

FOREIGN POLICY RESEARCH INSTITUTE

# What's At Stake In Ukraine

## European Security in a Broader Context

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EURASIA PROGRAM

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# About the Author

Dr. Stephen J. Blank is a Non-Resident Senior Fellow in the Foreign Policy Research Institute's Eurasia Program. He has published over 900 articles and monographs on Soviet/Russian, U.S., Asian, and European military and foreign policies, testified frequently before Congress on Russia, China, and Central Asia, consulted for the Central Intelligence Agency, major think tanks and foundations, chaired major international conferences in the U.S. and in Florence; Prague; and London, and has been a commentator on foreign affairs in the media in the U.S. and abroad. He has also advised major corporations on investing in Russia and is a consultant for the Gerson Lehrmann Group. He is the author of *Russo-Chinese Energy Relations: Politics in Command* (London: Global Markets Briefing, 2006), and *Natural Allies? Regional Security in Asia and Prospects for Indo-American Strategic Cooperation* (Carlisle, PA: Strategic Studies Institute, U.S. Army War College, 2005). Dr. Blank is also the author of *The Sorcerer as Apprentice: Stalin's Commissariat of Nationalities* (Greenwood, 1994); and the co-editor of *The Soviet Military and the Future* (Greenwood, 1992).

## Eurasia Program

The Eurasia Program at the Foreign Policy Research Institute was founded in 2015 with the aim of examining the political, security, economic, and social trends shaping Europe and Eurasia. Our research agenda covers the increasingly tense competition roiling the region from several angles. It has a multi-year focus on the Baltic Sea, the Black Sea, and Central Asia, emphasizing how geography, economics, ideology, and history continue to shape politics and security in these regions. The program also publishes analyses of Russian foreign policy, including Russia's role in Europe, Asia, Africa, and the Middle East. The Russia Political Economy Project, along with the Bear Market Brief, analyzes the linkages between Russia's economy, society, and its political system. The Eurasia Program's thematic initiatives also include the Democracy at Risk rubric, which examines the trends of democratization and authoritarian pushback in the region.





Ukrainian tank crews climb out of Leopard 2A4 main battle tanks following a live fire training at the Polish Army's Combined Arms Training Center (CAT-C) in Zagan, Poland. (NATO)

# Executive Summary

Virtually all of the commentary on Russia's aggression against Ukraine has focused on those two states to the exclusion of the vital importance of this war for the neighboring regions of Belarus and the Balkans. This report addresses the significance of the war for these areas and emphasizes that this war has great significance for Europe as a whole, not just Ukraine.

It does so in the context of criticizing the Biden Administration for not providing sufficient and timely support for Ukraine because that failure negatively impacts prospects for security in the Balkans or undermines Lukashenka's authoritarianism in Belarus.

Thus, this report argues that the crisis in Ukraine actually provided and still provides Washington with the greatest opportunity in a generation to advance US and European interests by defeating Russia and improving prospects for security and democracy in areas like Belarus and the Balkans.

In that spirit, the report outlines a multi-dimensional strategy for the US and its allies, encompassing the Balkans, Belarus, and Ukraine, to win the war and lay the foundation for a stable and secure peace afterward.



# Introduction

Crisis denotes both challenge and opportunity. The war in Ukraine is no exception. Moreover, both the crisis and the opportunity are clear. Russia continues to demand the de facto, if not de jure, destruction of Ukraine's sovereignty and territorial integrity. The opportunity now standing before Washington and Europe is the chance to defeat Russia and thereby affect the greatest strategic transformation in a generation.

As of September 2024, the United States therefore stands at a decisive, strategic inflection point triggered by Ukraine's offensive into Kursk Oblast, and concurrently, strong demands upon the West for both more and continuing support and the right to use Western weapons against deeper Russian targets persevere.

These events represent an inflection point despite mounting efforts by third parties – India and China—and misguided Western actors to arrange a negotiation process for the following reasons.

1. Russia shows no signs of negotiating, especially with Ukrainian troops on its territory, even though it demands recognition of its conquests as constituting part of Russia.<sup>1</sup>
2. Russian President Vladimir Putin has stated that if the West allows its weapons to be used, as Ukraine has requested, this will mean that NATO is at war with Russia which will then draw the appropriate consequences.<sup>2</sup> This obviously is another threat of escalation, potentially to the nuclear level.
3. Even before this last turn of events Putin had globalized the war by receiving ballistic missiles from Iran and North Korea, as well as not only dual-use goods but

actual military technologies from China.<sup>3</sup> In turn, Russia is supplying China with advanced submarine, missile, and stealth capabilities and is possibly abetting Iran's nuclear program.<sup>4</sup> Furthermore, despite his escalatory rhetoric, Putin has long since launched a series of attacks across Europe on infrastructure, intensified espionage and subversion efforts, and sent threats to leading defense figures, including attempted assassinations.<sup>5</sup>

Russian rhetoric has, since 2022, labeled Ukraine as a creature of NATO and Washington and explicitly stated that NATO is at war with Russia. While that was fiction and remains such, even if weapons use is approved, it is incontestable that Russia has been at war with Europe. Thus, his threats are not really new and obscure: The West has crossed all his previous "red lines," and nothing happened.

