McFaul: You’re listening to World Class from the Freeman Spogli Institute for International Studies at Stanford University. We bring you in-depth expertise on international affairs from Stanford’s campus, straight to you. I’m your host, Michael McFaul, the director of the Freeman Spogli Institute.

Today, Steve Pifer and Frank Fukuyama are joining World Class to talk about Ukraine. Steve is a former U.S. ambassador to Ukraine and is affiliated with the Center for International Cooperation and Security, and the Europe Center here at FSI. And Frank is a Senior Fellow here at FSI. He also runs our Master's in International Policy Program, and lead democracy and leadership development programs all over the world, or LAD, as we call them, including several programs that he’s done in Ukraine itself.

We're now entering the ninth month since Putin invaded Ukraine. And people have a lot of questions about what's happening, what's the trajectory of the war, what might cause the war to end and what might happen after the war. And so Steve, Frank, and I are going to try to talk about that today for a few minutes. Welcome back to World Class to both of you.

Fukuyama: Thanks a lot, Mike.

Pifer: Thank you, Mike.

McFaul: So Steve, let's start with you first. Give us your 30,000 feet assessment of where the war is in terms of battlefield stuff. And then Frank, we'll turn to you about where you think the war is now and where it's going in the next three to six months, or if you want to even speculate beyond that. Steve, go ahead. Then we'll turn to Frank.

Pifer: Well, the war has taken a very unexpected turn for Moscow, in that for the last two and a half months, Ukraine has been winning. They've pushed the Russian military entirely out of the Kharkiv oblast in the northeast. They're threatening to move into Luhansk oblast, and down in the south, they're making a bid that looks like it will be successful in the coming weeks to push the Russians out of Kherson, which would mean that there's no longer any Russian military presence on the western side of the Dnipro River, which roughly bisects
Ukraine. Now, the question is, can the Ukrainians sustain this? I would like to believe and think that the Ukrainians could push the Russians all the way out, or at least back to the February 23 line, but my guess is at some point, they're going to run out of steam.

And then the question is, does this settled down into a longer war of attrition — which is what the U.S. intelligence community expects — where the side slug it out, but neither can make a decisive win on the battlefield? We'll have to see, but it could go on for a long time.

McFaul: Steve, before I go to Frank just because you know, Ukraine better than the rest of us: help our listeners understand when you say, “the February 23 line.” What does that mean?

Pifer: The February 23 line was the line before the Russians launched this invasion on February 24. At that point in time, the Russians occupied Crimea, and they occupied about a third of what we call Donbas. That's the Donetsk and Luhansk oblasts in Ukraine's east.

McFaul: Right, and Putin has on paper annexed both Donbas — those two regions — and two more regions, but not in reality.

Pifer: More than that, even. Putin made those annexations in September when he did not even control the four oblasts in eastern Ukraine. And in fact, he's lost more ground since then. And his presidential spokesman cannot even define where the line was as to what they annexed. It's a very strange situation.

McFaul: Frank, what about you? What's your 30,000 feet view about where we're at now and where the war is heading?

Fukuyama: Well, the one worry that I have right now is really about the United States. You know, in the war up to this point, I think the Biden administration has done an admirable job in arming Ukraine. By far, the U.S. contribution has way outstripped anybody else's support for Ukraine. And it always seemed like the Europeans, especially the Western Europeans, were dragging behind and coming late with their equipment and offers of support.

But now in a way, the role seems to be potentially reversing. Support for continuing to support Ukraine in what in Europe is actually pretty strong. There doesn't seem to be any evidence and public opinion polls that the threat of a cold winter is going to deter that. This is one effective global warming, but it's been a warm winter so far. And so, gas supplies in Europe are actually pretty good; they stocked a lot anticipating this over the summer.

But now it's the United States that I worry about, because with every single aid vote in Congress, you know, it started out with something like four or five Republican House members voting against Ukraine aid at the beginning, and now it's up to like 40 but with every single vote, the number increases. A lot of the people on the far right, like Marjorie
Taylor Greene have come out very explicitly against more funding. She said, “Not another penny is going to go to Ukraine if Republicans take over.”

Now, I don't think that's an accurate prediction because there's still a lot of Republicans that do want to support Ukraine like Mitch McConnell, Tom Cotton, they still remain pretty hawkish. We’re recording this on Election Day; we don’t know what the results will be, but by the time this is put up, people will know what the results are

McFaul: Maybe! It could go on for a long time, right?

