

Thank you, Chairman Wilson and Chairman Cardin, Ranking Members Cohen and Wicker, and honorable members of the Commission for the opportunity to contribute to this critical discussion.

The battlefield situation in Ukraine will get worse for Ukraine before it gets better. The delays in Western materiel deliveries came at the cost of Ukraine's advantage. Russia is exploiting vulnerabilities across the frontline by increasing its rate of attacks and through efforts to draw in and fix Ukrainian forces, primarily through a new offensive operation in northern Kharkiv Oblast. Russia is simultaneously ratcheting up information operations targeting Western-decision-making, including with nuclear threats. Russia seeks to achieve battlefield effects in the remaining window of opportunity before Western and US military assistance reaches the front line at scale. Russia also seeks to falsely convince the United States that the aid will not make a difference – especially amid upcoming political milestones, such as the NATO summit, European Parliament elections, and US elections. Ukraine is likely to be able to stabilize the frontline and blunt the Russian offensive as the aid arrives, and Ukraine continues to address its manpower shortages.

The supplemental aid package helped avoid a path to the most dangerous outcome and reset a range of possible outcomes for the war that still includes a Russian defeat and Ukrainian victory. Which outcome Ukraine is moving toward depends in no small part on the US learning lessons of the last two years to guide our strategy in this war and our strategy to counter the Russian challenge to the US.

Lesson #1: US interests in this war remain unchanged, and so does the most advantageous outcome for the US. This will likely remain true regardless of the ebbs and flows on the battlefield.

Russia remains a self-declared adversary to the United States. Russia still explicitly seeks to erase Ukraine as an independent state, to subjugate its other neighbors, and to fracture NATO. There is no indication of Putin seeking an offramp from his maximalist objectives.

The most dangerous outcome for the United States is allowing Russia to prevail in this war. The United States would face the worst threat from Russia since the collapse of the Soviet Union, as a victorious Russia would emerge reconstituted and more determined to undermine the United States— and confident that it can. The risks of a Russian attack against NATO will rise. The challenge of defending the Baltic States could become almost insurmountable. A Russian victory would diminish America's deterrence around the world, emboldening others with an explicit or latent intent to harm the United States. If Russia wins in Ukraine due to collapse of the aid, US adversaries would learn that the US can be manipulated into abandoning its interests in a winnable fight. Russia prevailing in Ukraine would constitute a convincing argument for the effectiveness of nuclear blackmail and would likely accelerate nuclear proliferation.

A scenario in which Russia gets a reprieve via a premature ceasefire or insufficient Western aid that halts Ukraine's advance is far more costly than continuing to help Ukraine fight. This scenario would simply allow Russia to rebuild, launch new attacks on Ukraine, and confront NATO, leveraging its military learning and experience fighting a NATO-supplied adversary on a contemporary battlefield. The United States would face another invasion but at a higher cost of Ukrainian lives and US taxpayer dollars, worse escalation risks including those that could risk American lives, and under conditions that favor Russia, including a

strengthened Putin regime, a stronger Russian military, more advantageous starting lines for Russia compared to February 2022, and higher Russian immunity to coercive measures.

The most advantageous outcome remains helping Ukraine liberate its territory and people, as it is the only path to a durable peace, rather than a temporary respite, and then helping Ukraine rebuild, putting the largest and most powerful friendly military in Europe at the forefront of NATO's defense. As long as this course of action remains Ukraine's will, accepting the short-term risks of helping Ukraine liberate itself to decrease the chances of a larger risk of escalation and costs in the future remains the most prudent course of action for the United States.

Achieving this outcome should be the goal of US strategy – which requires the US, first and foremost, to shift from a reactive stance toward an actual strategy for victory, and then align support to Ukraine with this strategy. This also includes restructuring the public discourse around "defeating Putin", not simply "helping Ukraine." The Kremlin has invested a lot in preventing the West from developing a long-term policy on supporting Ukraine. This will remain Russia's principal effort for the next months.

Lesson #2: Decision-making speed has been a key factor defining successes and failures in this war.

