Thank you very much, Lois. And welcome, everybody, to CSIS’s Press Briefing on Ukraine and the associated global effects of Russia’s invasion of Ukraine.

We have a great selection of our experts here, which I will turn it over to them in just short order here. But first I want to say if you visit CSIS.org you’ll see at the very top of our website we have a resource page that collects a lot of our – all of our analysis on the – Russia’s invasion of Ukraine. It’s called “Crisis Crossroads: Ukraine,” and you can find it at CSIS.org.

Also, we’ve been doing a number of podcasts this week on my podcast, The Truth of the Matter, which you can get anywhere you listen to podcasts. I am talking to a cross-section of our experts at CSIS on a daily basis. Later today, I’ll be talking to Dr. Cohen – Dr. Eliot Cohen for – we’re recording a podcast. Yesterday, the current podcast up is with Dr. Seth Jones. Before that, we had one with Ben Cahill of our Energy Program, along with Nikos Tsafos. So you will be able to access those anywhere you listen to your podcasts.

So, without further ado, I’d like to start off with Dr. Seth Jones, who is senior vice president at CSIS. He’s our Harold Brown Chair and he is our director of the International Security Program at CSIS. Seth, over to you.

Dr. Seth G. Jones: Thanks, Andrew. You didn’t mention I was a former journalist myself, so –

Mr. Schwartz: Yes, that is true, as am I. So we’re among friends here.

Dr. Jones: Great. Well, thanks, everybody, for participating in this. I’ll be brief. I’m focusing primarily on the military campaign and some of the challenges, I think, that the Russians may eventually find themselves in in Ukraine based on what I’ll outline.

So I think as we can all see by now, the Russians are advancing into Ukrainian cities on three main military fronts. The first is a northern front that is primarily targeting Kyiv. The second is an eastern front which is – we’re keeping a close eye on Russian forces, most of whom have come from Russian territory. The northern thrust is coming from, in part, Belarus. And this – the eastern front is focused on cities like Kharkiv. And then there’s a southern front attempting to overrun cities like Kherson, Odesa, Mariupol from Crimea and the Black Sea.

The goal, I think, is still – the political goal, the immediate one, is to overthrow the Ukrainian government. And it’s not entirely clear whether the – whether Vladimir Putin wants to establish a pro-Russian government or simply to annex Ukraine into Russia. And he certainly talked about Ukraine not even being a country. However, what I want to do in the next minute or
so is just outline three challenges that I think the Russians are going to find over what will likely be a protracted war.

The first is, it’s going to be hard, I think, for the Russian army to hold territory for long, even if it’s successful in overrunning cities, because it’s got such a small ratio of soldiers to local inhabitants. It’s got about 190,000 soldiers, plus the irregular units, either inside Ukraine right now or just outside of the border, in a country, in Ukraine, that’s about 43 million people. And that works out to a force ratio of about four or so soldiers per 1,000 inhabitants.

That is a very historically low number of invading forces to establish any kind peace. Generally successful operations are at somewhere around 20 soldiers – I mean, there’s no real definitive formula – but 20 soldiers per 1,000 inhabitants. We’ve seen them slightly lower. In the U.S. sector of Germany by the end of World War II there were 90 – somewhere between 90 and 100 U.S. forces per 1,000 German inhabitants. The Germans invaded France with an army of about 3.3 million. So this is a tiny Russian army in Ukraine.

And second, it’s hostile territory, which suggests that the Russians would need a lot more forces. Ukrainians have risen up against Russian invaders. We’re seeing cab drivers and truck drivers from parts of the U.S., from Poland and other areas of Europe coming to fight. This is what Mao Zedong calls a people’s war, which will be a serious challenge as Ukrainians likely try to pick apart the Russian army as it holds territory.

And then just briefly, the third problem is that Russian forces have not blocked the Western border of Ukraine. It is a free flow of weapons, ammunition, other types of military and nonmilitary equipment that is flowing across the border from Poland and other NATO countries into Ukraine. This is a really bad sign for the Russians because the failure to interdict means that there’s an active sanctuary. And aid from great powers, including the U.S. So these are – these will be concerning developments.

With that, Andrew, I will hand this back to you. And obviously happy to take any questions, as with Eliot, on the military part of the campaign.

Mr. Schwartz: Thanks, Seth. And we will be having Q&A after each one of our experts here presents. So get your questions ready, colleagues. We have next Marti Flacks, who is the director and senior fellow of our human rights initiative here at CSIS. Marti, you’re up.

Marti Flacks: Thanks, Andrew. I just wanted to briefly make a couple of points about human rights, accountability, and the international legal architecture that this is happening within. And I want to start with what’s happening on the
ground in Ukraine, both because of it’s kind of inherent tragedy, and I think spotlighting it is one way to help kind of end this more quickly, by maintaining the strong international outrage against what’s happening and, frankly, generating outrage within Russia as well.

So if history is any indication, you know, we can expect to see a pretty significant increase in the air attacks that impact civilians and civilian infrastructure in the next few days. We’ve started to see this already in Kharkiv and elsewhere. We’ve seen video footage of apartment building being hit, hospitals, schools, shopping centers and downtown areas. The U.S. – (audio break) – cluster munitions and so-called vacuum bombs being move into Ukraine for potential use. (Audio break) – forces being moved into cities and begin to engage on the ground, there’s a very high risk that – you know, of either targeted killings of civilians or indiscriminate attacks that kill large numbers of civilians, all of which would constitute war crimes.

