-ukraine-kazakhstan-georgia-moldova/.

88 Timur Dadabaev & Shigeto Sonoda, "Silence is golden? Silences as strategic narratives in Central Asian states' response to the Ukrainian crisis," *International Journal of Asian Studies*, vol. 20, no. 1 (January 2022).

89 Assel Satubaldina, "President Tokayev Answers Tough Questions at Economic Forum in Russia," *Astana Times*, 18 June 2022, https://astanatimes.com/2022/06/president-tokayev-answers-tough-questions-at-economic-forum-in-russia/.

90 "After Publicly Backing Ukraine's Sovereignty, Uzbek FM Steps Down," *Radio Free Europe/Radio Liberty Uzbek Service*, 28 April 2022, https://www.rferl.org/a/uzbekistan-komilov-ukraine-steps-down/31825263.html.

91 Ministry of Foreign Affairs of Kyrgyzstan, "Ministr inostrannykh del KR Zheenbek Kulubaev prinyal Posla Ukrainy v KR Valeriya Zhovtenko," 4 October 2022, accessed 4 April 2023, https://mfa.gov.kg/ru/osnovnoe-menyu/press-sluzhba/novosti/ministr-inostrannyh-del-kr-zheenbek-kulubaev-prinyal-posla-ukrainy-v-kr-valeriya-zhovtenko.

92 AKIpress news, "Rakhmon – Putinu: My khotim, chtoby nas uvazhali," *Youtube*, 14 October 2022, https://www.youtube.com/watch?v=k0plRt5-eUE.

93 "Surveying Kazakh and Kyrgyz attitudes on Russia's war," *Eurasianet*, 6 September 2022, https://eurasianet.org/surveying-kazakh-and-kyrgyz-attitudes-on-russias-war.

94 Farkhod Tolipov, "Uzbekistan-2.0: Continuity and Change in Foreign Policy," *Central Asia-Caucasus Analyst*, 15 December 2022, http://www.cacianalyst.org/resources/221219_FT_Tolipov.pdf.

95 President of Russia, "Sammit ODKB. V Kremle sostoyalas vstrecha liderov gosudarstv – chlenov Organizatsii Dogovora o kollektivnoi bezopasnosti," 16 May 2022, accessed 4 April, http://kremlin.ru/events/president/news/68418.

96 "'Iz'Iz Kyrgyzstana napryamuyu v Ukrainu otpravili.'otpravili' Ispolzovala li Rossiya bazu v kante dlya perebroski voisk?" *Radio Azattyk*, 14 September 2022, https://rus.azattyq.org/a/iz-kyrgyzstana-napryamuyu-v-ukrainu-otpravili-ispolzovala-li-rossiya-bazu-v-kante-dlya-perebroski-voysk-/32031793.html; "Oni uekhali na 4 mesyatsa i bolshe ne vernulis," *Radio Ozodi*, 13 September 2022, https://rus.ozodi.org/a/32030414.html.

97 Colleen Wood, "Eurasia is more than Russia's backyard," *Foreign Policy*, 12 October 2022, https://foreignpolicy.com/2022/10/12/russia-backyard-conflict-armenia-azerbaijan-kyrgyzstan-tajikistan/.

98 Muslimbek Buriev, "Why is Tajikistan trying to set up relations with Iran once again?" *Cabar*, 17 June 2022, https://cabar.asia/en/why-is-tajikistan-trying-to-set-up-relations-with-iran-once-again.

99 S. Frederick Starr, "President Mirziyoyev's Strategic Urgency," *Central Asia-Caucasus Analyst*, 6 September 2022, https://www.cacianalyst.org/publications/analytical-articles/item/13734-president-mirziyoyev%E2%80%99s-strategic-urgency.html.

100 Almaz Kumenov, "Kazakhstan updates military doctrine, seemingly with Russia in mind," *Eurasianet*, 26 October 2022, https://eurasianet.org/kazakhstan-updates-military-doctrine-seemingly-with-russia-in-mind.

101 Ministry of Defence of Kyrgyzstan "Glava gosudarstva utverdil Vooennuyu doktrinu Kazakhstana," 24 October 2022, accessed 4 April 2023, https://www.gov.kz/memleket/entities/mod/press/news/details/446979?lang=ru.

102 "Turkmen president meets with Chinese defense minister," *China Military Online*, 26 April 2022, http://eng.chinamil.com.cn/view/2022-04/26/content_10150581.htm.

103 See Ministry of Foreign Affairs of China, "Wang Yi Attends the Third 'China+Central Asia' Foreign Ministers Meeting," 9 June 2022, accessed 5 April 2023, https://www.fmprc.gov.cn/mfa_eng/zxxx_662805/202206/t20220609_10700621.html; Ministry of Foreign Affairs of China, "President Xi Jinping Makes a State Visit to the Republic of Kazakhstan," 15 September 2022, accessed 5 April, https://www.fmprc.gov.cn/eng/zxxx_662805/202209/t20220915_10766191.html.

104 Genevieve Donnellon-May, "Turkey's Growing Influence in Central Asia," *The Diplomat*, 13 October 2022, https://thediplomat.com/2022/10/turkeys-growing-influence-in-central-asia/.

105 Joanna Lillis, "Russia forges ahead with gas ambitions in Uzbekistan, Kazakhstan," *Eurasianet*, 25 January 2023, https://eurasianet.org/russia-forges-ahead-with-gas-ambitions-in-uzbekistan-kazakhstan.

106 Nargis Kassenova, "Between Scylla and Charybdis: Kazakhstan Foreign Policy in Pursuit of a New Equilibrium," *Central Asia-Caucasus Analyst*, 5 September 2022, 5, http://www.cacianalyst.org/resources/pdf/220905_FT-Kazakhstan.pdf.

107 "Türkiye-Azerbaijan-Turkmenistan summit to strengthen ties," *TRT World*, 13 December 2022, https://www.trtworld.com/turkey/t%C3%BCrkiye-azerbaijan-turkmenistan-summit-to-strengthen-ties-63495.

108 Temur Umarov, "Russia and Central Asia: Never Closer, or Drifting Apart?" *Carnegie politika*, 23 December 2022, https://carnegieendowment.org/politika/88698.

109 "Kazakhstan to step up monitoring of goods re-exported to Russia," *Financial Times*, 23 March 2023, https://www.ft.com/content/b4e8c02a-adb5-4148-9b15-c0cf2845fa0f.

110 Johan Engvall, "Russia's war in Ukraine: Implications for Central Asia," *Central Asia-Caucasus Analyst*, 14 March 2022, https://www.cacianalyst.org/publications/analytical-articles/item/13712-russias-war-in-ukraine-implications-for-central-asia.html.

111 Kanat Nogoybayev, "The Impact of Partial Military Mobilization in Russia on the Countries of Central Asia," *Cabar*, 11 October 2022, https://cabar.asia/en/

the-impact-of-partial-military-mobilization-in-russia-on-the-countries-of-central-asia; "S nachala goda v Uzbekistan vekhali 395 tysyach rossiyan, bolshe poloviny – za tri mesyatsa," *Gazeta.uz*, 28 October 2022, https://www.gazeta.uz/ru/2022/10/28/russian-citizens/.

112 "Tovarooborot Tsentralnoi Azii i Kitaya v 2022 godu vyros na 45,4%," *Kazinform*, 13 January 2023, https://www.inform.kz/ru/tovarooborot-central-noy-azii-i-kitaya-v-2022-godu-vyros-na-45-4_a4023232.

113 European Council, "Joint press communiqué by Heads of State of Central Asia and the President of the European Council," 27 October 2022, https://www.consilium.europa.eu/en/press/press-releases/2022/10/27/joint-press-communique-heads-of-state-of-central-asia-and-the-president-of-the-european-council/.

114 Dana Omigazy, "Kazakhstan, Uzbekistan Sign Treaty on Allied Relations, Agreement on Border Demarcation to Foster Strategic Partnership," *The Astana Times*, 23 December 2022, https://astanatimes.com/2022/12/kazakhstan-uzbekistan-sign-treaty-on-allied-relations-agreement-on-border-demarcation-to-foster-strategic-partnership/.

115 Hugo von Essen and Jakob Hedenskog, "Russia's CSTO Intervention in Kazakhstan: Motives, Risks and Consequences," *SCEEUS Commentary* (Stockholm Centre for Eastern European Studies, January 2022).

116 Georgi Gotev, "Kazakh official: We will not risk being placed in the same basket as Russia," *Euractiv*, 29 March 2022, https://www.euractiv.com/section/central-asia/interview/kazakh-official-we-will-not-risk-being-placed-in-the-same-basket-as-russia/.

117 The emigration to some of these countries was facilitated by the fact that Russians could move there without possessing international travel passports. See Russian Federal Security Service, *Voprosy i otvety*, accessed 30 May 2023, *http://ps.fsb.ru/fps/dpk/oficial_materialy/voprosy.htm* .

5. Attrition and regeneration: Russia's Armed Forces at war

Johan Norberg, Ismail Khan and Jonas Kjellén

As noted in Chapters 2 and 3, Russia had decades-long political grievances with Ukraine and turned that into war in 2014, which expanded into a full-scale invasion on 24 February 2023. The war after the invasion has degraded Russia's Armed Forces, especially its land forces, i.e., the Ground Forces, Airborne Forces and Naval Infantry. The plentiful information about Russian battlefield losses rarely elaborates systematically what this situation means for Russia's ability to fight this and future wars. Understanding the war's effect on the Russian Armed Forces is crucial, since these forces will also remain a key tool for Russia's political leaders to use for deterrence, coercion, intervention and defence after the war in Ukraine ends.

Analyses of the war abound; they delve into both conventional warfighting and Russia's unconventional actions before the war.[1] This chapter assesses how the losses of personnel and equipment in the first year of the war affected Russia's warfighting potential, a potential as was assessed in the FOI report *Russian Military Capability in a Ten-year Perspective – 2019* (hereafter "the 2019 assessment").[2] The key observation is that the first year of the war destroyed around half of the pre-war warfighting potential of Russia's land forces, leaving its air-, naval- and nuclear forces much less affected. This chapter also reflects on our previous, mainly quantitative methods, to try to avoid the McNamara Fallacy, i.e., the overreliance on quantifiable aspects at the expense of a comprehensive understanding of an issue that includes qualitative aspects.[3]

The research question in this chapter is: How has the first year of Russia's war against Ukraine affected the warfighting potential of Russia's Armed Forces? Its warfighting potential is its ability to launch strategic-level operations, with conventional military forces, against another military great power (or alliance), in a theatre of military actions (TVD).[4] Our approach roughly corresponds to the first of the following four basic types of Russian strategic operations: 1) a strategic operation in a TVD; 2) a strategic aerospace operation; 3) a strategic operation with nuclear forces; and 4) a strategic operation to destroy critically important targets.[5] As in the 2019 assessment, warfighting potential, here, pertains to the resources for two key parts of such a strategic operation: battles (large land-forces-centric operations, with air and naval forces in support) and strikes with standoff weapons. We do not address other related aspects, such as how Moscow actually implemented the Russian concept of an initial period of war. Finally, *warfighting potential* denotes, in general and hypothetical terms, what Russia *could* do with its armed forces *before* a specific, actual war has started, but without addressing the possible outcomes against a specific adversary, such as Ukraine since 2022.[6]

This chapter proceeds with four delimitations. First, the focus is on losses specific to the Russian Armed Forces, i.e., to the uniformed services and arms (Ground Forces, Navy, Aerospace Forces, Airborne Troops, and Strategic Rocket Forces) under the Russian Ministry of Defence (MoD). This excludes military forces serving in other branches of the Russian government, such as *Rosgvardia*, the FSB Border Troops and other militarised security services, as well as other forces fighting for Russia in Ukraine, such as volunteers, convicts, mercenaries and Russia's proxy forces in Donbas. These non-MoD forces played an increasingly important role as the war attrited Russia's initial invasion force.

Second, the assessment only covers the first year of fighting, since some hindsight facilitates establishing facts in a dynamic situation. Third, the emphasis is on land forces, for two reasons: 1) the war is land-forces-centric, with air and naval forces in supporting roles, just as the pre-war Russian Armed Forces' peacetime establishment and annual strategic exercises indicated, and 2) Russia is a continental power in Eurasia, for which land forces will always be crucial. Fourth, military operations have (at least) five key functions: command and control (C2); manoeuvre (the ability to take and hold territory); fire support to the manoeuvre; mobility of forces; and sustainability of operations. The focus here is on the manoeuvre and fire support. Additional minor delimitations appear throughout.

This chapter has four more sections. The first section recaps the pre-war warfighting potential that Russia's Armed Forces had in 2019, roughly corresponding to its potential on the eve of the invasion, approximately three years later. The second section outlines and adapts the figures for Russian casualties and equipment losses. The third section deals with two issues that the 2019 assessment did not address: first, qualitative factors that have a bearing on how Russian forces fought, intangibles, such as morale and leadership and, second, Russia's mobilisation of personnel and materiel in long-term storage, simply because these two issues could not be predicted before the war. The fourth section discusses how the war has affected Russia's warfighting potential and what that implies.

5.1 The 2019 assessment of Russia's warfighting potential

To what do we compare the losses of Russia's Armed Forces in the war? Figure 5.1 provides a perspective on this by broadly outlining Russia's 1) pre-war peacetime military establishment, 2) standing forces and 3) the actual invading force on 24 February 2022. In 2019, the military establishment was the Armed Forces, with five military districts and, nominally, some 1 million positions for personnel in the organisation, with an actual manning of some 881 000 service members: 220 000 officers, 394 000 contract soldiers and 267 000 conscripts.[7] Russian law prohibits the deployment of conscripts to combat operations abroad unless Russia is in a state of war. The standing forces, officers and contract soldiers were available for rapid deployment, such as for military operations other than war, and consisted of about 70 percent of the military establishment, in terms of actual manning. Russia's military leaders often accounted for the availability of forces in terms of battalion tactical groups (BTG), an infantry or tank battalion taskforce with attached reduced subunits (e.g. artillery, air defence, or engineer) from the parent regiment/brigade.

Below, we summarise the pre-war warfighting potential of Russia's Armed Forces as a baseline for our assessment of the quantitative effects of the first year of the war. In 2019, Russia's available naval forces encompassed some 160 surface combatants and 40 submarines, plus an auxiliary fleet of some 450 vessels, in total (not all available). Available air forces included some 520 operational-tactical fixed-wing aircraft, 650 helicopters, 75 transport aviation aircraft, 70 long-range aircraft (bombers), and 20–25 other aircraft, such as airborne early warning and control, and aerial refuelling, aircraft.[8] Russian land forces included 59 brigade/division-sized elements (*soedinenie*):[9] 40 motor rifle and five tank from the Ground Forces, six naval infantry and eight airborne. Thirty of these were available on short notice, without mobilisation of reservists, i.e., some 100 000–130 000 troops, in 146 BTG.[10] In 2021, Russia claimed 168 BTG, i.e., 110 000–140 000 men.[11] This was the core of the 2022 invading force.

The 2019 assessment outlined forces for starting strategic operations in continental TVD. It had two parts, based on the Russian concept of a military operation: 1) battles, in terms of deployment of groups of forces (GOF); and 2) strikes by standoff weapons, such as land-attack cruise missiles (LACM), surface-to-surface missiles (SSM) and anti-ship missiles (AShM), armed with either conventional or nuclear warheads. For battles, each of Russia's five Joint Strategic Commands (one per MD) could organise a GOF, each averaging 100 000 servicemen.[12] Ground forces constituted some 70 percent of a GOF, with some 2–4 combined arms armies (CAA)

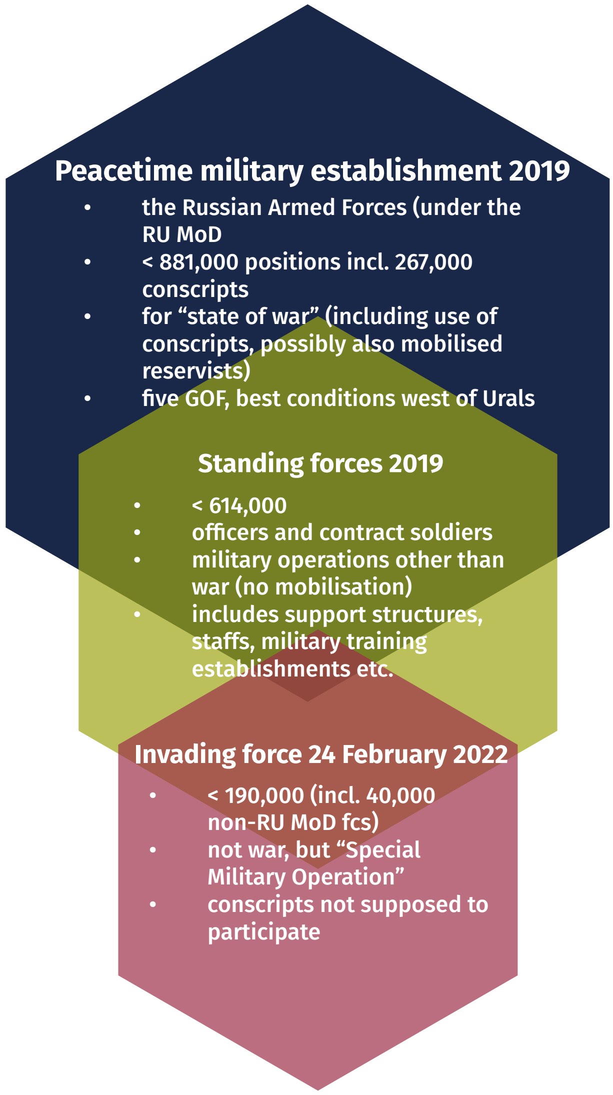


Figure 5.1 Russia's 2019 military establishment, standing forces and invading force.

Comments: The figure illustrates principle, not scale. Numbers are estimates.

Source: Kjellén & Dahlqvist Russia's Armed Forces in 2019, pp. 23–24; Jonas Kjellén: *Bringing the soldier Back in – Russian military manning, manpower and mobilisation in the light of the war in Ukraine*, (Stockholm: Swedish Defence Research Agency), https://www.foi.se/rest-api/report/FOI-R--5461--SE, 15–22.

fighting in a 300 x 300 kilometre area, with the support of air and naval forces.[13] A GOF had no fixed organisational structure, but was tailored for each mission. A GOF was not a precise measurement, but a notion of the right order of magnitude to enable discussing warfighting potential. For strikes, the estimate rested on what available delivery platforms could fire in initial salvos, some 1 550 missiles in a European War Theatre (1 150 for ground targets, 400 for sea targets).[14]

The 2019 assessment concluded that, west of the Urals, Russia had uniquely favourable preconditions for strategic operations in a TVD, for three reasons. That particular area of the country is comparatively small by Russian standards, only three out of eleven time zones. In addition, the infrastructure to support military operations, e.g., railways, as well as air and naval bases, is significantly denser than further east. Finally, some 75 percent of the Armed Forces peacetime force dispositions were in European Russia, which, combined with infrastructure, facilitated reinforcements and strategic- and operational-level mobility. Annual strategic exercises indicated that operations west of the Urals could start one month after a political decision, while operations east thereof would probably require two.

5.2 Russian losses in the first year of the war

This section estimates losses in the first year of the war to enable a gauging of the effect on the warfighting potential of the Russian Armed Forces. The Ukrainian and Russian military probably know their own respective losses. The differences when they state enemy losses, however, prompts suspicions about other purposes than merely reflecting reality, perhaps an understandable approach for a country at war.[15] In addition, media often quote Western intelligence services' public briefs, which rarely detail their sources or how they count. There is a risk of circular reporting. Several outlets quote the same original source, creating a false impression of confirmed facts.

Analysing Russian losses is essentially about two choices: which sources to use and how to deal with them. We use sources with as verifiable figures as possible and critically examine them to estimate Russian Armed Forces losses. Estimates depending on other sources or methods may generate different numbers. In this war, soldiers and civilians take pictures and post them online, creating a mass of information. We extrapolate figures and establish a range of Russian losses, since exact figures at a given moment may give a deceptively precise image of reality, given the chaos of war and delays in reporting.

As of early 2023, we have had two key sources available. The first, *BBC News Russian Service/Mediazona* (hereafter only *BBC*), has been collecting online information to illustrate Russian personnel losses, which underpins the estimates in our first subsection. The second key source, the *Oryx* website, has been compiling and updating equipment losses based on online pictures. Both these sources have drawbacks. As far as we have been able to see, the *BBC* accounts for its approach, but does not publish its original data, possibly out of consideration for the relatives of the fallen. In contrast, *Oryx* publishes its original data for all equipment in Ukraine, but this has required us to adapt in order to assess the losses of the Russian Armed Forces.

Gross personnel losses of the Russian Armed Forces

The *BBC* collected data, on Russian soldiers killed in action (KIA), from social media, obituaries, media and local authorities in Russia. After one year of war, the *BBC* reported 15 136 Russian KIA.[16] Table 5.1 shows that 5 202, i.e., a third of the KIA, were not from the Russian Armed Forces, which excludes that third from this assessment. It was not clear whether all of the remaining 9 934 KIA were from the Russian Armed Forces,

Table 5.1 Categories of Russian KIA (first year of war).

Russian Armed Forces (RuAF; under MoD)		Total
Motorised Rifle Troops	1 996	
Airborne Troops	1 552	
Naval Infantry	563	
Tank Troops	548	
Artillery Troops	406	
Special Forces	394	
Engineer Troops	108	
Other a	775	
Confirmed RuAF KIA	**6 342**	
Unknown affiliation (presumably RuAF)	**3 592**	
Total RuAF KIA* (confirmed + presumed)		**9 934**
Non-MoD Forces		
Volunteers	1 673	
PMC c (convicts)	1 310	
Mobilised	1 214	5 202
PMC (non-convicts)	588	
Rosgvardiia	417	
Total		**15 136**

Comments: (a) e.g., signal troops, Electronic Warfare troops, airmen and sailors; **(c)** PMCs, such as Wagner, are nominally private, but for all practical purposes a part of the Russian state's war effort.

Source: *BBC/Mediazona*, as of around 24 February 2023.

but we included 3 592, of unknown affiliation, so as to avoid underestimating. Thus, the Russian Armed Forces had some 10 000 KIA in the first year of the war, which is even more noteworthy if compared to the KIA in the Soviet Union's ten years of war in Afghanistan (some 17 500) and in Russia's two Chechen wars (some 13 200).[17] Manoeuvre units involved in direct contact, in battle, i.e., tank, motorised rifle, airborne and naval infantry units, suffered a much larger share of the KIA, some 73 percent (4 659, of 6 342).

Russia's MoD announced casualty figures, presumably for the Armed Forces only, thrice in 2022: 498 KIA after one week of fighting, 1 351 after a month and 5 937 after seven months.[18] If that rate of attrition remained steady, Russia would have had 10 178 KIAs in the first year of war, i.e., roughly in line with our interpretation of the *BBC* figures (9 934 KIA).[19]

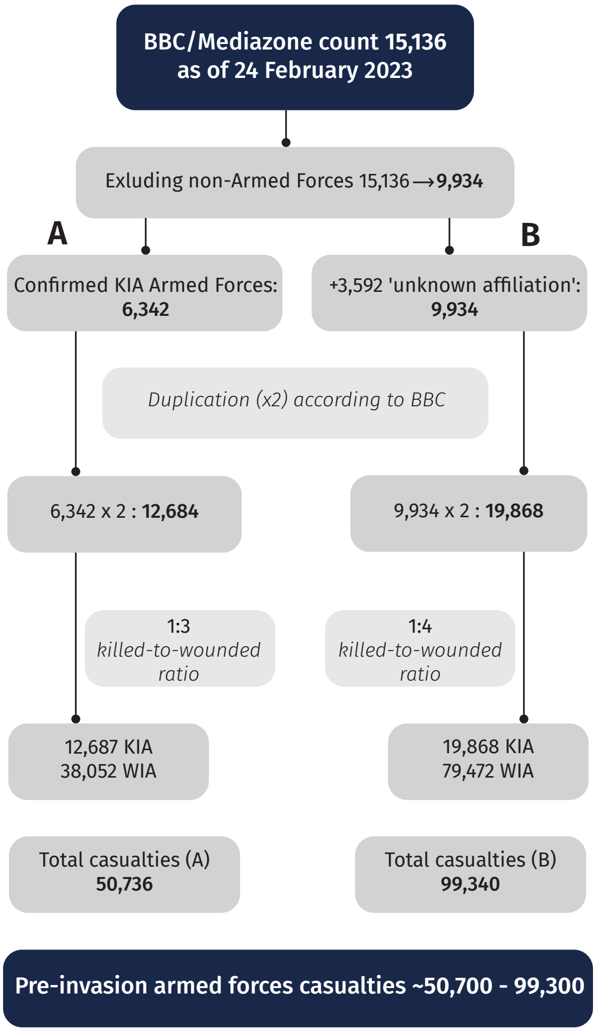


Figure 5.2 Establishing Russia's Armed Forces' total casualties, KIA and WIA (first year of the war)

Remarks: A, conservative count; B, ¬inclusive count.

Source: *BBC/Mediazona*, as of around 24 February 2023.

How do these established KIAs reflect the reality of total Russian casualties in the first year of the war, when including soldiers wounded in action (WIA)?[20] Figure 5.2 shows two approaches to assessing a range of Russian Armed Forces total casualties based on *BBC* KIA figures. The left column (A) is a conservative count, based on confirmed Russian Armed Forces' KIA, according to the *BBC*. The right column (B) reflects a more inclusive approach, also including KIA with unknown affiliation. Only counting recorded deaths means missing many cases. The *BBC* suggests doubling their count of KIA to better reflect reality, which gives a range of some 13 000 to 20 000 KIA.

Figure 5.2 outlines two ways to extrapolate WIA, based on either a killed-to-wounded ratio, from official Russian data (conservative count); or from an expert-based ratio for this type of conflict (inclusive count). The former builds on Russian MoD casualty figures from March 2022, 1 597 KIA and 3 825 WIA, roughly a 1:3 killed-to-wounded ratio.[21] That would give some 12 684 KIA and 38 052 WIA, a total of 50 736 casualties. In contrast, the inclusive count uses an expert assessment of a 1:4 ratio, which would mean some 100 000 Russian Armed Forces casualties, 20 000 KIA and 80 000 WIA.[22] We do not know to what extent lightly wounded soldiers return to the front. Russian Armed Forces' losses changed over the first year. The invading force had a high share of casualties in the first six months. Thereafter, losses were mainly from forces other than the invading force. A glance at the *BBC* website suggested that officer losses are proportional to their share of the pre-invasion force.[23]

In sum, the Russian Armed Forces casualties in the first year of the war were some 50 000 to 100 000 killed and wounded, of which some 32 000–50 000 were probably from manoeuvre units.[24] Other losses may hide in Ukrainian claims of Russian casualties, some 137 780, in February 2023, which may have included KIA, WIA, missing in action (MIA), or prisoners of war (POW).[25] These claims pertain to all pro-Russian forces: the Russian Armed Forces, separatists, volunteers, Wagner operatives and, since October 2022, mobilised reservists.

Gross equipment losses of the Russian Armed Forces in the first year of the war

According to *Oryx*, in the first year of war, Russia lost some 9 400 pieces of equipment, mainly land forces and aviation, in some 20 categories, from tanks to trucks, drones and ships. Analysing the effect of each category is beyond the scope of this chapter. Our analysis proceeds in three steps. First, we outline gross Russian losses, based on *Oryx* data in the conceptual categories, battles and strikes (see Section 5.2, above). Second, an analysis of lost tanks illustrates the complexities in using *Oryx* gross numbers only to assess the effect on the Russian Armed Forces. Based on this, we propose a rule of thumb for adapting the number of *Oryx* ground-equipment losses. Third, based on the rule of thumb, we surmise the net effect on Russia's warfighting potential, in terms of battles and strikes.

Table 5.2 outlines Russian gross losses for selected equipment, in terms of ground-force battalions, or aviation-squadron equipment sets.[26] There are two observations about battles. First, the significantly higher percentage losses of ground-force equipment (up to 70–80 percent of pre-war holdings) compared to helicopters and fixed-wing aircraft (around 10 percent) shows that the war's first year was ground-forces-centric, with aviation in a smaller role.[27] Second, the higher percentage of losses for armoured units, two-thirds (67 percent), than for artillery units, almost one-third (27 per cent), suggests that the fighting has been mostly close contact. The manoeuvre function, more directly exposed to enemy line-of-sight fire, suffered more than fire support, often deployed further from the frontline and thus less exposed.