4. Therefore, the arguments hitherto used to delay sending American or Western weapons to Ukraine have all been shown to be insubstantial. Putin has not escalated despite the offensive into Kursk, which he has downplayed.<sup>6</sup> The specious argument that no single weapon will win this war for Ukraine also has no merit, as Ukraine is not asking for one single weapon but for a range of offensive and defensive systems, including missiles and air defenses.<sup>7</sup> A similar argument that the weapons requested would do little good because Russia has moved its targets out of range overlooks the fact that it is precisely the Administration's slow-rolling of Kyiv's requests that allowed Russia to do this. Moreover, it flies in the face of abundant evidence of numerous Russian fixed logistic, military, and infrastructural installations within range of the requested weapons that are fixed targets.<sup>8</sup>

5. By the same token, the new argument that the costs of saving and then rebuilding Ukraine are so astronomical and expensive

for the West—as to justify Ukraine planning for some sort of negotiation—overlooks the facts that rebuilding Ukraine after the war will repay a considerable amount of the enormous investment in it and enhance Western security. Moreover, failure to prevent a Russian victory due to pervasive faint-heartedness in the West ensures a commensurate expenditure of billions, if not trillions of dollars, to prevent another war with Russia under worse conditions than is presently the case.<sup>9</sup>

6. Finally, the hollowness of the Biden administration’s excuses, juxtaposed to the urgency of the moment and Putin’s globalization of the war, must drive the Biden administration and its successor to the formulation and execution of a strategy truly integrating deterrence. It must comprise the military, economic, informational, and diplomatic sustainment of Ukraine and of European security now at risk, not just a policy and rhetoric that have been completely eclipsed by recent events. Otherwise, Russia and its allies will prevail, and the burdens of defense and the threat of war will rise commensurately.

Therefore, the Biden administration and Western policy must take into account that Ukraine was and remains a keystone of European security, whose fall would not only endanger all of Europe but put the very idea of international order at risk.<sup>10</sup> While Putin shows no sign of entering into negotiations in good faith—a commodity in scarce supply in Moscow, given the eight solemn treaties Putin broke to invade Ukraine in 2014 and 2022—he now demands a buffer state to be created out of the territories Russia captured since 2022 and calls on Ukraine to come back home.<sup>11</sup>

Likewise, Dmitry Medvedev, Chairman of the Security Council, recently stated that Ukraine is Russia and must come home. Moreover, he unveiled a map of Russia’s desired Ukraine,

where Moscow owns the entire coast and Eastern Ukraine while Poland and Romania swallow up much of Western Ukraine. The map indicates a Russian ambition to revamp not only Ukraine’s and its own borders, but those of the Balkans and Eastern Europe.<sup>12</sup>

## Western policy must take into account that Ukraine was and remains a keystone of European security.

Thus, the security, borders, and sovereignty of other European states—Belarus, Poland, Romania, Moldova, and the Baltic States—are at risk, should Ukraine be defeated or fail to oust Russia from Crimea and the Donbass. Many policymakers recognize or at least profess to realize that Putin will not stop at Ukraine, as both President Joe Biden and France’s Minister-Delegate for Europe Jean-Noel Barrot correctly stated on March 7, 2024.<sup>13</sup> Because both men accurately gauged Putin’s objectives and modus operandi, we must understand that Russia’s war also has long encompassed all of Europe. Therefore, defeating Russia in Ukraine has profoundly positive repercussions for all of Europe.

In this report we consequently focus on two of those possible repercussions: namely, the creeping Russian takeover of Belarus that has moved ever more towards dictatorial rule under President Alexander Lukashenko, and second, the impact of a Ukrainian victory on its ability to become a major energy exporter and thereby reverse and supplant Russia’s weaponization of its energy assets.

Indeed, Russia's failure to date to attain a decisive military victory offers the West the greatest opportunity in a generation to make a lasting and positive enhancement of European security. Should the United States and its allies continue supporting Ukraine financially and militarily, many analysts believe it has a real chance to bring about a Ukrainian victory.<sup>14</sup>

**A Ukrainian victory would inevitably place the Putin regime and its policies under severe pressure.**

A Ukrainian victory would achieve more than the termination of all acts of war, restoration of all its occupied territories, and full sovereignty: it would inevitably place the Putin regime and its policies under severe pressure. Moreover, a Ukrainian victory simultaneously generates many new possibilities for bringing about a Europe whole and free to use President George H.W. Bush's formulation.

Therefore, should Ukraine win, it creates possibilities for resolving at least two major security challenges to Europe posed by Russia's imperial drive: Belarus' subordination to Russia and Central and Eastern Europe's excessive energy dependence upon Russia. To the extent that the West can successfully address these issues that have been instrumental in Russia's imperial strategy it forecloses future Russian imperial adventures and dramatically strengthens democratic governance across Europe. And such foreclosure is a precondition for European, if not ultimately Russian security, for there can be no viable concept of European security if a revived Russian empire emerges.