We’re getting widely varying reports of exactly how many civilians have been killed and injured. The U.N. today is reporting about 130 or so. Ukraine is reporting over 2,000, which would be an extraordinary number. It’s unclear, you know, which end of that spectrum is more accurate, but certainly we’re seeing civilian deaths; we’re seeing civilian injuries. And as the air war intensifies over the next few days and eventually, if a ground war does begin, you can expect those numbers to go way, way up. And in fact, the irony of, you know, what Seth was just saying is that if this does turn into a protracted war, you know, with – and the Russians face significant resistance from Ukrainians, unfortunately, the consequences for civilians will only increase.

The ICC prosecutor, the International Criminal Court prosecutor has opened up an investigation into the situation because he has a reasonable basis, he has concluded, to believe that war crimes and crimes against humanity have already occurred. Of course, the prospects for Vladimir Putin or any Russian officials ending up at trial in The Hague are exceptionally slim, and happy to go into more detail about some of those mechanisms in the Q&A. But I just wanted to say that for that reason we all need to be thinking about accountability in this context a lot more broadly. If the Russians succeed in occupying Ukraine, we know there will be widespread human rights abuses. If they fail, it’s likely that they’re not going to leave without leaving – without scorching the earth behind them. And either way, we can’t sort of return to the status quo; we need to think about accountability for the leaders who made these disastrous decisions, whether that’s in a criminal law context or whether that’s long-term financial and reputational harm.

And then lastly, I just wanted to make a comment about sort of the accountability for the invasion itself and the violation of our fundamental international legal order. I think there’s been a lot of talk about the consensus that this invasion has generated among the rest of the
international community, and it’s been extraordinary to see the U.N. General Assembly convene in an extraordinary session. It’s exceptionally rare to see that happen. We’ve seen the U.N. Human Rights Council – almost all the diplomats walk out of the session yesterday when the Russian foreign minister spoke. You know, these are symbolic moves but they are consequential in helping to reaffirm our international legal principles, and I think it’s important that we try and leverage this moment here in the United States to make the case to Americans about re-envisioning the international system. I don’t know if there’s going to be a silver lining yet to this situation, but one of them could be that it could help shift the debate here in the United States about having all parties return to this kind of international orientation that both parties used to have and away from the isolationism of the last few years. We know that countries like China have been working in our absence to undermine the U.N. system, especially on human rights issues, and we’ve allowed that to go unanswered and I hope that the international consensus that has been generated by this unfortunate series of events does give us an impetus to really re-engage, not just in the short term but in many years to come.

So I’ll stop there. Thanks, Andrew.

Mr. Schwartz: Thanks, Marti.

We have with us next Dr. Eliot Cohen, who we are very pleased to have welcomed recently to CSIS where he came to us from Johns Hopkins School of Advanced International Studies. You all know Dr. Cohen; he is an icon in the foreign policy/national security community. And this is our first press briefing with Dr. Cohen.

So, Eliot, thank you for being here and we look forward to your remarks.

Dr. Eliot A. Cohen: Great. Thank you, Andrew. Thank you for that warm welcome.

I’m going to talk a bit about the geopolitical implications. The proviso, of course, is all these judgments have to be provisional; many, many things can change. Still, I think there are some things that are quite striking and what I’ll do is just talk about Russia, NATO, Europe, the U.S., and China. So Russia – I think it’s not too early to say that Russia is really suffering, will suffer major, possibly catastrophic damage as a great power, and that’s for a whole bunch of reasons.

One is that the sanctions are going to bite much more deeply than I would have expected. Just one example from today: Two-thirds of the Russian commercial air fleet is composed of Boeing’s and Airbus aircraft and those companies have cut off spare parts and maintenance. That’s quite apart from the financial sanctions and so forth.
Secondly, the Russian military has really demonstrated what I would characterize as incompetence— we may want to discuss this; Seth may have a somewhat different take—but at very basic things like tactics, combined arms, logistics. One could go on. The Russian military performance has been dismal.

And perhaps most important of all, Russia has been turned into a pariah state. The U.N. General Assembly just voted to denounce it 141 to five with 34 abstentions. That is pretty overwhelming, and that pariah status is going to have many, many different aspects to it. It will be psychologically damaging for Russia but it will also, I think, end up being materially damaging as well.

Obviously, this has been a huge boost in the arm to NATO, which has, obviously, a completely restored sense of purpose, unfortunately. We also see the emergence of the European Union as a security actor, something that a lot of European states have wanted but we’re now seeing, and above all, we have to pivot—there’s lots of changes. The most significant, I think, is the German pivot within days to cancel Nord Stream 2, to begin arming one side in a shooting war and, perhaps, most striking of all, to announce an emergency expenditure of $110 billion, roughly, which is, essentially, double the current German defense budget. That’s about a Germany that’s rearmed, and a Germany that’s rearmed in Europe is a—that’s a very different place for Europe as it is for Germany. It’s very, very striking and, in many ways, it’s an encouraging development.