The key successes achieved by Ukraine and its partners have resulted from strategic clarity. Lost opportunities have resulted from the West's failure to connect ground truths to our interests quickly enough to act. The world had a moment of clarity in February 2022, recognizing Russia's true intent and the stakes of the war. This clarity informed a myriad of actions by individuals and leaders in Ukraine, in the United States and globally. These actions led to critical successes, including enabling Ukraine to defeat Russia in the Battle of Kyiv, which meant the difference between the world's largest present-day war and what would have been the world's largest insurgency. Conversely, the West's slow decisions about materiel delivery in part driven by the Russian manipulations of Western perception, cost Ukraine on the battlefield. For example, US failure to proactively resource Ukraine's initiative after two successful counteroffensive operations in the fall of 2022 contributed to a missed opportunity for Ukraine to conduct a third phase of counteroffensive operations in the winter of 2022-2023. This reprieve allowed Russia to build its defenses in depth and conduct a partial mobilization to shore up manpower, making Ukraine's 2023 counteroffensive an extraordinarily difficult undertaking.

The frontline as of May 2024 would look different had the US proactively invested in Ukraine's initiative in 2022, had the US delivered advanced capabilities or passed the supplemental earlier.

Russia has learned this lesson early. So much so that the Kremlin's main effort – since its failed "three-day war" – focused on targeting US decision-making with the goal of slowing down Western support.

The US should learn this lesson as well, specifically:

- Plan to resource multiple Ukraine's campaigns over the long term and ensure a sustained US effort to grant Ukraine the certainty about resourcing so Ukraine can plan for future operations, and to disabuse Putin of the notion that he can outlast the West.

- Not expecting any single operation to be decisive.
- Recognize that the speed of knowledge transfer and decision-making matters disproportionately in this war, as Russia mastered using perception manipulation to achieve means beyond the limits of its power. The US and partners need to grow physical presence in Ukraine to connect the ground truth to our interests and capabilities fast enough to act. The US must also build resistance against Russian influence campaigns that aim to manipulate US decision-making– including the current Russian information operation supported by its intensified military action in Ukraine.

Lesson #3: The requirements for success have grown but Ukraine can still prevail.

Putting Ukraine on the path to victory requires both more capabilities and different approaches. More capabilities are needed because delays of materiel provision have come at a cost of Ukraine's advantage and because they provided Russia with time and space to adapt.

Ukraine and its partners also require new approaches in this phase of the war:

1. Helping Ukraine restore its own ability to maneuver on the battlefield, after it stabilizes the lines, is a priority. Achieving this objective will require more capabilities and an evolving warfighting concept to overcome positional warfare. A key task will be achieving temporary effects of air superiority without having what is conventionally defined as air superiority. This will require a much larger scale of ground-based long-range strike capabilities. Ukrainian forces may be able to restrict movements of Russian troops and supplies within a selected area of the front provided they have a sufficient quantity of long-range precision strike missiles, for example. Ukraine may also be able to innovate, achieve, and exploit a version of air superiority at lower altitudes if its partners continue to support its unmanned aerial vehicle capabilities. Ukraine needs additional air defense capabilities deployed at the frontlines to deny and contest Russia's ability to maintain localized air superiority. In sum, Ukraine needs capabilities to protect Ukrainian forces during maneuver, disrupt Russia's reconnaissance strike complex, employ deconflicting offensive and defensive electronic warfare at scale, defend Ukraine's airspace, disrupt Russian rear areas - including rear areas in Russia itself - at scale.
2. Denying Russia's sanctuaries. Russia is not entitled to sanctuaries when it is trying to erase a nation. The West must abandon the Russian information operation that Russia, having launched an unprovoked invasion of Ukraine, can somehow demand immunity from attack on the Russian rear with Western or Ukrainian weapons. The US must remove any existing constraints on Ukraine to target legitimate Russian military and defense industrial capabilities in Russia. Russia's sanctuary includes Russian airspace. The Russian Air Force is able to conduct massed glide bomb attacks against wide swaths of Ukraine uninhibited so long as it continues to leverage Russia's airspace sanctuary. Russian aircraft can strike Kharkiv indefinitely without ever leaving the sanctuary of Russian airspace. The West should also develop a long-term strategy against "sacred Russian cows" in the West, such as the Russian state nuclear energy corporation Rosatom. Shrinking Russia's sanctuary spaces will impose major strategic dilemmas on Russia.