## Belarus: The Forgotten Crisis

Belarus' ongoing crisis stems from Lukashenko's dictatorial rule that began in 1994. In the recent parliamentary and local elections, the deinstitutionalization of Belarusian politics continued with the sole exception of the strengthening of the All-Belarusian People's Assembly, whose main purpose is to prepare for the transition from Lukashenko to his chosen heir: his son.<sup>15</sup>

Although retaining power remains his primary objective, his economic mismanagement and hostility to reforms have made Russia the ultimate arbiter of any succession. Indeed, Russia is now the chief guarantor of Lukashenko's continued rule because of his policies. Lukashenko has hobbled Belarus' economy, thus institutionalizing its subordination to Russia. He has also severely repressed all opposition and democratization and has long been suspected of having political rivals murdered by a presidential death squad.<sup>16</sup>

The huge opposition demonstrations in the wake of his phony election "victory" in 2020 were suppressed by a Russian-backed counter-revolutionary offensive that led to imprisonment and/or exile of opposition leaders. Moscow also exploited this challenge to extend its creeping takeover of Belarus' state and economy.

One key reason for Lukashenko and Putin's success was the simultaneous Western fear of acting on behalf of Belarusian opposition and Western disinterest in the issue—factors that not only consigned Belarus to Russia's sphere of influence, but also helped validate Moscow's dismissal of the West as weak and indecisive.<sup>17</sup> Equally unfortunate is the fact that





Russian President Vladimir Putin arrived in Minsk on December 6, 2024. (kremlin.ru)

the repressions and exiles have helped divide the opposition abroad.<sup>18</sup>

Meanwhile, Russia has conducted a strategy of creeping takeover that, according to leaked documents, will undermine Belarus' sovereignty and culminate in 2030, when Belarus will supposedly join the Russian Federation.<sup>19</sup> These documents outline a comprehensive, sequenced, multi-dimensional strategy in economics (building upon Belarus' prior dependence upon Russian energy), politics, and defense that is already underway.<sup>20</sup> Thus, it resembles similarly leaked Russian plans for elite capture and state takeover in Moldova.<sup>21</sup> But in the context of the war in Ukraine, perhaps the most important and urgent threat posed by Lukashenko's subordination to Putin's Russia is the way in which he has allowed Russia to use Belarus as a base and potential staging ground for this war.

Belarus permitted Russian forces to launch their assault upon Kyiv from its territory, shortening the distance they needed to go by half; allowed Russia to train forces in Belarus

alongside the Belarusian army and former members of the Wagner private military company, whom he allowed in the country thereby helping Putin defuse its 2023 mutiny; and then deliberately sent Russian forces into the borderlands of Western Belarus to provoke Lithuania and Poland.<sup>22</sup> This potential crisis has now engaged the attention of other states, particularly France. French President Emmanuel Macron, in a long telephone call to Putin in 2021, claimed to have elicited from him a promise that he will "talk to" Lukashenko and supposedly defuse this crisis.<sup>23</sup> But it is a crisis that can easily be turned on and off as befits Putin and Lukashenko.

Lukashenko has allowed Russia not only to have military bases in Belarus but to deploy tactical nuclear missiles there.<sup>24</sup> Although those missiles do not enhance Russia's existing capability to strike European targets, they send a chilling political message to NATO and Ukraine due to Belarus' proximity to Poland, Ukraine, the Baltic States, Finland, and Sweden.<sup>25</sup> This deployment also clearly accords with Moscow's overall nuclear strategy of intimidation,<sup>26</sup> so it still has negative

implications. First, Belarus' military doctrine, for the first time, provides for using nuclear weapons.<sup>27</sup> Although it is inconceivable that Moscow would devolve control over these weapons to Belarus, the second implication of this "policy innovation" goes beyond merely restating the pre-existing threat in more dramatic terms.

Instead, this deployment represents an innovation in Russian policy, namely the deployment of Russian nuclear weapons abroad for the first time since 1962. Despite Moscow's control over these weapons and Lukashenko's histrionics about controlling nuclear weapons, the significance of deployment cannot be disregarded, especially given Putin's frequent complaints about US nuclear deployments in Europe and ensuing NATO threats to Russia. In turn, Putin's mounting threats to NATO that take the form of nuclear saber rattling have provoked NATO responses that Putin then exploits to justify his war.

Even if the announcement of these deployments merely amounts to a strategic bluff, even potential Russian nuclear threats must be carefully monitored. Moreover, "If Russia has placed nuclear arms in Belarus, it confirms only that Belarus really is one of Putin's imperial holdings, and that Lukashenko is little more than a Kremlin subcontractor whose power is mostly limited to abusing Belarusians."<sup>28</sup> These weapons also trigger concerns that under Russian pressure, Lukashenko, despite his obvious reluctance to do so, may allow Russia to use its forces in or traversing through Belarus to attack Ukraine and/or threaten it with the nuclear weapons deployed there.