Table 5.2 Assessed Russian Armed Forces equipment losses (unit sets, first year of the war)

		Category	2019[a]	Assessed losses around 24 FEB 2023			
				Destroyed			Left
		Ground forces (# items in a bn set)	# pre-war bn sets	# items	# bn sets	% of # bn sets	# bn sets
Battles	Armour	Tanks (30)	80	1 771	59	74	21
		On wheels / BTR (40/bn)	22	775	19	88	3
		On tracks / BMP (40/bn)	69	1 448	36	52	33
		On tracks / BMD airborne (30/bn)	21	350	12	56	9
		On tracks / MTLB (40/bn)	21	569	14	68	7
	Artillery	Towed (all calibres; 18/bn)	25	163	9	36	16
		Self-propelled (all calibres; 18/bn)	83	353	20	24	23
		Self-prop. mortar (120 mm; 18/bn)	13	27	2	15	11
		MLRS (122 mm cal.; 18/bn)	33	120	7	20	26
		MLRS (220+ mm cal.; 8/bn)	14	50	6	44	8
		Aerospace forces[b] (#/sqn)	# sqn	# items	# sqn sets	% of # sqn sets	# sqn sets
		Helicopters (20/sqn)	33	67	3	30	10
		Fighter / attack aircraft (12/sqn)	43	64	5	38	12
Standoff strikes		Missiles[c]	2019[a]	Fired[c]	Sum	18 Nov 2022	
		Iskander SSM	1,150	830	1,760	120	N/A[e]
		Kalibr cruise missile		390		230	
		Kh-101 cruise missile		130		130	
		Kh-555 cruise missile		150		150	
		Kh-22 cruise missile		260		120	
		Onyx anti-ship missile	400	120	620	350	
		Kh-35 anti-ship missile		500		350	
		S-300 SAM	N/A[d]	1 020	1 040	6 980	
		Kinzhal		20		40	
		SUM	**1 550**		**3 420**	**8 470**	

Source: Oryx database, as of 24 February 2023; RMC-2019 (pp. 25–37) adapted into battalion level units based on bmpd livejournal, IISS Military Balance , Milkavkaz (via www.arcive.internet.org), VDV presentation by Bartles/Grau, available from one of the chapter's authors, Johan Norberg; for missiles, see Kossov (2023).

Comments: unit = battalion for ground forces; squadron for Aerospace Forces; **(a)** FOI-assessed available for operations in 2019; **(b)** excluding strategic bomber and transport aircraft due to small losses; **(c)** first nine months; for selected equipment for Russia's Ground and Aerospace forces; **(d)** we assessed that Kinzhal and S-300 for ground strikes were unavailable in 2019; **(e)** we cannot assess losses in percentage, since we obviously underestimated available missiles in 2019. The pre-war number of tanks in the Russian Armed Forces stated in this chapter differ from those in chapter 7 due to different sources and estimates. **#-** number; **%-** percentage; **arty**- artillery; **bn**- battalion; **cal**- calibre; **MLRS**- Multiple Launch Rocket System; **N/A**- not applicable; **op**- operational; **pcs**- pieces of equipment; **SAM**- Surface-to-Air Missile; **SSM**- Surface-to-Surface Missile; **sqn**- squadron. BTR, BMP, BMD and MTLB are Russian abbreviations for different armoured vehicles.

Second, for strikes, Table 5.2 shows that, according to Ukraine's MoD, Russia launched some 3 400 standoff strikes in the first nine months of the war, i.e., some 4 500 on an annual basis, presuming the same rate of fire, while Russia managed to produce at least 885 new missiles. The same source noted that Russia had 8 470 missiles in stock on 18 November 2022: 7 000 were S-300 SAM.[28] The use of these against ground targets was surprising, given their relatively small warheads and short range.[29] If true, trends indicated that Russia's stock would last two years, at least for strikes on ground targets, mainly with S-300 missiles. After nine months of war, Russia possibly retained the potential to carry out some 7 000 strikes with the S-300, and some 1 500 using traditional standoff weapons. The latter figure roughly equals the 2019 assessment, which, however, only pertained to the first salvos in a hypothetical war, perhaps more in line with Russian thinking about the use of standoff weapons in the initial period of war.[30] For the real and long campaign in Ukraine, Russia's actual use of standoff weapons casts doubt on their effectiveness for both deterrence and warfighting. Strikes neither made Ukraine give up, decisively degraded its military forces, nor deterred Western military support to Ukraine.

How well does Table 5.2 reflect actual losses by the Russian Armed Forces? A well-informed observer of the Russian military claims that the accounting by *Oryx* represents 40–60 percent of actual Russian losses, which should then be roughly 50 percent higher.[31] Tank losses, then, should not be 1 771, but some 2 650, which roughly corresponds to a pre-war open source assessment of 2 609 tanks in the Russian Armed Forces.[32] Russia's use of long since decommissioned T-54/55 tanks in the war possibly supports the observation that Russia is running low on tanks, but two arguments point the other way.[33] First, most *Oryx* entries use close-up pictures to determine the affiliation and model of equipment, but many of the photos it relies on are also from gunsights or UAV, which entails a risk of double-counting.

Second, both Russia's proxy forces in Donbas and the Russian Armed Forces use Soviet legacy equipment, which complicates precise attribution. *Oryx's* tank losses come from Russia's Armed Forces and from Russia-backed separatists in Donbas, which had some 400 to 700 tanks on the eve of the war.[34] How to separate them? *Oryx* noted that the first year of the war destroyed 1 771 Russian tanks, but, as Table 5.3 shows, less than half (755) were definitely models in use by Russia's Armed Forces. We modify this conservative count and establish a ceiling for Russian tank losses by adding the 198 unknown tanks, the 101 T-72s of unknown model and the 235 T-80s, all potentially belonging to Russia's Armed Forces. The tank losses of Russia's Armed Forces would then range from 755 to 1 288, or 43–73 percent (average 58 percent) of the nominal *Oryx* number.

Since 2014, Russia supplied a broad range of ground forces equipment to its proxy forces in Donbas, creating problems similar to those for assessing Russian tank losses, as outlined in Table 5.3.[35] *Oryx* reflects the losses of the Russian Armed Forces sufficiently well, in terms of order of magnitude, but not precision. Precise numbers risk conveying a false sense of exactness that our sources do not underpin, despite their nominal clarity. We prefer to assess losses in ranges and propose a rule of thumb: *Oryx* figures reflect 80–100 percent of Russia's Armed Forces equipment losses in the first year of the war, so, hereafter, we call this the "80–100 percent rule".

5.3 Intangibles and mobilisation

Our 2019 assessment covered forces available for a strategic operation in a TVD, but not their quality, nor how they would handle a prolonged conflict. The assessment did not address issues that proved crucial to Russia's first year of warfighting in Ukraine. Many issues were simply not visible before the war. This section addresses two issues, to complement the quantitative assessment above. First, intangible aspects, such as troop morale, what soldiers fight for, as well as political and military planning, and the guidance of a particular operation, are either specific for each war, or are general and structural, e.g., poor training or corruption. It is hard to gauge structural intangibles without access to the forces, and nigh impossible to describe their effect in war, beforehand.

Table 5.3 Russian tank losses (first year of the war)

Model	# lost
Tank models predominantly used by the Russian Armed Forces; 755 units	
T-72 (BA/B3 -16)	525
T-80 (U/BV/BVM)	174
T-90 (A/S/M)	55
Tank models likely not used by the Russian Armed Force; 819 units.	
T-62 (M/MV)	65
T-64 (A/BV)	51
T-80 (BV)	235
T-72 (A/AU/B, -89)	367
T-72 (unknown)	101
Confirmed destruction of tank merely through gun sight; 198 units.	
Unknown tank	198
Total	**1 771**

Source: Oryx data as of 26 February 2023.

Intangibles clearly undermined Russia's war effort, albeit not enough to result in strategic defeat. Second, the mobilisation, since 21 September 2022, of equipment in storage and reservists, allowed Russia to stay in the war, despite high losses in the invading force. Both issues are case-specific for the first year of this war and do not enable precise predictions about Russia's future use of military force. One insight is that the observed performance of the best part of a force, such as its elite units, cannot be seen as a standard for the force as a whole.[36]

Regarding case-specific intangibles, the flawed political planning and guidance of the war effort and military operations are arguably the most significant of these.[37] A narrow circle around President Vladimir Putin appears to have prepared the decision to conduct the full-scale invasion. The Federal Security Service (FSB) and the Presidential Administration, rather than the Russian General Staff, dominated the process (see also Chapter 3).[38] Intelligence based on political ambition and assumptions about Ukraine's weak leadership, an apathetic Ukrainian society distrusting its leaders, and the alleged poor state of the Ukrainian Armed Forces directly affected the conduct of operations.[39] President Putin apparently decided to start the war before all preparations were finished.[40] The Russian operation thus got off to a very bad start, from which it struggled to recover in the first year of fighting.

Russian military thinking sees morale, the psychological and social processes affecting effectiveness of soldiers in combat, as consisting of three elements: 1) spirituality, often linked to the Orthodox Church; 2) emotional community in a military context; and 3) the use of force based on a mandate from the state, based on Russian law.[41] Russian military planners should reasonably have addressed these issues to ensure force morale. Already early in the war, reports suggested faltering morale.[42] Probably not only corruption and poor training underpinned this, but possibly also the fact that this war was not about averting a clear and present military threat to Russia, but simply about subjugating a peaceful Slavic neighbour.

Regarding structural intangibles, Russia's endemic corruption, and its cousin, negligence, permeated the military and adversely affected warfighting in Ukraine, through poor, late, or no, deliveries of weapons, ammunition and supplies in sufficient quantity and quality to frontline forces. These factors also undermined maintenance, a fundamental skill in any military force.[43] Corruption probably also eroded training and professionalism, thus undermining a key ambition of the military reform launched in 2009.[44] After more than ten years of well-financed reform, the war displayed deficient training among Russian forces. Pilots lacked the skills for combat operations and ground crews did not properly prepare aircraft for combat missions. When BTG were being set up, or reorganised, the commanding officer was often poorly aware of the skills of the available personnel. Poor skills in handling communications equipment dented command and control.[45] To be fair, high-intensity warfighting is difficult for any force. Observations from the war suggested that there were structural deficiencies in the training of Russian contract soldiers and sailors. As the war attrited the original invading soldiers, they were replaced by those who had had even less training. The problems were not severe enough, however, to stop the Russian operation in the first year of the war.

Russia's efforts to replace lost forces occurred in two periods, before and after the partial mobilisation. The first, the premobilisation period, saw several hastily organised Russian recruitment campaigns to compel volunteers to replace battlefield casualties in the Armed Forces. Such outreach was visible in mass media, on billboards, in military recruitment offices, on job search websites and through nominally private military companies (e.g., Wagner), who recruited both volunteers and convicts. Examples of irregular forces in the war included Chechen *kadyrovtsy*, as well as "national battalions" from some of Russia's ethnic minorities.[46] After two months, such efforts indicated that there was already a shortage of soldiers for the war. By July, the Russian operations had faltered. In September, Ukraine retook the Kharkiv region, in a swift military move. Russia had to do something.

The second period began with the "partial mobilisation" of 300 000 reservists. Russia's military reforms in the 2010s had effectively dismantled mobilisation as a tool to expand forces significantly in wartime. The mobilisation was a bumpy ride. Up to 700 000 men quickly left Russia to dodge the draft. Reports indicated that there were poor or no preparations to receive conscripts in garrisons and a lack of both personal equipment, functioning weapons and trainers. In March 2023, a Ukrainian commentator noted that Russia had some 400 000 personnel in the operation. Some 250 000 of these were in Ukraine, some 20 percent on the front lines and up to 100 000 in exercise areas and garrisons in Belarus and Russia.[47] Despite these high numbers, Russian forces appeared unable to carry out assigned missions, especially offensive actions, possibly due to the spring rain-and-mud season, but probably also due to degraded C2, in a sense, the sum of qualitative problems for the forces fighting for Russia. Mobilisation did not enable Russian forces to prevail, but was enough to continue the operation. Given the scale and scope of the war, that was no mean feat.

How observations like these should inform future assessments of warfighting potential is outside the scope of this chapter. Leaving them unaddressed is clearly insufficient. The experiences from this war may potentially change future Russian political and military decision-making profoundly. Or, perhaps, the problems are so ingrained that nothing will really change. We simply don't know.

5.4 Battles and strikes after one year of war

This section discusses how the first year of war affected the warfighting potential of the Russian Armed Forces in terms of battles and strikes. "Battles" refers to the ability to launch a strategic operation in a TVD, i.e., with a GOF, a ground-forces-centric formation, with air and naval forces in support. "Strikes" pertains to the ability to launch non-nuclear standoff strikes against land and sea targets.[48] The focus is on battles, in terms of manoeuvre and fire support units, with a more cursory attention to strikes. Since the Aerospace Forces' losses were comparatively small, we do not deal with them further here.

Regarding battles, Table 5.2 outlined Russia's losses of equipment and personnel in deceptively exact terms, given possible flaws in both our sources and analytical approach. This section applies the "80–100 percent range" rule of thumb to describe Russian equipment losses. Table 5.3 elaborates gross losses for land forces. We estimate that Russia lost 148–184 battalions: 47–59 tank, 65–81 motorised rifle and 36–44 artillery in the first year of war. Out of the 50 000–100 000 Russian casualties (KIA and MIA), some 32 000–50 000 came from manoeuvre units, predominantly infantry. Manoeuvre unit casualties were some 64–100 battalions, assuming some 500 soldiers in each infantry battalion, fewer in tank and artillery. Overly simplified, the number of casualties only corresponds to about two-thirds of the number of lost battalion sets of equipment. The remaining third possibly corresponded to losses we have not accounted for, such as MIA, or POW. This does not factor in, however, how Russia's mobilisation generated additional equipment and personnel, albeit of an arguably lower quality.

Russia's Armed Forces lost 50–70 percent of its pre-war land force manoeuvre units and 20–50 percent of its artillery. In 2019, Russia's Armed Forces had 80 tank, 133 armoured and 168 artillery units, constituting the core offensive capabilities in five GOF. With our 80–100 percent rule, that would mean that Russia, after one year of war, retained 21–33 tank battalions, 52–68 armoured and 83–132 artillery, i.e. manoeuvre, units for some 2–3 GOF and fire support for 3–4. The mobilisation probably provided enough men, but not skills. This crucial misbalance may undermine Russia's potential for mobile operations, both offensive and defensive.

As for standoff strikes, a significant numerical and qualitative advantage over Ukraine did not help Russia's Armed Forces to prevail in the first year of the war. Before the war, Russia widened its strategic deterrence from primarily resting on nuclear weapons to including non-nuclear standoff strike weapons with conventional warheads.[49] These deterrence ambitions did not materialise. Ukraine defended itself. The West supplied ever-more advanced weapons. Russia's increasing use of Iranian-made attack drones, in the autumn 2022, indicated an insufficient ability to conduct deep-strikes on Ukrainian targets.

Only the Russian military and perhaps some intelligence communities know Russia's true standoff weapons stocks. Others have to estimate. The 2019 assessment noted Russia's potential for standoff strikes on the eve of an operation, based on what the available platforms could deliver in initial salvos (1 150 for ground targets; see Table 5.2). Russia carried out standoff strikes across Ukraine at the outset of the war, probably to suppress fixed air-defence installations and other key military objects. Russia fired some 3400 missiles in the first nine months of war, more than double what the assessment stipulated. The assessment pertained, however, to initial salvos, not a prolonged conflict, and did not foresee Russian use of some 1 000 S-300 Surface-to-Air Missiles (SAM) to strike at ground targets. Broadly speaking, the first year of war attrited half of the Russia's Armed Forces' potential for launching offensive land-forces-centric operations (battles) and showed that Russia had more missiles than we thought before the war, but that this was mainly due to the surprising use of S-300 SAM (standoff strikes).

5.5 General observations

After one year of war, four overall observations can be made about the warfighting potential of Russia's Armed Forces. First, Russia was no longer able to carry out strategic operations in continental TVD as long as the war against Ukraine continued. Second, qualitative aspects of warfighting significantly hampered Russia's war effort, although Moscow partly rectified this through mobilisation. Third, after the war, Russia would have an opportunity to rebuild its armed forces from a clean slate, hould it want to. Finally, the war brought back the idea of mass and attrition as key elements of warfare. Map 5.1 broadly outlines how, in 2019, Russia could be visualised as having the potential to organise five GOF, one per MD. On the map, the GOF are the boxes drawn with black dotted lines: three boxes west of the Urals, one in central Russia and one in the Far East. This placement underpinned an ability to launch strategic operations

Table 5.4 Remaining land forces battalions (after first year of the war).

	Category	# battalions				Remaining battalions 2023	
		2019	War losses (1 yr)				
			Min	Max	%	Range	Sum
Armour	Tanks	80	47	59	59-74	21 – 33	21 – 33
Armour	On wheels / BTR	22	15	19	70-88	3 – 7	52 – 68
Armour	On tracks / BMP	69	29	36	42-52	33 – 40	
Armour	On tracks / BMD airborne	21	10	12	45-56	9 – 11	
Armour	On tracks / MTLB	21	11	14	54-68	7 – 10	
Artillery	Towed (all calibres)	25	7	9	29-36	16 – 18	83 – 132
Artillery	Self-propelled (all calibres)	83	16	20	19-24	23 – 67	
Artillery	Self-prop. mortar (120 mm)	13	2	2	12-15	10 – 11	
Artillery	MLRS (122 mm)	33	6	7	16-20	26 – 27	
Artillery	MLRS (220+ mm)	14	5	6	35-44	8 – 9	

Source: Table 5.2.

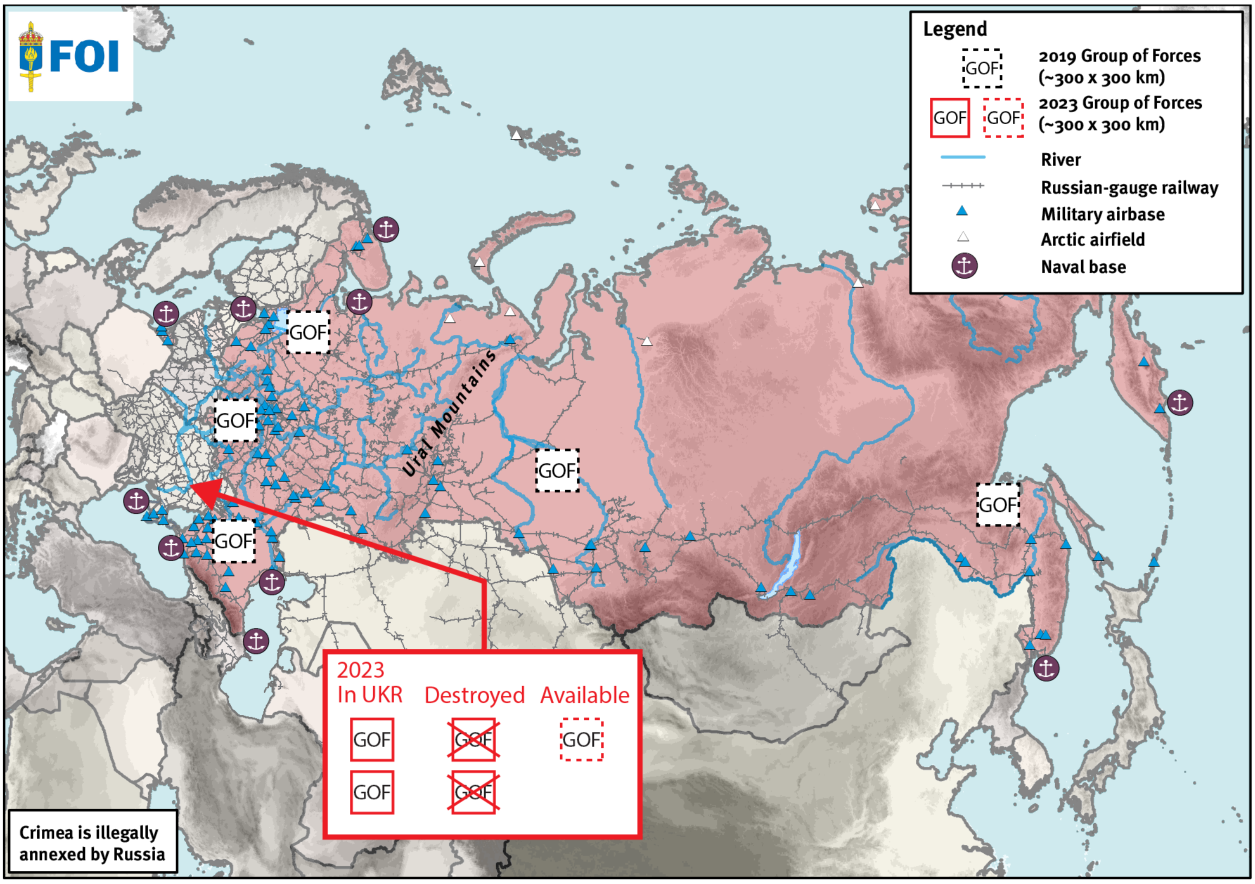
in continental TVD: offensive operations in Europe and defensive in the Far East. The cores of these GOF were the offensive land units, the manoeuvre and fire support units, outlined here. The red box on the map illustrates where the five GOF were after one year of war, in 2023. Their peacetime establishment, in 2019, underpinned a potential to organise GOF in all five MD. In 2023, almost all of them were in one place: Ukraine.

The two crossed-over, red GOF boxes illustrate that equipment losses, and possibly casualties, equalled half of Russia's offensive land forces. The equipment for two GOF probably remained in Ukraine. This left Russia with the freedom of action for, possibly, one GOF. It might have been possible for Russia to carry out operational-level actions with land forces outside Ukraine, but probably only in one place. Russia also retained the freedom of action for its nuclear forces, for deterrence, as well as for most of its pre-war air and naval forces, the latter two mainly for potential service-specific contingencies.[50]

As long as Ukraine remains Moscow's political and military priority, the war absorbs almost all the land forces that Russia has for deterrence, crisis intervention with rapid reaction forces, and national defence. As a result, this puts whatever military prowess that Russia may have in Eurasia, let alone the rest of the world, in doubt.

Qualitative aspects dogged the Russian operation, possibly in a decisive way. These aspects are likely to remain important for the Russian Armed Forces in fighting future wars, although it is impossible to say which ones and how. Only war will tell. In the meantime, the possible ways to address the qualitative aspects of warfighting include increased efforts to study what is available in terms of theory and examples, and even allow speculation to broaden our understanding of these topics. For Russia, in its war against Ukraine, mobilising hundreds of thousands of men and thousands of pieces of equipment partly replaced what the fighting had degraded, but it was impossible to gauge exactly how and to what extent. After a year, the Russian operation may have involved up to 400 000 servicemen, almost twice the invading force, but it is hard to say exactly what it meant, or means, for Russia's war effort. Moscow appeared able to hold on to occupied territories, but not expand them. Perhaps they felt that that was good enough for the time being.

Before the war, the Russian and Ukrainian military establishments were the two largest Soviet-era legacy forces, in terms of equipment, and the first-and third-largest military establishments in Europe, respectively. Russia's military reforms in 2009 did away with the Soviet-era mass-mobilisation system of assembling a multimillion-man army for war.[51] The first year of the war against Ukraine did away with up to 10 000 pieces of Russian equipment, i.e., much of the equipment needed for Soviet-scale and Soviet-style warfare. Once the war is over, recreating Russia's military would entail a choice. Russia may well have a clean slate to build new types of forces, should it want to. Such a profound change would probably require a major prompt, such as defeat in war. Alternatively, Russia could also continue acquiring Soviet-legacy equipment, but newly produced. Modernising old equipment, the preferred approach in the 2010s, would be difficult, as there will be much less left to renovate. Building entirely new forces requires money, time, a clear political mandate and individuals with the vision and influence to drive the process. After a year of war, Russia still appeared to have money, but precious little of the other ingredients. Thus, making more of what one already produces is more likely the way ahead.



Map 5.1 The assessed Warfighting Potential of Russia's Armed Forces 2023

Many Western countries dismantled their Cold War military establishments to focus on military operations such as peace support, counterinsurgency operations (COIN), or counterterrorism, often relying on high-tech equipment and air power. For such countries, the scale and scope of this ground-centric war was a rude awakening, since lean and mean may no longer suffice. Mass is back. This merely illustrates Clausewitz's old axiom that the nature of war is permanent, but its characteristics are constantly changing. ■

Endnotes

1 See, for example, Lawrence Freedman's regular comments, such as "Still Bakhmut," 26 March 2023, *https://samf.substack.com/p/still-bakhmut*; Dara Massicot, "What Russia Got Wrong – Can Moscow Learn From Its Failures in Ukraine?" *Foreign Affairs*, March/April 2023, *https://www.foreignaffairs.com/ukraine/what-russia-got-wrong-moscow-failures-in-ukraine-dara-massicot;* Mykhailo Zabrodskyi, Jack Watling, Oleksandr Danylyuk, and Nick Reynolds, "Preliminary Lessons in Conventional Warfighting from Russia's Invasion of Ukraine: February–July 2022," *Royal United Services Institute*, 30 November 2022, *https://www.rusi.org/explore-our-research/publications/special-resources/preliminary-lessons-conventional-warfighting-russias-invasion-ukraine-february-july-2022*; Jack Watling, Oleksandr Danylyuk, and Nick Reynolds, "Preliminary Lessons from Russia's Unconventional Operations During the Russo-Ukrainian War, February 2022–February 2023," *Royal United Services Institute,* 29 March 2023, *https://static.rusi.org/202303-SR-Unconventional-Operations-Russo-Ukrainian-War-web-final.pdf.pdf*.

2 Johan Norberg and Martin Goliath, "The Fighting power of Russia's Armed Forces in 2019," in Fredrik Westerlund and Susanne Oxenstierna (eds.): *Russian Military Capability in a Ten-year Perspective — 2019* (Stockholm: Swedish Defence Research Agency, 2019), 59–77.

3 An entire website, *https://mcnamarafallacy.com/*, is devoted to the McNamara Fallacy, accessed 2 May 2023.

4 FOI's 2019 assessment used the term fighting power. See Norberg and Goliath, "The Fighting power of Russia's Armed Forces in 2019," 60–65. The Russian military term, *war theatre (teatr voiny,* abbreviated TV), roughly corresponds roughly to a continent, with its surrounding seas and the air and space above. A TV consists of several theatres of military action *(teatr voennykh deistvii, TVD)*, i.e., parts of a continent. See *Teatr Voiny* and *Teatr Voennykh Deistvii (TVD)*, Online Encyclopaedia of the Russian MoD, *https://encyclopedia.mil.ru/encyclopedia/dictionary/details.htm?id=10897@morfDictionary* and *https://encyclopedia.mil.ru/encyclopedia/dictionary/details.htm?id=14091@morfDictionary*, accessed 2 May 2023.

5 According to the Russian definition, a TVD can be either continental or oceanic. Here, TVD pertains to the former. Roger McDermott and Chuck Bartles, "An Assessment of the Initial Period of War: Russia-Ukraine 2022: Part Two," *Russia Strategic Initiative,* 2022, 5–6.

6 For an initial discussion of the term, "warfighting potential", see Johan Norberg and Natalie Simpson, *"Zapad-2021 and Russia's potential for warfighting,"* August 2021, Foreign Policy Research Institute, *https://www.fpri.org/wp-content/uploads/2021/09/web-eucom-1-norberg-.pdf*, 7–9. A further elaboration, in Johan Norberg, "Towards a Theory of Military Exercises – Implications for Warfighting Potential," *Proceedings and Journal of the Royal Swedish Academy of War Sciences,* (forthcoming), is not applied here systematically.

7 Jonas Kjellén and Nils Dahlqvist, "Russia's Armed Forces in 2019," in Fredrik Westerlund and Susanne Oxenstierna (eds.): *Russian Military Capability in a Ten-year Perspective — 2019* (Stockholm: Swedish Defence Research Agency, 2019), 23–58.

8 Kjellén and Dahlqvist, "Russia's Armed Forces in 2019," 31, 33.

9 This Russian term, *soedinenie* (nominative singular), pertains to the type of mission a formation is designed to handle and can refer to both divisions, independent brigades and regiments. Russian ground force divisions often consist of regiments, which complicates counting and comparing. Equipment and organisation vary considerably between them. As far as we know the term has, no clear English equivalent.

10 Kjellén and Dahlqvist, "Russia's Armed Forces in 2019," 29.

11 "Shoigu zaiavil, chto v armii Rossii naschityvaetsia 168 batalionno-takticheskikh grupp," *TASS*, 10 August 2021, *https://tass.ru/armiya-i-opk/12099255*, accessed 17 May 2023.

12 A GOF presumably consisted of both contract soldiers and mobilised reserves or conscripts, the latter being possible to mobilise given that Russia was formally in a state of war.

13 The proposed 300 x 300 km area is a simplification, but roughly matches descriptions in the document "Osnovnye operativno-takticheskie normativy" (Main [offensive and defensive] operational-tactical norms) as found at *http://russianairbornetroops.info* (document available via Johan Norberg, one of the authors of this chapter).

14 Norberg and Goliath, "The Fighting power of Russia's Armed Forces in 2019," 62.

15 Ukraine's MoD noted on 01 May 2023 that some 191460 Russians had been "liquidated," see *https://www.mil.gov.ua/en/news/2023/05/02/the-total-combat-losses-of-the-enemy-from-24-02-2022-to-02-05-2023/*, a number similar to what the UK MoD noted on Twitter, in early April 2023, *https://mobile.twitter.com/DefenceHQ/status/1642407224583634944*, both accessed 2 May 2023. As described in the section below, Russian officialdom mentioned some 6000 of its own casualties in September 2022, but has since remained silent on the topic.

16 See *Mediazona*, as of 23 February 2023, *https://en.zona.media/article/2022/05/11/casualties_eng*. The BBC revises the website regularly. We downloaded the web page on 23 February 2023.

17 *Unknown soldiers: What do we know about Russian military losses in the war with Ukraine?,* Re: Russia, 20 January 2023, *https://re-russia.net/en/analytics/048/*.

18 "Minoborony vpervye soobschchalo o poteriakh v operatsii na Ukraine: 498 pogibshchikh," Kommersant, 2 March 2022, *https://www.kommersant.ru/doc/5239486*, accessed 17 May 2023; Vadim Savitskii "V Minoborony RF soobschchili o gibeli bolee 1,3 tys. rossiiskikh voennosluzhashchikh na Ukraine," *TASS*, 25 March 2022, *https://tass.ru/armiya-i-opk/14187031*, accessed 17 May 2023; *RIA Novosti* "Rossia poteriala 5937 chelovek v spetsoperatsii, zaiavil Shoigu," 21 September 2022, *https://ria.ru/20220921/poteri-1818333891.html*, accessed 17 May 2023.

