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The West's military aid for Ukraine – crisis management in lieu of strategy

Unlocking the aid package for Ukraine by the United States will stabilize the front line and halt Russian advances, but it will not lead to a breakthrough in the war nor to Ukraine regaining the strategic initiative. Western support is scattered, unsystematic and often driven by ad hoc political considerations. Taking into account Russia's resources and actions, aid for Ukraine should be long-term and strategic – its current nature and formula will not have a decisive impact on the course of the war.

Consequences of delaying military support for Ukraine. Starting in the fall of 2023, both the situation of Ukrainian forces on the front and the ability to defend Ukraine against Russian air attacks have slowly but systematically deteriorated. A significant reason for this was the suspension of US military aid. At the same time, European states were unable to compensate for the lack of this support, especially in the field of ammunition production; – for example, none of the so-called “munitions initiatives” were fully implemented.

The deepening shortages of weapons and ammunition made it easier for Russia to switch to offensive operations. For almost eight months, Ukraine was deprived of American supplies, which enabled Russia to occupy further towns and areas, despite significant losses, without fear of a Ukrainian counterattack. In turn, the deficit of air defence allowed Russia to continue attacks on civilian objects and critical infrastructure. Moscow seems to have also become convinced that it has regained the initiative, and all of its disinformation and propaganda activities aimed at discouraging the West from supporting Ukraine are working. However, in response to the unblocking of American aid, Russia intensified its activities on the front in order to advance as much as possible before weapons and ammunition reach Ukrainian units, as well as to destabilize the entire Ukrainian defence line (Kharkiv, which has been under intense fire since the beginning of the year, has become the target of intensified attacks, among others).

Unblocking the aid package restored credibility to the United States and improved morale in Ukraine, but the consequences of the many-month delay are so serious that Ukrainian reactions were far from enthusiastic. Acknowledgment and gratitude to the US were widely accompanied by many voices of bitterness, as well as sharp criticism of the Republican members of Congress, which blocked the adoption of the package.

Problematic support. Without external help, Ukraine will not be able to effectively defend itself against Russian aggression, and 95% of strictly military aid comes from Western countries. Even though this aid was evenly distributed between Europe and the United States (until the adoption of the most recent US aid package), with Europe being the leader in terms of humanitarian and financial aid, American support is crucial. Until recently, it was (and now is again), systematic and predictable – on 24 May 2024, President Joe Biden approved the 58th tranche (since August 2021) of military aid for Ukraine. Therefore, blocking support for Ukraine by the Republican Party, led by Donald Trump, had serious consequences for the course of the war. Ultimately, Trump himself took a more reserved position, realizing that 60% of voters in swing states (those states that may decide the final result of the presidential election) support US aid to Ukraine. The approval of the package was also influenced by the dynamics of changes in the international environment, Russia's growing self-confidence, and pressure from the American army and intelligence, as well as NATO allies.

Help from Europe is dispersed. The actions of the European Union – focused largely on humanitarian and financial support undertaken at various levels, such as meetings of the European Council and the Foreign Affairs Council – depend on the will of individual member states. These, in turn, operate primarily on the basis of their own independent initiatives of various types – examples include Great Britain, Sweden, the Netherlands,

the Czech Republic or France. The effectiveness of these initiatives, for many reasons, varies. For example, the German plan to acquire air defence systems for Ukraine was met with little support.

The situation is similar in the case of NATO – in April, Secretary General Jens Stoltenberg proposed to establish a 5-year fund of EUR 100 billion for Ukraine, which would be financed by the alliance members in proportion to their GDP. However, considering the unenthusiastic reactions of allies, it is not known whether the fund will be created, when, and in what amount.

Meetings of the Ukraine Defence Consultative Group (the so-called Ramstein format) mainly focus on coordinating aid provided by individual states and do not result in significant or breakthrough decisions. However, they are an opportunity for Ukraine to raise the issue of supplies of weapons and ammunition, as well as the consent of Western countries to use the supplied weapons on Russian territory, on an international forum. At this stage of the war, this consent is an issue of critical importance.

There is also an ongoing discussion about taking over and using the West's frozen Russian assets, worth USD 300 billion, to support Ukraine. The United States is particularly pressing for this, but it only accounts for USD 5 billion of the total amount – the remaining assets are located in the EU and G7 countries. The US proposes, among other things, that profits (interest) from frozen assets be used to purchase weapons and as loans to Ukraine – Europe is sceptical about these suggestions.

The situation in Russia. Stopping American aid to Ukraine gave Russia a clear military advantage. Moscow's reaction to the approval of the aid package was predictable: an intensified disinformation and propaganda campaign and further nuclear blackmail (exercises with tactical nuclear weapons "in response to provocative statements and threats against Russia"). However, Russian potential (military, demographic, economic, industrial) invariably exceeds Ukraine's. The Russians have also learned lessons from the course of the war so far, improved their tactics, and developed mechanisms for evading sanctions. They benefit from external assistance from Iran (drones), North Korea (ammunition) and China (dual-use technologies, e.g. semiconductors). According to estimates, in 2024 Russia's security expenditure will exceed 7% of GDP (slightly less is planned for 2025 and 2026), which means over 12 trillion rubles (almost USD 140 billion), and at the same time, one-third of all state budget expenditure. It should be noted, however, that these are all expenditures in the sphere of security – approximately 25% of this amount will probably be allocated to direct financing of the war.

The Russian armaments sector currently employs approximately 3 million workers and is able to produce more than Western companies. This also drives internal demand, which stabilizes the economy, at least in the short and medium term. The striving for economic optimization and "tightening the system" is also evidenced by changes – the "newly elected" President Putin left practically the entire previous nomenclature in their positions, replacing only the Minister of National Defense with an economist-technocrat and purging the military bureaucracy personnel under the guise of fighting corruption.

Despite this, the industry cannot keep up with replenishing losses, which forces Russia to reach for equipment from warehouse resources and rely on imports. Combined with the general economic and social situation, this means that, barring unforeseen events, Russia will be able to wage war against Ukraine at its current level of intensity for another two to three years.

Conclusions. Unlocking American aid will stabilize the front line and stop the Russian advance, but it will not fundamentally change the course of the war nor allow Ukraine to regain the strategic initiative. With the current level of Western support and problems with mobilization, Ukraine will not be able to take offensive actions this year.

Russia is also in a difficult position: in the face of sanctions and the need to change markets, it must simultaneously meet its war needs and maintain a relatively stable standard of living in society. It is also unable to achieve any military breakthrough. However, it still maintains the same goals – erasing the Ukrainian state and the subordination of Ukraine (or its vassalization). Therefore, Russia hopes for a deepening of political and

social divisions in the West, both within states and in relations between them, and for an increase of political forces reluctant to support Ukraine. Russia is also actively working to destabilize the West socially and politically (e.g. by supporting the so-called “anti-war movements”).

The United States is a special case in this context – the aid package for Ukraine was granted for a year, and – Trump’s election victory may therefore mean the end of American aid. Meanwhile, it is the USA that plays a key role, politically and militarily, in supporting Ukraine’s war effort. Thus, Europe should mobilize and adopt a common plan for long-term assistance to Ukraine – NATO may become a platform, as Stoltenberg suggests (especially in case of the US withdrawal from military support for Ukraine). The current deliveries of weapons and ammunition are actually a form of crisis management and should be replaced by strategic planning. It may prove difficult, given the lack of coordination, uncertainty about the development of the political situation, and constant fears of “escalation”. Meanwhile, taking into account both the economic and social situation of Ukraine and Russia, assistance should be planned for at least the entirety of 2025.