3. Thinking beyond standard force ratios and focusing on asymmetries. Ukraine's effort in the Black Sea is an example of an operational effort producing outsized strategic effects. This is exactly the kind of effort that the US needs to amplify with more resources – given its potential to have an even larger effect, including on the ground war. Additionally, Ukraine's rapid innovation cycles present massive opportunities if coupled with the ability to scale, so does Ukraine's defense industrial base that has an estimated \$10bln gap between its level of financing and production capability, according to the recent statement by Ukraine's Ministry of Strategic Industries.
4. Surging Western capabilities. A lot of discussion is focused on how to creatively allocate existing Western military assets while adding new capability on the margins. That's important, but not the main problem we need to solve. The United States needs to lead a global coalition of partners – both in Europe and Asia – to dramatically increase the overall stock of capabilities that are making the difference in Ukraine, but which are also likely to matter to US efforts to deter and fight future wars. The West's existing and latent capability dwarfs that of Russia. The combined GDP of NATO countries, non-NATO EU states, and our Asian allies is over \$63 trillion. The Russian GDP is on the close order of \$1.9 trillion. Iran and North Korea add little. China is enabling Russia, but it is not mobilized on behalf of Russia and is unlikely to do so. If we lean in and mobilize a higher percentage of our latent capacity, Russia loses. Mobilizing would mean surging military production, sparing more of our existing military capabilities and economic assets, and accepting a higher threshold for pain and risk now to avoid more cost and pain and risk in the future.

Lesson #4: The West has the advantage over Russia; it needs to choose to use it.

The gap that Ukraine and its partners need to close to help Ukraine liberate its territory and people is smaller than the gap that Russia needs to close to achieve its unchanged objectives of subjugating Ukraine. Make no mistake - the Kremlin intends to close this gap - in fact, the most recent appointment of a competent industrial planner, Andrey Belousov, to lead Russian Ministry of Defense is another indicator of Putin's prioritization of the DIB and production capacity. Nevertheless, what the Kremlin has mobilized to date is orders of magnitude higher than what the West has mobilized on behalf of Ukraine. Russia had every advantage in the last ten years and occupied 18% of Ukraine at an enormous cost. Putin has additional resources he can and will mobilize. Russia's surge capacity is neither unlimited nor without constraints. ISW has continued to observe the indicators of these limitations. For example, recent satellite imagery indicates that Russia is largely sustaining its war effort by pulling old armored vehicles from storage and modernizing them rather than producing new vehicles and weapons systems at scale. Putin also understands that he cannot accomplish his objectives in Ukraine if Ukraine's will to fight persists alongside Western support. The Kremlin's main effort – in addition to ramping up its own capacity – is to convince us that Russia prevailing in Ukraine is inevitable and that we must stay on the sidelines, allowing Russia to fight Ukraine in isolation. The notion that the war is unwinnable because of Russia's dominance is a Russian information operation, which gives us a glimpse of the Kremlin's real strategy and only real hope of success. **The Russian strategy that matters most, therefore, is not Moscow's warfighting strategy, but rather this Kremlin's strategy to cause us to see the world as it wishes us to see it and make decisions**

in that Kremlin-generated alternative reality that will allow Russia to win in the real world. The US has the power to deny Russia its only strategy for success.

Lesson #5: Russia's defeat in Ukraine is the lynchpin to an effective US strategy to counter the Russian challenge to the United States itself.

The future of Russia, Russia's power, and its ability and intent to pose a threat to the US, NATO, and its neighbors run through Ukraine. Russia's invasion of Ukraine has grown an ultra-nationalist ideology that believes in expansion by force and that is inherently anti-Western. If Russia is defeated in Ukraine, the next Russian leader may or may not be worse than Putin. A Russian victory in Ukraine is a nearly guaranteed path to another Putin or worse, however, because of the political imperatives that an empowered ultranationalist community would create. Several other critical path dependencies are tied to the outcome of the war, namely Russia's bandwidth to meaningfully contribute to the anti-US coalition, including its partner Iran, as well as the future of NATO because neither NATO's border nor Article 5 are magic shields.

An effective US strategy to counter the Russian challenge to the US will center on Russia's defeat in Ukraine, while tackling other components of the Russian threat across theaters and domains. Such a strategy will transcend political cycles and stem from the recognition that there is no going back to the status quo; that Ukraine is a lynchpin of Russia's power; Russia's threat to the US is a persistent challenge that requires persistent effort, and that the costs of persistence are minor compared to the catastrophic consequences of letting Russia prevail in Ukraine and letting Russia achieve its objectives vs. NATO and the United States. Recognizing that this is the moment we are in may be the most critical task of all.

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