Fukuyama: True, it could. But I don't think anybody is expecting the Democrats to do terribly well.

McFaul: Right.

Fukuyama: And once the Republicans take over the House and possibly the Senate, it’s very possible that you'll have a kind of snowball effect opposing further aid to Ukraine. If Donald Trump declares his candidacy, I think he's got a lot of incentives to actually make this a big issue.

It’s very hard for me to imagine him supporting Joe Biden on this particular issue, given how his base is really, increasingly turning against this. And that means that what Putin has been hoping for all along may actually come about, which is to say that the United States will be weakened.

Some Russians like Prigozhin have said that they are interfering in the American election, and the talking heads in Moscow are saying very explicitly that they're hoping for the Republicans to win because this is what's really going to help them in their war against Ukraine.

McFaul: Right. To remind everybody, Prigozhin is the head of the Wagner Group that was initially involved in the 2016 election interference, and he's now saying these things explicitly. Steve, what's your reaction to that? I'm curious what your sense is, both on the political stuff that Frank's talking about with the shift in the Congress, but I'm also interested in your views about how you think the Biden administration is doing in terms of staying the course.

Pifer: Vladimir Putin is fighting a two-front war. The military fight in Ukraine his military is now losing. But his second front is really to undercut American and Western support for Ukraine, because if he can get the West to cut off the flow of financial assistance and arms to Ukraine, ultimately, the Russian military can prevail on the battlefield.

I do worry about the points that Frank raised. For 30 years, we've generally had strong bipartisan support from both Republicans and Democrats for Ukraine, but the trend lines that
you've seen, particularly in the MAGA wing of the Republican Party over the past six or seven months, are not good. So, I worry about that.

Now, if there is this threat, what I think the Biden administration can do is try and push through legislation in the lame duck season to try to sustain support well into 2023 for Ukraine. But it does seem to me that the administration understands that we want to be in a position where the West helps Ukraine either drive the Russian military out of Ukraine, or where the Ukrainians get to a point where there can be a negotiated settlement on terms that Kyiv can accept, and we're nowhere near that point yet.

So that does mean that the Biden administration should keep doing more. I think they can do more in terms of tightening sanctions, particularly on the energy sanctions. That would restrict or reduce the flow of energy revenues going to Russia. And my one quibble with the administration is that I believe we should be providing more weapons to Ukraine now, first and foremost, air defense systems.

But because the Russians have now resorted to this tactic of indiscriminate attacks on Ukrainian cities, and attacks aimed at the energy, the power, and the water infrastructure in Ukraine break, we also need to provide armor. And I think it's time to provide the Ukrainians with the longer-range version of the HIMARS rocket that can go 200 miles, not just 50 miles. We've seen the Ukrainians over the past four months and how they've used the shorter-range version, the 50-mile version, to usually disrupt Russian logistics. And that's had a big impact on Ukraine’s ability to conduct counter offenses both in the east and the south.

With the 200-mile version, they could disrupt logistics in Crimea, farther back in Donbas, and that would just relieve the pressure and make it easier for the Ukrainians to advance on the front line. Certainly, they could provide the long-range missile with the same proviso that we gave them for the short-range systems: don't strike targets in Russia proper. Although I would also put a little asterisks on that if the Russians escalate or continue indiscriminate attacks, maybe we would drop that proviso and give the Ukrainians a green card to go ahead and launch attacks into Russia proper.

**Fukuyama:** One development to worry about is that there's been talk about the Russians buying longer-range ballistic missiles from Iran, which has already provided these shorter-range, very slow drones that have been used to attack Ukrainian infrastructure. The ability of these air defense systems to deal with at least a certain class of ballistic missiles is much more limited. And if that's the case, really the only counter is to actually go after the sources of the missiles.

**McFaul:** The launchers, right.
**Fukuyama:** A lot of them are coming from Crimea. I think Steve suggested this recent tweet that the ATACMS, these long-range weapons that we supply, could be used to go after those bases in Crimea from which these attacks on Ukrainian infrastructure happen. It's a very unbalanced war because the Russians have been free to attack civilian targets all over Ukraine, but the Ukrainians can't fit back, including against the military targets from which these rockets are being launched. And I think that's going to be a real problem for Ukraine if the Iranians do supply these ballistic missiles.