The United States has shown exemplary leadership in putting together a coalition. But it’s also, I think, demonstrated leadership in another way. The selective release of information before and during the conflict not only disarmed Russian attempts to confuse the issue. It also restored American credibility in a way that was still suffering the damage of Iraq in 2003.

What I think will be left for the United States is to define for itself its new leadership role in Europe. It won’t be like Cold War I, but it will be much more than it’s been over the last 20 years when you’ve had a number of presidents, basically, wanting to disengage somewhat from European security.

Finally, there’s China. There are big—although China and Russia are aligned, there are big differences. Russia, I think, has—it’s fair to say, has wanted to break a large element of the international order. China wants to bend it. They have to be wary of the back blast of sanctions. I think a lot of Chinese companies will hesitate about doing business with Russia, and I would suspect—I don’t know, but this will be something to look for—they have to be troubled by the recklessness and self-destructiveness of their main
partner and they also, I suspect, have to be disconcerted by European strength and by American leadership.

So rather than encouraging China, as some have said, because the United States is distracted, I suspect that, actually, this will be disconcerting for the leadership in Beijing.

Thanks very much.

Mr. Schwartz: Thanks, Eliot. Really appreciate it.

We have up next Andrew Lohsen, who is a fellow in our Europe, Russia, and Eurasia Program. Andrew lived in Ukraine until very recently and has a lot of insight on this. Andrew, over to you.

Andrew Lohsen: Thank you, Andrew.

I think Putin’s fundamental miscalculation in Ukraine was to launch a war with unachievable objectives, and this is going to have serious consequences for him at home. It was a completely flawed assumption to believe that Ukraine – the Ukrainians would accept a puppet leader and to lay down their weapons, having spent eight years battling Russia-backed separatists in the Donbas, and over the last week it has become really blindingly clear that Zelensky has the unquestioned support of his people and that Ukrainians are prepared to go to great lengths to defend their homeland.

So I think at this point it’s fair to say that Putin has caught himself in a trap of his own making. He’s going to have to escalate the intensity of the war to notch victories on the battlefield. But as Marti had indicated, the toll on the Ukrainian people is going to be severe and this is going to undermine his image as a liberator and a protector of Russian and Slavic peoples, and it’s also going to perpetuate resistance in Ukraine and strengthen calls for the United States and the West to keep the pressure on Russia to get Putin to back down.

And so I’ve come – you know, I’ve come to the conclusion that the war is going to have a deeply destabilizing effect on Russian domestic affairs. Unlike the seizure and the annexation of Crimea in 2014, this war seems to lack the same level of public support. In a survey taken last month by one of Russia’s most reputable polling firms, more than half of respondents in Russia said that they feared a war with Ukraine. And another poll that was taken last December showed that 85 percent of Russians still said they thought positively of the Ukrainian people – no matter what you have to say about the government, that kind of feeling that Russians identify with the Ukrainian people is, I think, a very important notion.
And so citizens in Russia are going to be seeing images of war. They’re going to see the human costs of a conflict that’s affecting people who Putin himself had described as a fraternal nation and they’re going to see dead Russian soldiers. And this has spawned an anti-war movement that – it’s already – you know, it’s quite small now, but it could grow into something larger. And as of I think maybe just an hour ago, more than 7,000 people have been arrested during protests in at least 103 cities in Russia, and this is demonstrating the depth of conviction of Russian citizens against this war. And as Russian soldiers come home in body bags or if they’re just made to disappear, then I expect that the intensity of that domestic outrage is going to grow.

And so I think this is what’s led now the Russian government to launch a parallel war, which is a war on truth, in order to prevent discontent from growing at home. There are independent media such as Echo of Moscow and TV Rain that have been forced off the air because they’re broadcasting objective information about Russia’s role. Journalists have been told that they have to report only the information that’s provided by official Russian sources. And the telecommunications regulator has partially limited access to Facebook, and has blocked access to at least 12 Ukrainian media outlets and also the websites of the Russian – or, excuse me, the Ukrainian emergency services and the Ministry of Health.

So I think in the future it’s possible we might see a throttling of Web traffic that’s similar to what was done last year to disrupt access to information about protests led by Alexey Navalny and his movement, but you know, this is a culture of samizdat. This is – (laughs) – these are the people who developed a culture of sharing banned literature and forbidden information during the Soviet era. There’s still plenty of cross-border contacts between Russia and Ukraine because you have split families with relatives on either side. So I have every expectation to believe that the real story of what’s happening in Ukraine will come back to Russia and it will be quite destabilizing.

And the last comment I’d like to make is that sanctions and similar measures are crippling the Russian economy. It’s raising the pressure on Putin to – and making it harder for him to channel funds to political elites to ensure their loyalty. So at the time when he’s facing growing domestic discontent, he also may be losing the support of some of the political elites around him. And so I think in time this war may ultimately prove to be Putin’s undoing, but it’s still a little bit too early to say.

Mr. Schwartz: Andrew, thanks very much.

Up next we have Caitlin Welsh, who is the director of our Global Food Security Program.
Thanks very much, Andrew.

Bottom line is that Russia’s war in Ukraine disrupts global grain and energy markets, which will push up food prices with food-importing countries experiencing the most serious consequences.