19 Extrapolating Russian Armed Forces average KIAs to the whole first year is not feasible as these losses were relatively higher in the first six month of the war.

20 "Wounded" presumes they are permanently unable to continue fighting. Accounting for other Russian losses is hard.

21 Savitskii, "V Minoborony RF soobschchili o gibeli".

22 Christopher A. Lawrence, "The Ukrainian casualty claims are inflated – part 1," 3 June 2022, *Mystics & Statistics*, *http://www.dupuyinstitute.org/blog/2022/06/03/the-ukrainian-casualty-claims-are-inflated-part-1/*, accessed 17 May 2023.

23 The BBC establishes losses for different arms of service as well as for personnel categories, such as volunteers, mobilised, PMC operatives (including inmates).

24 MIAs may be dead or alive, and POWs are constantly taken and exchanged.

25 Government of Ukraine, "Total combat losses of the enemy from 24.02.22 to 12.02.23," 12 February 2023, accessed 17 May 2023, *https://www.kmu.gov.ua/en/news/zahalni-boiovi-vtraty-protyvnyka-z-24022022-po-12022023*.

26 While real numbers vary slightly, battalion/squadron sets are sufficiently standardised for our purposes, here.

27 Ismail Khan, *The Aerial War Against Ukraine – The First Six Months,* Swedish Defence Research Agency, FOI Memo 8133, *https://www.foi.se/rest-api/report/FOI%20Memo%208133.*

28 We have not found the equivalent combination of overview and detail in other sources and therefore quote this Ukrainian official source as reported by Igor Kossov, "How many missiles does Russia have left?" *Kyiv Independent*, 13 January 2023, accessed 2 April 2023, *https://kyivindependent.com/how-many-missiles-does-russia-have-left/*,

29 S-300 missiles have significantly smaller warheads (150 kg) and operational ranges (300 km) than Iskander (700 kg/500 km), Kalibr (500 kg/2500 km) and Kinzhal (500 kg/2000 km).

30 McDermott and Bartles, "An Assessment of the Initial Period of War."

31 Conflict Intelligence Team's (CIT) Ruslan Leviev in a daily update of the war by journalist Michael Naki on Youtube, 25 March 2023, *https://youtube.com/watch?v=K54ELtfSiDU&si=EnSIkaIECMiOmarE*, after some 2 minutes 30 seconds, accessed 3 April 2023. Mr Leviev is a rare commentator of this war. He readily admits mistakes and corrects them, a refreshing contrast to the more cocksure attitude of others. Furthermore, CIT occasionally publishes their open source data for others to verify and challenge.

32 See the blog *Bmpd-livejournal*, "Obzor sostoiania tankovykh voisk Vooruzhennykh sil Rossiii na 2021 god," 12 September 2021, accessed 3 April 2023*https://bmpd.livejournal.com/4393829.html*.

33 "Russia is Pulling 1940s T-54/55 Tanks Out Of Storage: How Viable Could They Be in Combat in Ukraine?" *Military Watch Magazine*, 23 March 2023, *https://militarywatchmagazine.com/article/russia-t5455-storage-viable-ukraine*, accessed 3 April 2023.

34 Artur Abakov, "Ekspert rasskazal, otkuda DNR poluchila 700 tankov i 400 BMP," *Moskovskii Komsomolets,* 10 February 2017, *https://www.mk.ru/politics/2017/02/10/ekspert-rasskazal-otkuda-dnr-poluchila-700-tankov-i-400-bmp.html*, accessed 17 May 2023.

35 Russia's proxy forces in Donbas had some 200 categories of Russian and Soviet military equipment in 2021. See Weapons in the War in Ukraine, Conflict Armament Research, November 2021, accessed 3 April 2023, *https://www.conflictarm.com/wp-content/uploads/2021/11/Weapons-of-the-war-in-Ukraine-low.pdf*. We do not detail all equipment categories here, but hope others may use our approach to do so.

36 Zabrodskyi et al., "Preliminary Lessons," 44.

37 See McDermott and Bartles, "An Assessment of the Initial Period of War", and O. G. Tumakov, "Osnovnye napravlenia sovershenstvovania voenno-politicheskopi raboty pro podgotovke operatsii," *Voennaia Mysl*, vol 2, February 2023, the latter for an implicit Russian critique of the pre-war planning process.

38 Greg Miller and Catherine Belton, "Russia's spies misread Ukraine and misled Kremlin as war loomed", *Washington Post*, 19 August 2022, *https://www.washingtonpost.com/world/interactive/2022/russia-fsb-intelligence-ukraine-war /*.

39 Robert Dalsjö, Michael Jonsson and Johan Norberg, "A Brutal Examination: Russian Military Capability in Light of the Ukraine War", *Survival*, vol 64, No 3, June-July 2022, *https://www.tandfonline.com/doi/full/10.1080/00396338.2022.2078044*, 7–28.

40 Zabrodskyi et al., "Preliminary Lessons," 7.

41 See Pär Gustafsson, *Rysk syn på stridsmoral - Grundidéerna från 1990-talet till 2022* [A Russian view on the will to fight – basic ideas from the 1990s to 2022], FOI-R--5356—SE (Stockholm: Swedish Defence Research Agency, 2022), *https://www.foi.se/rest-api/report/FOI-R--5356--SE* (in Swedish), 12–20.

42 Dalsjö et al., "A Brutal Examination," 11, 16.

43 Dalsjö et al., "A Brutal Examination," 11, 16.

44 Jonas Kjellén, *Bringing the soldier back in – Russian military manning, manpower and mobilisation in the light of the war in Ukraine* (Stockholm: Swedish Defence Research Agency, 2023), *https://www.foi.se/rest-api/report/FOI-R--5461--SE*, 26–31,

45 Zabrodskyi et al., "Preliminary Lessons," 29, 30, 31– 32, 39–40 and 47.

46 In April–September 2022, these were regular themes on the daily war updates with journalist Michel Naki and Conflict Intelligence Team's Ruslan Leviev, *https://www.youtube.com/@MackNack*; Kjellén, *Bringing the soldier*, 17–18.

47 Jonas Kjellén, *Bringing the soldier*, 20–22, 29–31; Yulia Latynina interview with Ukrainian military expert Roman Svitan, Latynina TV, 26 March 2023, *https://youtu.be/4eJHRh0-434*, accessed 4 April 2023.

48 Norberg and Goliath, "The fighting power of Russia's Armed Forces in 2019," 60–65.

49 Valeriy Akimenko, "Russia and strategic non-nuclear deterrence: Capabilities, limitations and challenges," *Chatham House*, July 2021, *https://www.chathamhouse.org/sites/default/files/2021-07/2021-07-29-russia-strategic-non-nuclear-akimenko.pdf*.

50 Except the Black Sea Fleet and Naval Infantry (from all fleets), which acted as ordinary infantry in the war.

51 Kjellén, *Bringing the soldier*, 15–22.

6. Russia's economy: bracing for the long haul

Emil Wannheden and Tobias Junerfält

THE SCALE OF THE war against Ukraine, as such, and the consequent international sanctions against Russia have had profound impacts on its economy. Russia has had to adapt to the sanctions, increase military expenditure and mobilise the defence industry. In the longer run, Russia needs a strong civilian economy to sustain a large and modern army that corresponds to the Russian political leadership's ambitions.

This chapter analyses how the war and the sanctions have affected the Russian economy and military expenditure during the year following the invasion on 24 February 2022. More specifically, it attempts to answer the following questions: first, what are the most important effects of the war and the sanctions on Russia's economy? Second, how much has Russia spent on its military in 2022?

Much of the media reporting on the effects of the sanctions and the war on Russia's economy has focused on estimates and forecasts of gross domestic product (GDP). The absence of a very large drop in Russian GDP in 2022 led some media reports to erroneously conclude that the sanctions have had a limited effect on the Russian economy. It is argued here that sanctions have indeed affected Russia's economy, and that Russia faces increasingly difficult trade-offs regarding government spending on the military versus spending on welfare and living standards. This chapter focuses on overall economic development, the energy and industrial sectors and government spending and revenues. The chapter does not focus on the effects on regional development, on the commercial and financial sectors, the rule of law and corruption, or education and research.

The chapter is organised as follows. The first section provides a chronological overview of the economic measures implemented by the government following the invasion on 24 February 2022. The second section analyses the impacts of the sanctions and the war on Russia's political economy, on its external trade, its overall economic development, and the energy and industrial sectors. The third section analyses the trends in spending on Russia's military and other public expenditure in 2022 and 2023 and the government's options for increasing its incomes. Finally, the last section presents the conclusions.

Unfortunately, it has become more difficult to access official Russian economic data since 24 February 2022. Russia has ceased publishing several economic indicators, notably some of its trade statistics and detailed data on federal and consolidated budget expenditure. This is a conscious strategy by the Russian government, aimed at casting doubt on the efficacy of the sanctions and concealing the costs of the war. Therefore, this analysis relies mostly on assessments by independent Russian and Western economists and analysts. Trade data can be inferred from Russia's trade partners, while some researchers have access to data from the Russian customs agency. Russian official sources are used as a comparison or when deemed sufficiently trustworthy. Among these are statements by the government and government officials, the texts of the Russian budget laws, and the data published by the Ministry of Finance on total federal budget revenue and expenditure.

6.1 Economic measures implemented by the government

The following section provides a timeline of economic measures implemented by the Russian government following the invasion in February 2022.

February–March 2022: Initial shock

The main aim of the sanctions imposed by the Western countries in 2022 was to weaken Russia's ability to finance the war.[1] The sanctions were harsher than Russia expected.[2] Around half of the Central Bank of Russia's (CBR) foreign exchange reserves were frozen, transactions with some of Russia's biggest banks were prohibited and some banks were excluded from the Society for Worldwide Interbank Financial Telecommunications (SWIFT). The sanctioning countries also put in place export controls on dual-use goods and the energy and transport sectors.[3] Hundreds of Western companies announced they would leave or curtail their operations in Russia.[4] Russian citizens started withdrawing cash from banks, sparking fears of a bank run. Citizens and companies exchanged roubles for dollars, causing the exchange rate of the rouble to decrease sharply.[5] Two weeks after the invasion, the rouble was trading at almost half its value preceding the invasion. Notably, however, the European Union (EU) did not impose an embargo on the import of Russian oil and gas.

Russian authorities responded quickly to support the economy and the financial system. Already on 25 February, the CBR announced measures to support Russian banks.[6] On 28 February, it raised the key interest rate from 9.5 to 20 percent and the government forbade companies and individuals from transferring foreign currency abroad. On 8 March, the CBR stopped exchanging roubles for dollars and imposed a limit on foreign currency withdrawals from Russian banks.[7] These measures helped to stabilise the Russian economy in the weeks following the invasion.

April–August 2022: Stabilisation

The economic uncertainty caused by the invasion benefited Russia in one important aspect – it contributed to raising the global market price of oil and gas. Since the European countries continued to import Russian oil and gas, Russia's energy incomes increased. Table 6.1 shows the total federal expenditures and revenues in 2022 and the first two months of 2023. Figure 6.1 shows the composition of federal budget revenues during the same period. In February 2022, federal budget income from oil and gas amounted to RUB 972 billion; in March, to RUB 1 208 billion; and, in April, to RUB 1 798 billion, or more than 60 percent of the total federal revenue during that month.

The high revenues from energy exports, in combination with falling imports, created a large current account surplus, which supported the rouble. In May, the government started easing the restrictions on selling foreign currencies.[8] By June, the CBR had cut the key interest rate to 9.5 percent, the pre-war level. In July, the IMF adjusted its original forecast of minus 8.5 percent Russian GDP growth to one of minus 6 percent, while that of the CBR was set at minus 5 percent.[9]

The government also increased its public spending in March and April (Table 6.1). The increase in spending during these months was reserved for the military, as well as for the national economy and social policy, presumably to counter the effects of the sanctions. In June, Russia defaulted on its foreign debt. However, the default had limited negative effects, since Russia was already cut off from international capital markets.

September–November 2022: Adaptation and mobilisation

In a video meeting held on 12 September, President Vladimir Putin signalled his expectations of his cabinet and civil servants regarding the Russian economy: "Russia is coping with the external pressure… the

Table 6.1 Federal budget revenue and expenditure from January 2022 to February 2023; billion RUB

Month	Taxes on oil and gas	Other public revenue	Total revenue	Total expenditure	Surplus/Deficit
January 2022	795	1 294	2 089	1 964	125
February	972	1 145	2 117	1 829	288
March	1 208	1 756	2 964	2 225	738
April	1 798	1 067	2 865	2 975	-110
May	886	1 123	2 009	1 555	454
June	718	1 255	1 973	2 095	-121
July	770	991	1 761	2 657	-90
August	672	1 157	1 829	2 170	-340
September	689	1 444	2 133	2 215	-83
October	1 271	1 129	2 400	2 326	73
November	877	1 763	2 640	2 211	429
December	931	2 114	3 045	6 908	-3 863
January 2023	426	931	1 356	3 117	-1 776
February	521	1286	1 807	2 627	-1 387
2022 total	**11 586**	**16 239**	**27 825**	**31 131**	**-3 306**
2023 total*	**947**	**2217**	**3 163**	**5 744**	**-3 163**

Remarks: *only first two months of 2023.

Source: Julian Cooper, *Military expenditure in 2023 according to the budget law of 5 December 2022*, unpublished research note for 2022; Finmarket, *Defitsit biudzheta RF v ianvare otsenivaetsia v 1,76 trln rub.*, 6 February 2023, accessed 2 May 2023, http://www.finmarket.ru/news/5891710 for January 2023; Finmarket, *Za 2 mesiatsa defitsit biudzheta RF sostavil 2,6 trln rub.*, 6 March 2023, accessed 2 May 2023, http://www.finmarket.ru/news/5908513 for February 2023.

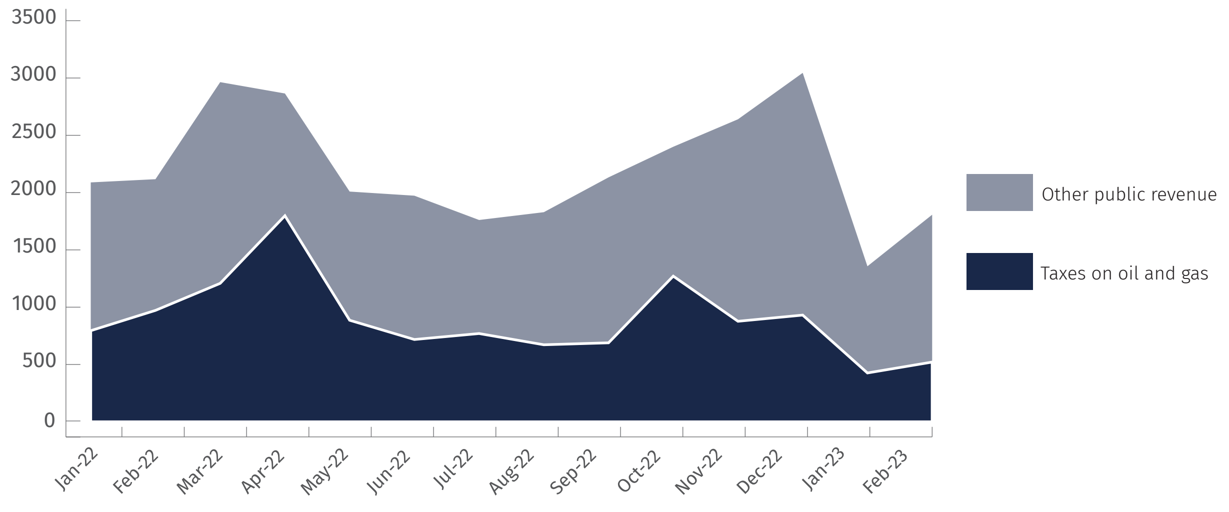


Figure 6.1 Composition of federal budget revenues from January 2022 to February 2023; *billion RUB*
Source: Julian Cooper, *Military expenditure in 2023 according to the budget law of 5 December 2022*, unpublished research note for 2022; Finmarket, *Defitsit biudzheta RF v ianvare otsenivaetsia v 1,76 trln rub.*, 6 February 2023, accessed 2 May 2023, http://www.finmarket.ru/news/5891710 for January 2023; Finmarket, *Za 2 mesiatsa defitsit biudzheta RF sostavil 2,6 trln rub.*, 6 March 2023, accessed 2 May 2023, http://www.finmarket.ru/news/5908513 for February 2023.

economic *blitzkrieg* [by the West] did not work" and "the economy is gradually entering a trajectory of growth."[10] While setting ambitious targets for the economy as a whole, the government also started implementing more measures to support its war effort in Ukraine. On 21 September, the government announced a partial mobilisation. Over the course of the autumn, about 300 000 Russian men were drafted into the army. Many more chose to leave the country, contributing to an already serious problem of brain drain.[11] On 21 October, Putin ordered the creation of a new Coordination Council to oversee the provision of supplies and materials for Russia's Armed Forces during the invasion of Ukraine.[12]

December 2022 onwards: Decreasing energy revenues

The Russian oil industry, a major source of revenue for the Russian state, has been faced by two rounds of Western sanctions: first, the EU import ban, together with the EU/G7 oil price cap of USD 60 per barrel, in December 2022; and, second, the ban on refined petroleum products, in February 2023.[13] This has put downward pressure on the price Russia can get for its oil.

Federal budget expenditure from December 2022 onwards was unusually high (Table 6.1). The government resorted to levying a large ad-hoc tax on Gazprom during the last three months of 2022 to boost the state's coffers.[14] Nonetheless, despite the exceptionally high energy incomes during 2022, Russia ended the year with a fiscal deficit equal to 2.3 percent of GDP. In January and February 2023, energy incomes were 46 percent lower than the year before.

Overall, the Russian government and authorities have proved competent at managing the initial economic shock caused by the war and the sanctions. Russian businesses, which are used to operate in an uncertain and volatile economic and regulatory environment, have demonstrated a capacity for adaptability that has allowed them to survive the current economic turbulence.[15]

6.2 Consequences of the war and sanctions

The war and the sanctions have affected the Russian economy in various ways. The following section goes through the most important changes.

Russia's changing economy: more state control, less productivity

Russia's domestic political economy, here understood as Russia's economic system and the relations between its domestic institutions and actors, is changing and adapting as a consequence of the war and the sanctions. In 2014, when sanctions were imposed in connection with the illegal annexation of Crimea and the war in the Donbas, Russia started pursuing a policy of sanctions-proofing, de-dollarisation and securitisation of its economy.[16] This policy has helped it weather the effects of the sanctions. The economist, Richard Connolly, argued in 2018 that Russia has fashioned its economic system in a way that sacrifices economic growth for the ability to respond quickly and effectively to sanctions.[17] This tendency has been reinforced after February 2022.

Russia's 2021 National Security Strategy describes its economy as an integral part of its sovereignty and national security (see Chapter 3). Economic sanctions are described as a threat to Russia's national interests.[18] The state is the most important economic actor in Russia; it accounts for at least a third of Russian GDP and more than half of formal sector employment.[19] The dominance of the state gives it the capacity to protect vulnerable sectors of the economy and reshape Russia's interaction with the rest of the world economy.

The most important sector of Russia's economy is the natural resources sector. The sale of oil, gas and other mineral fuels to other countries generates enormous profits, which are taxed by the state. Around 40 percent of Russia's federal budget is financed this way (see Table 6.1). The sector is controlled by state-owned enterprises and oligarchs who have close links to the government. Russia's economic growth depends in large part on the export of natural resources and their international prices.[20] The profits generated by the natural resources sector sustain large and usually state-owned companies that have survived from the Soviet era. Examples of such companies are those in manufacturing and the defence and other heavy industries. These companies are generally inefficient and, with the notable exception of the defence industry, unable to sell their products on the international markets. To survive, they rely on domestic demand and purchase orders from the government.[21]

The fact that Russian companies are operating under economic stress caused by the sanctions has increased their dependence on the state.[22] The sanctions have forced many Russian oligarchs who used to be able to travel freely and use their villas and yachts in the West to reconcentrate their activities to Russia. The oligarchs' dependence on the state has increased, since the lion's share of their accessible assets is now located within Russia. Furthermore, the government has increased pressure on businesses to contribute to the federal budget and the war effort.[23] Putin has made it plain that he expects large corporations and oligarchs to behave patriotically by remaining and investing in Russia.[24] Property rights and the rule of law have been weakened further, making political connections more important if businesses are to survive.[25] The state has gradually taken control of assets of Western corporations and awarded them to oligarchs whom it perceives as loyal.[26]

The process of securitising and adapting the domestic political economy to sanctions and war continued throughout 2022. The most prominent example is the executive order signed by Putin in October 2022, introducing a regime of "increased readiness," and authorising governors in certain regions to undertake a wide array of measures, including limiting economic and financial activity, transferring the ownership of assets, and taking control over critical infrastructure.[27] In practice, this executive order creates a legal basis for the state to start introducing a war economy.[28] As of May 2023, it does not appear that regional governors have used the powers introduced by the executive order.

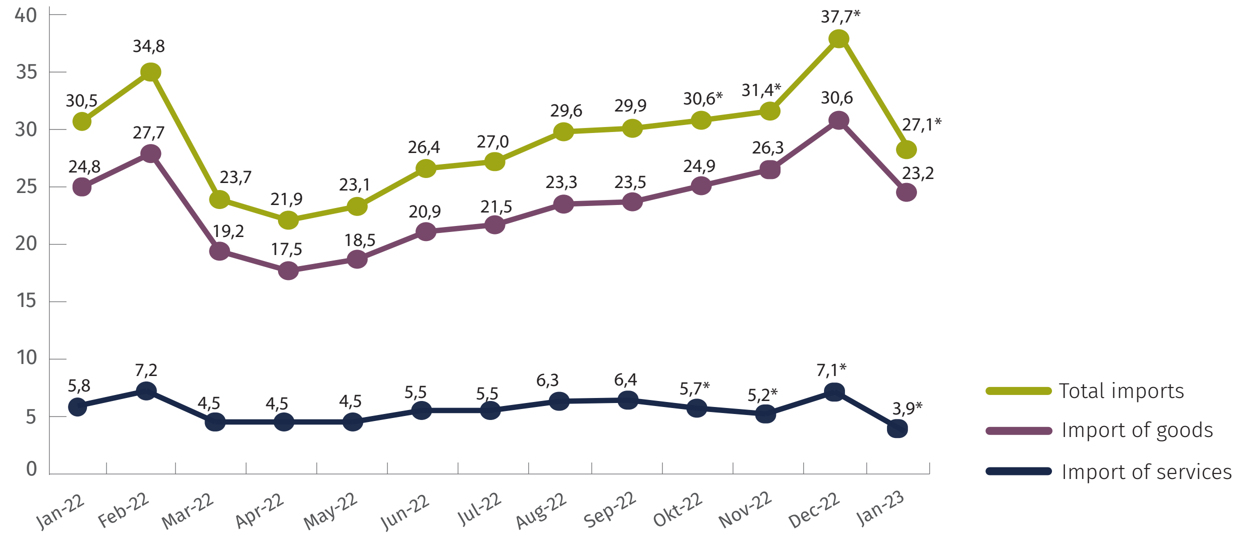


Figure 6.2 Russia's imports from January 2022 to January 2023; *billion USD.*
Remarks: * denotes an estimate.
Source: Central Bank of the Russian Federation, *Statistika vneshnego sektora*, accessed 28 March 2023, www.cbr.ru/statistics.

Shifting import dependencies

The trade sanctions have had a major impact on the structure of Russia's imports. In 2021, an estimated 21 percent of Russia's GDP was derived from imports, and various sectors of the Russian economy depended upon foreign input goods.[29] After the invasion, total imports to Russia decreased drastically during a few months, but then bounced back during the rest of 2022, followed by a downward dive in January 2023 (Figure 6.2).[30] At the end of 2022, imports from regions and countries such as the EU, the United States (US), the United Kingdom (UK) and Japan remained below their pre-war levels, whereas the reverse was true for not least China and Turkey (Figure 6.3).[31] Moreover, imports from Belarus, Armenia, Kazakhstan, Kyrgyzstan and Uzbekistan increased during 2022. Increase in imports from certain countries partly indicates a shift in major import origins, but also indicates an increased importance of the imports through third countries, so-called transshipments. Transshipments are used by Russia and its trading partners to circumvent the trade sanctions.[32]

Russia has thus been able to shift its major import origins and recover its levels of total import during the second half of 2022. However, semiconductors and electronic integrated circuits, some of which are classified as dual-use technologies, are among those goods affected by trade sanctions. In terms of total value, these imports decreased during the first quarter of 2022, but by the end of the year, import levels were well above pre-war levels. By the end of 2022, imports from China and Hong Kong, often transhipped through Turkey, dwarfed semiconductor imports from other countries. It is not evident to what extent these semiconductor imports are of the proper quality for their purpose, nor is it clear to what extent they have ended up in the Russian defence industry.[33] At the same time, Russia and its military have previously obtained access to Western-made electronic components by transshipments through third countries, such as Turkey.[34] However, the Turkish government has announced that as of 1 March 2023 transshipments of sanctioned goods to Russia from Turkey will be discontinued.[35]

During 2022, China also claimed a greater share of various segments of the Russian market other than semiconductors, such as smartphones, certain household appliances, passenger vehicles and vehicle components.[36] Moreover, Russia imported unmanned aerial vehicles (UAV) and spare parts from China throughout 2022.[37] Even before the invasion, China was one of Russia's major import origins for machinery, mechanical appliances and electrical equipment. Russia relies on technology imports from other countries in East Asia and Southeast Asia, as well. Some of these imports, primarily those from Japan, South Korea and Taiwan, have been subject to export restrictions, whereas others, mostly those from China and ASEAN countries (Association of Southeast Asian Nations), have not. Whether imports from China and ASEAN will be able to substitute technology goods previously sourced from Japan, South Korea and Taiwan remains to be seen.[38]

The trade relationship between China and Russia is asymmetric; in 2021, Russia was not even among

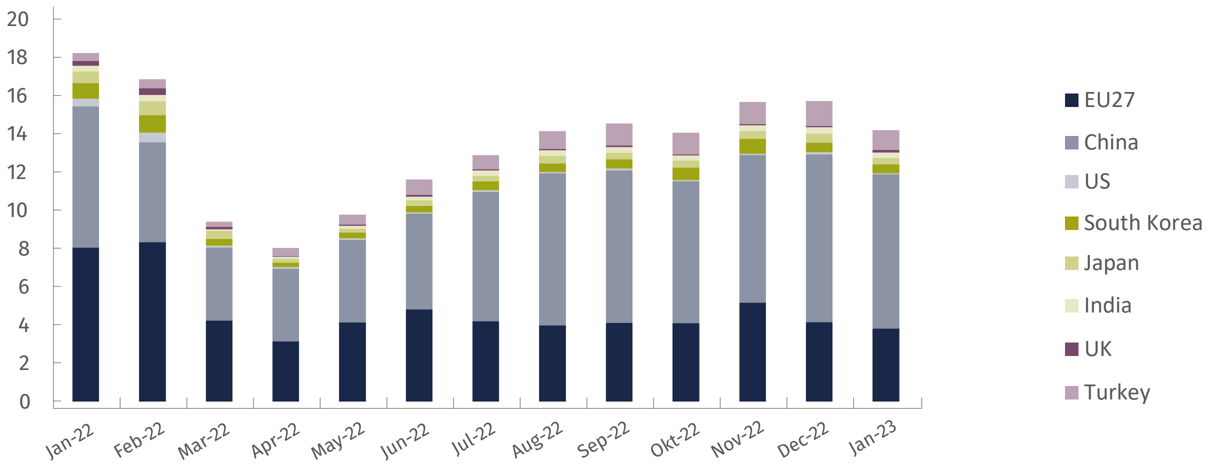


Figure 6.3 Russia's imports from selected countries and regions from January 2022 to January 2023, *billion USD.*

Remarks: The data presented in this figure is based on mirror statistics for 34 countries. Total monthly values do not correspond to the CBR data presented in Figure 2. However, the data represents the bulk of Russian trade (about 75 percent of total imports and exports for Russia in 2019).

Source: Bruegel, *Russian foreign trade tracker*, accessed 28 March 2023, https://www.bruegel.org/dataset/russian-foreign-trade-tracker.

China's ten most significant export destinations.[39] The Sino-Russian trade relationship grew in importance in various ways during 2022, even though its asymmetric character is likely to persist for the foreseeable future. In the long term, shifts away from Western import sources, and an increased emphasis on primarily Chinese imports, will strengthen Russia's economic dependency upon its large neighbour.