**McFaul:** Well, that's pretty depressing. So, you would recommend, Frank, these new systems like Steve was talking about, right? The ATACMS?

**Fukuyama:** Yes. And I think the Ukrainians have shown that if we tell them don't attack Russia proper, they'll do that. I don't think we have to worry about that.

**McFaul:** Right.

**Fukuyama:** But I do think that they need some options beyond the ones they currently have on the table to deal with what they're going to face over the winter.

**McFaul:** Right. Steve, you touched on it a bit, but I want to drill down a little bit further, because there's been recently here in the United States, a lot of back and forth about Ukraine. The Progressive Caucus released a letter and then they withdrew it, but some of their members said they didn't withdraw. But the basic gist was that “We need to give diplomacy a chance,” and the Biden administration is not doing not enough on the diplomatic front. First, to you Steve and then to Frank. Give our listeners your views of those kinds of arguments and what's realistic and what's not.

**Pifer:** Well, I think it's a good idea, as was described in a recent article in the Wall Street Journal, for the Biden administration to maintain contact with Russia to avoid miscalculation, to avoid escalation, and things like that. But I also do not think it's a good idea for the United States now to engage with Russia on the terms of a settlement between Kyiv and Moscow.

And the reason I think this is that, ultimately, I would like to see the Ukrainians be able to drive the Russians out of Ukrainian territory. But I'm sure they can do that. So, I suspect that at some point, there will be a negotiation. That negotiation is going to get in some very sensitive questions.

Would with the Ukrainians consider, for example, some territorial concessions? I don't think the United States or the Germans or the British can make those decisions for Kyiv, because those are going to be questions with huge domestic political ramifications. That can only be a
decision for Kyiv to make. Thus far, the Biden ministration is not pushing the Ukrainians to negotiate; that should be their decision.

And there really is no prospect of any kind of a serious negotiation when you have the Russians not only with their original demands, but now also demanding even more; they're asking the Ukrainians to recognize Russia's illegal annexation of four Ukrainian oblasts even though the Russian military doesn't control that territory.

So until there's a change in Moscow and Moscow begins to get more serious about this, we shouldn't be asking the Ukrainians to try to negotiate.

McFaul: What's your view, Frank?

Fukuyama: Well, I think looking forward, it probably is not realistic at this point to think that the Ukrainians can drive the Russians out of all of the territory they occupied after February 24. Although, they could still do quite a lot. The most important parts are really in southern Ukraine, so that they regain access to the to the Black Sea.

The Institute for the Study of War in Washington did an interesting analysis a couple of weeks ago about what defensible lines would look like for the Ukrainians. And basically, I think we have to assume that if there's a negotiation and a ceasefire after further Ukrainian advances, that this would not be an end to conflict for the Russians. They will rearm and get ready for a second round, and Ukraine has to be ready for that.

As to what constitute a good position to be in, anticipating this continuation of the conflict, the Institute for the Study of War basically said that Ukraine has to push the Russians out of Kherson oblast onto the east bank of the Dnipro River, and you have to push them out of artillery range, which is about 25 kilometers south of the river.

The river itself is a good defensive line that they should be able to hold, and you don't want the Russians to be able to pile up artillery along the right bank of the river. And there's probably similar lines in Donbas that would be defensible. So I suspect that it might be the case that if the Ukrainians realistically can get to that point, then maybe they could start thinking among themselves — and I agree completely that it's not up to us — but it's really up to them whether there's a basis for talking at that point.

But I do think that this should be driven by these kinds of military considerations, not under any illusions about whether you're somehow going to negotiate a permanent peace with Moscow. And I think that will really depend on political change in Moscow itself, which, you’re the one that would be able to talk about that, Mike.
**McFaul:** Well I'm not sure I have much to say on it. But you're right; I think President Zelenskyy said that on the record, at least, that you'll need a different leader in Moscow to have permanent peace.

Well, to close out: a couple of last questions for you both about the future

First, I'm curious — what is the mood like, to the best of your understanding, in Ukraine among Ukrainians? You both talk to Ukrainians often about where the war is now.

Then the second question is: is it too early to begin to talk about postwar reconstruction? There are estimates between 750 billion and a trillion dollars will be needed. Who's going to pay for that? How is it going to be distributed? But maybe it's too early to talk about that? I'm curious both you know, mood music and the sentiment in Ukraine, and then is it too early to start talking about postwar kinds of issues like reconstruction and security guarantees, for that matter?