Indeed, Lukashenko is now discussing a possible attack on the Suwalki Gap, Lithuanian and Polish territory that is located between Belarus and Russia's Kaliningrad Oblast. It has long been recognized as a likely invasion route for the Red Army into the Baltics and Poland,<sup>29</sup> and these remarks

came only five months after the First Deputy Secretary of Belarus' Security Council, Pavel Muraveiko, proposed "breaking through (this) the gap" to Kaliningrad, causing an outrage in Lithuania.<sup>30</sup>

## **The continuation of Lukashenko's rule as Moscow's satrap in Minsk threatens Belarus' sovereignty, economic, military, and political security, as well as that of all its neighbors.**

Thus, the continuation of Lukashenko's rule or that of his designated successor as Moscow's satrap in Minsk threatens Belarus' sovereignty, economic, military, and political security, as well as that of all its neighbors, not least Ukraine. It also exemplifies the fundamentally imperial thrust of Russian policies: the well-known program by which Russia exports not only its corruption but also its authoritarianism and repression of reformers to friendly and neighboring governments and the weaponization of its energy dominance in Europe to provide a financial basis for its takeover of "the commanding heights" of targeted states across multiple domains.

Indeed, elite and state capture, a strategy for empire-building that has been a pillar of Russian policy since the Grand Dukes of Muscovy, is precisely what Russia's energy policy abroad is all about, in Belarus and across Eastern Europe.<sup>31</sup> Contemporary Russian strategy represents an updating of those tactics to fit current realities.



Ministry of Energy of Ukraine | Facebook

## Ukraine, Eastern Europe, and Energy

In Ukraine, Belarus, Austria, Hungary, Germany, and even Italy, excessive dependence on Russian oil, gas, and in some cases, nuclear energy has been the foundation and financial basis upon which Russian influence stands in these states. Therefore, much of that influence manifests itself in energy dependence upon Russia or subsequent Russian penetration of the countries' political processes and elites. Indeed, "employing energy is a hybrid form of political, societal, or economic coercion to meet political ends that can expose vulnerabilities of energy."<sup>32</sup>

Thus, Russia can employ its energy as a weapon to break these countries' resistance to Russian encroachments in the economy,

media, politics, or even defense. Austria, for example, remains 98 percent dependent upon Russian gas.<sup>33</sup>

In Bulgaria, leaked documents have repeatedly confirmed Russia's concealed control over the TurkStream pipeline from Turkey to Bulgaria, Serbia, and Hungary.<sup>34</sup> Indeed, Bulgaria has long been a major target of Russia's unceasing effort to parlay its energy presence in the Balkans into lasting political influence. As the Center for the Study of Democracy in Bulgaria reported in 2020 based on leaked corporate documents, since 2019, before construction of this pipeline began, Russia was using Saudi, Belarusian, and European companies to evade US sanctions against TurkStream. Consequently, Russia ships the gas, builds the pipeline, and finances it through proxy entities.<sup>35</sup>

Russian citizens and former Gazprom officials are in control of the management of the consortium building the TurkStream pipeline on Bulgarian territory, although the bid for

construction has formally been won by the Saudi company ARKAD.

The Saudi company has subcontracted all of the actual construction activities to several Russian firms, including the Infrastructure Development and Construction company that has listed Gazprom as its ultimate owner

ARKAD has also used Beltruboprovodstroy as a subcontractor, a Belarusian state-owned pipeline-builder previously reflagged by EU countries as a national security risk.

The pipelines for the project have been ordered, paid for, and transported to Bulgaria even before the start of the project by Russia's biggest pipeline-maker, TMK. TMK owner Dmitry Pumpyansky is on the US sanctions list of ninety-six oligarchs in the US Countering America's Adversaries Through Legislation Act.<sup>36</sup>

This report, which clearly preceded the war against Ukraine, demonstrates that Russia was already resorting to proxies in the Balkans well before the 2022 invasion of Ukraine. And since then, Russia has been successful in selling gas to Hungary and Balkan states through TurkStream, either directly or indirectly.<sup>37</sup> Nevertheless, observers like Dimitar Bechev forecast that Russia's dominance of the Balkan energy scene is likely to run afoul of increasing Western sanctions, renewable energy sources, and nuclear energy.<sup>38</sup>

This looming challenge, if not threatening Russia's Balkan position, has already led Moscow to resort to new threats that it might have to close TurkStream due to sanctions. Closing TurkStream absent other energy sources would leave Balkan states in the lurch. At the same time, Moscow has plans to insert itself into projected Azeri energy supplies to the Balkans that are intended to replace Russian sales.<sup>39</sup>

## Since 2022, Russia has been successful in selling gas to Hungary and Balkan states through TurkStream, either directly or indirectly.

In Serbia, Russia gained a commanding position over Serbian energy almost twenty years ago, and as late as 2018, Serbia imported about 65 percent of its natural gas needs from Russia and more than 70 percent of its crude oil consumption.<sup>40</sup> This agreement also converted Serbia from being merely a consumer to becoming a transit country, since the pipeline would also bring gas to Croatia.<sup>41</sup> Indeed, Russia's hegemonic position in Serbian energy can lead to only one conclusion previously stated by Mark Galeotti: "The model therefore predicts that the overall Russian objective in Serbia will be state capture, trying to establish powerful networks of allies and clients able to dominate the country."<sup>42</sup> And, recently, Ivica Dacic, acting Prime Minister of Serbia, stated that Serbia's relations with Russia and China are in Serbia's "vital interests."<sup>43</sup>