An ongoing realignment of energy exports

Exports have also been affected by the sanctions. In 2021, they accounted for around 31 percent of Russia's GDP.[40] As mentioned above, the natural resources sector is of paramount importance for the Russian economy. The bulk of Russian exports is derived from the energy sector, in terms of hydrocarbons such as oil, gas and coal. Other natural resources of significance for Russian exports include various chemicals and minerals, as well as wood and wood products.[41]

Even though energy-related exports from Russia are dominated by oil and gas, from an international perspective Russia is also a major exporter of nuclear technology and fuel. State-owned Rosatom and its subsidiaries have a strong international role as a nuclear-power supplier.[42] The Russian nuclear industry is a leading supplier for all kinds of nuclear-related services, partaking in about 50 percent of all international deals, according to one estimate.[43] Furthermore, during the period 2018–2022, Russia was the world's second-largest exporter of arms, after the US, even though the gap to France, number three, is shrinking.[44] However, the arms industry's share of Russia's total exports is limited.[45]

At an aggregate level, Russia's exports remained relatively stable throughout 2022, with a few bumps in the road. In the beginning of 2023, however, there was a steep dive in export levels (Figure 6.4).[46] Russia's exports to the EU reached a local peak in March 2022, before they started on a downward trend during the rest of 2022 and in the beginning of 2023. Exports to other Western countries, such as the US, the United Kingdom (UK) and Japan, also decreased during this period, whereas exports to China and India increased (Figure 6.5).[47]

Oil industry

The oil industry remains Russia's most important economic sector. In 2022, Russia exported oil for an estimated worth of USD 223.4 billion. Crude oil exports accounted for the greatest share, at USD 158.7 billion, whereas oil products represented USD 64.7 billion.[48] Oil exports accounted for about 40 percent of the total value for exports of goods in 2022.[49]

The Russian oil industry has been the main target of the Western sanctions regime against the Russian energy sector. The EU was previously a significant importer not only of Russian crude oil, but also of refined petroleum products, notably diesel and fuel oil. However, since the invasion, imports to the EU of both crude oil and oil products have decreased, even though import volumes were still significant during most of 2022 (Figure 6.6).

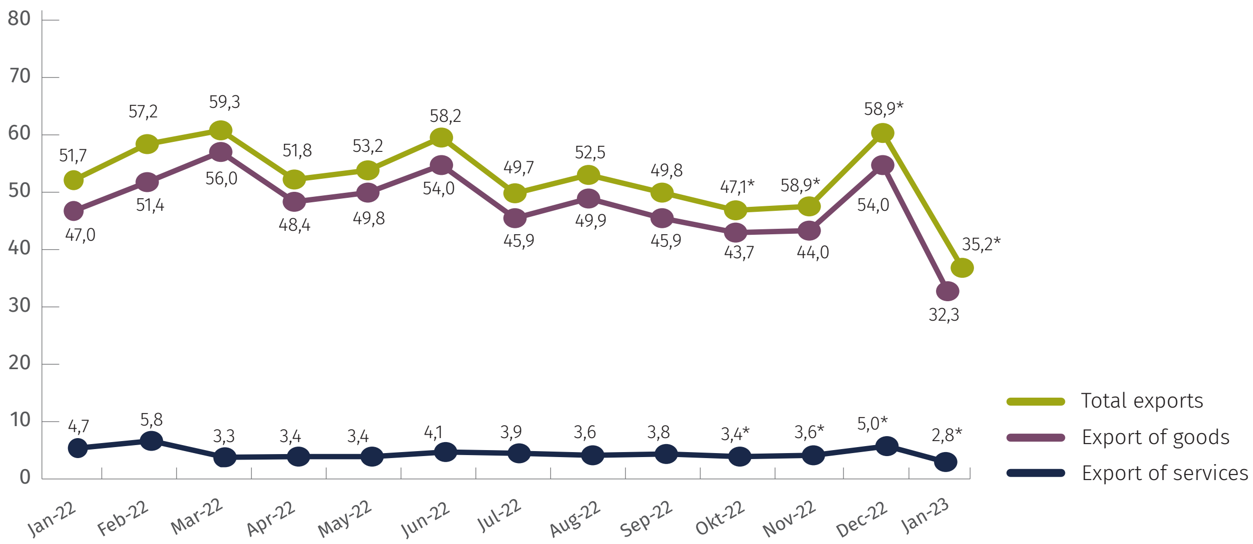


Figure 6.4 Russia's exports from January 2022 to January 2023, *billion USD*.
Remarks: * denotes an estimate.
Source: Central Bank of the Russian Federation, *Statistika vneshnego sektora.*

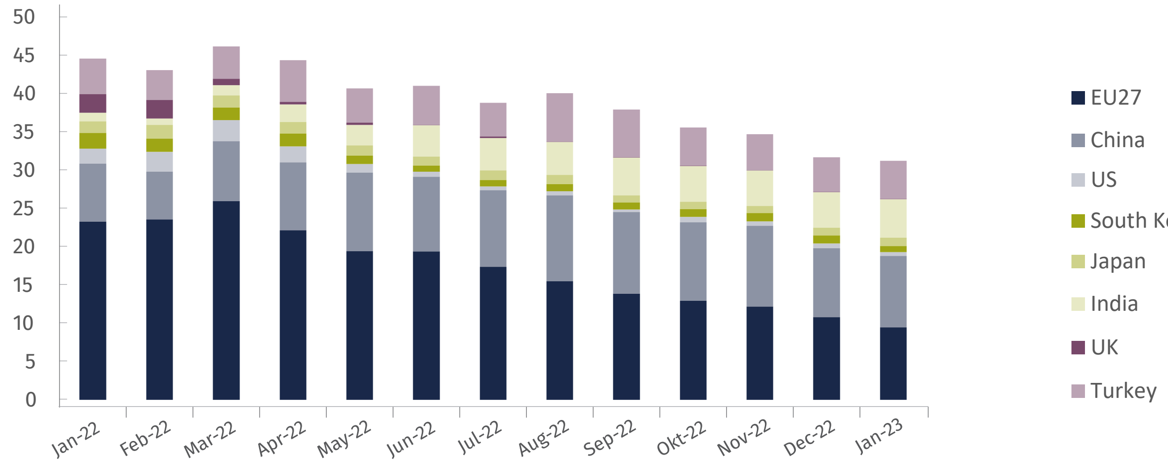


Figure 6.5 Russia's exports to selected countries and regions from January 2022 to January 2023, *billion USD*.
Source: Bruegel, *Russian foreign trade tracker.*

The two rounds of sanctions in late 2022 and early 2023, respectively, have been followed by continued declines in Russian oil revenues from the EU market.[50]

For the Russian oil industry, a likely effect of the loss of the EU as a major export market, combined with limited domestic demand for refined petroleum products, is an increasing emphasis on the export of crude oil to Asia.[51] Especially India, but also China and Turkey, increased in importance as export markets for Russian oil, chiefly crude oil, during 2022 (Figure 6.6).[52] Not only did India, China and Turkey become more important for Russia in terms of oil earnings, but demand from these countries also helped the Russian oil industry, in 2022, to keep crude oil production, in terms of barrels per day, at pre-war levels. Moreover, even if India, China and Turkey are not major importers of Russian refined oil products, their domestic oil refineries can blend and refine Russian crude oil to resell to the EU and third countries without breaking the sanctions.[53]

Concerning the sanctions and their effect on oil prices, there might be ways for the Russian oil industry to sidestep the price cap, for example by reporting exaggerated shipping costs when redirecting exports from Europe to Asian countries such as India.[54] The price cap

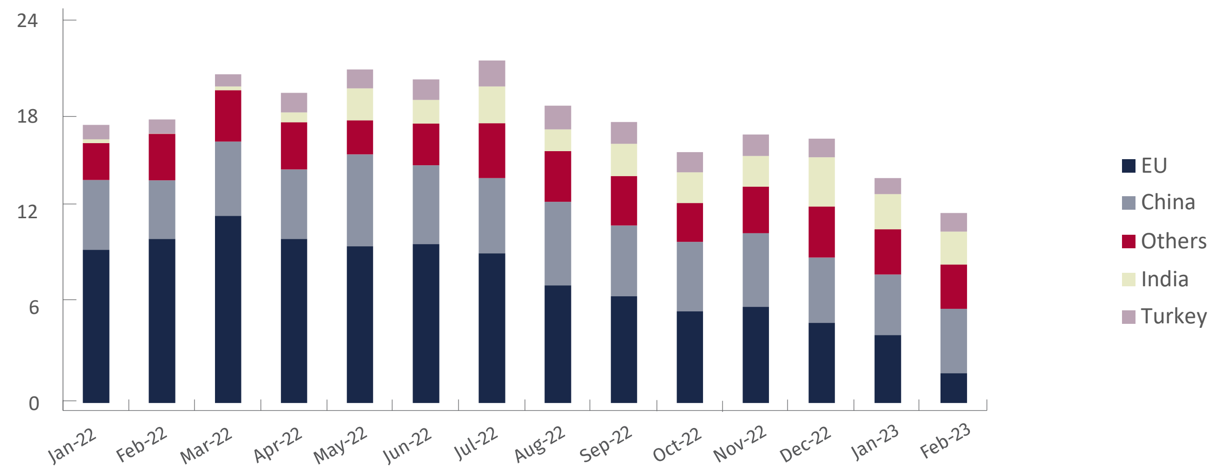


Figure 6.6 Export destinations for Russian oil from January 2022 to February 2023, *billion USD*.
Remarks: Oil includes both crude oil and oil products. Major export destinations within the "Others" category include Egypt, United Arab Emirates, Malaysia, the US, as well as unverifiable export destinations.
Source: CREA Russia Fossil Tracker.

incentivises Russian oil companies to underreport the actual prices of their oil exports. Together with the somewhat lesser use of Western shipping services, this entails increased difficulties for foreign observers to determine the actual prices being paid per barrel of Russian oil. Moreover, the Urals reference price might not yet take into account the shift in major export destinations that has taken place within the Russian oil industry. One estimate, based on Russian customs data, suggests that Russian oil was being sold at an average price of USD 74 per barrel, well above the price cap, in December 2022.[55] There has been an international discussion regarding a lowering of the current oil price cap, but, as of April 2023, no such changes have been implemented.[56]

The Russian government is expecting oil and gas revenues to be more than 20 percent lower in 2023 compared to 2022, and bases the federal budget on an estimated average price of USD 75 per barrel of oil.[57] The Russian government is gradually increasing the taxes on oil and gas to ensure that they are reflective of the actual incomes of the oil and gas companies.[58] As of April 2023, the Russian government no longer uses the Urals market price as its reference for oil revenues. Instead, the Brent price minus a gradually decreasing discount is now used as reference when extracting taxes from the Russian oil industry.[59]

Western sanctions imposed upon the Russian oil industry and the consequent shift in exports towards more distant customers in Asia have shed light on Russia's limited domestic shipping capacity. Moving forward, Russia will either have to upsize and modernise its own fleet of oil tankers, or rely on non-Western shipping companies that are willing to circumvent sanctions.[60] The loss of access to Western markets might also affect the ability of the Russian oil industry to negotiate prices with international trade partners.[61] However, Russia has long been a "price-taker," rather than a "price-maker," due to the limited market share, from a global perspective, of the Russian oil industry.[62] Moreover, the sanctions may exacerbate pre-existing long-term challenges for the production capacity of the Russian oil industry. The Russian oil industry has previously relied on foreign, not least Western, technology, know-how, capital and partnership opportunities for new ventures, including in the Arctic region.[63]

Gas industry

In 2022, Russia exported gas for an estimated worth of USD 93.3 billion.[64] This constituted about 20 percent of the total value for exports of goods. Increased gas prices more than compensated for the decrease in export volumes, and contributed to Russia's significant trade surplus in 2022.[65]

The Russian gas industry has not been targeted by the Western multilateral sanctions regime. The EU was by far Russia's largest export market for gas before the invasion. This remains the case during 2022. Turkey and China were also important export destinations for gas throughout 2022. However, after exceptionally high levels during the first half of 2022, total gas earnings have been dwindling, in particular since EU countries, such as Germany, have decreased or ceased their imports (Figure 6.7).[66]

However, a major shift towards Asia as an export market for the Russian gas industry comes with stricter infrastructural limitations than is the case for the oil

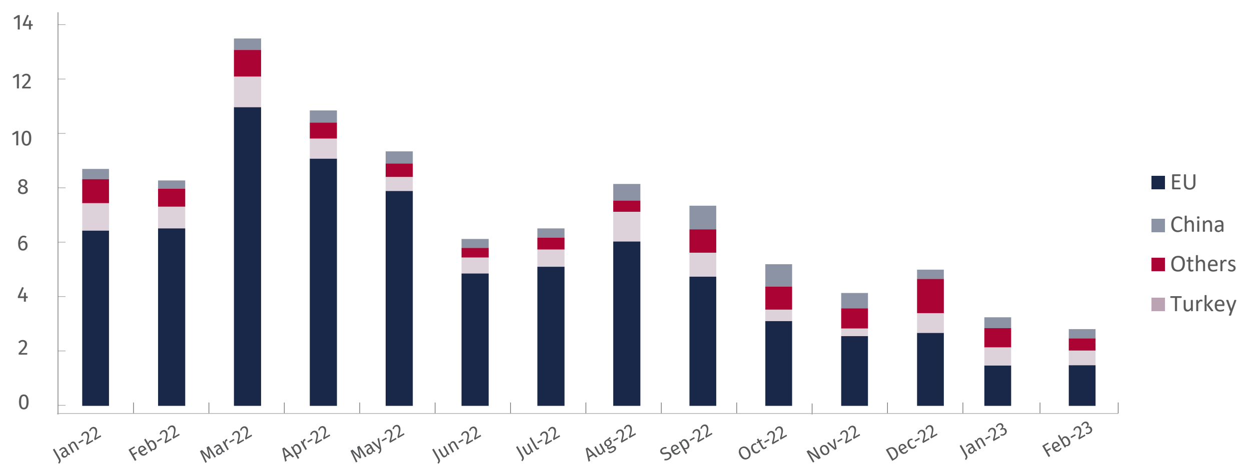


Figure 6.7 Export destinations for Russian gas from January 2022 to February 2023, *billion USD.*
Remarks: Gas includes both LNG and pipeline gas. Major export destinations within the "Others" category include Japan, Moldova, Serbia and South Korea.
Source: CREA Russia Fossil Tracker.

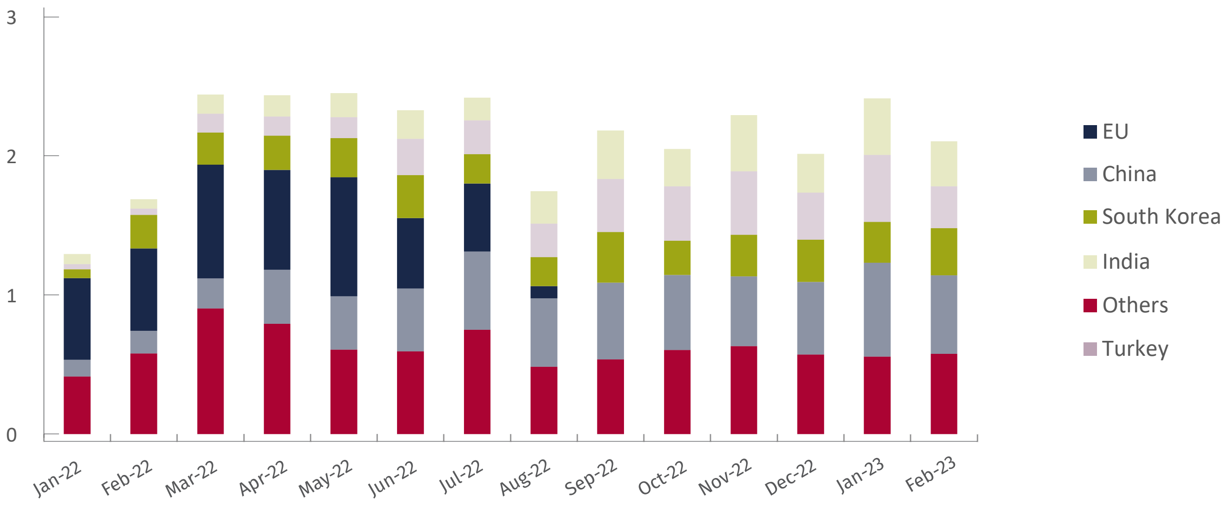


Figure 6.8 Export destinations for Russian coal from January 2022 to February 2023, *billion USD*.
Remarks: Major export destinations within the "Others" category include Japan, Taiwan, Morocco and Brazil.
Source: CREA Russia Fossil Tracker.

industry. A large proportion of Russian gas exports presuppose fixed pipelines between Russia and the export destination. Whereas such pipeline infrastructure is already in place between Russia and Europe, it is scarce between Russia and Asia. Notably, the gas exports derived from Western Siberia, which target Europe and the Middle East, do not employ the same infrastructure as gas exports derived from Eastern Siberia, which are directed toward China.[67]

Expanding pipeline infrastructure to China has been planned for some time, but has yet to be implemented. In the short term, the potential for vastly increased exports of pipeline gas to China thus appears limited. Moreover, China does not rely heavily on Russian gas and seems prone to maintain the current level of dependency.[68] It thus appears likely that Russia's gas exports will shrink in 2023.

Furthermore, as with Russia's oil industry, the gas industry also depends on foreign technology, know-how and capital for new ventures. This is the case not only for pipeline construction, but also for growth in LNG production, which would be another way for Russia to increase exports to Asia. Insufficient access to Western technology and partnership opportunities constitutes a long-term issue for the Russian gas industry.[69]

Coal industry

Russian coal has also been targeted by Western sanctions, albeit laxer than those imposed upon Russian oil.[70] Russia exported coal for an estimated USD 25.3 billion in 2022, a minor share of its total energy-related exports. During 2022, the single-most significant export destination for Russian coal was China, followed by the EU, South Korea, Turkey and India. At the same time, for these export destinations, except in the case of South Korea, coal imports are trumped by gas and oil. Additionally, coal exports to the EU have ceased during the second half of 2022 (Figure 6.8).[71] As with the oil and gas industry, the Russian coal industry suffers from infrastructural constraints. Insufficient railway and port capacity limits Russia's short-term ability to realign coal exports in an efficient manner.[72]

Worsening prospects for economic development and living standards

To what degree did the sanctions and the war affect Russia's economic growth in 2022 and its prospects in 2023? While a more rigorous analysis would be needed to separate the influence of the war and sanctions from other factors affecting GDP growth, a simple counterfactual analysis is possible (Table 6.2). Before Russia's invasion in February 2022, the IMF predicted that its

Table 6.2 Russian GDP growth in 2022 and 2023, percent.

	2022f	2023e
IMF (December 2021)	2.8	2.1
IMF (March 2023)	-2.1	0.7
World Bank	-2.1	-0.2
Ministry for Economic Development	-2.1	1.2

Remarks: **e** – estimate; **f** – forecast.
Source: Interfax, *Minekonomrazvitiia prognoziruet rost;* World Bank, *Europe and Central Asia Economic Update*; IMF, *Russian Federation Country Data.*

real GDP growth would be 2.8 percent in 2022 and 2.1 percent in 2023. The actual figure for 2022, reported by the Russian federal statistics service, Rosstat, was a decrease of 2.1 percent; the Ministry of Economic Development's forecast for 2023 is an increase of 1.2 percent.[73] The World Bank, on the other hand, predicts a 0.2 contraction in 2023, while the IMF predicts 0.7 percent growth.[74]

This comparison suggests that Russia lost several percentage points of real GDP growth by invading Ukraine in February 2022. The GDP loss would have been even greater if it had not been for the high international oil and gas prices. In 2014–2015, the situation was the reverse; the sanctions were more limited, but their effects on Russia's economy were reinforced by a drastic fall in energy prices.[75]

What about the impact on Russia's long-term growth potential? Already before the war, Russia's growth potential had been assessed as limited. One study estimated that Russia's annual growth potential in the coming two decades would be only about 1.5 percent, because of low productivity and unfavourable demographics.[76] The war and the sanctions have only exacerbated these problems. Russia is experiencing a demographic crisis: since 2017, its population has decreased by about two million people. In 2022, at least half a million Russians left the country without coming back. Of these, about 100000 were workers in information technology (IT), or approximately ten percent of Russia's IT workforce.[77] Owing to the effects of the war, Russia's birth rate in the second half of 2023 could decline to the lowest in the country's history.[78] Declining productivity can also be expected, due to sanctions on technology and the withdrawal of foreign firms and foreign direct investment. Corruption is likely increasing as a result of the worsening repression and lack of rule of law (also see Chapter 3).

It is possible that the GDP figures published by Rosstat understate the degree of economic contraction in 2022. In any case, as Russia's economy adapts to the sanctions and the war, GDP becomes a less meaningful indicator for understanding the impact of sanctions. GDP measures the added value of production, including production of military materiel, but it does not measure welfare effects. In addition, it is difficult to measure product quality with GDP. The substitution of Western imports with lower quality domestic inputs is not reflected in the GDP calculations.[79] In practice, GDP could be kept at more or less the same level as before. However, the worsening quality of input factors means produced goods are of lower quality. In other words, sanctions could be effective at reducing the quality of goods, including military materiel, without necessarily affecting GDP.

Living standards in Russia have declined after February 2022, but it is difficult to estimate to what extent. Rosstat has changed its methodology for calculating real incomes, making it an untrustworthy indicator. The same is true for the rate of inflation, which is likely higher than the official figures (11.9 percent in 2022).[80] Retail-trade turnover, a proxy for private consumption, decreased by about 10 percent in 2022.[81] This suggests that Russian households cut back on spending in 2022, with a decrease in their living standards as a result. According to the World Bank, the poverty rate increased from 2.9 to 3.5 percent in 2022 and is set to increase further in 2023.[82]

More weapons, less refrigerators: adapting manufacturing

The trade sanctions have had an adverse impact on some sectors of Russia's manufacturing industry.[83] It is not certain that imports from countries such as China and India can fully substitute critical inputs and goods previously imported from Western countries. The production capacity of some segments of the Russian defence industry has been affected, as the access to various Western-made defence-related inputs has been curtailed.[84] At the same time, Russia has other sources for defence imports, such as Iran, Belarus, North Korea and potentially China.[85]

Overall industrial production in Russia decreased by only 0.6 percent in 2022. Table 6.3 shows the 2022 year-on-year change in production in selected sectors. While production in aluminium and concrete increased, steel production decreased. Some categories that provide inputs for the defence industry and the Russian Armed

Table 6.3 Industrial production, selected sectors, 2022 year-on-year change; *percent.*

Sector	Increase/ decrease (%)
Specialised clothing, including uniforms	62.3
Radar equipment and remote radio equipment	21.7
Aluminium	18.1
Ball or roller bearings	15.8
Concrete	9
Pharmaceuticals	8.6
Metal goods, including ammunition	7
Steel	-10.7
TVs	-36
Household refrigerators and freezers	-42.2
Household washing machines	-49.2
Passenger cars	-67

Source: Rosstat, *Dinamika promyshlennogo proizvodstvo v 2022 godu*, accessed 1 March 2023, www.rosstat.gov.ru.

Forces increased significantly, notably ammunition, ball and roller bearings, specialised clothing and uniforms, and radar equipment. Production of certain categories of civilian goods suffered greatly, notably passenger cars, washing machines, refrigerators and TV sets. However, the production of pharmaceuticals increased.[86]

The manufacturing segments that fared worst were to some extent dependent on inputs, or Russian-based production, derived from companies from the sanctioning countries. Following the withdrawal of Western firms from Russia, imports of washing machines from China and Turkey soared during the second half of 2022. The same was the case for refrigerators and freezers, where Serbia and Uzbekistan also played a role. A similar dynamic has affected passenger cars, where Chinese imports have taken a larger share of the market. Moreover, following sanctions limiting the maximum value of vehicle exports to Russia, there has been an increased emphasis on the imports of used and lower-priced vehicles, including from Germany, Japan and South Korea. At the same time, Russian domestic vehicle production and civilian aircraft industry face issues related to access to parts.[87]

Military expenditure

The question of how much Russia is spending on its military has become increasingly important, since the main aim of the sanctions was to constrict Russia's ability to finance the war. Since Russia has classified its federal budget expenditures, it is impossible to identify the exact extent of total military expenditures in 2022.[88] The amount of classified spending in the Russian federal budget has increased from 18 percent in 2021 to 22 percent in 2022.[89] Nevertheless, it is possible to draw some conclusions about the current trend in Russian military spending by looking at available expenditure figures for the first months of the war.

Two different terms are used here to refer to Russian military expenditure. Spending on "national defence" refers to the expenditure contained in the national defence budget item in the Russian federal budget. "Total military expenditure" refers to SIPRI's definition of military expenditure, which contains additional military-related expenditure that falls under other items in the Russian budget.[90] Table 6.4 contains an overview of Russia's planned spending on national defence and total military expenditure in the 2022 federal budget listing and the 2023 federal budget law.[91] The 2023 budget lacks a more detailed breakdown of national defence spending. According to these budgets, Russia planned to spend 4 percent of GDP on its military in 2022 and 4.4 percent in 2023.[92] There is thus a clear trend of upward revisions of planned total military expenditure since the invasion in February 2022. As a comparison, in 2021 the US spent 3.5 percent of its GDP on military expenditure, China 1.7 percent and the UK 2.2 percent.[93] The NATO target for each alliance member's military spending is 2 percent of GDP.

Figure 6.9 shows the share of Russia's GDP devoted to total military expenditure since 2012. 4.4 percent of GDP is a high figure compared to other military powers, such as the US and China, but it is nothing exceptional

Table 6.4 Russia's planned military spending 2022 and 2023; *billion RUB, percent*

	2022	2023
National defence budget, of which:	**4 544**	**4 972**
Armed Forces	3 483	
Mobilization and ex-forces training	17	
Mobilization of the economy	3	
Collective security and peace-keeping	4	
Nuclear weapons complex	49	
International military-technological cooperation	15	
Applied R&D in the field of national defence	487	
Other questions in the area of national defence	411	
Other military expenditure	**1 355**	**1 698**
Total military expenditure	**5 896**	**6 668**
GDP	**146 065**	**149 949**
Total military expenditure as % of GDP	**4.04**	**4.43**

Source: August 2022 budget listing quoted in Cooper, *Military expenditure in 2023*; Ministry of Finance, *Biudzhet dlia grazhdan*, accessed 22 February 2023, https://minfin.gov.ru/ru/perfomance/budget/process/utverzhdenie/budget_citizen.

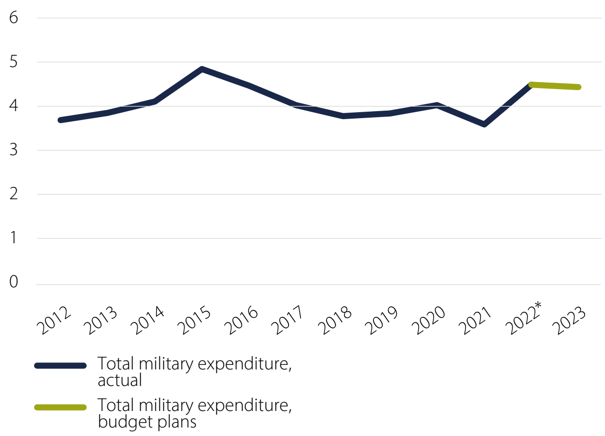


Figure 6.9 Russia's total military expenditure as share of GDP 2012–2022, *percent.*

Remarks: 2022* denotes authors' estimate.

Source: *SIPRI Military Expenditure Database* for 2012 to 2014; Cooper, *Military Expenditure in 2023* for 2015 to 2023; authors' calculations.

for Russia. In fact, Russia spent an even higher share in 2015 and 2016, during the efforts to modernise the Armed Forces.[94] As far as economic planning goes, the relatively "normal" amounts of planned military spending in 2022 suggest that the Russian leadership was not preparing for a protracted and costly war. By July 2022, Russia had already spent more than 80 percent of its initial 2022 allocation for national defence.[95]

While there is no data on actual military expenditure for the second half of 2022, it is known that by the end of the year, Russia had spent 11.2 percent more on its total federal budget than planned in the August 2022 budget listing.[96] An estimate of actual total military expenditure in 2022 can thus be made. Assuming total military expenditure also increased by 11.2 percent, it would mean its share of GDP was 4.5 percent in 2022, equal to RUB 6 556 billion.[97] The Norwegian Defence Research Establishment estimate is 4.7 percent of GDP.[98]

A complicating factor relates to regional budget spending and extra-budgetary spending. These expenditures are not included in the federal budget, but included in the "consolidated budget." There are indications that a part of military expenditure has been moved from the federal budget to the regions' budgets, further decreasing the transparency of military expenditure.[99] In addition, burdening the regions with military expenditure will affect their ability to finance housing, schools and other welfare.[100]

The level of military spending is a matter of political priorities, and Putin has made his priorities clear. On 21 December 2022, Putin met with the senior officials of the Ministry of Defence and declared: "We have no restrictions on funding the military. The country, the government will give everything that the army asks for." During the same meeting, Minister of Defence Sergei Shoigu announced that the number of personnel in the Armed Forces would expand to 1.5 million servicemen, among a number of other military reforms that will require substantial increase in military spending.[101] In practice, the government arbitrarily revises the national defence budget upwards as needed, without disclosing how much it is already spending on its military. It is evident that the sanctions, while having a large economic impact overall, have not induced a reduction in military spending. Military expenditure has increased only gradually, and not to the degree that one would expect given the scale of the war in Ukraine. This may be due either to a political hesitation to treat the war as anything more than a "special military operation" that requires limited funding, or because of absorption bottlenecks that make further increases of military expenditure inefficient.