Steve, let's start with you, then we'll give Frank the last word.

**Pifer:** On the mood, I believe the Russians are making another miscalculation. They have fought this for in a way that was almost designed to foster an increase in strength and Ukrainian resolve. I think there's evidence that in the Kremlin and in the Russian General Staff, they seriously lack a real understanding of Ukrainians.

**McFaul:** Yes.

**Pifer:** What they've done for the last eight months has only hardened the resolve of the Ukrainians to resist. And I think that that just continues to build.

In the post war, I think it's certainly not too early to begin planning, because you're going to want to have a good plan. It's going to be a very expensive and extensive project for Ukraine to rebuild, and we need to think about where we're going get the money. I would like to see the West move to take that $300 billion in frozen Russian Central Bank assets and put that toward a fund for rebuilding Ukraine.

But we also have to think about the problem that Frank mentioned. If there is an end of this war, but Vladimir Putin is still in Moscow, the war has been suspended, but it hasn't been ended. So I do think we have to consider how do we help Ukraine avoid a repetition of this?

Now, some will say that the answer is NATO membership. I try to caution Ukrainians against that because at this point in time, I don't see a consensus among NATO members that they would be prepared to go to war with Russia for Ukraine. My guess is maybe a third of the NATO members are, but a lot aren't.
I think the Ukrainians instead should be pressing to get commitments from Washington, Berlin, London, everyone, that they will help Ukraine build a modern, robust army — I’m talking things like Leopard tanks, M1 tanks, modern air defenses, maybe ATMs and F-16 aircraft — so that the Ukrainians have the ability themselves to deter another Russian attack.

I think that puts the deterrence in the hands of the Ukrainians. And my guess is that it will be easier for Ukraine to get those commitments from Western leaders than it will be to get a commitment to come to their defense should Russia invade again.

**McFaul:** Right. Frank?

**Fukuyama:** I think that Ukraine in the future is going to have to turn into a little Sparta or Israel in terms of its long-term ability to defend itself. I don't think it's too early to think about postwar, because it affects the war objectives. It’s much more important to liberate those southern ports like Kherson and Melitopol and Mariupol and so forth than it is to get back the whole of the Donbas, because Ukraine absolutely needs to be able to export freely, not at the whim of the Russians. And I think they can do that.

One of the interesting things that happened in the last week is that after an attack on Sebastopol, Putin announced that he was pulling out of the Grain Deal. But Erdogan kind of flexed his muscles and forced the Russians to back down on that, so the grain ships are still going. I think you need to end up at a point after negotiations where the Russian Black Sea Fleet cannot impose this blockade that they've been doing.

One final thing to say on the Russian side: In the last couple of days, it’s been unbelievable. They’ve targeted some more than a dozen sites where these newly mobilized troops have been pouring into the Kherson area. They have killed . . .

**McFaul:** They being the Ukrainians?

**Fukuyama:** Yes, the Ukrainians have killed hundreds and hundreds of Russians. You actually feel very sorry for these guys, because they’re pulled off the streets and then two or three weeks later they're dead and their relatives can't even collect their bodies.

The Russians are also facing a really big crisis, and one of the questions is whether they're going to be in a 1917-type situation at some point where you're just shoving all of these civilians into this meat grinder, calling them “soldiers,” and whether they're just going to revolt against this because the choices are certain death if they go into battle, or they take the risks and try to turn against their commanders.
McFaul: Well, that's something we should watch. Let's get you guys to come back and we'll talk about that the next time because I completely agree; it's shockingly shocking how badly they're doing this, and the noise inside Russia about it is increasing. As one of my Russian friends said to me: “The war for Russia didn't begin in February. It began in September, when mass mobilization made everybody pay attention.” And the longer that goes on, the more unsettling it's going to be inside. Without predicting 1917-like scenarios, right? We're usually pretty bad at predicting those kinds of things, but it's something we should all watch.

Steve and Frank, fantastic conversation. Let's do it again. We have to keep talking, and keep watching one of the most important, but tragic, but significant events of our times.

You've been listening to World Class with Steve Pifer and Frank Fukuyama. My name is Michael McFaul, here at the Freeman Spogli Institute for International Studies at Stanford University. If you like what you're hearing, please leave us a review and be sure to subscribe on Apple and Simplecast to stay up to date on what's happening in the world, and why.