Hungarian Prime Minister Victor Orban's support for Russia in Hungary is equally tied to his willingness to make deals with Russia for energy, namely the TurkStream pipeline cited above. In 2023, Hungary reaffirmed its energy deals with Russia<sup>44</sup> and told the European Union it would veto sanctions over its Russian-built nuclear power station.<sup>45</sup> In Germany, Russia's prewar influence upon German politics turned out to have been much greater than previously believed.<sup>46</sup> More recently, an FBI report found that Germany is particularly vulnerable to Russian influence operations due to German dependence on Russian





Leaders from Bulgaria, Russia, Serbia, and Turkey attend the 2020 inauguration ceremony for the TurkStream natural gas pipeline. (Kremlin.ru.)

energy and residual guilt feelings borne out of World War II.<sup>47</sup>

Finally, the war in Ukraine has now revealed the extent of Russian presence in Italy's politics that grew on the foundation of its dependence on Russia for 40 percent of its natural gas.<sup>48</sup> These examples underscore Russia's pervasive influence in other countries' energy sectors, politics, and economics, thereby displaying the ubiquity and considerable effectiveness of Russia's strategies of elite and state capture.

In Ukraine, Russia effectively exploited popular resistance to economic reform after 1991—especially regarding the energy sector—to maintain Ukraine's vulnerability to Russian economic-political penetration and insert itself into the superstructure of elite and state capture that grew upon this foundation.<sup>49</sup> In Belarus, however, Russia's energy domination

is much greater than in Ukraine based upon its ability to subsidize Belarusian oil refineries by selling crude oil without re-export duties and keeping gas prices artificially low.

“Considering that much of Belarus’ revenue comes from gas transit fees, re-export of cheap oil, and value-added petroleum products, which account for 16.5 percent<sup>50</sup> of exports, Belarus’ economy depends heavily on affordable Russian energy.”<sup>51</sup> However, Russia's energy hegemony here goes much farther. Writing in 2022, Alisa Reiner commented that,

*Russia's ownership of Belarus' gas transmission systems contributes to the unequal relationship. In exchange for low-priced gas, Belarus offered Beltransgaz, the country's largest gas company, to Russia's state-owned, vertically-integrated Gazprom through a share repurchase mechanism, turning the company into Gazprom*

*Transgaz Belarus—a fully-fledged subsidiary of Gazprom. Likewise, Russia’s energy giant Slavneft retains majority ownership of Naftan—one of the two Belarusian oil refineries, and recently Russian companies have been advancing their ambitions for overtaking the Mozyr refinery. Should they succeed, Moscow will control two-thirds of Belarus’ exports to the West. Lastly, Russian nuclear monopoly Rosatom is the principal contractor of Belarus’ first nuclear power plant, Ostravets, which became operational in 2021 thanks to \$11 billion<sup>52</sup> in loans from Russia. When fully completed, it is expected to meet 40 percent of domestic electricity demand.<sup>53</sup>*

Russia’s aggression against Ukraine and ensuing sanctions have greatly diminished Russian energy positions in Central and Eastern Europe except for Belarus. But they have neither eliminated those positions nor suppressed Russia’s ongoing multi-dimensional information, energy, and other forms of non-kinetic warfare against those states.

The 2023 attempted coup against Moldova and ongoing tensions with neighboring Transnistria make that quite clear.<sup>54</sup> More recently, the elections for president of Moldova and the Moldovan referendum on accession to the European Union have provided the spur for a massive Russian influence-operation there to buy these elections, forestalling Moldova’s definitive accession to the European Union and domestic reduction of Russian influence.<sup>55</sup> The fact that approval of EU membership barely squeaked through the election testifies to the scale of this effort to buy up to 300,000 votes and the likelihood that Russia will continue heavily investing in Moldova, if not throughout the region.

Consequently, only a Ukrainian victory paves the way to freeing Central, East European, Ukrainian, and Belarusian states from Russian energy domination, corruption, subversion,

and elite capture. Simultaneously, a Ukrainian victory also paves the way to undermining Russia’s creeping takeover of Belarus that is founded on energy domination, reinforcement of Lukashenko’s autocracy, and the parallel, slow-motion military takeover of Belarus with its attendant nuclear threats to Europe and Ukraine.

## Ukrainian Victory and Belarus

A Ukrainian victory, meaning retrieval of all its territories, sovereignty, and freedom to join foreign alliances or associations, inevitably will have serious repercussions in Belarus as well as Russia. A Russian defeat will severely test and undermine Putin’s personal rule and entire system. This postulate also holds true for Lukashenko’s system in Belarus. To the degree that Russia props up Lukashenko’s system with subsidies, trade deals, insider corruption, political and intelligence penetration, and now potential military occupation, any erosion of Putin’s power jeopardizes Lukashenko’s hold on power. Under present conditions this is probably the only way, barring his death or unforeseen withdrawal, that fundamental political change can now come to Belarus.