Other government spending

While military expenditure is set to rise, spending cuts are foreseen for other important areas. Table 6.5 shows planned expenditure for all the budget items in the August 2022 budget listing and the 2023 budget law (see also Figure 6.10). The budget as a whole is expanded by 5.2 percent. However, if inflation corresponds to

Table 6.5 Planned expenditure by budget item for 2022 and 2023, *bn RUB, percent.*

Budget items	August 2022 budget listing	2023 budget law	2023 budget law, real terms	% change
General state matters	2 629	2 008	1 898	-27.8
National defence	4 679	4 973	4 699	0.4
National security	2 788	3 564	3 368	20.8
National economy	4 318	3 801	3 592	-16.8
Housing	645	591	558	-13.4
Environment	355	352	333	-6.3
Education	1 319	1 410	1 332	1.0
Culture	205	197	186	-9.2
Healthcare	1 533	1 524	1440	-6.1
Social policy	6 453	7 674	7252	12.4
Sports	90	71	67	-25.5
Media	128	120	113	-11.4
Debt servicing	1 403	1 519	1 435	2.3
Budget transfers	1 096	1 252	1183	8.0
Total expenditure	**27 614**	**29 056**	**27 458**	**-0.6**

Remarks: Real terms based on the Ministry of Economic Development's forecast 5.5 % yearly inflation in 2023. Percentage change refers to change between August 2022 budget listing and the 2023 budget expressed in real terms.

Sources: August 2022 budget listing quoted in Cooper, *Military expenditure in 2023*; 2023 federal budget law, accessed 2 May 2023, http://publication.pravo.gov.ru/Document/View/0001202212050007; authors' calculations.

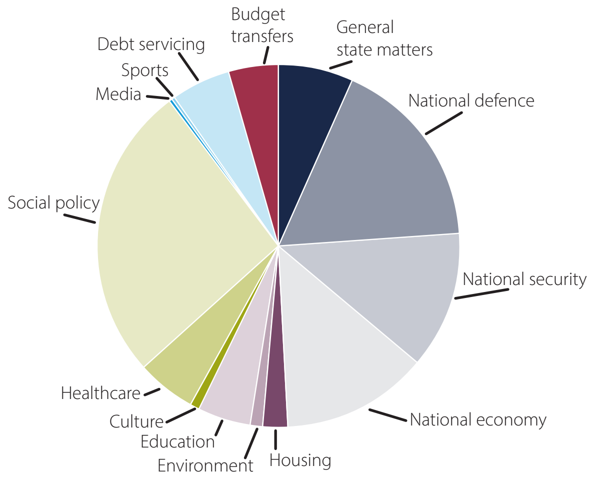


Figure 6.10 Budget items' share of Russia's 2023 federal budget.

Source: 2023 budget law.

the government's forecast of 5.5 percent in 2023, this actually implies a 0.6 percent decrease in real terms. Reductions in spending are planned for general state matters, the national economy, housing, the environment, culture, health care, sports and media. Spending on education is flat, while there is an increase in social spending. The planned increase for social spending is likely in part due to spending for social support of families of the dead and wounded in combat in Ukraine, as well as the introduction of pensions and social support for people living in the newly annexed territories, to be paid from 1 March 2023.[102]

The only sizeable increase in public spending in addition to social policy concerns "national security," which is planned to increase by more than 20 percent in real terms in 2023. This budget item contains spending on the judiciary, the criminal justice system and some military spending, as defined by SIPRI, notably on the National Guard (*Rosgvardiia),* which has been involved in the invasion and occupation of Ukrainian territories since February 2022. It also contains spending on the Federal Security Service (FSB), the Federal Guard Service (FSO) and the Foreign Intelligence Service (SVR).[103] The Ministry of Finance's documentation shows that a large part of the spending increase for national security in 2023 will go to the National Guard; the Ministry of Internal Affairs; and the Ministry for Civil Defence, Emergency Situations and Elimination of Consequences of Natural Disasters.[104] The fact that the largest planned budget increases in 2023 are reserved for the domestic security services and civil defence (and not for the military) is telling of the government's priorities: to ensure control of the national territory and population, including in the annexed regions in Ukraine.

The Ministry of Finance data shows a high rate of spending during the first three months of 2023. By the end of March, the budget deficit was already about 50 percent higher than the planned deficit for the whole year.[105] It is thus possible that high military and social expenditure will cause a higher budget deficit in 2023 than initially planned. Meanwhile, in his annual address to parliament, Putin announced ambitious domestic goals to modernise the health system, expand transport

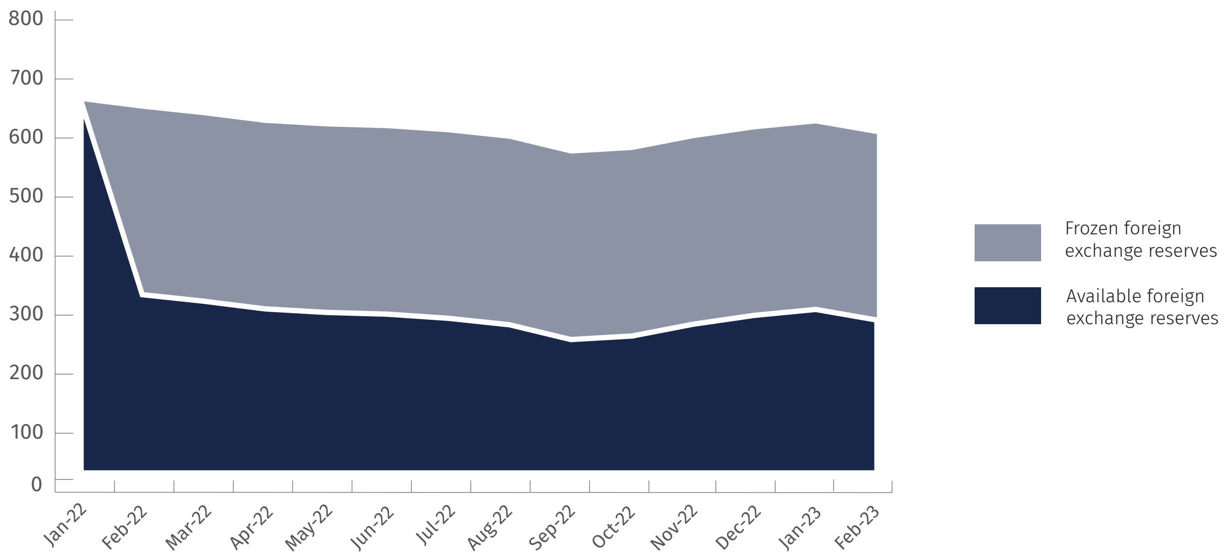


Figure 6.11 Russia's foreign exchange reserves, *billion USD*.

Remarks: Assumes USD 315 billion (equivalent to about EUR 300 billion) of reserves are frozen.

Source: Central Bank of Russia, *Mezhdunarodnye reservy Rossiiskoi Federatsii*, accessed 2 May 2023, https://www.cbr.ru/hd_base/mrrf/mrrf_7d/.

infrastructure, speed up regional development and renovate sports and cultural infrastructure, among other things.[106] The government will have to balance between spending on these domestic initiatives and military spending, and the need to maintain a manageable deficit. The government will also have to consider that increasing government spending carries the risk of increasing inflation.

Financing a budget under pressure

Russia's government has a variety of options at its disposal to increase its incomes and finance an increase in spending. It can increase taxes on the sale of natural resources, increase its other taxes, borrow on the domestic market, and sell its reserves of foreign currency and gold. In 2022, tax receipts were complemented by withdrawals from the National Welfare Fund, domestic bond issuances and a special tax levied from Gazprom.[107] In 2023, the Ministry of Finance expects to finance the deficit by further withdrawals from the National Welfare Fund and revenue from other as of yet unspecified sources.[108] Minister of Finance Anton Siluanov confirmed in February 2023 that the government expected large Russian companies to replenish the budget with a total of about RUB 300 billion in "voluntary" contributions.[109]

The size of Russia's foreign exchange reserves is illustrated in Figure 6.11. As of February 2023, the non-frozen reserves amounted to about USD 259 billion, which would cover approximately 9 months of imports. The reserves should therefore be able to cover even relatively large fiscal deficits in 2023 and 2024.[110] However, if the fiscal deficits persist, the government will face increasingly difficult choices between cutting expenses, depleting the reserves, or finding other ways of raising money.

6.3 Conclusions

We have only just started seeing the effects of the war on Russia's economy and society. Some of the effects are short-term and already evident; others will only become apparent in the longer term. The impact of the sanctions will depend on their implementation and Russia's ability to adapt to their effects. Russia's government has so far proven competent at limiting the effects of sanctions.

The short-term effects are mostly related to the direct impacts of the war and the economic measures introduced in response to the sanctions. An important part of the workforce, not least in the IT sector, has been taken out of the economy, either through the military draft or emigration. Businesses have had to adapt to trade sanctions and find new trading partners. Many Western companies have left, leading to a decline in the production of civilian products, which have to be imported, instead. The industrial production of military goods has risen.

The export incomes from oil, gas and other natural resources remain the life-blood of the Russian economy, and have so far held up well and helped blunt the negative impact of the sanctions. Oil production has remained high and the bulk of Russian oil exports has shifted away from the EU toward China, India and Turkey. The federal budget, however, is under serious pressure. Whether Russia will be able to continue realigning exports of natural resources to friendly countries for a sufficiently high price is a key variable going forward.

Throughout 2022, Russia has substituted imports from Western countries with imports from China, Turkey and countries in Central Asia. Transshipment through third countries has been a means for Russia to circumvent foreign sanctions. The shift in import sources has to some extent ensured the supply of certain strategic goods, such as electronic components based on semiconductors. At the same time, some important input goods previously sourced from Western suppliers appear not to have been successfully replaced, notably in the defence industry (see Chapter 7).

The balance of power in the Russian economy have started to shift. The state is taking an increasingly large role, and has introduced legislation to enable direct control of the economy if deemed necessary. The economic difficulties caused by the sanctions have made large corporations more dependent on government orders. Oligarchs are expected to behave patriotically, remain in Russia and contribute directly or indirectly to the war effort by investing in the economy.[111]

Putin's speeches emphasise the importance of socio-economic development, but the government's actions and budget planning show that military expenditure is nonetheless prioritised over spending on healthcare, education and other forms of welfare. Spending on the military and internal security has risen, especially starting in the second half of 2022, while spending on education, research, healthcare and the economy stagnates. The main goal of the current economic policy is to weather the sanctions and sustain a potentially long-term war effort. Maintaining macroeconomic stability and promoting a resilient civilian economy is still an important priority for the government. Federal budget incomes have diminished during the first months of 2023, but Russia has substantial reserves to draw upon and will not have any problem maintaining current levels of military expenditure in 2023. The sanctions have not led to a reduction in military spending, and sanctions will not by themselves induce Russia to back down from its invasion. That being said, it is possible that military expenditures could have been even higher if sanctions had not been introduced.

There are longer-term effects that are unavoidable, even if the war were to stop today. The potential future GDP growth will be lower, because of the negative demographic effects and the loss of productivity. Economic collapse is unlikely, but Russia faces economic stagnation, instead of recovery, after the current recession. The loss of Western know-how and technology will likely intensify long-term challenges for the oil and gas industries that sustain the Russian economy. Russia's increased isolation and loss of access to technology means it will be difficult to diversify its economy; therefore it will continue to rely on energy exports. Russians' living standards and health expectancy will be lower than they otherwise would have been. If trade sanctions remain in force, Russia will be more dependent on its trade relationships with China and India. To enable an expansion of trade with them, Russia will also have to invest in the development of transport infrastructure, such as roads, railroads, harbours and new gas pipelines.

In his address to the Federation Council on 22 February 2023, Putin warned against destroying the civilian economy for the sake of maintaining a high military expenditure, and to "not repeat the mistakes of the past," a reference to the 1980s, when it became apparent that the Soviet Union's high military spending was unsustainable. Russia faces a similar dilemma today. The war effort requires high military expenditures; but too high military expenditures damage the civilian economy. At the same time, Putin is well aware of the fact that Russia needs a resilient civilian economy to endure a long-term confrontation with the West (see Chapter 3). The trade-off is thus not only between militarisation and welfare, or "guns versus butter"; it is also between achieving success in Ukraine in the short term and preparing the economy and the society for a long-term confrontation with the West. ■

Endnotes

1 See, for instance, Council of the European Union, *Impact of sanctions on the Russian economy, https://www.consilium.europa.eu/en/infographics/impact-sanctions-russian-economy/*. There may be many other aims, both overt and covert, but this is the most commonly cited purpose of the sanctions.

2 Max Seddon and Polina Ivanova, "How Putin's technocrats saved the economy to fight a war they opposed," *Financial Times,* 16 December 2022. Perhaps these predictions were meant to discourage Putin from launching the invasion, rather than providing a realistic assessment.

3 For a complete list of sanctions and sanctioning countries, see Kyiv School of Economics' sanctions database: *https://sanctions.kse.ua/en/visualization-of-sanctions/*.

4 For an updated list of companies that have left Russia, see *Leave Russia,* Kyiv School of Economics, *https://leave-russia.org/*.

5 Andreas Johnson and Susanne Oxenstierna, *How tough are the sanctions on Russia?* FOI Memo 7842, Swedish Defence Research Agency, March 2022.

6 Central Bank of the Russian Federation, *Mery Banka Rossii po podderzhke finansogo sektora v usloviakh volatilnosti,* press release, 25 February 2022, accessed 3 March 2023. *https://www.cbr.ru/press/pr/?file=25022022_160000sup_meas25022022_155231.htm*

7 Johnson and Oxenstierna, *How tough are the sanctions on Russia?*

8 Reuters, "Russia softens capital controls to allow companies to transfer forex overseas," 7 June 2022, https://www.reuters.com/markets/europe/russia-softens-capital-controls-allow-companies-transfer-forex-overseas-2022-06-07/.

9 Intellinews, "IMF admits Russia is coping with sanctions,*"* 27 July 2022, *https://intellinews.com/imf-admits-russia-s-coping-with-sanctions-251752/*.

10 President of Russia, *Soveschanie po ekonomicheskimvoprosam*, 12 September 2022, accessed 2 February 2023, http://kremlin.ru/events/president/news/69336.

11 Margarita Zavadskaya, "Anti-war wave of emigration: Should I stay or should I go?" *Riddle Russia,* 25 July 2022, *https://ridl.io/anti-war-wave-of-nbsp-emigration-should-i-nbsp-stay-or-nbsp-should-i-nbsp-go/*.

12 President of Russia, *Ukaz n. 763 o Koordinatsionnom sovete pri voinskikh formirovanii i organov*, 21 October 2022, accessed 10 February 2023, *http://kremlin.ru/acts/news/69657*.

13 CREA, *Tracking the impacts of EU's oil ban and oil price cap,* accessed 17 February 2023, *https://energyandcleanair.org/russia-sanction-tracker/*. The import ban entails a prohibition of seaborne imports of Russian crude oil to the EU, which constitute the majority of imports, while imports by pipeline to certain EU countries, such as landlocked Czechia, Hungary and Slovakia, are still permitted. The oil price cap prohibits EU and G7 vessels from transporting Russian crude oil and certain petroleum products directed toward third countries, unless the corresponding purchases are below the given price cap. This prohibition also includes offering related services, such as insurance. For more details, see Council of the European Union, *EU sanctions against Russia explained*, accessed 25 February 2023, *https://www.consilium.europa.eu/en/policies/sanctions/restrictive-measures-against-russia-over-ukraine/sanctions-against-russia-explained/.*

14 Ministry of Finance, *Svedenia o formirovanii i ispolzovanii dopolnitelnikh neftegazovykh dokhodov federalnogo biudzheta,* 2 January 2023, accessed 10 February 2023, *http://minfin.gov.ru*.

15 Oleg Viugin, Evsei Gurvich, Oleg Itshoki. Andrei Yakovlev and Kirill Rogov, *Worse than a crisis. The 2022 Russian economic anomaly: how it works, and where it is headed,* Re-Russia, 8 February 2023, *https://re-russia.net/en/expertise/052/*.

16 Securitisation is the process of transforming issues into matters of "security"; de-dollarisation is the process of reducing the economy's reliance on the United States dollar. Examples of Russia sanctions-proofing its economy include stress-testing banks, accumulating surplus oil and gas revenue in the National Welfare Fund (NWF), maintaining a small government debt, increasing the reserves of Chinese currency, and reducing the reliance on foreign financing for Russian corporations

17 Richard Connolly, *Russia's Response to Sanctions: How Western Economic Statecraft is Reshaping Political Economy in Russia* (New York: Cambridge University Press, 2018), 69–71. .

18 Government of Russia, *Strategia natsionalnoi bezopasnosti Rossiiskoi Federatsii*, 2 July 2021, accessed 13 February 2023, *http://www.kremlin.ru/acts/bank/47046/*. See paragraphs 1, 13, 22, 25, 26, 33, 40, 44 and the section on economic security, paragraphs 56–78.

19 Gabriel Di Bella, Oksana Dynnikova and Slavi T. Slavov, *The Russian State's Size and its Footprint: Have They Increased?,* IMF Working Paper No. 2019/053, 8 March 2019.

20 Torbjörn Becker, *Russia's Oil Dependence and the EU,* working paper, Stockholm School of Economics, August 2016.

21 Clifford G. Gaddy and Barry Ickes, "Putin's rent management system and the future of addiction in Russia." in *The Challenges for Russia's Politicized Economic System,* ed. Susanne Oxenstierna (New York: Routledge, 2015).

22 This point was illustrated clearly during the meeting that Putin held with business leaders on the day of the invasion; see President of Russia, *Vstrecha s predstaviteliami rossiiskikh delovykh krugov,* 24 February 2022, accessed 23 March 2023, *http://kremlin.ru/events/president/news/67846*.

23 TASS, "Vlasti RF planiruiut poluchit okolo 300 mlrd rublei v kachestve vznosa ot biznesa," *TASS,* 16 March 2023, *https://tass.ru/ekonomika/17282781*.

24 President of Russia, *Plenarnoe zasedanie sezda RSPP,* 16 March 2023, accessed 28 March 2023, *http://kremlin.ru/events/president/news/70688* and President of Russia, *Poslanie Prezidenta Federalnomu Sobraniiu*, 21 February 2022, accessed 27 February 2022, *http://kremlin.ru/events/president/news/70565*.

25 Vladislav Inozemtzev, "Ownership and serfdom," *Riddle Russia*, 10 March 2023.

26 Anders Åslund, "Stealing Russia," *Project Syndicate,* 7 February 2023.

27 President of Russia, *Ukaz n. 757*, 19 October 2022, accessed 10 December 2022, *http://static.kremlin.ru/media/events/files/ru/ce8gmJQieKPmowMcx4u3zHqDhqApkVAv.pdf*.

28 "War economy" is here intended as the reorganisation of the economy to provide resources for the war effort.

29 World Bank, *Imports of goods and services (% of GDP) – Russian Federation*, accessed 28 March 2023, *https://data.worldbank.org/indicator/NE.EXP.GNFS.ZS?locations=RU*.

30 Central Bank of the Russian Federation, *Statistika vneshnego sektora*, accessed 28 March 2023, *www.cbr.ru/statistics.*

31 Bruegel, *Russian foreign trade tracker,* accessed 28 March 2023, *https://www.bruegel.org/dataset/russian-foreign-trade-tracker.*

32 Andrew David, Sarah Stewart, Meagan Reid, and Dmitri Alperovitch, *Russia Shifting Import Sources Amid U.S. and Allied Export Restrictions: China Feeding Russia's Technology Demands*, Silverado Policy Accelerator, January 2023, 4, 10, *https://silverado.org/news/report-russia-shifting-import-sources-amid-u-s-and-allied-export-restrictions*.

33 Free Russia Foundation, *Effectiveness of U.S. Sanctions Targeting Russian Companies and Individuals*, 30 January 2023, 48–52, *https://www.4freerussia.org/effectiveness-of-u-s-sanctions-targeting-russian-companies-and-individuals/*. The goods described here are HS 8541 (semiconductors) and HS 8542 (electronic integrated circuits). HS is an abbreviation for Harmonised System, which is a standardised method for classifying trade goods internationally.

34 Steve Stecklow, David Gauthier-Villars, and Maurice Tamman, "The supply chain that keeps tech flowing to Russia," *Reuters*, 13 December 2022, accessed 4 April 2023, *https://www.reuters.com/investigates/special-report/ukraine-crisis-russia-tech-middlemen/*.

35 Bloomberg News, "Turkey Blocks Transit of Goods Sanctioned by EU, US to Russia," 10 March 2023, accessed 4 April 2023, *https://www.bloomberg.com/news/articles/2023-03-10/turkey-blocks-transit-of-goods-sanctioned-by-eu-us-to-russia*.

36 David et al., *Russia Shifting Import Sources*, 15–25.

37 Free Russia Foundation, *Effectiveness of U.S. Sanctions*, 47.

38 Aino Röyskö and Heli Simola, *Russia's technology imports from East Asia*, Bank of Finland Institute for Emerging Economies, BOFIT Policy Brief no. 6, 2 November 2022, 6–14, *https://publications.bof.fi/bitstream/handle/10024/52238/bpb2206.pdf*. ASEAN is an abbreviation for the Association of Southeast Asian Nations.

39 IMF, *Direction of Trade Statistics,* accessed 1 March 2023, *https://data.imf.org/regular.aspx?key=61013712*.

40 World Bank, *Exports of goods and services (% of GDP) - Russian Federation*, accessed 28 March 2023, *https://data.worldbank.org/indicator/NE.EXP.GNFS.ZS?locations=RU*.

41 Michael Bradshaw and Richard Connolly, "Russia's Natural Resources in the World Economy: history, review and reassessment," *Eurasian Geography and Economics*, vol. 57, no. 6 (October 2016): 713–16, *https://www.tandfonline.com/doi/full/10.1080/15387216.2016.1254055*.

42 See, for example, World Nuclear Association, *Conversion and Deconversion*, accessed 2 March 2023, *https://world-nuclear.org/information-library/nuclear-fuel-cycle/conversion-enrichment-and-fabrication/conversion-and-deconversion.aspx*; World Nuclear Association, *Uranium Enrichment*, accessed 2 March 2023, *https://world-nuclear.org/information-library/nuclear-fuel-cycle/conversion-enrichment-and-fabrication/uranium-enrichment.aspx.*

43 Jessica Jewell, Marta Vetier, and Daniel Garcia-Cabrera, "The international technological nuclear cooperation landscape: A new dataset and network analysis," *Energy Policy*, vol. 128 (May 2019): 838–9, 844, *https://www.sciencedirect.com/science/article/pii/S0301421518308231*.

44 Pieter D. Wezeman, Justine Gadon, and Siemon T. Wezeman, *Trends in International Arms Transfers, 2022,* SIPRI, March 2023, 2, *https://www.sipri.org/sites/default/files/2023-03/2303_at_fact_sheet_2022_v2.pdf*.

45 Connolly, *Russia's response to sanctions,* 125–126.

46 Central Bank of the Russian Federation, *Statistika vneshnego sektora*.

47 Bruegel, *Russian foreign trade tracker*.

48 CREA, *Payments to Russia for fossil fuels since 24 February 2022*, accessed 3 March 2023, *https://www.russiafossiltracker.com/.* Special thanks to Hubert Thierot at CREA for providing access to their dataset.

49 Tania Babina, Benjamin Hilgenstock, Oleg Itskhoki, Maxim Mironov, and Elina Ribakova, *Assessing the Impact of International Sanctions on Russian Oil Exports*, SSRN, 22 February 2023, 4. https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4366337. Note that the data for Russian oil exports presented by Babina et al. is based on Russian customs data, whereas the data in this report is derived from statistics collected by CREA from multiple sources. Estimates of oil export earnings and their share of total exports thus vary to some extent.

50 CREA, *Tracking the impacts.*

51 Vladislav Inozemtsev, "Russian oil after the embargo," *Riddle Russia*, 27 January 2023, *https://ridl.io/russian-oil-after-the-embargo/*.

52 CREA, *Payments to Russia.*

53 Babina et al., *Assessing the Impact*, 9–10, 23–24. EU sanctions do not prohibit the import of refined oil products made from Russian crude oil in third countries.

54 Sergey Vakulenko, "A Price Cap or Smoke and Mirrors? How Much Does Russian Oil Actually Cost?" *Re: Russia*, 23 January 2023, *https://re-russia.net/en/expertise/049/*.

55 Babina et al., *Assessing the Impact*, 6.

56 See for example Kyiv School of Economics, "KSE Proposal for a Further Package of Oil and Gas Sanctions," 13 January 2023, *https://kse.ua/about-the-school/news/kse-proposal-for-a-further-package-of-oil-and-gas-sanctions/*.

57 Ministry of Finance, *Poiasnitelnaia zapiska k proektu federalnogo zakona o federalnom biudzhete na 2023 god i na planovyi period 2024 i 2025 godov*, accessed 5 October 2022, *https://sozd.duma.gov.ru/bill/201614-8*.

58 Anastasia Stognei, "Russia alters oil taxes to capture bigger share of trades above price cap," *Financial Times*, 22 March 2023, accessed 4 April 2023, *https://www.ft.com/content/1679afca-0aa5-4498-b1a5-1eb65c6f5d91*.

59 Ministry of Finance, *Minfin Rossii podgotivil izmenenie tekushego poriadka opredelenia kotirovok rossiiskoi nefti,* press release, accessed 21 April 2023, https://minfin.gov.ru/ru/press-center/?id_4=38375

60 Sergey Vakulenko, "Oil Cap Plans Will Open a New Front in Russia-West Conflict," *Carnegie Endowment for International Peace*, 20 October 2022, *https://carnegieendowment.org/politika/88211*.

61 Julian Lee, "Putin's Few Oil Buyers Demand Deep Discounts," *Bloomberg*, 27 November 2022, accessed 2 May 2023, *https://www.bloomberg.com/opinion/articles/2022-11-27/china-india-squeeze-big-oil-discounts-out-of-putin*.

62 Bradshaw and Connolly, "Russia's Natural Resources," 716.

63 Niklas Rossbach, *The Geopolitics of Russian Energy: Gas, oil and the energy security of tomorrow*, FOI-R--4623--SE (Stockholm: FOI, 2018), 42–43.

64 CREA, *Payments to Russia.*

65 Babina et al., *Assessing the Impact*, 4. As was noted above regarding the oil export earnings, there are different estimates of Russian gas export earnings, based on different underlying data, which means that corresponding shares of total exports may vary to some extent.

66 CREA, *Payments to Russia.*

67 Rossbach, *The Geopolitics of Russian Energy*, 68–69.

68 Filip Rudnik, "The Power of Siberia-2 gas pipeline remains in the design stage," *Centre for Eastern Studies*, 6 April 2023, *https://www.osw.waw.pl/en/publikacje/analyses/2023-04-06/power-siberia-2-gas-pipeline-remains-design-stage*.

69 Nikos Tsafos, "Can Russia Execute a Gas Pivot to Asia?", *CSIS*, 4 May 2022, *https://www.csis.org/analysis/can-russia-execute-gas-pivot-asia*.

70 See for example Council of the European Union, *EU sanctions against Russia explained*.

71 CREA, *Payments to Russia*.

72 Muyu Xu and Maxim Nazarov, "Infrastructure bottlenecks hamper Russia's booming coal exports to China," *Reuters,* 26 October 2022, accessed 24 April 2023, *https://www.reuters.com/markets/commodities/infrastructure-bottlenecks-hamper-russias-booming-coal-exports-china-2022-10-25/*.

73 Interfax, *Minekonomrazvitiia prognoziruet rost VVP RF v 2023 godu na urovne 1,2 %,* 14 April 2023, accessed 27 April 2023, *https://www.interfax.ru/business/896025*. It is possible that the GDP figures published by Rosstat understate the degree of economic contraction in 2022. Rosstat's independence from the government has been questioned, since it has been pressured by the government to report misleading statistics. See Proekt, *Nenaturalnye chisla. Rasskaz o tom, kak vlasti boriutsia so statistikoj vmesto problem*, 8 July 2021, *https://www.proekt.media/narrative/dannye-rosstata/*.

74 World Bank, *Europe and Central Asia Economic Update, Spring 2023: Weak Growth, High Inflation, and a Cost-of-Living Crisis,* April 2023, 98; IMF, *Russian Federation Country Data, https://www.imf.org/en/Countries/RUS.*

75 Evsei Gurvich and Ilia Prilepskii, "Western Sanctions and Russian Responses," in *The Russian Economy under Putin,* eds. Torbjörn Becker and Susanne Oxenstierna (New York: Routledge), 2018, 45.

76 Iikka Korhonen, "Russia's growth potential post-COVID-19," *BOFIT Policy Brief 9/2021,* 2021. 1.5 percent is the best-case scenario.

77 The Bell, *Skolko rossiian v 2022 godu uekhalo is strany i ne vernulos,* 30 December 2022, *https://thebell.io/skolko-rossiyan-v-2022-godu-uekhalo-iz-strany-i-ne-vernulos*.

78 Igor Efremov, "Rozhdaemost v 2023 godu prodolzhit padat," *Gaidar Institute Commentary*, 9 January 2023, *https://www.iep.ru/ru/kommentarii/igor-efremov-rozhdaemost-v-2023-godu-prodolzhit-padat.html*

79 BOFIT, *BOFIT Forecast for Russia 2023–2024: An unprecedented fog of uncertainty,* 13 March 2023, *https://www.bofit.fi/en/monitoring/forecasts-for-Russia-and-China/latest-forecast-for-russia/*.

80 Proekt, *Nenaturalnye chisla*; Rosstat, *Ofitsialnaia statistika – tseny, inflatsiia, https://rosstat.gov.ru/statistics/price*.

81 Retail.ru, "Oborot roznichnoi torgovli v Rossi v 2022 godu snizilisia pochti na 10 %," 27 December 2022, *https://www.retail.ru/news/oborot-roznichnoy-torgovli-v-rossii-v-2022-godu-snizilsya-pochti-na-10-27-dekabrya-2022-224240/*. Rosstat later reported a drop of 6.7 percent in 2022, see *https://rosstat.gov.ru/statistics/roznichnayatorgovlya*.