For some background, Ukraine and Russia are both among the top five global exporters of grains and oilseed. These countries combined together account for almost 30 percent of global wheat exports, and Ukraine alone accounts for 50 percent of the global market for sunflower oil. Fertilizer, too: Russia and Belarus account for significant proportions of global trade in multiple types of fertilizers.

When it comes to the impacts of the war, global supply of grains and oilseed is under threat. In Ukraine, I’m looking at three reasons.

Number one, because farmland is threatened. Significant proportions of agricultural production takes place in areas in the east that are – that were occupied prior to the war and also in land bordering on Russia and Belarus.

Second, because of transportation disruptions. The number of dry bulk carriers in the Black Sea has fallen over 60 percent in the last week amid concerns about safety or slowdowns. And in fact, a ship chartered by Cargill, one of the world’s largest food suppliers, was hit by a projectile in the Black Sea last week.

And finally, you have major multinational agricultural corporations pulling out. ADM, Bunge, and other corporations have pulled – announced pullouts recently, which ceases operations at multiple grain silos and processing facilities. It also causes them to withdraw hundreds of employees from Ukraine.

So you see production in Ukraine being disrupted.

Also, in Russia exports are disrupted. Amid last week’s comprehensive sanctions, Treasury did issue a general license, an OFAC license authorizing transactions related to agriculture. But trade in ag commodities from Russia is not free-flowing as it requires transactions with Russian banks, which importers are unable or unwilling to do, the OFAC license notwithstanding. And finally, as oil and gas prices soar, this puts further upward pressure on food prices.

So how do we see this playing out? Food security for food-importing countries is what we’re watching most closely. The effects will be felt most sharply in low and middle-income countries, where food accounts for a higher proportion of the budget than in developed countries, and where food
price inflation is more closely tied to movements in global food – global food prices. After China, the world’s largest wheat importing regions are North Africa and the Middle East. Egypt, of course, being the world’s largest importer of wheat, which recently was importing 85 percent of its wheat imports from Russia and Ukraine. Prior to this war, USDA was projecting that Iraq, Syria and Iran would need to double their imports of wheat due to droughts in those regions. And other major wheat importing countries and regions include Brazil, Nigeria, and several countries across Southeast Asia, which we should also keep our eyes on.

Agricultural production has the potential to be affected as well. Fertilizer shortages will have implications in developing countries. As high fertilizer prices reduce fertilizer use and result in poor harvests, they disincentive the use of fertilizer in low- and middle-income countries. All of this, higher food prices and the potential for lower production, is taking place at a time when global food insecurity is already at a 15-year high due to the effects of COVID, climate change, and other conflicts. So Russia’s war on Ukraine has the potential to exacerbate food insecurity around the world. Thanks very much. I’ll stop there.

Mr. Schwartz: Thanks so much, Caitlin.

Next up is Ben Cahill, who’s a senior fellow in our Energy Security and Climate Change Program. Ben, over to you.

Ben Cahill: Thanks, Andrew. And thanks to everyone for joining today. So we are looking at one of the biggest energy disruptions potentially since the oil shocks of the 1970s. This is really a seismic event for the energy relationship between Russia and Europe. And it really raises big questions about Russia’s future role as an energy exporter. And the backdrop, until the last week is that for the last six months we’ve already seen incredibly high natural gas prices and electricity prices in Europe. We also had a very tight oil market. We’ve seen a big runup in oil prices, really since last fall. And today, prices are over $110 a barrel for Brent crude.

And a bit of context on Russia’s role, and then I’ll talk a little bit about the near-term impacts that we’re seeing. So Russia supplies close to 40 percent of Europe’s gas. Because the vast majority of this is via pipeline, there really are no easy alternatives for a lot of the buyers. And again, the market is quite tight. There’s not a lot of spare capacity available. On the oil side, Russia, as you know, is one of the world’s big three oil producers, along with Saudi Arabia and the United States.

In January, Russia produced about 10 million barrels a day of crude and over 900,000 barrels a day in condensate. It exported about 5 million barrels a day in - (inaudible) – last year. About 60 percent of that went to Europe and
about 35 percent to China, a little bit to the United States and other markets. So Russian oil exports are equivalent to about 5 percent of global demand. It also exported about 2.85 million barrels a day in petroleum products, so it's a key supplier of diesel and other products to Europe.

On the gas side, you know, a couple weeks ago the idea of a complete gas shutoff to Europe really seemed outlandish, impossible. I don't think that's the case anymore. I think we have to consider that possibility. And the reality is that nobody else can step in and replace Russian gas in the short term. Russia typically supplies around 175 billion cubic meters to Europe. That's just an enormous amount. It's far and away Europe's largest supplier.

So what's happening in the oil market today? It's clear that we're going to have a big supply disruption from Russia. So sanctions have not directed targeted crude or petroleum products, but basically we have de facto sanctions. With this much risk and uncertainty, refiners don't want to buy Russian crude, tankers don't want to lift it, banks don't want to finance purchases, and insurers do not want to get involved in this trade. So there's a lot of self-sanctioning happening now.