Undoubtedly liberalization, although not genuine democracy, would be welcome to both the Belarusian people and Ukraine (since that would remove a threat to the north) and certainly to Europe as it would reduce the potential for further Russian imperial encroachments and the accompanying threat of war. Since a rising number of reports assert that Putin is preparing for a general war with Europe, we should welcome any military-political transformation of the situation on the ground.<sup>56</sup> Indeed, victory can only come to Ukraine if NATO and its members both supply



The NATO-Ukraine Council meets on November 26, 2024, following Russia's launch of an intermediate-range ballistic missile. (NATO)

Ukraine with the weapons it needs and firmly grasp the nettle of conventional deterrence to thwart any Russian military action at the lowest possible level, thereby precluding the possibility of nuclear escalation.<sup>57</sup> Victory also offers an opportunity for the West to redeem itself for doing so little in 2020 to support the large-scale opposition movement in Belarus.

A liberalized Belarusian regime reduces threats to the Baltic States, Poland, and Ukraine while restricting Russia's possibilities of imperial renewal. It also opens the way for modernizing Belarus' economy through association not only with the European Union but with revitalized regional and sub-regional institutions, such as the Three Seas Initiative. It also generates the possibility of a liberalization movement inside Russia because historically Belarus and Ukraine have been channels for modernizing, Westernizing, and now democratizing cultural-political trends in Russia, hence Putin's increasingly brutal efforts to suppress these channels.

Lastly, because Russian pipelines go through Belarus to the West, a liberalized regime in Belarus would be able to obtain gas and oil from diverse sources rather than exclusively Russia, curtailing Russia's ability to use energy as a weapon. Europe would also likely welcome a liberalized Belarus to a more formal association with the European Union because its government would likely both want and need to gravitate towards the European Union and its *Acquis Communautaire* for reasons of economic-political development and security. And if all the conditions outlined here came about through vigorous multilateral political and diplomatic activity by the West, this would reduce Russian threats and induce Russian rulers to forego the empire and concentrate more on alleviating Russia's crushing socio-economic problems.





The European Union launched the REPowerEU plan in 2022 to reduce dependence on fossil-fuel imports and increase clean energy sources. (Facebook | European Commission)

## European Energy and Ukraine After Victory

The war has already inflicted serious damage on Russia's capacity to use the energy weapon against Europe. Due to Ukrainian targeting of Russian oil refineries, it is now importing more gasoline from Belarus, even though Belarus sends Russia natural gas and oil.<sup>58</sup> Thus, despite its energy power Russia also has serious energy vulnerabilities.<sup>59</sup> But, if Moscow prevails we should expect it to attempt to regain the ground it lost and actually claw back some of it through its own efforts and those of pro-Russian elements in Europe.

Two reasons for arguing thusly are the internal divisions within many European states that

have substantial pro-Russian factions—Serbia, Bulgaria, and Germany—and Europe's incomplete transition to foreign energy sources and to green energy. Although Europe is committed to these transitions it is clearly having difficulties converting to green energy or ending its addiction to Russian energy.<sup>60</sup>

While the difficulties of executing this dual transition are particularly marked in the Balkans, they transcend that region. Indeed, global demand for coal peaked in 2023 according to the International Energy Agency although it is expected to fall in 2024. This rise in European coal use is directly traceable to price rises triggered by sanctions and Russia's reorientation of its energy markets to the East.<sup>61</sup> Thus, a Russian victory, coming in addition to expansion of Russian liquefied natural gas shipments to Europe and high prices for natural gas and oil, can reasonably be expected to stimulate a revival of Russian energy exports to Europe.<sup>62</sup>



The Balkans, which are a natural market for both Russia and Ukraine, given the existing infrastructure for pipeline energy, exemplify Europe's difficulties in making this dual transition. A 2023 report observed that,

*Countries in Southeast Europe are particularly vulnerable to energy and climate security risks. Most of the region's political leaders have adopted a façade of confidence, promising to guarantee the security of supply in the event of an actual physical disruption of Russian flows, but they have yet to implement concrete measures to mitigate this risk and seek viable long-term gas alternatives. The region's historical lack of alternative energy sources to Russian oil and gas, the slow pace of the energy transition, and the more acute issue of energy poverty have all made the economic pain that resulted partially from joining the energy sanctions on Russia particularly unwelcome, both for policymakers and the general public. As a result, many Southeast Europe countries have been hesitant to follow the rest of Europe's example, requesting derogation from common EU sanctions or even openly opposing measures to reduce the region's dependence on Russia.<sup>63</sup>*

Consequently, despite a long-running substantial program of building pipelines and interconnectors, key Balkan states remain vulnerable to the siren song of Russian hydrocarbons.<sup>64</sup>

However, if Ukraine wins the war and launches or continues restoring its energy industry, including the installations seized by Moscow off the coast of Crimea, it could soon, especially with Western help, become a net exporter of energy and therefore alleviate not only the excessive Balkan reliance on coal but also facilitate the Balkans' transition to green energy. Ukraine's extensive gas storage capabilities, abundant endowment in coal, oil, and natural gas, and nuclear power stations, along with a growing renewable energy sector,

make this a possibility provided Ukraine thoroughly reforms this sector, receives the necessary foreign investments to rebuild its energy sector, and once the war ends, integrates into existing and prospective new infrastructures.<sup>65</sup>

Since many gas and oil pipelines from Russia to the Balkans and Eastern Europe traverse Ukraine and its Black Sea platforms and adjoin those of Romania, reconstruction of this sector and development of the renewables could soon justify itself economically. The rebuilding of this infrastructure would also give a definite mission to the floundering but potentially valuable Three Seas Initiative thereby integrating Ukraine into regional and sub-regional networks and displacing Russia in the Balkans.