82 World Bank, *Macro Poverty Outlook for Europe and Central Asia: Russia Country Note*, October 2022.

83 Mari Eccles and Gabriel Gavin, "Turbulence batters Russia's air sector," *Politico*, 14 February 2023, accessed 24 April 2023, *https://www.politico.eu/article/russia-alexander-neradko-aeroflot-s7-airlines-turbulence-aviation-sector/*.

84 András Rácz, Ole Spillner, and Guntram B. Wolff, "Why Sanctions Against Russia Work," *Intereconomics*, vol. 58, no. 1 (2023): 52–5, *https://www.intereconomics.eu/contents/year/2023/number/1/article/why-sanctions-against-russia-work.html*; Max Bergmann, Maria Snegovaya, Tina Dolbaia, and Nick Fenton, *Out of Stock? Assessing the Impact of Sanctions on Russia's Defense Industry*, CSIS, April 2023, *https://csis-website-prod.s3.amazonaws.com/s3fs-public/2023-04/230414_Bergmann_Out_Stock.pdf*.

85 András Rácz, Ole Spillner, and Guntram B. Wolff, *Russia's War Economy: How Sanctions Reduce Military Capacity*, German Council on Foreign Relations, DGAP Policy Brief no. 3, February 2023, 9, *https://dgap.org/en/research/publications/russias-war-economy*.

86 Rosstat, *Dinamika promyshlennogo proizvodstvo v 2022 godu,* accessed 1 March 2023, *http://www.rosstat.gov.ru.*

87 David et al., *Russia Shifting Import Sources*, 18–25; Mari Eccles and Gabriel Gavin, "Turbulence batters Russia's air sector", *Politico*, 14 February 2023, *https://www.politico.eu/article/russia-alexander-neradko-aeroflot-s7-airlines-turbulence-aviation-sector/*.

88 Until April 2022, the Federal Treasury published data on monthly spending by federal budget chapter. See Federal Treasury, *Otchetnost po ispolneniiu biudzhetov*, *https://roskazna.gov.ru/ispolnenie-byudzhetov/federalnyj-byudzhet/*. The reports included classified spending.

89 Ministry of Finance, *Poiasnitelnaia zapiska.*

90 *SIPRI Definition of military expenditure*, *https://www.sipri.org/databases/milex/definitions*; Julian Cooper, *Russian Military Expenditure. Data, Analysis and Issues*, FOI-R--3688--SE (Stockholm: Swedish Defence Research Agency, 2016). The SIPRI definition is standardised for all countries and includes spending on the armed forces, including peacekeeping forces; defence ministries; paramilitary forces; military space activities; retirement pensions of military personnel; social services for personnel and their families; military research and development; and military aid. In the case of Russia, spending that is not included in the national defence budget line regards military pensions, and spending on the National Guard and the Federal Border Service, among other items.

91 Russian military expenditure is planned every year within the framework of the budgetary process that determines the federal budget. The Ministry of Finance drafts the budget law based on the President's budget statement (biudzhetnoe poslanie) and with input from other ministries and government agencies, including the military. The budget law contains the Ministry of Economic Development's forecast of GDP growth, inflation, oil prices and other economic variables. The draft budget law is discussed in the State Duma, and the Duma's Committee on Defence provides an opinion on the parts of the budget that relate to military spending. The budget law passes three readings in the State Duma before it is signed off by the President. Federal budget listings (*biudzhetnyie rospisi)* are published during the year if the amount of planned budget expenditures change. They state the maximum amount

that can be spent within each budget chapter. For more details on the Russian federal budget process, see Cooper, *Russian Military Expenditure.*

92 Note that these budgets assumed a larger contraction of GDP than what actually took place in 2022.

93 SIPRI, *Military Expenditure Database, https://www.sipri.org/databases/milex*.

94 Susanne Oxenstierna, "The economy and military expenditure," in Fredrik Westerlund and Susanne Oxenstierna (eds.) *Russia's Military Capability in a Ten-Year Perspective 2019*, FOI-R--4758--SE (Stockholm: Swedish Defence Research Agency, 2019), 108.

95 Susanne Oxenstierna and Emil Wannheden, *The Russian economy and military expenditure in light of the war in Ukraine and economic sanctions,* FOI Memo 8023 (Stockholm: Swedish Defence Research Agency, 2022), 11.

96 Ministry of Finance, *Budget portal,* budget.gov.ru. Total federal budget expenditure in 2022 was RUB 31131 billion, or RUB 3517 billion more than what was planned in the August 2022 budget listing.

97 It seems reasonable to assume that the share of total military expenditure in total budget expenditure was at least constant.

98 Cecilie Sendstad and Julie Helseth Udal, *Den russiske regjeringens forslag til føderalt budsjett for 2023 og planperioden 2024–2025,* Eksternnotat 22/02328 (Oslo: Norwegian Research Establishment, 2022).

99 Oxenstierna and Wannheden, *The Russian Economy.*

100 Sendstad and Helset Udal, *Den russiske regjeringens forslag.*

101 Jonas Kjellén, *Bringing the soldier back in – Russian military manning, manpower, and mobilisation in the light of Russia's war in Ukraine*, FOI-R--5461--SE (Stockholm: Swedish Defence Research Agency, 2023).

102 President of Russia, *Ustanovleni osobennosti osushchestlveniia vyplat po obiazatelnomu sotsialnomu strakhovaniu grazhdanam, prozhivaiushchim v DNR, LNR, Zaporozhckoi i Khersonskoi oblastiakh*, accessed 4 April 2023, *http://www.kremlin.ru/acts/news/70537*. On 21 February 2023, president Putin also announced the creation of a special fund for social support for families of military servicemen serving in Ukraine.

103 Cooper, *Russian Military Expenditure*, 26.

104 Ministry of Finance, *Poiasnitelnaia zapiska k proektu federalnogo zakona o federalnom biudzhete na 2023 god i na planovyi period 2024 i 2025 godov*, accessed 5 October 2022, *https://sozd.duma.gov.ru/bill/201614-8*. 485–489.

105 Ministry of Finance, *Elektronnyi biudzhet*, accessed 29 March 2023, https://budget.gov.ru. The website is not accessible from countries that Russia considers "unfriendly."

106 President of Russia, *Poslanie Prezidenta Federalnomu Sobraniiu.*

107 Ministry of Finance, *Kratkaia informatsia ob ispolnenii federalnogo biudzheta*, accessed 28 February 2023, minfin.gov.ru. The National Welfare Fund is Russia's sovereign wealth fund.

108 Ministry of Finance, *Biudzhet dlia grazhdan.*

109 "Siluanov: dobropolnye vznosy biznesa v biudzhet budut odnokratnymi v etom godu," *Kommersant,* 21 February 2023, *https://www.kommersant.ru/doc/5840536*.

110 The assumption, of course, is that the reserves are liquid enough and that Russia is able to transfer them abroad. This is not a given under the present conditions.

111 President of Russia, *Plenarnoe zasedanie sezda RSPP*.

7. Russia's defence industry at war: can it live up to expectations?

Tomas Malmlöf

Russia's botched attempt to conquer Ukraine decisively, in February 2022, in combination with its erroneous assessment of Western reactions, inadvertently put its defence industry under amplified pressure. Embroiled in a war that turned out to be equally more intensive and more extensive than previous post-Soviet Russian experiences of armed conflict, the question remains: Is Russia's defence industry adequately prepared to endure the working conditions that arise under the stress of major war and extended foreign sanctions?

The purpose of this Chapter is to assess the impact of a large-scale war on Russia's defence industry, regarding its output of military systems and equipment, during the first year of fighting. More specifically, this Chapter focuses on Russia's current output in replacing destroyed military systems, equipment and consumed ammunition, and rebuilding its stockpiles.

On an overall level, Russia's military operations during the first year of fighting were mostly carried out as land-based army campaigns, enhanced with fire support from artillery and long-distance cruise and precision missiles. Naval backing and Air Force support played only secondary roles. Consequently, it was Russia's Ground Forces, Airborne Forces, and Naval Infantry, all services with boots on the ground that took the heaviest losses (see Chapter 5). This was matched by Russia's equipment losses and its use of ammunition.

The research question for this Chapter is the following: How has the Russian defence industry's output rate of the military systems and ammunition associated with the above branches of service changed during the first year following its invasion on 24 February 2022?

Analogous with Chapter 5 of this volume, the analysis is restricted to Russia's production of armoured vehicles, or, more specifically, main battle tanks (MBT), as well as artillery shells and rockets for multiple-launch rocket systems (MLRS). These are all primary elements associated with military manoeuvre and fire support, the main elements of the land war taking place in Ukraine. One might argue that if artillery shells and rockets are part of the analysis, then the artillery systems themselves should also be included. However, the shares of Russia's losses of artillery systems and MLRS from the totals of the active stocks and reserves (on paper) of these systems appear less critical than the shares of destroyed MBT from the total stock of MBT. In other words, and with regard to Russia's military equipment portfolio, Russia's active stocks and reserves of artillery systems and MLRS is not dimensional for how long Russia can continue to pursue its war against Ukraine. This is why they have been excluded from the analysis.

Furthermore, although there has been much publicity regarding Russia's use of cruise missiles and its new precision and hypersonic arms, their role in the war has not been pivotal for the outcome of specific military battles. For that reason, they have also been excluded from the analysis.

Tagging along with the general Russian trend in later years, Russia's military-industrial complex has become shrouded in a veil of increasing secrecy. This has made it more difficult to estimate Russia's military production capacity and assess the likely future military-equipment holdings of its Armed Forces. The war has added a new layer of operational secrecy to Russia's release of data, at the same time as the war itself has made the analytical environment much more dynamic and unpredictable.

For these reasons, as of spring 2023, using open-source material to produce forecasts and estimates of Russia's equipment portfolio and the production capacity of its defence industry had become significantly more difficult and increased the ambiguity of assumptions and deductions. Under these conditions, the main value of forecasts and estimates is not necessarily their exactness, or the approximate magnitudes of particular data. Their value, rather, depends on whether or not they can contribute to our comprehensive understanding of the dynamics of the composition and volume of Russia's military equipment portfolio and how these factors influence its military capability over time.

In spite of the above-mentioned difficulties, this Chapter is an open-source research study. The assessments of the rate of Russia's production of military systems draws on previous FOI studies in this area, combined with *Military Balance* estimates of Russian military equipment in active use and in reserve. It also uses reports of Russia's losses in Ukraine that are available from the General Staff of the Ukraine Armed Forces and the *Oryx* website. Russia's consumption of ammunition is based on data reported in the first year of the war by Ukrainian and Western sources. Estimations of Russia's pre-war stockpiles of ammunition, as well as production rates of ammunition, builds on older Russian data, with extrapolations made in Western open-source analyses, up to spring 2023.

The rest of this Chapter is organised as follows. The next section outlines the structure of Russia's defence-industrial base, its military research and development, and military procurement; it also serves as a background for the remainder of the chapter. The ensuing section reflects on the impact and consequences of the war on Russia's defence industry and military procurement. It also discusses and assesses the possible limits of Russian modernisation, or production, of its MBT, as well as the production of artillery shells and MLRS rockets as of spring 2023. The final section wraps up the findings from the two preceding sections.

7.1 The economics of Russian arms production

Russia is one of a handful of countries that still has the ambition of maintaining a defence industry covering the entire line of military systems, platforms and equipment, for all branches of its military and security forces. It is also the second-largest arms exporter in the world: in 2010–2018, Russia had average annual sales of weapons and military equipment of around USD 14.5 bn, while its order portfolio is said to amount to USD 50–55 bn.[1]

According to Russian doctrines, the domestic defence industry is a constituent part of the state's military organisation; as such, the defence industry plays a key role in the development of Russian military power.[2] Within the Russian economic system, the defence-industrial sector belongs to its rent-dependent segment. Budget constraints on Russia's defence companies are usually soft; as a rule, they rely on financial transfers from the more profitable state energy sector in order to make ends meet: the rent-generating sector in the Russian economy. Although Russian arms export tangents its military procurement – in 2018, Russia's procurement of weapons, military research and development (R&D) and arms repair amounted to RUB 1297.4 bn or USD 20.7 bn – company performances and achievements depend ultimately and almost entirely on the state.[3] It is the state that shapes the defence market and allows access to the export market, in its capacity as the main financier, buyer and regulator.

The defence-industrial base

Back in 2019, Russia's defence-industrial complex consisted of 1353 organisations and entities, including military R&D institutes.[4] The complex employed approximately two million people. Compared to how the defence-industrial sector is usually organised in the West, there are few small- and medium-sized enterprises. Another difference is that Russian companies are usually less diversified; production is concentrated on military equipment rather than civilian commodities.[5]

Ownership of Russian defence industries fluctuated in the 2000s, but the state has retained and successively strengthened its vertical control of the entire sector, among other things through reorganisation, the establishment of large state corporations and vertical integration.[6] In all likelihood, vertical integration has not entirely produced the expected results, in terms of minimising the duplication of production and consolidation of production skills. It has also increased operational costs. Moreover, as consortiums have to compete with each other for the redistribution of rents from the rent-generating sector, the current order increases corruption, nepotism and bureaucratic hurdles.[7]

Military research and development

Russia's military R&D infrastructure consists of more than 250 research institutes, primarily conducting applied military research for the defence industry. In addition, about 300 design bureaus and scientific production associations work on the design and development of prototypes.[8] This legacy structure was supplemented, in 2012, with the Advanced Research Foundation, tasked with the development of civil and dual-use technologies, and by, in 2018, the Era technopolis, which focuses explicitly on military technologies.[9]

Since the autumn conscription of 2013, the Ministry of Defence (MoD) has also recruited military-science units (*voennye nauchnye roty*), based on research establishments and higher educational institutions related to the MoD, for specific applied research, with an emphasis (but not exclusively) on cyber operations, signals intelligence, and electronic warfare.[10] In early 2023, there were 17 such scientific units, of which eight were associated with Era.[11] Although these units have attracted much attention, their impact on Russian military R&D is probably limited. Presumably, they are of greater importance as a recruiting base for technically advanced work within the Armed Forces, or, as a starting point for a scientific career within the defence-industrial complex. In contrast to other major powers,

Table 7.1 Overview of GPV 2020

Military branch	Size of allocation (trn RUB)	Percent of total	Planned procurement & activities
Ground Forces	2.6	15	2300 MBTs, 2000 art.syst., 10 bde Iskander-M, 9 bde S-300B4, >30000 motor vehicles.
Navy	5.0	25	8 proj. 955 Borei, 8 proj. 885 Yasen, 12 conventional submarines, 51 surface ships (incl. 15 frigates and up to 35 corvettes).
Air Force	4.7	24	600 aircraft, 1100 helicopters
Strategic Missile Forces	1.0	5	270–280 SS-29 Yars, development of solid-fuel Rubezh & liquid-fuel Sarmat ICBMs.
Aerospace Defence Forces	3.4	17	56 div. S-400, 38 div. S-350, 120 Pantsir-S, integrated-control system, 4 Voronezh radar systems, 100 satellites.
Other	2.7	14	New systems for communication, command & control, intelligence.
Total	**19.4**	**100**	

Source: CAST, Centre for Analysis of Strategies and Technologies (2015), 'Gosudarstvennie programmy vooruzheniia Rossiiskoi Federatsii – problemy ispolneniia i potentsial optimizatsii – Annaliticheskii doklad', *http://cast.ru/files/Report_CAST.pdf*, (accessed 24 May 2023), p.23.

Russia, with its traditional state-driven, top-down innovation model, is an outlier. In the Russian context, with its strong, vertical, state control over the entire defence-industrial sector, this model is to be expected. Yet it has been somewhat modified to take advantage of the advances made in the civilian sector, thus partly emulating the US and Chinese approaches to innovation.[12] The persistent and remaining weaknesses of Russian military R&D are a shortage of human capital, lack of innovation, deteriorating quality of higher scientific education and a dearth of innovation-led manufacturing.[13] The lack of human capital is likely to become an increasingly severe problem in the future (see also Chapter 6 in this volume). As an illustration, the Radioelectronic Technologies Concern (KRET), had already noted, in 2012, that 80 percent of all its employees were 45 years or older.[14] Recruitment is hampered by the fact that there is a gap between the credentials received in the education system and the concern's needs. Other enterprises have reported similar challenges over the years.

In Russia's case, there is a civil and military technology gap to the most advanced economies in the West that it has not succeeded to bridge. On the contrary, the sanctions against Russia enhance the probability that the gap will grow. It is a matter of slow processes though, whose consequences might become apparent only after several years. The timeline from Russia's invasion of Ukraine and the writing of this report just over a year later is too short for any radical changes in Russia's R&D environment to have taken place. It is therefore assumed here that what applied before the invasion was still applicable in spring 2023.

State armament programmes and procurement

Military procurement in Russia takes place within the framework of the state armament programmes, the GPV (*Gosudarstvennaia programma vooruzheniia*, GPV), which are ten-year programmes that envisage the procurement, refurbishment and development of military hardware to equip and modernise the Armed Forces. As a rule, the GPV are updated with a new ten-year programme every fifth year. The latest programme, GPV 2027, covers the period 2018–2027 and amounts to over RUB 20 trn (approximately USD 330 bn). Of this, the MoD was expected to receive an allocation of around 19 trn for the procurement of military equipment, its modernisation and repair, and R&D.[15] It was adopted in mid-December 2017.[16]

Under the preceding GPV 2020, defence-industrial performance had been mixed. The programme itself might be characterised as a once-and-for-all catching up exercise. To buttress the ability of the defence-industrial sector to meet the procurement goals, the GPV 2020 had been accompanied by a variety of State Programmes and Federal Targeted Programmes, throughout the 2010s to enable capital investment and stimulate technological improvement.[17] The industry had managed to deliver arms and equipment based on established designs or modernised versions of older and proven systemic solutions of late-Soviet blueprints, in relatively large quantities. It had been less successful in completing the transition to serial production of new Russian-made designs and more sophisticated arms systems, due to the lack of investments in the 1990s and early 2000s, excessively optimistic R&D plans and Western and Ukrainian sanctions from 2014 onwards.[18]

In comparison with its predecessor, the GPV 2027 appeared leaner and more focused and realistic, at its outset. Prior to the likely adoption of the new programme, in mid-December 2017, the official line that was communicated was that allocations would be more evenly distributed between the different branches of service, in such a way that every type and kind of service would receive approximately the same amount of funds.[19] In contrast to GPV 2020, the precise distribution has not been revealed. It is believed though, that the GPV 2027 would follow up on all newly developed systems that had been delayed or postponed under the GPV 2020 or not yet transferred to serial production.

The total sum allocated to GPV 2027 amounted to around RUB 20 trn, i.e., approximately the same sum as for GPV 2020. The MoD was expected to receive the same sum, approximately RUB 19 trn, for the procurement of military equipment, its modernisation and repair, and R&D.[20] GPV 2027 financing was expressed in nominal terms and backloaded. In other words, there was no baked-in compensation for inflation, and the largest sums would be spent during the second half of the programme.[21] Even given the prospect of only modest economic growth, the GPV 2027 appeared to be economically feasible, and therefore more attainable, than GPV 2020.[22]

7.2 Forecasting Russian arms procurement and equipment portfolio

As for the likely outcome of GPV 2027, a reasonable assumption, in the late 2010s, was that within a decade, Russia's Armed Forces would probably rely on a mix of fully modern designs, legacy hardware and gap-filling, modernised Soviet systems. This was provided that, by then, Russia would have made significant progress in the development of new-generation equipment.[23]

In the 2019 FOI report on Russian military capability, it was deduced that Russia's defence industry would not only be able to consolidate the progress made in equipment recapitalisation under GPV 2020, but also to increase the total equipment holdings for the organisation of the Armed Forces.[24] Based on open data on Russia's defence-industrial output, and without regard to economic constraints, the study concluded that, in theory, Russia could probably increase its ground-force equipment by 30–70 percent; double its naval platforms; and enlarge its aerospace systems by about 70–110 percent, throughout the 2020s. The study also noted that the sheer size of the Russian landmass implied that the quantity of equipment would always remain a crucial element in Russia's defensibility. A hypothetical, complete turnover of Russian military platforms would therefore take several decades.[25]

Implications of the invasion for Russia's defence industry

The full-scale invasion of Ukraine in February 2022 brought about a high-intensity escalation of Russia's uncompleted war against its Slavic neighbour-state. This escalation, in turn, generated far-reaching repercussions for Russia's defence industry.

First, in place of the effortless victory anticipated by the Russian regime, the invasion rapidly became a serious detriment to Russia's military capability, as well as a considerable force of contraction on its pre-invasion military stock. As demonstrated further on in this chapter, one year into the invasion, Russia's Armed Forces had lost or used up significant amounts of arms, platforms and equipment, ammunition and missiles, in particular as regards military equipment and ammunition for land warfare. Although more or less refuted by the Russian regime, in all likelihood prior GPV 2027 procurement planning had to make room for the necessity of refurbishing repairable equipment, and replacing what was destroyed, as well as the replenishment of all kinds of ammunition. In his report to the president, in late December 2022, Defence Minister Sergei Shoigu admitted that the most important feature of the implementation of the yearly State Defence Order (*Gosudarstvennyi oboronnyi zakaz*, GOZ), in 2022, had been the provision of weapons and equipment to Russia's military forces in Ukraine. In order to strengthen their combat capabilities, deliveries of the most urgent equipment had had to be advanced from 2024–2025 to 2023.[26]

Second, another upset for Russia's defence industry due to the invasion, became its increased exposure to additional Western sanctions related to military and dual-use products. Led by the US and the EU, this new wave of sanctions was imposed on Russia as an instantly recognisable consequence of the invasion. The aim of the EU economic sanctions "is to impose severe consequences on Russia for its actions and to effectively thwart Russian abilities to continue the aggression."[27] The EU list of banned products has been designed to maximise the negative impact of the sanctions for the Russian economy. The aim of US sanctions is to restrict "Russia's access to technologies and items needed to sustain its aggressive military capabilities."[28] In addition, the US Commerce Department's Bureau of Industry & Security expanded export controls on the first day of the invasion, in a bid to restrict Russia's access to advanced technologies and items needed to sustain its military capabilities. These controls are primarily targeting Russia's defence, aerospace, and maritime sectors, and include semiconductors, computers, telecommunication systems, information security equipment, lasers, and sensors.[29]

As development of the bulk of Russia's new post-Soviet systems was being finalised throughout the 2010s, it became known that they were heavily reliant on critical specialist components manufactured outside of Russia.[30] Non-partisan technical analyses of Russian arms lost or destroyed on the battlefields of Ukraine have later confirmed this picture and also shed some further light on the scope and extent of Russian dependence on Western semiconductors and electronic subcomponents for its military equipment.[31]

The findings, for instance, of the field investigators from Conflict Armament Research (CAR), who document the arms used in Ukraine, "highlight the centrality of foreign technology to Russian advanced defence equipment." Up to September 2022, CAR had identified a total of 144 non-Russian manufacturers of more than 650 unique component models in Russian equipment used in Ukraine. Most of these components had been produced between 2014 and 2021, suggesting that Russia had stockpiled foreign technology in order to build resilience against sanctions and export-control mechanisms. CAR concluded that Russia was "highly reliant on a narrow set of particular technology to produce the advanced weapon systems […] deployed …"[32] Subsequent CAR investigations of the remnants of two of the Kh-101 cruise missiles that had been used in a large-scale missile attack on Ukraine on 23 November 2022, demonstrated that they had been manufactured as late as between July and September and between October and November 2022, respectively. When combined, such findings may be an indication of decreasing Russian stockpiles for its more advanced systems, such as cruise missiles.[33] In March 2023, CAR investigators also made their first discovery of a US-based company's components that had been manufactured long after the initial invasion, or, more specifically, in August 2022. According to CAR, this discovery indicated that Russia's defence industry had thenceforth had to look beyond its pre-invasion stocks of components to find alternative supplies.[34]

Taken together, the consequences of the invasion on the activities and performance of Russia's defence industry are thus of such a magnitude that they cannot be ignored. Previous pre-invasion assumptions about Russian defence-industrial prerequisites for production capacity require reconsideration. The same applies to previous assessments about the content, implementation and possible end-state of the GPV 2027.

Of particular interest for this Chapter is the Russian output potential, one year into the invasion, for replacing destroyed military systems and equipment and filling up its stockpiles of ammunition. The invasion has had a particularly devastating effect on Russia's Ground Forces, Airborne Forces and Naval Infantry, an outcome that is also reflected in all estimates of their losses of military equipment and use of ammunition. The remainder of this section, therefore, focuses on Russia's production of MBT and replacement of artillery shells and MLRS rockets.

Land warfare equipment

Until 2021, the Russian government regularly released fairly detailed data on its yearly procurements of main military systems under the GOZ. For instance, Russian news outlets and think tanks documented at least 26 300 new, modernised, or renovated, pieces of equipment that had been delivered to Russia's Armed Forces, in 2011–2018, by the defence industry.[35] Based on these data, Table 7.2 shows this study's projections of Russian equipment availability, one year into the invasion, of Russian main battle tanks, MBT, with forecasts for the future. The tables in the appendix show similar projections for selected other major systems and platforms for ground combat. The approach used for the compilation of this table relates to the method that was developed for the forecast of the end-state of the GPV 2027 that was published in the above-mentioned 2019 FOI report.

To establish a baseline for Russia's pre-invasion military equipment portfolio, the table draws on the *Military Balance* for the years 2015–2021.[36] The reason why several years are included in the analysis is to catch, more accurately, any changes to Russia's stored equipment. Older equipment might have been sold, or written off, but it may have also been transferred to active use, in conjunction with modernisation, renovation and overhaul. This process does not necessarily appear to be reflected in the standard tables of the *Military Balance*, a situation that motivates the use of a longer time-line. Admittedly, the study's choice of 2015 as its starting year was arbitrary.

The category "Remaining Russian equipment" relates to how many units of each type Russia had left in active use during the first quarter of 2023. The three different estimates in the table relate to the 2023 *Military Balance*, and the assessments of the *Oryx* website and the General Staff of the Armed Forces of Ukraine (GSUAF), in late February 2023, regarding destroyed or captured Russian equipment.

To establish how long it would take Russia to restore all its equipment in active use to the level of the 2021 *Military Balance*, the table uses *Oryx* data over lost equipment, combined with an assessment of the limits of Russian yearly production capacity, for each system. Where public data on actual production capacity is lacking, known information on equipment deliveries from 2007 and onwards have been used as a proxy. In other cases, the stipulated production volumes from revealed

Table 7.2 Replacement of lost Russian main battle tanks.

MAIN BATTLE TANKS	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
T-90 TOTAL	**400**	**200**	**350**	**375**				**142**	**142**
T-90M Proryv	60		150	93		62	-0,7	0	0
T-90/T-90A	340	200	200	282		62	0,9	142	142
T-80 TOTAL	**580**	**2 870**	**280**	**172**				**2 817**	**521**
T-80BVM	220		155	167		80	0,7		521
T-80B/BV/K, U/E/K/M2	360	2 870	125	4				2 817	
T-72 TOTAL	**2 750**	**6 262**	**1 720**	**1 679**				**5 674**	**665**
T-72B3M	570		325	580		140	-0,1		
T-72B3	1 150		675	552		140	4,3		
T-72B/BA	700		430	535					
T-72/T-72/A/B	330	6 262	290	11				5 674	665
T-64 TOTAL	**60**	**1 940**	**60**	**6**				**1 940**	**388**
T-64A/B/BV	60	1 940	60	6				1 940	388
T-62	150	2 325	150	77				2 325	465
T-62M/MV /Obr. 1967	150	2 325	150	77				2 325	465
T-55 TOTAL	**0**	**2 800**	**0**	**0**				**2 800**	**560**
T-55		2 800		0				2 800	560
TOTAL	**3 940**	**16 397**	**2 560**	**2 309**	**767**			**15 699**	**2 741**

Abbreviations: MB - Military Balance; **GSUAF** – General Staff of the Armed Forces of Ukraine; **act.eqm.** – active equipment.
Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

procurement contracts have also been used as a substitute for real production data. The time to replace lost units is given in years. It is not possible to aggregate the result, as certain systems might be produced in parallel, whereas other systems might need to be manufactured consecutively, as they depend on the same production staff and production lines.

The number of available and stored units of a certain system caps the number of units that might be modernised or upgraded. The question is how much of the stored equipment is actually usable. According to the Ukrainian military-political analyst, Aleksandr Kovalenko, only 20 percent of all the MBT available from Russian storage centres are suitable for the restoration of their combat capability.[37] The last two columns in Table 7.2 illustrate how much inventory would remain in storage after restoring the 2021 level of active equipment, whether given either 100, or 20, percent usability.

Thus, one year into the war, even the very high figures from the General Staff of the Armed Forces of Ukraine demonstrate that Russia had not really started to empty their stores from conserved equipment, although the numbers of main battle tanks and artillery systems was running critically low. With the prevailing production capability of the 2010s, Russia would be able to replace older lost equipment with modernised or refurbished units from its stores within a few years' time, in most cases. The critical question is how much inventory that can actually be put into usable condition. Even considering the more conservative and moderate estimates of Russia's losses of equipment from the *Military Balance* and *Oryx*, it will be difficult for Russia to maintain the long-term sustainability and endurance of its military equipment portfolio.