If you add it all up, we're probably looking at about 2 million barrels a day in supply shortages. This market is moving at warp speed. Every day there are new revolutions. So we're very much in the middle of it. But it's clear that this is going to have a big impact. And in the worst-case scenario, where we have direct sanctions of Russian crude and exports, that's 5 million barrels a day in exports at risk. So that's about 5 percent of global demand.

You know, and another critical issue for Russia over the near to medium term is that companies are pulling out. We've seen just in the last few days BP, Equinor, Shell, ExxonMobil and other companies have pulled out of Russia. So that creates real challenges for them in the future to maintain oil production. So the immediate response from OPEC+ is that they are not really stepping in to help. Today we had a decision from OPEC+ which was basically to stick with the current deal. They're planning to add just 400,000 barrels a day into the market each month.

Their stance is that they're not seeing physical shortages in the oil market yet. The price is being drive up by speculators and traders. And they don't feel the need to step in. And I think this is a really important moment for OPEC. You know, the whole goal of that organization is to promote market stability, but what kind of stability do we have in this situation? So it's clear that the political dialogue between the White House and OPEC countries will continue. But so far, it's not been very fruitful.

So what's next? Just yesterday the United States and all the IEA countries announced a coordinated release of petroleum reserves, 60 million barrels
altogether. The impact of that is still uncertainty, but I think it’s significant because it shows that the importing states are coordinating. We’re definitely going to see a response from the shale sector in the United States. Supplies will ramp up. But it’s going to take a couple months. If the market disruptions continue, it’s definitely possible that Saudi Arabia will announce a kind of unilateral cut. There could be another OPEC+ emergency meeting. More strategic reserve sales could happen in the future.

And I think basically in Europe we’re looking at a period now of emergency planning from now until next winter. We basically have until next winter to find gas wherever we can – in the United States, Qatar, Norway, North Africa. The issue is there’s not a whole lot to be found and, again, it’s tough to substitute for Russian supplies. So add it all up, I think the bottom line is we’re going to have high oil prices for months to come. And if the war drags on and Russia doesn’t back down, we could have sanctions escalation. And I’ll stop there. Thank you.

Mr. Schwartz: Ben, thank you very much.

Our final speaker today before we open it up to your questions is Erol Yayboke, who is director and senior fellow of our Project on Fragility and Mobility. Erol’s written a lot about migrations and has got some really terrific insights here. Erol, up to you, buddy.

Erol Yayboke: Thanks, Andrew. So there are nearly 900,000 Ukrainian refugees already. And for folks that haven’t seen, there’s a new operational data portal that the U.N. Refugee Agency just launched, which I would highly recommend. It’s got the most accurate, up-to-date data. Over half of those refugees are in Poland, which with the assistance of UNHCR and NATO allies like the United States, have been preparing for that influx for weeks.

Generally speaking, they have been prepared, although we shall see how that preparation continues to be important as the numbers go up. There are countless more internally displaced people, many of whom are trying to move west, away from the worst of the fighting. Some are waiting to cross borders. Others are kind of holding out in Lviv and other places where they deem themselves to be safe. The fewer safe places there are in Ukraine, the more people will seek to leave Ukraine.

The speed of the forced displacement seen in the past week is particularly notable. Every time I think to talk about this almost as soon as I talk about the figures they’re outdated. People are moving much faster, and in already large numbers, than the peak of the so-called migration crisis in Europe in 2015. They’re even moving faster than the forced displacement at the beginning of the war in Kosovo in 1999. It’ll take a – it’ll take a while for the
true scope of the humanitarian disaster to unfold, but we’re certainly seeing themes reminiscent of World War II-era displacement.

The U.N.’s preparing for upwards of four million refugees officially. That would constitute about 10 percent of the entire Ukrainian population, though some estimates, including by U.S. officials, put that potential figure over 5 million, especially if fighting intensifies and broadens and especially, as Seth mentioned, if the borders the west remain open. On that point, the EU and all of Ukraine’s neighbors, with the notable exception of Belarus, have been providing assistance to refugees and have been keeping their borders open, though wait times, obviously, at border crossings are increasing as the numbers grow so quickly.

And so the initial welcome of EU and neighboring states I think personally should be applauded. Efforts should be made to ensure that the welcome includes all people fleeing conflict regardless of race, religion, or country of origin.

I’ve been getting some questions from journalists and others on the U.S. and whether Ukrainians will come to the U.S. The U.S. is certainly under pressure from resettlement agencies and advocates to increase the number of Ukrainians it takes, and just yesterday there was a call to create temporary protected status for Ukrainians currently in the United States. So those are two spaces to watch.

A couple of longer-term implications. I realize I’m standing in between y’all and questions, so. It’s worth noting that the welcoming posture that I just mentioned could change over time as the world’s attention moves on and as Ukrainians who are displaced increasingly seek access to labor markets, jobs, and schools for their kids. I think how many people eventually return is a – is a very interesting question. Obviously, we’re in the early stages of the conflict. But in any displacement scenario, it’s worth thinking as early as possible about return. The fact that men are not being allowed to leave could have some very interesting repercussions. Once that ban on men leaving Ukraine is lifted, there could be a spike in the number of refugees, those men leaving; or, at the same time, there could be higher numbers of Ukrainians as family members who are looking to go back to Ukraine quickly. Of course, the scale of devastation of Ukraine will certainly play into return. If there’s nothing to return to, then that’s certainly an implication.