**Despite a long-running substantial program of building pipelines and interconnectors, key Balkan states remain vulnerable to the siren song of Russian hydrocarbons.**

Since Europe is scheduled to eliminate all Russian gas by 2027—including liquefied natural gas—and stocks for next year are already abundant, Ukraine now feels it can safely terminate its contract with Gazprom to bring oil to the Balkans and Eastern Europe through pipelines located in Ukraine.<sup>66</sup>

Ukraine, despite the war, has been on and off exporting electricity to states like Romania since the war began, and the advent of peace could certainly see a regeneration of those exports.<sup>67</sup> Admittedly such visions may seem



Ukrainian President Volodymyr Zelensky, Lithuanian President Gitanas Nausėda, and Polish President Andrzej Duda at the Three Seas Initiative Summit in April 2024 held in Vilnius, Lithuania. (3seas.eu)

far-fetched or even utopian when Russia is literally pulverizing whatever it can of Ukraine's energy sector in retaliation for Ukraine's strikes on Russian oil refineries. Nevertheless, those strikes also reflect Russia's growing alarm that its own energy sector is being targeted and at risk of being excluded from its natural historical market, Europe. Indeed, Foreign Minister Sergei Lavrov now complains that the West wants to defeat Russia to oust it from energy markets, demonstrating Russia's concerns about being supplanted by a revived Ukraine.<sup>68</sup> Moscow obviously believes that a restored or resurgent Ukraine can compete effectively with it in European energy markets.

Furthermore, Russia already must compete with other non-European gas markets to whom Europe has turned, namely Qatar and Algeria,<sup>69</sup> and soon other African states will also enter into this competition.<sup>70</sup> In the Balkans, Azerbaijan has concluded new gas and even arms deals with Serbia and will

double gas supplies to Europe by 2027, clearly challenging Russia's European and Balkan positions.<sup>71</sup> In addition, major new gas finds in Austria and off Turkey's Black Sea coast offer more alternative sources coming on the market concurrently with the ongoing building of new pipelines and interconnectors.<sup>72</sup>

Finally, American liquefied natural gas and gas exports also offer new opportunities to what previously had been Russian markets. For example, the new bilateral agreement between Belgrade and Washington allowing American companies to invest in Serbia's energy sector represents a direct assault upon Russia's dominance in that sector and its substantial leverage over Serbia in general.<sup>73</sup>

There is no doubt that Moscow will react highly negatively to this latest sign of Serbia's inclination to the West. Indeed, *Danas*, a Serbian newspaper, reported that while Putin is still intensely soliciting Serbian President

Alexander Vucic's attendance at the upcoming October 2024 BRICS summit in Kazan, he is increasingly angry with Serbia and has resorted to threats against Serbia's energy supply. Thus, Danas commented that Putin reminded Vucic that the contract with Russia would end in 2025 and claimed that almost nobody else has such a favorable deal. Therefore, Serbia should "be careful."<sup>74</sup>

It also claimed that Putin is annoyed at Serbia's new deal to buy French Rafale jets, its deal allowing Germany to buy Serbian lithium, and that it had largely implemented the Franco-German plan for Kosovo while also selling weapons to Ukraine, thereby endangering Russia's leverage on its last potential satellites in Europe outside former Soviet boundaries.<sup>75</sup>

**Should Ukraine win the war, Europe has genuine chances to considerably undermine it by ousting or at least reducing Russia's prominence in Central and Southeastern European energy markets.**

This story underscores exactly how Russia utilizes its energy weapon in Europe and the benefits to the West of breaking Moscow's leverage on European energy sectors as part of a strategy of Ukrainian victory. So, while Russia, and particularly Russian gas, still has a noticeable amount of leverage over Europe, even prior to a Ukrainian victory it is possible to undermine that leverage. Should Ukraine win the war, Europe has genuine chances to considerably undermine it<sup>76</sup> by ousting or at least reducing Russia's prominence in Central and Southeastern European energy markets.

Then Ukraine could substitute its energy sources for those provided by Russia.

In this context, the reconstruction of Ukraine's hydrocarbon, nuclear, and renewable energy sources—including solar energy—could begin even in wartime, especially if it gets the weapons it needs to thwart Russian bombing. If its electric power sources can be rebuilt, Ukraine can even resume sending excess electricity to its neighbors. If Ukraine wins, the same could be said for its nuclear power sector.<sup>77</sup> At the same time, the opportunity to rebuild Ukraine in general and these sectors in particular presents a vast new investment opportunity for European firms with the added benefit of considerably enhancing prospects for European integration. This reconstruction would therefore amount to building on the foundation already laid for further integration.