As for the short-term sustainability, can Russia reconstitute during combat operations, considering the rate of its losses in Ukraine? The curves in Figure 7.1 represent three different scenarios to explore this issue further. In analogy with Table 7.2, it is here assumed that before the invasion, Russia's Armed Forces listed a total of 3 940 MBT in active use, as a starting point. The downward slope in all curves up to the dashed vertical line represents Russia's total losses of MBT as documented by *Oryx* from 24 February 2022 to 29 May 2023. Although there is a time lag between an actual loss and *Oryx* documentation of the fact, there is an overall

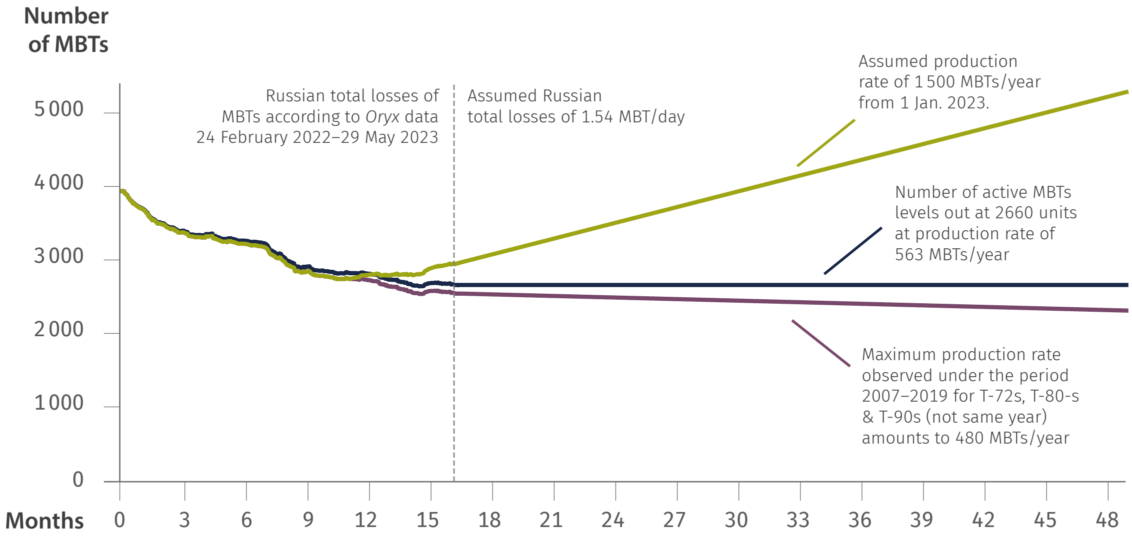


Figure 7.1 Assessment of Russia's stock of MBT in active use.
Sources: Military Balance, different years, Westerlund, Fredrik, and Oxenstierna, Susanne (eds.) *Russian Military Capability in a Ten-Year Perspective – 2019*, FOI-R--4758—SE, Stockholm, December, author's own calculations.

observable trend of a diminishing slope for Russia's losses of MBT over time. For instance, during the first 30 days of the invasion, Russia lost, on average, 9.8 MBT each day. During the last 30 days preceding 29 May 2023, its losses of MBT had decreased to 2.6 MBT per day, on average.

If the *Oryx* data used here were approximated with a second-degree polynomial trend line, Russia would stop losing any further MBT from early October 2023 onwards. Given the improbability of this model, in its place it is here assumed that Russia's losses stagnate around a linear trend of 1.54 MBT lost each day, on average. This number corresponds to the trend in Russia's losses of MBT on 29 May 2023.

Given the losses of MBT from the *Oryx* data and the subsequent interpolation, the scenario represented by the bottom curve assumes that Russia can add 480 units to its stock of MBT in active use each year, or approximately 1.3 units per day, through production of new MBT, or through modernisation or overhaul of existing ones. This figure is based on the maximum number of T-72, T-80 or T-90 that were delivered in a year that occurred in 2009–2019. For instance, the highest number of T-72 modernised or overhauled occurred in 2014, when 293 units were delivered. Given other assumptions of how much Russia has increased its military production since the start of the invasion, this figure might appear somewhat conservative or modest. On the other hand, it is not known to what extent production, modernisation or overhaul of one tank model or another depend on the same production lines or the same group of workers and technicians.

The curve in the middle represents a scenario in which Russia's losses of MBT is levelled out by the replacement rate. It corresponds to 1.54 MBT per day or 560 units per year.

The third scenario, represented by the top curve, assumes a replacement rate of some 4.1 MBT on a daily basis, or 1 500 units per year. This figure has been mentioned by Dmitry Medvedev, who claimed that this is how many MBT Russia will be able to add to its arsenal of MBT in active use under 2023. Considering that Soviet production of MBT, at most, amounted to some 2000 units per year during the late Soviet period, this scenario appears highly unrealistic.

To conclude this section, even if one exclude the Medvedev scenario, it appears that Russia's ability to reconstitute its arsenal of MBT is not seriously stymied even if increases in production output remains modest. The true constraining factors are the production costs as well as the number of recoverable stored MBT, as discussed above in connection with Table 7.1.

Artillery shells

The first year of Russia's invasion of Ukraine was characterised by its surprisingly high intensity, which, even at the beginning, had already swallowed up ammunition at a rate not experienced since the Second World War. Apart from the great logistical difficulties such intensity places on the warring parties, the wider question is how long supplies of ammunition could last on both sides. In Russia's case, ammunition supplies were a function of the volume of its pre-war stockpiles, and the pace at which it could replenish its stocks with newly manufactured ammunition from its own factories, or by buying them on international markets.

In the early 1990s, Russia's Armed Forces had inherited about 15 mn metric tons of missiles and ammunition, stored at 180 arsenals, bases and warehouses, from the Soviet Army. A total of 3 mn tons of this amount were due to the removal of ammunition from Soviet bases abroad. In addition, on average, Soviet industry had produced 1.0–1.2 mn tons of missiles and ammunition, annually, until the collapse of the Soviet Union.[38]

In January 2013, this stockpile had been brought down to 3.7 mn tons, through different federal target programmes for industrial disposal of weapons and military equipment, of which 1.1 mn tons were considered unusable. The set target for the Armed Forces during the remaining 2010s was to get down to 2 mn tons of artillery shells and rockets, with a yearly consumption of up to a hundred thousand tons per year, due to operations and combat training, an amount then perceived as sufficient to match the ongoing, parallel, military reforms. Evidently, Russia's lasting stockpiles after the reduction were not dimensioned to take on an opponent who defended himself and whose military-technological level was neck and neck with Russia's, and who could swiftly mobilise roughly the same military capability for a high-intensity and protracted war.

In spite of these constraints, during the first months of the war, Russia fired artillery and high-precision missiles as if its resources were endless. In summer 2022, Russia's Armed Forces experienced an acute shortage of personnel in the Donbas fighting, which it tried to neutralise with heavy artillery fire.[39] Some analysts estimated that Russia then fired some 20 000–30 000 shells a day.[40] According to a senior source within the Ukrainian military command, rather, Russia used up to 60 000 artillery and rockets each day in the summer fighting in Donbas.[41]

With both Russian and Ukrainian forces dug in during the autumn, the war during the winter of 2022–2023 settled into an artillery duel. Different sources estimated, in February and March, that Ukraine was at the time on the receiving end of about 10 000–20 000 shells and rockets a day, from the Russian side.[42] Allegedly, Russian artillery fire was even down by as much as 75 percent at some sections of the frontline in January 2023.[43] In spite of the wide variations of figures provided by different sources, a significant number of estimates nevertheless concurred, in spring 2023, that Russia's rate of fire had been falling from late 2022 and onwards – a possible indication that Russian forces were beginning to experience a critical shortage of ammunition, "shell hunger."

Already in autumn 2022, the Ukrainian publication *Defence Express*, assumed that the pace of Russia's artillery barrages depended on transfers of shells from the Belarusian army. On the word of the Ukrainian MoD, allegedly, Russia simultaneously tried to buy up all types of shells with Soviet calibres from abroad to replenish its arsenals.[44]

In early March 2023, the GSUAF claimed that Russia had used up almost the entire stock of the artillery ammunition that it kept in storage in the central part of Russia. The GSUAF reported that it had observed movement of ammunition from depots located in other Russian regions to the occupied territories of Ukraine. It also claimed that almost 50 percent of this ammunition had visible signs of rust damage. By and large, "these new batches of ammunition [were] in an unsatisfactory state and their quality [was] further reduced due to improper storage and violation of service rules and regulations," according to the GSUAF. The GSUAF anticipated that, by extension, this meant that the Russian army would experience critical shortages within the next 2–3 months.[45]

During the first year of the invasion, and in spring 2023, there were several different estimates of how much ammunition Russia had had at the beginning of the invasion, how much was left, and the replenishment rate. According to one estimate, Russia's total stockpile could have been as many as 16 mn rounds, of which half might have been used, or lost, in Ukraine by that time.[46] In February, Major General Kyrylo Budanov, Chief of the Defence Intelligence of Ukraine, claimed that stockpiles of artillery shells in Russia had decreased to 30 percent of the pre-invasion stock.[47] Nevertheless, Serhii Cherevatyi, speaker for the Eastern group of the Armed Forces of Ukraine, noted in April that there was no noticeable "shell hunger" wherever Russia was focusing its efforts.[48]

Any claims that Russia suffered from ammunition shortage were dismissed altogether by the Russian side, in spring 2023. According to *Vzgliad*, a Russian business newspaper associated with the Russian regime, the budget item of the yearly GOZ for production of ammunition for armoured vehicles, heavy artillery weapons and multiple launch rocket systems expanded dramatically throughout the 2010s, after Sergei Shoigu had been appointed defence minister.[49] According to Aleksei Leonkov, Russian military expert and editor of the magazine *Arsenal otechestva*, Russia then even updated the ammunition in its long-term storage depots, disposing shells accumulated in Soviet times.[50] Fast forward to late December 2023: Defence Minister Shoigu stated that the financial resources provided in 2022 had made it possible to increase the production volumes of ammunition for rocket and artillery weapons and aircraft weapons by 69 to 109 percent, for certain types.[51]

Sergei Chemezov, the long-time General Director or CEO of the state-owned defence conglomerate Rostec, claimed later, in an interview in January 2023, that any talk that Russia was running out of ammunition or anything else, "was complete nonsense."[52] Allegedly, Rostec had increased its production of ammunition several times and, for some types, it would have been increased by several orders of magnitude. Chemezov repeated this talking point in subsequent interviews, and it was also used by other representatives for Rostec. Moreover, in late December 2022, another 10 state factories involved in ammunition production had been transferred to Rostec.[53] Rostec planned to integrate them into the structures of two of its previous holdings and modernise them. It was ostensibly in the process of investing tens of billions of roubles in the modernisation and re-equipment of factories, for the production of special chemicals and ammunition components, in order to create a new look for the ammunition industry.[54]

There is, thus, much to suggest that there was an increase in Russian production of shells, from 2022 onwards, but it was not possible to verify, in the spring of 2023, the exact pace, or the volumes involved. According to some estimates, Russian production of shells before the invasion allegedly amounted to some two thousand shells a day, or 60 000 shells per month, which might serve as a credible basepoint for further assumptions of how the war has affected Russia's production of ammunition.[55]

Under the defence ministry programme "Effective Army," Russia restored 1.7 mn rockets and shells in 2014–2017, that is, about 570 000 per year, which would have cost the budget RUB 39 bn per year, if they were produced from scratch.[56] Pavel Luzin, expert in Russian military affairs, has used these data, combined with figures on the earnings of the corresponding industrial enterprises and conglomerates, to reach the rough estimate of a total annual rate of replenishment of artillery arsenals in the 2010s to 1.6–1.7 mn shells of all types, or, at most, 4 400–4 700 shells per day.[57] An interesting detail, as Luzin notes, is that, in 2017, the supply of rocket projectiles of all calibres amounted to only 10 700.[58]

Similar calculations have also been made by Hlib Parfonov, a Ukrainian analyst, who came to the conclusion that Russian production capacity of 152 mm shells in 2021 amounted to just about 730 000 per annum, which is 61 000 a month, or 2 000 a day. As for rockets for the multiple launch rocket systems (MLRS), Smerch, Uragan and Tornado-G, Parfonov estimated that production of Uragan and Tornado-G rockets in 2 021 was about 15 700. Taken together, the total cost of reproducing the entire range of munitions that Russia used up during the first year of the invasion would exceed RUB 6 trn, according to Parfonov.[59] Given that the entire GPV 2027 amounted to RUB 20 trn for a ten-year period, this figure put further strains on the Russian defence budget, the spending balance between different parts of the defence industry, and the production capacity of the ammunition industry.

However, as long as the war lasts with an intensity similar to that during the first year, Russia will not even have the opportunity to start rebuilding its stockpile of ammunition, let alone stop depleting it further. Figure 7.2, below, illustrates this point in a simple model, based on the discussions above. Positing an initial stockpile of 16 mn shells, of which half were allegedly used up during the first year of fighting, gives an average firing intensity of some 24 000 shells per day. Assuming a production rate of some 2 000 artillery shells per day, before the invasion, and with no prospects to increase it further, or import any significant amount from abroad, Russia would run out of artillery shells after about 24 months, or two years, after the start of the invasion. This is illustrated by the steepest downward-sloping line in the figure.

The second downward-sloping line is based on the same firing intensity. However, it is here assumed that each third month, Russia would manage to increase its production of artillery shells by another 2 000 shells per day. Furthermore, this increase would continue until the production rate has reached 16 000 shells per day, corresponding to half a million shells a month, or just over 5.8 million shells on a yearly basis. Figure 7.2 demonstrates that as long as the war continues, not even these highly unrealistic production numbers would save Russia from running out of artillery shells, although this would be postponed by another year and a half, compared to the previous scenario.

Apart from the problems, of a very practical and technical nature, involved in eightfolding the production rate of artillery shells, the third upward-sloping line in the figure demonstrates that Russia would also be stymied by financial constraints, were it to push its production rate beyond what is realistic. Assuming that the financing of GPV 2027 was to be evenly distributed over the entire period (which it is not, as discussed earlier in this chapter), the MoD yearly acquisitions would amount to RUB 1.9 trn, on a yearly basis. Given the average unit price of RUB 68 400 per artillery shell, which is based on the accounting of the MoD Effective Army programme referred to above, fully developed, the production of artillery shells would increase from 2.6 percent to devour a fifth of the entire yearly budget for MoD acquisitions, or almost RUB 400 bn.

To conclude, even dramatic increases of Russia's production capacity for artillery shells would have a minor impact on how long its shell stockpiles would

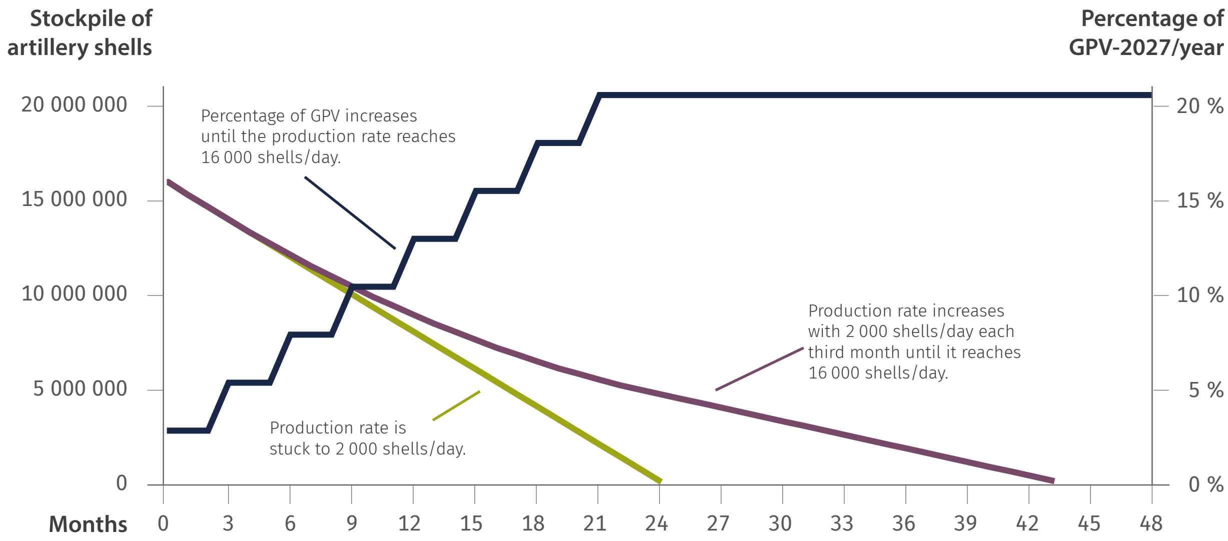


Figure 7.2 Impact of shelling on Russia's stockpile of artillery shells.

last, and it would come at a tremendous cost increase. For instance, as can be seen from Figure 7.2, already a modest increase to 8 000 shells per day would devour ten percent of the yearly GPV 2027 allocations, but only give Russia 6 more months of shelling compared to the most pessimistic scenario.

7.3 Conclusions

Seen from abroad, on the threshold of the 2020s, Russia's defence industry appeared to be in better shape than it had been for decades. It had achieved high political priority and a more efficient organisational structure. It had delivered on the defence orders regarding the modernisation and refurbishment of older and proven systemic solutions, of late Soviet design, included in the generously financed GPV 2020. In addition, it had at least positioned itself to complete the unfinished transition to serial production of new Russian-made designs and more sophisticated arms systems, under the new GPV 2027. Admittedly, the sanctions introduced against Russia after its occupation of Crimea in 2014, and the subsequent low-intensive war against Ukraine, in the Donbas region, had been a major setback for the defence industry. However, Russia's policy measures to mitigate their impact had already helped the defence sector to function in a relatively normal fashion by 2017.[60] Over the period out to 2025, it therefore appeared that it would "retain a high-priority status, function in a growing economy and be allocated sufficient funding to enable it to achieve objectives concerning improvements in capital stock and technological innovation."[61]

Russia's full-scale invasion of Ukraine in February 2022 completely overturned these prospects and changed the analytical focus of interest. Forecasts regarding Russia's defence-industrial production soon had to be narrowed down to apply to the immediate future, or, to the extent that Russia's defence-industrial production capacity would enable it to replace destroyed military systems, equipment and consumed ammunition, and rebuild the military stockpiles.

Given the internal dynamics of the war, as well as the overall secrecy surrounding the Russian defence industry, any estimates are subject to great uncertainty and ambiguity. Still, as this Chapter demonstrates, it is nonetheless possible to make certain deductions regarding the ability of the defence industry to contribute to Russia's war efforts, and, in this regard, the significance of its stockpiles of military equipment.

First, although we may not know exactly how much equipment Russia has lost or ammunition it has used up, the overall consensus of different sources on the order of magnitude indicates that Russian military planners cannot ignore them. Although Russian decision-makers say otherwise, the GPV 2027 must have been revised to remain a usable instrument to provide for Russia's immediate demands for military equipment and ammunition.

Second, as for land-warfare equipment, main battle tanks and armour-protected vehicles, in particular, there is no acute shortage. However, as newer, active equipment has been destroyed, Russia has had to rely increasingly on refurbished or, in best case, modernised, equipment brought back to active use from its stockpiles. This means that the average age of Russia's military equipment portfolio will increase inexorably the longer the war goes on, which will have a long-term qualitative negative impact on Russia's military capability.

Third, all figures indicate that Russia's intensive use of ammunition is not tenable. So far, the intensity has been kept up by reducing the stockpiles of stored ammunition. Russia's production of ammunition might certainly prolong the pace of consumption for a while, but it is far from enough to sustain the war efforts and at the same time start building up the stockpiles again. Although Russia did not seem by then to have changed its military tactical and operational policies nor its strategic objectives, it was still obvious one year into the invasion that Russia would soon have to make some tough decisions in the following months.

Denied a swift victory over Ukraine, it has been speculated that Russian President Putin now believes he can win the war through attrition. Be that as it may, the figures nevertheless indicate that it would be a Pyrrhic victory, from which Russia would not be able to recover and restore its pre-war military capability for a very long time. ■

Endnotes

1 Christopher Mark Davis, "The Russian defence industry, 1980–2025 – Systemic change, policies, performance and prospects," in *The Economics of the Global Defence Industry*, eds. Keith Hartley and Jean Belin (London: Routledge, 2020), 83, 110.

2 Tomas Malmlöf and Johan Engvall, "Russian armament deliveries," in *Russian Military Capability in a Ten-Year Perspective – 2019*, edited by Fredrik Westerlund and Susanne Oxenstierna (Stockholm: FOI-R--4758--SE, December 2019), 115.

3 Christopher Mark Davis, "The Russian defence industry, 1980–2025 – Systemic change, policies, performance and prospects," in Keith Hartley and Jean Belin, eds., *The Economics of the Global Defence Industry* (London: Routledge, 2020), 80. The average exchange rate used here is RUB 62.8 Russian per USD, in 2018.

4 Valeriia Viktorovna Glazkova, "Sostoianie i osnovnye tendentsii razvitiia oboronno-promyshlennogo kompleksa Rossiiskoi Federatsii," E-Management 4, no. 4 (2021): 16–23, accessed December 14, 2022, DOI: 10.26425/2658-3445-2021-4-4-16-23, *https://e-management.guu.ru/jour/article/view/174*.

5 Malmlöf and Engvall "Russian armament deliveries," 115.

6 Davis, "The Russian defence industry," 111–112.

7 Richard Connolly and Mathieu Boulègue, "Russia's New State Armament Programme – Implications for the Russian Armed Forces and Military Capabilities to 2027," Research Paper, May 2018, Chatham House, Royal Institute of International Affairs, London, 34; Richard Connolly and Cecilie Sendstad, "Russian Rearmament – An Assessment of Defence-Industrial Performance," Problems of Post-Communism 65, no. 3 (2018): 143–160, Routledge, London.

8 Ministry of Industry and Trade, "Ob utverzhdenii perechnia organizatsii, vkliuchennykh v svodnyi reestr oboronno-promyshlennogo kompleksa," Prikaz no. 1828, 23 July 2015.

9 Katarzyna Zysk, "Military R&D, innovation and breakthrough technologies," in Samuel Bendett, Mathieu Boulègue, Richard Connolly, et al., "Advanced military technology in Russia – Capabilities and implications," Research Paper, September 2021, Chatham House, Royal Institute of International Affairs, London, 15–16.; Johan Engvall, "Russia's Military R&D Infrastructure – A Primer," FOI-R--5124—SE (Stockholm: Swedish Defence Research Agency, 2021).

10 Bilyana Lilly and Joe Cheravitch, "The Past, Present, and Future of Russia's Cyber Strategy and Forces," in 2020 12th International Conference on Cyber Conflict, RAND, NATO CCDCOE, accessed May 23, 2023, *https://ccdcoe.org/uploads/2020/05/CyCon_2020_8_Lilly_Cheravitch.pdf*, 140–141.

11 Ministry of Defence, "Nauchnye roty i vzvoda," n.d., accessed February 14, 2023, *https://recrut.mil.ru/for_recruits/research_company/companies.htm*.

12 Zysk, "Military R&D", 12.

13 Richard Connolly and Mathieu Boulègue, "Russia's New State Armament Programme – Implications for the Russian Armed Forces and Military Capabilities to 2027," Research Paper, May 2018, Chatham House, Royal Institute of International Affairs, accessed May 23, 2023, *https://www.chathamhouse.org/sites/default/files/publications/research/2018-05-10-russia-state-armament-programme-connolly-boulegue-final.pdf*, 33.

14 Clinton Reach, "Russian Electronic Warfare," in Andrew Radin et al., *The Future of Russian Military – Appendices*, RAND, accessed May 23, 2023, *www.rand.org/pubs/research_reports/RR3099.html*, 197.

15 Connolly and Boulègue "Russia's New State Armament Programme," 10.

16 Tomas Malmlöf, "Russia's New Armament Programme – Leaner and Meaner," RUFS Briefing No. 42, FOI Memo 6365 (Stockholm: Swedish Defence Research Agency, 2018).

17 Matthew Povlock, Andrew Radin, and Clinton Reach, "Russian Defence Spending," in Andrew Radin et al., *The Future of Russian Military – Appendices*, RAND, accessed May 23, 2023, *www.rand.org/pubs/research_reports/RR3099.html*, 31; Tomas Malmlöf and Roger Roffey, "The Russian Defence Industry and Procurement," in Gudrun Persson (ed.), *Russian Military Capability in a Ten-Year Perspective – 2016,* FOI-R--4326--SE (Stockholm: Swedish Defence Research Agency, 2016), 154.

18 Malmlöf, "Russia's New Armament Programme;" Malmlöf and Engvall, "Russian armament deliveries," 118; Connolly and Boulègue, "Russia's New State Armament Programme," 8–9.

19 Aleksandra Dzhordzhevich and Ivan Safronov, "U trillionov est dva soiuznika — armiia i flot," *Kommersant*, accessed May 24, 2023, *https://www.kommersant.ru/doc/3500710*.

20 Connolly and Boulègue, "Russia's New State Armament Programme," 10.

21 Malmlöf, "Russia's New Armament Programme."

22 Susanne Oxenstierna, "The economy and military expenditure," in Fredrik Westerlund and Susanne Oxenstierna (eds.), *Russian Military Capability in a Ten-Year Perspective – 2019*, FOI-R--4758--SE (Stockholm: Swedish Defence Research Agency, 2019), 97–111; Conolly and Boulègue, "Russia's New State Armament Programme," 10–14.

23 Conolly and Boulègue, "Russia's New State Armament Programme," 37.

24 Malmlöf and Engvall, "Russian armament deliveries," 122–127.

25 Malmlöf and Engvall, "Russian armament deliveries," 120.

26 Sergei Shoigu, *Speech at the extended session of the Ministry of Defence,* December 21, 2022, accessed May 5, 2023, *https://eng.mil.ru/en/news_page/country/more.htm?id=12449212@egNews*.

27 Council of the European Union, "EU sanctions against Russia explained," February 7, 2023, accessed February 23, 2023, *https://www.consilium.europa.eu/en/policies/sanctions/restrictive-measures-against-russia-over-ukraine/sanctions-against-russia-explained/#coordination*.

28 U.S. Department of State, "The Impact of Sanctions and Export Controls on the Russian Federation," October 20, 2022, accessed February 23, 2023, *https://www.state.gov/the-impact-of-sanctions-and-export-controls-on-the-russian-federation/#:~:text=Since%20Russia%20launched%20its%20unjustified,Russia%20for%20its%20brutal%20aggression*.

29 U.S. Department of Commerce – International Trade Administration, "Sanctions Framework," June 21, 2022, accessed February 23, 2023, *https://www.trade.gov/country-commercial-guides/russia-sanctions-framework*.

30 Jack Watling and Reynolds, "Operation Z – The Death Throes of an Imperial Delusion," Special Report, RUSI, 22 April 2022, *https://rusi.org/commentary/operation-z-death-throes-imperial-delusion*, 10.

31 James Byrne et al., "Silicon Lifeline: Western Electronics at the Heart of Russia's War Machine," RUSI, August 2022, accessed April 22, 2023, *https://rusi.org/explore-our-research/publications/special-resources/silicon-lifeline-western-electronics-heart-russias-war-machine*.

32 Conflict Armament Research, "Component commonalities in advanced Russian weapon systems," *Ukraine Field Dispatch*, September 2022, accessed 22 April 2023, *https://ukraine-2021-itrace.hub.arcgis.com/apps/239f756e2e6b49a5bec78f5c5248bf3d/explore*. See also Conflict Armament Research, "Documenting Russia's advanced weapon systems in Ukraine," *Ukraine Field Dispatch*, May 2022, accessed 22 April 2023, *https://ukraine-2021-itrace.hub.arcgis.com/apps/19ca0782f2354c87b25972da7356f0e8/explore.*

33 Conflict Armament Research, "Dating newly produced Russian missiles used in Kyiv attacks," *Ukraine Field Dispatch,* December 2022, accessed on 22 April 2023, *https://ukraine-2021-itrace.hub.arcgis.com/apps/81bc6b71fdc64361a05a21020c3d6d5e/explore.*

34 Conflict Armament Research, "Identifying post-invasion components in Russian weapons," *Ukraine Field Dispatch,* April 2023, accessed on 22 April 2023, *https://ukraine-2021-itrace.hub.arcgis.com/apps/00594bef40bc4148b16dc7267172d033/explore*.

35 Malmlöf and Engvall, "Russian armament deliveries," 120.

36 IISS, "Russia and Eurasia," *Military Balance*, 116:1–123:1 (2016–2022), Taylor & Francis.

37 Aleksandr Kovalenko, "Blogpost" [Telegram], 26 November 2022, accessed 7 March 2023, *https://t.me/s/zloyodessit/17661*.

38 "Zadachi khraneniia i utilizatsii boepripasov reshaiutsia planomerno," *Arsenal Otechestva,* No.1, 2013, *https://arsenal-otechestva.ru/article/157-hranenie-i-utilizaciya-boepripasov*, (accessed 31 March 2023).

39 "Proizvodstvo boepripasov dlia Ukrainy zaderzhivaetsia iz-za defitsita porokha i vzryvchatki v Evrope," *Meduza,* 19 March 2023, accessed 27 April 2023, *https://meduza.io/feature/2023/03/19/proizvodstvo-boepripasov-dlya-ukrainy-zaderzhivaetsya-iz-za-defitsita-poroha-i-vzryvchatki-v-evrope*.