Post-conflict recovery is something that, obviously, we think about here at CSIS. The temporary brain drain represented by the refugees is sort of manageable in the short term, but losing 10 percent or more of a well-educated population could be devastating.
And lastly, look, there will undoubtedly be longer-term psychological health and other impacts on the Ukrainian refugees and IDPs. We keep talking about winning and losing, and I feel like the reality is that everyone has already lost. Ukrainians will be dealing with this trauma long after the camera is focused elsewhere and the shockwaves will be felt beyond Ukraine for years to come.

Back over to you, Andrew.

Mr. Schwartz:  
Erol, thanks so much.

And with that, Operator, we’re going to open it up to questions. We can do that right now.

Operator:  
Thank you.

(Gives queuing instructions.)

And our first question is from Brett Samuels from The Hill. Please go ahead.

Q: Hi, everyone. Thanks for doing this call this afternoon.

My question is – maybe Andrew or somebody else can speak to this, but I was hoping to get a little more insight into how the perception within Ukraine may have changed about President Zelensky since this invasion started. I’m just hoping to get some more information or context about, you know, potentially how Ukrainians kind of viewed President Zelensky before this invasion began and, obviously, now he’s become sort of an international hero, I guess you could say, or certainly has garnered a fair bit of international attention. So just hoping to get some more context on sort of his arc as president of Ukraine, given sort of his prominence now over the last week or so. Thank you.

Mr. Schwartz:  
Andrew? Andrew Lohsen, do you want to take that first?

Mr. Lohsen:  
Absolutely.

You know, he – coming into this, he had a rating of about 33 percent approval among the Ukrainian population. He was elected with about 75 percent of the vote in 2019. And like any Ukrainian president, that’s going to drop like a rock over time.

You know, I don’t know how hard it is to or what it involves to conduct polling in a warzone, in the middle of a conflict, but there has – there is a Ukrainian polling firm that asked about Ukrainians’ perceptions of Zelensky’s performance. Ninety-one percent said that they support him. And
you know, these images of him broadcasting from in front of the presidential administration, you know, when there’s reports of a bounty on his head or that he’s, you know, enemy number one, I mean, that is real courage. So, absolutely, he’s really become respected as the leader of the country and still has the faith of the vast majority of his citizens right now.

Mr. Schwartz:  
Next question, Operator?

Operator:  
The next question is from David Walsh from Sheffield News. Please go ahead.

Q: Thank you very much.

I’d like you to, I guess, Dr. Jones, assess the two sides’ battlefield cyber-force capabilities in terms of their respective systems or tools, whether it’s DDoS, sat phone and (GPS ?) jamming, spoofing, and as a subordinate to that if you want to talk about electronic warfare. Anyway, get your ideas on that would be appreciated. Thank you.

Dr. Jones:  
Yeah, thanks for the question. And Andrew Schwartz can also put you in touch with – we’ve got some experts at CSIS who are much better than I am on the cyber side, Jim Lewis and Emily Harding, among others. But let me just briefly note that, I mean, we’ve certainly historically seen Russia’s GRU and SVR in particular conduct aggressive cyber operations against Ukraine, going back to NotPetya and a number of other malware attacks. Those have continued in Ukraine over the past several days. Russians have been pretty aggressive. I mean, one of the areas we’re seeing some assistance to the Ukrainians, which actually have had a pretty robust cyber defense and some offensive cyber capabilities also conduct attacks against Russian – the Russian ability to communicate over radios, and trying to jam satellite phones as well. I mean, there are a couple of developments that I think are interesting in this campaign, and one is, we’re seeing a number of cyber what I’ll call hackers start to target the Russians that have nothing to do with the U.S. or other Western, certainly European states and their governments. These are – so there’s a nonstate component to the offensive cyber campaign that we’re seeing that I can’t say I’ve really seen, certainly at this magnitude, in previous wars where, you know, Anonymous and other organizations are conducting – are getting into the fight. In some cases they don’t like the Russians. I mean, that’s an interesting development.

We are seeing one of the types of equipment that the U.S. and some European countries have identified is electronic warfare capabilities for the Ukrainians and continuing cyber capabilities for the Ukrainians for a prolonged, protracted conflict. So, you know, I expect this one to continue for the foreseeable future. Again, leave it to Andrew Schwartz. You know, we’ve got a couple of other cyber experts who could talk in more detail than I certainly can.
Q: Thank you, Seth.

Mr. Schwartz: Yeah, happy to connect you. Just send me an email, aschwartz@csis.org.

Next question.

Operator: Thank you, and again, if you do have a question, please press one and zero at this time.

And at this – I’m sorry, we do have a follow-up from David Walsh. Please go ahead.

Q: Yeah, thank you very much for that and I appreciate the heads-up on the other guys. Do you think that NATO member states can be expected to share cyber best practices and quote/unquote “techniques” and rules of engagement with the U.S. and vice versa?