For example, in 2021, before the war, numerous hydrocarbon agreements were signed with German, Austrian, Czech, and Slovak gas transmission operators with the intention of creating a Central European hydrogen corridor to bring Ukraine's estimated 45,000 annual production capacity of green hydrogen to Central European markets.<sup>78</sup> Victory in the war would allow Ukraine to make the transition from coal-based energy and electricity to nuclear energy and nuclear-powered electricity as its reactors would come back under its sovereignty and be restored to full operating power on the basis of EU standards and with the help of foreign investment.<sup>79</sup>

Apart from the opportunities to provide gas and oil through a newly developing and restored infrastructure from Ukraine to the Balkans and Eastern and Central Europe, Ukraine can play a major role in the overall greening of the European economy. From 2007 to 2021 it added the most amount of wind and solar power of any Eastern European country, and in 2021 Kyiv proclaimed a goal of sourcing 25 percent of its power using renewable energy by 2035.<sup>80</sup> Obviously,

the war has set back all these plans. But the point to be made here is that victory and the ensuing prospect of EU membership under the *Acquis Communautaire* generates opportunities to restore and transcend this progress on energy issues, allowing Ukraine and Europe to reduce Russia's energy leverage with respect to hydrocarbons, nuclear power, and green energy, facilitating the transition to the green economy. Therefore, it should be clear that just as in Belarus' case, "Prevailing against Russia's energy war is essential for ensuring that Ukraine can defend itself and push the armed conflict toward victory."<sup>81</sup>

## Toward a Strategy for Victory

This foregoing example highlights the point that a truly integrated Western and American strategy are needed to overcome Russia rather than what they have now: a series of disjointed and uncoordinated policies. This strategy must express a truly integrated deterrence in practice rather than rhetoric. Indeed, in a previous paper the author has outlined the elements of what this integrated strategy might look like.<sup>82</sup>

Militarily this strategy must go beyond the continuing support of Ukraine by providing it with a steady stream of the weapons it needs while simultaneously undertaking what several bipartisan commissions here have advocated, namely the modernization and recapitalization of the US conventional defense sector while simultaneous trends occur in Europe.<sup>83</sup> Doing so would restore conventional deterrence in Europe and negate Putin's nuclear threats at the lowest level of deterrence while providing a major boost to Ukraine's defense.

While this should be coordinated here with a nuclear buildup to counter Russo-Chinese and other lesser threats like North Korea, the key point is restoring genuine deterrence. It entails not only financial support for the Ukrainian government but also support for reform and concerted measures to promote a true diversification of all of Europe's energy supplies, be they fossil fuels or green energy.

Likewise, domestic security agencies here and throughout NATO must both be invigorated and their mutual coordination enhanced to rebuff Russia's espionage, subversion, and infrastructural attacks, often using indigenous criminal forces against NATO members. At the same time, the United States also needs to support the opposition in Belarus more vigorously and put more pressure on Belarus to weaken Russia's ability to take it over and use it as an instrument of its attacks on Ukraine and Europe.

**The US needs to support the opposition in Belarus more vigorously and put more pressure on Belarus to weaken Russia's ability to use it as an instrument of its attacks on Ukraine and Europe.**

Lastly, it is long been necessary that the United States and its allies undertook a coordinated information policy targeting the Russian people as well as Russian information outlets abroad who have also now been shown to be conducting espionage in the West.<sup>84</sup>



In the United States the Biden administration and its successor must also take the case for Ukraine and for this defense buildup to the public to both garner its support and understanding, as well as to Congress.


Together these coordinated elements not only constitute a truly strategic response to Russia's long-running war against the West, they also strengthen Ukraine's cause and the objective of a thriving Europe that is whole and free.

## Conclusions

Clearly the Russian threat to Ukraine, Belarus, and Europe in general is multi-dimensional and not exclusively militaristic. Despite the urgent necessity for NATO to rearm itself and Ukraine, it is equally necessary to attack, if not eliminate the non-military sources of Russia's power to continue waging war on Europe as it has done for a generation. Not only does this mean bringing Ukraine and eventually Belarus into the European Union if not NATO. It also, inter alia, means genuinely transitioning away from dependence upon Russian energy to a greener economy across the West.

Since Russia is on the verge of swallowing up Belarus as its revealed strategic plans indicate, it is no less urgent to fashion an equally multi-dimensional strategy for Belarus. Indeed, too many Western governments or political movements both in the United States and Europe continue to deny the necessity for actively resisting Russia's multi-dimensional coercive strategy.<sup>85</sup> Instead they remain unwilling to face the long-standing and possibly increasing threat to Europe from Russia, as seen in the numerous recent statements by governments who see the threat and call it out.<sup>86</sup>

But beyond the immediate multiform Russian threats confronting the West we have the

opportunity, provided we think and act strategically, to strengthen many of the dimensions of European security, including Belarus' progress and the reduction of energy dependence upon Russia by grasping the interconnections that have led to the current war and the implications of failure to do so. For if Ukraine is enabled to win, we can take giant steps forward to a Europe whole and free. But if we shirk our responsibilities and, more to the point, our interests, not only will Ukraine fall but with it the very ideas of European security and an international order. 

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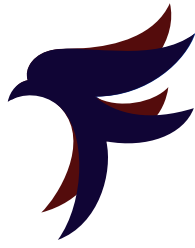
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