40 Matthew Luxmoore and Evan Gershkovichm, "Artillery Shortage Hampers Russia's Offensive in East Ukraine, Western Officials Say," *Wall Street Journal*, 14 March 2023, *www.wsj.com/articles/acute-artillery-shortage-is-hampering-russias-offensive-in-east-ukraine-western-officials-say-6f2fb94a.*

41 Thomas Gibbons-Neff, Andrew E. Kramer, and Natalia Yermak, "Shortage of Artillery Ammunition Saps Ukrainian Frontline Morale," New York Times, 10 June 2022, *www.nytimes.com/2022/06/10/world/europe/ukraine-ammo-shortage-artillery.html*.

42 "Keeping the guns blazing," *Economist,* No. 8, February 25–March 3 2023: 22, *https://www.economist.com/briefing/2023/02/19/the-west-is-struggling-to-forge-a-new-arsenal-of-democracy*; Luxmoore and Gershkovich, "Artillery Shortage".

43 Natasha Bertrand, Oren Liebermann, and Alex Marquardt, "Russian artillery fire down nearly 75%, US officials say, in latest sign of struggles for Moscow," *CNN*, 10 January 2023, accessed 28 April 2023, *https://edition.cnn.com/2023/01/10/politics/russian-artillery-fire-down-75-percent-ukraine/index.html*.

44 Defence Express, "Kak RF poteriala 'sovetskie' zapasy snariadov i kak rashisty k zime 'dobiut' tanki i SAU," 1 September 2022, accessed 10 May 2023, *https://defence--ua-com.translate.goog/weapon_and_tech/jak_rf_zmarnuvala_radjanski_zapasi_snarjadiv_ta_jak_rashisti_do_zimi_dobjut_tanki_ta_sau-8757.html?_x_tr_sl=uk&_x_tr_tl=ru&_x_tr_hl=sv&_x_tr_pto=wapp*.

45 "Explained: Russia's 'Rusty' Artillery Shell Problem," *Kyiv Post,* 10 March 2023, *www.kyivpost.com/post/14094*.

46 David Hambling, "When Will Ammunition Shortage Silence Russia's Artillery?" *Forbes,* 5 April 2022, accessed 2 May 2023, *https://www.forbes.com/sites/davidhambling/2023/04/05/when-will-ammunition-shortage-silence-russias-artillery/?sh=5aec5fa66d95*.

47 Katerina Reshchuk and Boris Davidenko, "Ogromnoe nastuplenie rossiian dazhe ne vse zamechaiut," *Forbes Ukraine,* 22nd February 2023, accessed 3rd May 2023, *https://forbes.ua/ru/war-in-ukraine/rosiya-vzhe-rozpochala-velikiy-nastup-chi-zmozhe-rf-mobilizuvati-shche-500-000-moldativ-koli-zakinchitsya-viyna-velike-intervyu-kirila-budanova-21022023-11881*.

48 Tetiana Lozovenko, "Russia has no ammunition shortage and never had it – Ukraine's Armed Forces," *Ukrainska Pravda*, 5 April 2023, accessed 3 May 2023, *www.pravda.com.ua/eng/news/2023/04/5/7396613/*.

49 Andrei Rezchikov, "Ekspert sravnil obespechennost snariadami rossiiskoi armii i VSU," *Vzgliad,* 17 January 2023, accessed 4 May 2023, *https://vz.ru/news/2023/1/17/1194251.html*.

50 Vladimir Astapkovich, "Chemezov nazval razgovory o snariadnom golode vs Rossii polnoi erundoi," *RIA Novosti*, 27th January 2023, accessed 4th May 2023, *https://ria.ru/20230127/chemezov-1847759752.html*.

51 Shoigu, *Speech at the extended session*.

52 Vladimir Astapkovich, "Sergei Chemezov: Rossii nado navsegda zabyt o 'boingakh' i 'eirbasakh,'" *RIA Novosti*, 27th January 2023, accessed 4th May 2023, *https://ria.ru/20230127/chemezov-1847586519.html*.

53 President of Russia, *Ukaz Prezidenta Rossiiskoi Federatsii ot 30 dekabria 2022 g. No 987, Ob imushchestvennom vznose Rossiiskoi Federatsii v Gosudarstvennuiu korporatsiiu po sodeistviiu razrabotke, proizvodstvu i eksportu vysokotekhnologichnoi promyshlennoi produktsii "Rostekh,"* accessed 4 May 2023, *www.kremlin.ru/acts/bank/48800*.

54 Pavel Bedniakov, «Boepripasnaia otrasl fakticheski pereshla na voennye relsy, zaiavil 'Rostekh,'» *RIA Novosti,* 14 March 2023, accessed 4 May 2023, *https://ria.ru/20230314/boepripasy-1857769391.html*.

55 «Proizvodstvo boepripasov dlia Ukrainy zaderzhivaetsia iz-za defitsita porokha i vzryvchatki v Evrope,» *Meduza,* 19 March 2023, accessed 5 May 2023, *https://meduza.io/feature/2023/03/19/proizvodstvo-boepripasov-dlya-ukrainy-zaderzhivaetsya-iz-za-defitsita-poroha-i-vzryvchatki-v-evrope*.

56 Ministry of Defence, "Itogi deiatelnosti Minoborony Rossii v 2017 godu," accessed 9 May 2023, *https://itogi2017.mil.ru/Results.html*.

57 Pavel Luzin, "A farewell to arms. By year end Russia will be left almost without shells, artillery and armored vehicles," *The Insider,* 31 August 2022, accessed 10 May 2023, *https://theins.ru/en/politics/254573*.

58 Rostec, *Annual Report 2017,* accessed 10 May 2023, *https://rostec.ru/upload/iblock/e51/e51272bbcf59ce3ce8320cdabf668a1d.pdf*, 70.

59 Hlib Parfonov, "Russia Struggles to Maintain Munition Stocks (Part One and Two)," *Eurasia Daily Monitor*, Jamestown Foundation, accessed 10 May 2023, *https://jamestown.org/program/russia-struggles-to-maintain-munition-stocks-part-one/* and *https://jamestown.org/program/russia-struggles-to-maintain-munition-stocks-part-two/*.

60 Richard Connolly, *Russia's Response to Sanctions – How Western Economic Statecraft is Reshaping Political Economy in Russia* (Cambridge: Cambridge University Press, 2018), 3.

61 Christopher Mark Davis, "The Russian defence industry, 1980–2025 – Systemic change, policies, performance and prospects," in Keith Hartley and Jean Belin (eds.), *The Economics of the Global Defence Industry* (London: Routledge, 2020), 118.

Appendices to Chapter 7

The tables below show the projections of Russian equipment availability, one year into the invasion, of Russian major systems and platforms for ground combat, with forecasts for the future. The approach used for the projections of these tables is the same that was used to construct Table 7.2 in this chapter as well. It relates to the method that was developed to forecast the end-state of the GPV 2027 that was published in the 2019 FOI report on Russian military capability.

Table A7.1 Replacement of lost Russian reconnaissance equipment.

RECONNAISSANCE	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
BRDM	1 000	1 000	1 000	991				1 000	200
BRDM-2/2A	1 000	1 000	1 000	991				1 000	200
BRM	700	0	700					0	0
BRM-1K/-1K Obr. 2021	700		700	674					
TOTAL	**1 700**	**1 000**	**1 700**	**1 665**				**1 000**	**200**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.2 Replacement of lost Russian infantry fighting vehicles.

INFANTRY FIGHTING VEHICLES	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
BMP	4 600	8 500	3 590	3 152				7 430	630
BMP-3M	40		40	40		53	0,0		
BMP-3/3F	720		470	485		53	4,4		
BMP1/2 (unknown)				-105					
BMP-2M	70			54		91	0,2		
BMP-2	3 300	1 500	2 580	2 540		91	8,4	740	-460
BMP-1AM	20		50	-2					
BMP-1	450	7 000	450	140		91	3,4	6 690	1 090
BTR	1 970	0	1 620	1 256					
BTR-80/82 (unknown)				-46					
BTR-82A/AM	1 870		1 520	1 357		150	3,4		
BTR-80A	100		100	-55		150	1,0		
TOTAL	**6 570**	**8 500**	**5 210**	**4 408**				**7 430**	**630**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.3 Replacement of lost Russian armoured tracked personal carriers.

ARM PERS CARRIERS TRACKED	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
MT	3 800	2 000	3 250	3 231				1 431	-169
MT-LB/-LBVM/-LBVM1K	3 800	2 000	3 250	3 231		200	2,8	1 431	-169
TOTAL	**3 800**	**2 000**	**3 250**	**3 231**				**1 431**	**-169**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.4 Replacement of lost Russian armoured wheeled personal carriers.

ARM PERS CARRIERS WHEELED	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
BTR	2 600	4 000	2 350	2 438				3 998	798
BTR-80	1 600		1 350	1 446		150	1,0		
BTR-70	200		200	195					
BTR-60	800		800	799					
BTR-60/70		4 000		-2		150	0,0	3 998	798
TOTAL	**2 600**	**4 000**	**2 350**	**2 438**				**3 998**	**798**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.5 Replacement of lost Russian vehicles of the Airborne Forces.

AIRBORNE FORCES' VEHICLES	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
BMD	1 351		850	1 086					0
BMD-4M	351		250	286		83	0,8		
BMD-4				0					
BMD-3				0					
BMD-2	1 000		600	801		186	1,1		
BMD-1				-1					
BTR	822	0	700	736				0	0
BTR-MDM	122		100	108		60	0,2		
BTR-D	700		600	628		36	2,0		
TOTAL	**2 173**		**1 550**	**1 822**				**0**	**0**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.6 Replacement of lost Russian rocket artillery.

ROCKET ARTILLERY	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	**Oryx**	**GSUAF**				
	Active	**Stored**	**Active**	**Active**	**Active**			**Usability 100 %**	**Usability 20 %**
122 mm	766	2 420	646	646				2 420	484
9 K51M Tornado-G	180		160	167		36	0,4		
9K55 Grad-1		420		-3				420	84
9K51 Grad	586	2 000	486	482				2 000	400
132 mm	0	100	0	0				100	20
BM-13		100		0				100	20
220 mm	218	700	168	169				700	140
9K57 Uragan	218	700	168	169				700	140
220/300 mm	6	0	6	6				0	0
9K512 Uragan-1M	6		6	6					
300 mm	124	0	124	123					
9K515 Tornado-S	20		20	20					
9K58 Smerch	104		104	103					
TOTAL	**1 114**	**3 220**	**944**	**944**	**640**			**3 220**	**644**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.7 Replacement of lost Russian towed artillery systems.

TOWED ARTILLERY SYSTEMS	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	**Oryx**	**GSUAF**				
	Active	**Stored**	**Active**	**Active**	**Active**			**Usability 100 %**	**Usability 20 %**
120/122 mm	274	4 500	249	224				4 500	1 630
2B16 Nona-K	124		109	113					
D-30	150	2 500	140	111				2 500	880
M-30		2 000		0				2 000	750
130 mm	0	350	0	0				350	130
M-46		350		0				350	130
152 mm	250	2 350	320	141				2 272	637
2A36 Giatsint-B/M, 2A43, 2A53/M	50	600	50	30				600	220
2A65 Msta-B	200	400	150	122		30	2,6	322	42
D-20		750	100	-11				750	215
D-1		500	20	0				500	140
ML-20 (M-1937)		100		0				100	20
203 mm	0	40	0	0				40	8
B-4M		40		0				40	8
TOTAL	**524**	**7 240**	**569**	**361**				**7 162**	**2 405**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

Table A7.8 Replacement of lost Russian self-propelled artillery systems.

SELF-PROPELLED ARTILLERY SYSTEMS	Russian equipment, MB 2021		Remaining Russian equipment early 2023:			Estimated prod/year (units)	Recovery time act. eqm. 2021 level (Oryx, yrs)	Left in store after recovery of active equipment to 2021 level	
			MB	Oryx	GSUAF				
	Active	Stored	Active	Active	Active			Usability 100 %	Usability 20 %
120/122 mm	605	2 500	542	528				2 477	477
2S1 Gvozdika	245	2 000	215	197				2 000	400
2S34 Khost	50		48	48					
2S9 Nona	280	500	240	257		16	1,4	477	77
2S23 Nona-SVK	30		39	26		6	0,7		
2S31 Vena				0					
130 mm	36	0	36	36					
A-222 Bereg	36		36	36					
152 mm	1 844	2 000	1 579	1 541				1 722	122
2S3 Akatsiya	850	1 000	750	698		20	7,6	848	48
2S5 Giatsint	100	850	85	80		20	1,0	830	150
2S19/M1 Msta-S	536	150	436	430		56	1,9	44	-76
2S19M2 Msta-S 2S33 Msta-SM	350		300	325		36	0,7		
2S35 Koalitsiya-SV	8		8	8					
203 mm	60	260	55	54				260	52
2S7SM Malka	60	260	55	54				260	52
240 mm	40	200	40	36				196	36
2S4 Tyulpan	40	200	40	36		12	0,3	196	36
TOTAL	**2 585**	**4 960**	**2 252**	**2 186**				**4 655**	**687**

Sources: Military Balance (2016—23), Oryx website, GSUAF, FOI Russian Military Capability (2013, 2016, 2019), author's calculations.

8. Russia after one year of war

Maria Engqvist and Emil Wannheden

Three main observations can be made about the first year of Russia's war against Ukraine. The first one is that the motives for the invasion had less to do with Ukraine's political development, and more to do with the Russian political leadership's perception of Russia as a great power with the right to dominate its neighbouring countries. The political leadership in Moscow regards Ukraine as part of Russia's sphere of interest and seek to justify a war of territorial expansion. The Russian political leadership claims that Russia is a separate civilization and as an equal to the US and China, with special rights that are not accorded to other lesser countries. By this logic, Russia's political leadership refused Ukraine's right to choose its own security arrangements and, in particular, its choice of European and Euro-Atlantic integration. This view is, quite obviously, incompatible with the Charter of the United Nations and the founding principles of the Organization for Security and Cooperation in Europe. Still, Russia's leaders claim that the US and its Western allies are promoting an unjust unipolar world order, and that they seek to dominate Russia and undermine its sovereignty. Russia's leaders therefore assert that the war is directed against the West, and that the war is necessary for securing Russia's sovereignty. In reality, the war is a manifestation of the leadership's imperialistic ambitions of establishing dominance over its neighbouring countries.

Yet, one year after the invasion, Russia has become weaker instead of stronger, and further from its goals of strengthening its regional dominance and weakening the West. Ukraine has gone through a process of military and political consolidation and has turned away from Russia. NATO has found new unity and resolve and accepted Finland as a member, while Sweden as of spring 2023 was still in the process of joining. Russia's influence over its neighbouring countries is challenged by China, Turkey, Iran and the European Union. Russia is also becoming increasingly dependent on China.

With the full-scale invasion of Ukraine, Russia bit off more than it could chew and encountered much harder resistance than expected. The grievous losses of the Russian Armed Forces have dented the aura of Russian power. Russia's previous military intervention in Syria (2015) and the wars against Georgia (2008) and Ukraine (from 2014) were attempts to reaffirm Russia's great power status. As long as these interventions were limited and apparently successful, they served the political purposes of the Russian leadership.

The second observation regards the risk of escalation – not just for Ukraine, but also for countries in the vicinity of Russia in Europe and Asia. So far, the war has been fought under the assumptions that a direct conflict between Russia and NATO should be avoided, and that nuclear weapons should not be used. If either of these assumptions are called into question, there is a substantial risk of escalation – both geographically and in terms of the intensity of the conflict. The Russian Strategic Nuclear Forces are intact and the increased use of nuclear threats by Russian politicians and leaders has thus far aimed to deter the West from aiding Ukraine. Russia's Aerospace Forces and Navy (minus the naval infantry and the Black Sea Fleet) are also reasonably intact, which provides the equipment base for strategic operations at sea, strategic air operations as well as air and naval parts of strategic operations against critical infrastructure targets. There were, however, no concrete indications among open sources in May 2023 that Russia's military has taken steps to prepare the use of nuclear weapons or widen the geographical scope of the war.

The third observation is, that regardless of how the war in Ukraine develops, Russia's confrontation with the West is of a long-term nature. It is not possible to return to a *status quo ante*. Too much has been destroyed in terms of trust, relationships and cultural and economic exchanges, too many lives have been ruined and war crimes have been committed. Russia's political leadership insists that the war is waged against Western values and ideas; therefore, they are unable to formulate a victory condition, achievable military goals or indeed an end point for the confrontation. They also insist that the war was inevitable as a result of this increasing Western pressure. The war has become a goal in and of itself for Russia's political system, with or without Putin.

In addition to these three main observations, there are several more specific conclusions to be drawn from each of the chapters in the study. Regarding Ukraine, the degree of consolidation and reform that had taken place from 2014 to 2022 allowed it to resist a full-scale invasion by a supposedly superior attacker. Ukrainian civil society played a crucial role during this period, contributing to Ukraine's European integration and the re-orientation of its security and foreign policy. The Ukrainian Armed Forces also underwent transformation in both qualitative and quantitative terms, with substantive support from NATO partners. By February 2022, Ukraine had fought a war for eight years with Russia in Donbas; it had prepared for the eventuality of its expansion, and had benefited from the formal and informal cooperation with the EU, NATO and Western countries.

Russia is reaching out to countries around the world, both to major powers such as China and India as well as countries in Africa, the Middle East, Latin America and Southeast Asia to ensure their support, or at least quiet acquiescence, in its conflict with the West. Some of these countries have openly or tacitly allowed the flow of sanctioned goods and profited from Russia's increasing isolation. Throughout 2022, Russia has substituted imports from Western countries with imports from countries such as China, Turkey and Central Asian states. The shift in import sources has to some extent ensured the supply of certain strategic goods, such as semiconductors.

The varying reactions to the war in Belarus, Moldova, Georgia, Armenia, Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan has unequivocally shown that they cannot be reduced to a unified post-Soviet space with a Russian centre of gravity. The war has accelerated already existing trends of declining Russian influence and a diversification of international relations where China, Turkey and the EU takes a on a larger role. Russia's regional integration projects, not least the Collective Security Treaty Organisation (CSTO), have come under question. The war in Ukraine has constrained Russia's ability to act as a security guarantor in the Caucasus and in Central Asia. For Moldova and Azerbaijan, this development has provided a window of opportunity for more independent political course. However, deep political, economic and cultural ties to Russia will remain. Upholding a sphere of influence as a marker of great power status remains important to Russia. There is an evident gap between Russia's enduring ambitions of dominance and the attempts of its neighbours to find new allies and partners. Belarus, which in the spring of 2023 is at Russia's disposal politically as well as militarily, is a clear exception. How the countries in Russia's vicinity choose to navigate the shifting security landscape will be an important variable for Russia in the years to come.

The Russian government sees military power as a foundation for its security policy. A key take away from the first year of war is the importance of quantity (with sufficient quality). Large amounts of trained personnel, ammunitions and materiel are critical when a planned quick operation drags on into a long war of attrition. Despite its ominous rhetoric, Russia de facto launched a half-hearted war, pouring fewer resources than would have been required in order to succeed with an invasion of these proportions.

The first year of the war destroyed equipment for some two thirds of the manoeuvre units, and up to one third of its artillery units in Russia's land forces. The 50 000 – 100 000 Russian casualties largely mirror the equipment losses. Mobilisation of reservists and stored equipment partly compensated for losses in quantitative terms, but not in terms of quality. Russia used thousands of missiles for standoff strikes, more than pre-war assessments envisioned, but without producing a decisive victory in the war. As of late 2022, Russia probably retained a few thousand more missiles for land targets, mainly refitted older surface-to-air-missiles (SAM).

Broadly speaking, Western armies see artillery as acting in support of infantry. In contrast, the Russian Armed Forces emphasises artillery. Some even say that its infantry acts in support of artillery. The winter of 2023 saw reports about a shortage of artillery shells among Russian troops, known as *snariadny golod* (shell hunger). The estimates in the chapter on the defence industry (Chapter 7) indicate that Russia cannot sustain the current rate of firing of artillery shells for more than two years at the current rate of production. This conclusion is based on very uncertain assumptions, but regardless of the numbers one chooses to base this calculation on, the take-away is that if the war continues, then Russia's military will at some point have to either reduce the scale and scope of their operation or change the way they fight. The former is likely to be politically unappealing, the latter is a tall order for the military. Already after the first year of war, Russia appeared to have a shortage of well-trained infantry able to carry out offensive actions. If Russia also cannot use its artillery, it will have a tougher task countering Ukrainian forces' actions. The high rate of usage of Russian artillery shells also prompts the question whether the Western countries can catch up in the production of ammunition in the event of a large-scale war.

Grossly simplified, all this means that the Russian Armed Forces lost roughly half of their warfighting potential in the first year of war. The bulk of Russia's land forces remain bogged down in Ukraine and continue to suffer losses. Consequently, as long as the war continues, Russia cannot muster forces for another ground forces-centric strategic operation. Neither the ability to train and recruit soldiers, nor defence industry capacity, can rectify this in less than three to five years. This has three implications. First, Russia's conventional forces deterrence is severely dented. Second, Russia's ability to intervene with rapid deployment forces such as its elite airborne forces, is but a shadow of its former self. After a year of war, it is hard to see Russia being able to repeat the type of rapid deployment which for example took place to Kazakhstan in early January 2022 any time soon. Third, Russia can probably only mount an operational level defence operation against large-scale attacks by a peer military adversary with conventional forces in one place at the same time. This represents a dilemma for a vast country spanning 11 time zones. Russia's military great power status now essentially rests on its nuclear arsenal. In short, Russia appears weaker militarily, in the world, in the former Soviet Union and, probably, also at home.

Russia's economy has been damaged by the war and the sanctions, but it is not facing an imminent collapse. Putin recognizes that excessive military expenditures damages the civilian economy, and the political leadership regards it as a priority to maintain macroeconomic balance and a well-functioning civilian economy to endure a long-term confrontation with the West. Russia has thus increased its military expenditure only gradually in 2022. The federal budget is nevertheless under serious pressure. The export incomes from oil and gas remain vital for financing the Russian budget and powering the wider Russian economy. Whether Russia will be able to continue to export its natural resources to other countries for a sufficiently high price is a key variable for the future sustainability of the federal budget. The economic sanctions have overall been successful in creating difficult trade-offs for the Russian government regarding the use of scarce financial resources, and creating difficulties for the import of technology used in the defence sector. The war has forced Russia's defence sector to focus on the immediate needs of replacement of destroyed military systems and consumed ammunition, instead of working towards modernization and technological innovation. In order to sustain the current rate of firing of artillery shells, Russia would need to drastically increase production of ammunition. But this increase in production would consume a growing share of the procurement budget of the Ministry of Defence, potentially running into financial constraints and crowding out other military procurement.

Socio-economic development and living standards are sacrificed for the sake of repression, financing of the war effort and countering the effects of international sanctions. Among the short-term effects are a lack of work force because of mobilisation and emigration; the militarisation of industrial production; the lack of access to Western technology; an even bigger involvement of the state in the economy; and reduced influence for oligarchs. Among the long-term effects are lower potential economic growth; negative demographic trends; lower living standards and life expectancy; and a greater dependence on trade relations with Russia's Eastern neighbours.

Russian society has become increasingly militarised, and the last remnants of civil society and political opposition is being systematically repressed. The balance of power has tilted even further from the regions towards the Moscow and the president himself. At the same time, Russia's regions disproportionally contribute to the war effort. The increased concentration of power in Putin's hands is striking considering the visible lack of arrangements for the coming problem of succession of power. However, Russia's aging political leadership is facing a generational shift whether it would like to or not. The median age in the Security Council will be 69 in 2024, a figure which furthermore illustrates the problem of succession of power in Russia.

Looking ahead, the development of Russia's continued confrontation with the West the next couple of years will depend on at least the following four variables. First, Russia's political system is straining under a great deal of self-inflicted pressure created by the war. The war has widened the gap between the political leadership's great power ambitions and Russia's actual economic and military might relative to the rest of the world. The process of accepting a proportionate role commensurate with Russia's actual weight in terms of economy and population will be painful. These accumulated pressures and the problem of Putin's succession may lead to changes in the balance of power in Russia's political system. Second, the outcome of the war in Ukraine will inevitably shape Russia's political room of manoeuvre. The more losses Russia's military absorbs, the less Russia can afford an aggressive posture in international politics. Relying on the use of irregular units and private military companies may even threaten the state's monopoly on violence. Still, unless there is radical change in Russia, its leaders will continue to pursue confrontation with the West, regardless of the outcome of the war in Ukraine. Third, the development of the conflict depends on the reactions and actions of the international community. Russia depends on the willingness of its trading partners, especially China, to help it evade sanctions and export its oil and gas. Ukraine depends entirely on the West for financial and military assistance, and potential Western impatience is a threat to Ukraine's successes in the war. Fourth, Russia's ability to muster the necessary human and economic resources to maintain and reconstitute a large and equipped military force is key to its self-image and assertiveness in international relations. The ability to mobilise and educate new officers and personnel will also be key to uphold the war effort and overbridge the generational losses made in the war; this will be particularly vital when Russia is to rebuild its ground forces in the years to come. The already observed, and forthcoming Russian ability to adapt and learn from the experiences in Ukraine, will also be a crucial factor to consider.

To conclude: wars are costly for countries to sustain, especially if they are large and last for a long time.

Russia's leaders project an image of their country being able to continue fighting for a long time. That may be true, but it is evident that as time goes on, they will be forced to make increasingly difficult and painful trade-offs to keep the war effort going. The stronger pressure the West exerts by supporting Ukraine and implementing strict sanctions, the more difficult and costly it will be for Russia's political leadership to continue the war. Russia's leaders apparently failed to see how eight years of war in Donbas changed Ukraine profoundly. If the West fails to understand how this war changes Russia, it does so at its own peril. ■

Contributors

Co-editors

Maria Engqvist is an Analyst, and Deputy Head of the Russia and Eurasia Studies Programme at FOI. She holds a M.A. in Slavic Studies from Stockholm University and a BA in History. She follows the development of Russian security and domestic policy, as well as military related questions.

Emil Wannheden is an Analyst at FOI. He holds an MSc in Development Economics and a BA in Philosophy. Emil's work focuses on Russia's economy and defence economics.

Authors

Maria Engqvist (see Co-editors, above)

Johan Engvall is an Analyst at the Stockholm Centre for Eastern European Studies (SCEEUS). He holds a Ph.D. in political science from Uppsala University. His specialisation is domestic, foreign and security policy in Central Asia.

Carl Michael Gräns is Deputy Research Director at FOI. Carl Michael is a diplomat and former ambassador. He holds a M.A. of Economics, a BA in Russian and covers mostly Russian security and foreign policy. As of spring 2023, he works part-time at the Swedish Ministry of Foreign Affairs.

Tobias Junerfält is a Researcher at FOI. He holds a M.Sc. in Industrial Engineering and Management – International (Mandarin Chinese) and a BA in Japanese. His research focuses on geoeconomics, international supply chain dependencies and defence industry.

Ismail Khan is an Analyst at FOI, he holds a M.Sc. in Oriental Studies with focus on security. Ismail follows developments within the Russian military and security establishment, analysing as well security related developments in Russia's immediate neighbourhood, such as Ukraine.

Jonas Kjellén is an Analyst at FOI, and he holds an M.Sc. in political science from Uppsala University. His main area of research is the Russian Armed forces, with focus on the Russian Navy. As of spring 2023, he is temporarily stationed at the Swedish Ministry of Defence.

Tomas Malmlöf is a Senior Analyst at FOI. He holds an M.Sc. in political science, and a BSc in economics from Luleå University of Technology. His research focuses on the Russian defence industry and its armament programmes, including armament acquisition and delivery to the Russian Armed Forces.

Kristina Melin is a Junior Analyst at FOI. Kristina focuses on Russia and countries in the former Soviet Union, as well as nuclear weapons. Kristina holds a BA in political science from Uppsala University and a M.A. from the Department of War Studies, King's College London.

Johan Norberg is Deputy Research Director at FOI. His research covers the Russian military. He has worked at the Swedish Ministry of Defence and the Ministry of Foreign Affairs. He is a reserve officer in the Swedish Army, with service on four peacekeeping operations abroad.

Carolina Vendil Pallin is Deputy Research Director at FOI, and project manager of the Russia and Eurasia Studies Programme. Carolina holds a PhD, and her research covers Russian decision-making, domestic politics, as well as Russian military reform, cyber strategy and Russia's relations with the EU.

Emil Wannheden (see Co-editors, above)

Russia's decision to invade Ukraine in 2022 marks a turning point, not only for Ukraine, Russia and their relations with the rest of the world, but also for global security in a long-term perspective. This anthology identifies the most important political, economic and military consequences of the first year of Russia's full-scale war against Ukraine. The focus is on the consequences for Russia, its neighbouring countries and international security.

The motives behind Russia's invasion had less to do with Ukraine's political development, and more to do with the Russian political leadership's perception of Russia as a great power with the right to dominate its neighbouring countries. Russia's leaders assert that the war is directed against the West, and that the war is necessary for securing Russia's sovereignty. In reality, the war is a manifestation of the Russian leadership's imperialistic ambitions of establishing dominance over its neighbouring countries. Yet, one year after the invasion, Russia has become weaker instead of stronger, and further from its goals of strengthening its regional dominance and weakening the West.

Nevertheless, there is a substantial risk of escalation of the conflict – both geographically and in terms of the intensity. In addition, Russia's confrontation with the West is of a long-term nature. Russia's political leadership insists that the war is waged against Western values and ideas; therefore, they are unable to formulate a victory condition, achievable military goals or indeed an end point for the confrontation.

This report and other FOI publications on Russia are available on the Russia and Eurasia Studies Programme's website, www.foi.se/russia, where you can also register for our newsletter.

FOI

ISSN 1650-1942

www.foi.se