Dr. Jones: Well, David, I would have been surprised a week ago to hear that some European states were going to be providing Stingers before the U.S. and that they were going to be providing attack aircraft, and even the Germans who are now going to be shipping weapons. So I think at this point, you know, anything is possible right now. The levels of support that U.S. and European countries are now willing to provide Ukraine I certainly could see technical capabilities to conduct cyber defense and also, at this point now, offensive cyber operations, because the decision I think will continue to be the case that NATO countries are not going to become directly involved in the war itself by deploying forces, but the campaign we’ve already seen has involved cyber. Cyber capabilities are important, and I think everything – I’ve spoken to senior U.S. and European officials – cyber is definitely on the table and there is – there does appear to be significant support to help the Ukrainians out here as they have done with fighters and antitank weapons and surface-to-air missiles and other kinds of equipment.

Q: Thank you.

Mr. Schwartz: Operator, do we have any more questions?

Operator: We do. We have a question from Ben Gittleson from ABC News. Please go ahead.

Q: Hello. Thanks for doing this. It’s very helpful.
I had two sanctions-related questions. I was, first of all, hoping to get your reaction to the new sanctions the U.S. announced today targeting the oil and gas sector and, specifically, equipment for this sector, as well as the sanctions on the Russian defense sector or entities, and also on Belarus.

And then my other question, I think, would be for Ben, who mentioned that there are, effectively, de facto sanctions against Russia’s oil and gas sector. I was wondering if you could share your thoughts on what difference it would make if the U.S. and West and Europe actually cut off oil and gas imports from Russia and actually fully sanctioned that sector compared to what’s happening now – what we’re seeing now with the sanctions currently in place.

Mr. Schwartz: Who wants to take the sanctions question first?

Seth, do you want to jump in on the sanctions question?

Dr. Jones: Yeah. I mean, I’d defer to others, particularly, on the oil and gas, and Eliot may want to weigh in on this, too. I don’t know that there’s, like, going to be a short-term impact on the Russian military and individuals being sanctioned. I think Gerasimov’s been sanctioned. I think Sergey Shoygu, the minister of defense, has been sanctioned. This may have a longer-term impact on – you know, somewhere down the road.

But, I think, in the short term the Russians, I think, are going to be able – if they run out of ammunition, which they have in some areas, of oil and lubricants or they need additional aircraft to push to the fight or tanks or – you know, the main battle tanks, armored personnel carriers, they should be able to get those from other areas in Russia or Belarus, or they may be able to import some military equipment from the Chinese or a few other allies.

So I’m not convinced that the military-related sanctions are going to have a short-term impact. I don’t even know about the long term. Other sectors, though, that’s a totally different matter. So, you know, I, certainly, leave to others on the oil and gas sector. Probably Eliot may have other thoughts on some of these sanctions before we get to the oil and gas.

Dr. Cohen: No, I agree with what Seth said. I think the angle that will be – turn out to be one of the most interesting is, really, in many ways, the psychological one and that is, as I said earlier, that sense of Russia becoming a pariah state where its, you know, people who are invested in the system can’t travel abroad, can’t send their kids abroad. They have this feeling of being closed out of the developed world, which they would like to think that they’re part of, and what that plays into is the question of elite politics in Moscow and that’s going to be opaque.
You know, I don’t think anybody should assume that Putin is going to be deposed from power anytime soon. But I also think we shouldn’t be surprised if it does happen because of the pressure of this, and there’s, really, no good news in any of this for the Russian economy, for the Russian polity, and for Russian elites, and sanctions is – are most definitely part of that.

Mr. Schwartz: Ben, over to you on oil and gas.

Mr. Cahill: Yeah. I’m sorry. I was disconnected for a minute so I didn’t hear the question. Andrew, can you just let me know, quickly, what it was?

Mr. Schwartz: Ben, do you want to repeat your question? Ben Gittleson?

Q: Sure. Sure.

You had mentioned that the oil and gas sector in Russia already had de facto sanctions on it as a result of the sanctions that have already been put in place, and I was wondering if you could share your thoughts on what a full sanctioning of the oil and gas sector would mean. What difference would it be from what we’re seeing now if the U.S. and Europe fully stopped imports of Russian oil and gas?

Mr. Cahill: So what we’ve seen so far is that a lot of people in the oil trade have been very reluctant to do business with Russian companies because of the fear factor, right? If you sign a contract for today, it’s often for delivery four weeks from now. With this much uncertainty about what’s going to happen in the next month, no one wants to touch those cargoes. So refiners, shippers, they’re looking for alternatives, and the near-term impact that we’ve seen is that the prices for Russian crude and petroleum products have really dropped as a result. The differential has really widened. There have been a couple tenders of crude oil from Russia with no buyers.

So, again, this is kind of like a voluntary response to the sanctions in place so far. And I think it’s more severe when you’re talking about seaborne exports, things that are dependent on tankers, because you need insurance for those, you need offtakers, you need multiple parties.

I don’t think that they have caused any disruption so far with pipeline exports, either west to Europe through the Druzhba Pipeline system, which supplies about 750,000 barrels a day, or to the ESPO Pipeline, which flows to China. If you do have full sanctions that directly target both crude and products, then that’s going to affect all buyers. And again, I think that would be a much, much bigger scale, the price impact would be dramatic, and it would lead to a scramble around the world for alternative supplies.

And frankly, we just don’t have that much. You know, if you’re thinking about natural gas supplies, we’re all fortunate that the U.S. LNG export industry has
been ramping up at a time when Europe needed it. Those cargoes started to flow to Europe back in December. The market sent a very strong signal that the gas was needed, you know, even before political pressure ramped up. But there’s a limit to that. I mean, a lot of countries in Europe don’t have LNG regas terminals. They’re disconnected from the rest of the continent. Spain’s a good example. So LNG is not really, you know, a sufficient solution.

On the oil side, there are not many alternative suppliers from countries like the Middle East – say Saudi Arabia, Iraq, Kuwait – or North Africa that have a lot of spare capacity to add into the market. So, yes, you can look for alternatives. It’s certainly much easier than if you’re dependent on a pipeline system and have to replace those volumes. You do have options. But they’re scarcer and they’re going to get more expensive. And if we’re talking about a disruption on this scale – you know, multiple million barrels a day – hitting the market all at once, I think the price impact would be pretty dramatic.

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Mr. Schwartz: Operator, any more questions?

Operator: Thank you. We do have a pre-submitted question. And that question is: What about Russian oligarchs’ support for the war? What are they saying and what does it matter?

Mr. Schwartz: Eliot, do you want to lead that one off?

Dr. Cohen: Well, you know, there have been a number of the oligarchs who have tried very carefully to indicate that they’re not entirely happy about this, but none of them are really going to go head to head with Putin, because however much money they may have abroad they still, you know, have their homes in Russia and have family and the bulk of their employees and so on.

It’s also, you know, I think one shouldn’t be too immediately optimistic about what squeezing the oligarchs does – you know, stripping them of yachts and soccer clubs and things like that. What matters – Russia’s a police state and what matters is, does Putin still have control of the FSB? Does he still have control of the military? There’s no indication that any of that is shaken.

In the long run, does it make a difference? It probably does. But as I said, it – Russian internal politics at the elite level, at the very top level, is opaque. And so we’ll probably be surprised when Putin in some way goes down, as will Vladimir Putin because that’s the only way he can go down.

Mr. Schwartz: Operator, any more questions?

Operator: We have a question from the line of David Walsh. Please go ahead.

Q: Thank you very – excuse me. Thank you very much.
As a kind of predicate, it seems as though from open-source reporting that although Russia is one of the preeminent cyber actors – state actors – in the world, that their operations regarding cyber have been relatively small. I mean, several ministries have been attacked, but I think that they were patched, and they’re back up operating again. However, if the sanctions, et cetera, continue apace, as they surely are going to do, should we – should we be concerned about possible global war, global cyber war being undertaken, unleashed from Moscow?

Dr. Jones: Andrew, this is Seth. I can – I can add a couple of comments to that. Just on the – just on some of the challenge that the Russians have had on cyber, even though they have used it, it dovetails a little bit, I know, with what Eliot and I have been following, which is the Russian Army has experienced communications and logistical problems, shortages in fuel, ammunition, and food. There are indications of sagging morale, including from some captured or defected Russian soldiers. So the Russian Army – and the cyber end is certainly a component of that – has definitely had some challenges.

But I think as the sanctions bite, and as – and assuming that there is a pipeline continuing – probably increasing pipeline of U.S., European and probably other Western weapons, including very significant weapons – I mean, when I served in Afghanistan we did not have to deal with surface-to-air missiles. We didn’t really have to deal with much in a – in a, you know, sort of highly sophisticated anti-tank guided munitions. The Taliban didn’t really have any of that kind of stuff. So the Russians are going to deal with sort of serious equipment coming in from the West.

There are also – we’ve seen some retired U.S. and other Western special operations fighters going into Ukraine now. So some competent individuals. So I think as the sanctions hit, as the Russians – as Russian ground forces likely flee for the reasons we talked about at the beginning of this, I think there’s absolutely a possibility that they will start to ramp up efforts to respond to, you know, if there’s sanctuary in Poland of weapons and other material that goes into Ukraine, targeting – there may be physical attacks in Poland, but cyberattacks against U.S. companies, banks.

U.S. companies have started to pull out their personnel. I mean, I’ve talked to some companies actually worried that their Americans in Russia might be seized. The Russians have also deployed maritime forces off the coast of – a couple weeks ago – off the coast of Ireland, very close to the fiber optic cables that go underneath the Atlantic. And the clear indication, and the way NATO took it, was it was a threat. The Russians were essentially signaling a threat to cut those fiber optic cables, which they’ve done this year around the Svalbard area of Norway, also a signal.
So I think there definitely are serious possibilities that the cyber war in particular, and the irregular war, kind of expands outside of just Ukraine and sort of – you know, the Ukraine-Belarus area.

Q: Thank you, Seth. And ladies and gentlemen, excellent presentation.

Mr. Schwartz: Thank you very much, David. I think we have one more question, Operator, and then we’re going to have to wrap.

Operator: Thank you. And that was a pre-submitted question. What’s China’s role in all of this and implications for Taiwan and Asia?

Mr. Schwartz: I think Eliot has left the call, but that question I’m going to – whoever submitted that question, please email me and I will connect you with one of our Asia experts who can better answer that question than the ones we have assembled here, who are not Asia experts.

So with that, Operator, we’ll wrap up the call. We will have a transcript of this available within a few hours, and we’ll email it to all of you. Thanks so much for joining today, and thanks to our experts.