



By: **Ian Bremmer**

Ukraine has altered the strategic equation



On June 1, Ukraine conducted one of the most extraordinary asymmetric operations in modern military history.

Using domestically built first-person view (FPV) drones deployed from deep inside Russian territory, the Ukrainians launched a coordinated assault against multiple military airbases – some as far away as eastern Siberia, the border with Mongolia, and the Arctic.

“Operation Spider’s Web” destroyed or severely **damaged** as many as 20 strategic aircraft, including nuclear-capable bombers and early-warning planes. (Ukraine claims the true toll could reach 41.)

Then, just two days later, the Ukrainian Security Service struck again – this time detonating underwater explosives and **damaging** the Kerch Bridge, the critical rail and road artery connecting Russia to occupied Crimea.

The message from Kyiv could not have been clearer: we may be far smaller and weaker (on paper, at least), but we can strike hard, and we can do it from anywhere within Russia.

Using drones produced indigenously for less than the cost of an iPhone, Ukrainian armed forces took out strategic bombers **worth** upward of \$100 million each – many of which are nearly impossible to replace, owing to sanctions and Russia’s degraded industrial base.

At a 300,000-to-one return on investment, this was the kind of asymmetric operation that can upend the rules of modern warfare.

The lessons will reverberate globally

Just as significant as the material damage is what the attacks revealed: that a small but determined and innovative country can deploy cheap, scalable, and decentralized technology to challenge a much larger, conventionally superior foe – even degrading elements of a

nuclear superpower’s second-strike capacity. The lessons will reverberate globally, from Taipei to Islamabad.

More immediately, Ukraine’s battlefield coup may challenge the core strategic presumption that has guided Russian President Vladimir Putin’s thinking for over three years.

The success of Ukraine’s drone and sabotage operations challenges Putin’s theory of victory

Since his full-scale invasion began, Putin has bet on outlasting Ukraine – grinding down its defenses, draining Western support, and waiting for the political winds in Washington and Europe to shift. That assumption has underpinned his refusal to negotiate seriously.

But the success of Ukraine’s drone and sabotage operations challenges his theory of victory.

It shows that Ukraine is not simply holding the line or surviving a war of attrition; it is shifting the battlefield and increasing the costs for Russia in ways that the Kremlin had not anticipated.

Continuing the war carries risks for Russia

This shift matters, especially in the diplomatic context. The timing of the drone campaign – just 24 hours before a round of talks between Russian and Ukrainian officials in Istanbul – was hardly coincidental.

Ukraine’s actions were designed to signal that it is not negotiating from a position of weakness and won’t be coerced into a bad deal.

Though the **negotiations** in Istanbul were predictably fruitless – lasting just over an hour and reflecting the irreconcilability of the two sides’ positions – the fact that the Russians

showed up fresh off such a high-profile embarrassment suggests that the Kremlin may be starting to recognize that continuing the war carries risks for Russia.

A permanent peace settlement remains as distant as ever

To be sure, a permanent peace settlement remains as distant as ever. Ukraine continues to push for an unconditional ceasefire, which Russia rejects out of hand.

In Istanbul, Russian negotiators proposed two equally unacceptable alternatives: that Ukraine either retreats from Russian-claimed territories or accepts limits on its ability to rearm, including a halt to Western military aid.

But Ukraine's show of strength gives Russia a reason to stay engaged and makes more limited agreements at least plausible.

With the right kind of pressure from the United States, coordinated with European allies, the Ukrainians now have a better chance of securing a 30-day ceasefire, a humanitarian corridor, or a prisoner swap; and such a phase-one deal could then potentially turn into something bigger and more durable.

Putin might consider a tactical nuclear strike

At the same time, Ukraine's recent battlefield victories also increase the tail risk of a dangerous escalation.

Russia's deterrent posture has been eroded. Putin's red lines – on NATO enlargement, the use of Western weapons, attacks inside Russian soil – have been crossed repeatedly without serious consequence.

By making the Russian leader look weak, this increases the risk that he will feel compelled to retaliate dramatically, to restore his credibility at home and abroad.



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Russia's immediate response to the recent attacks will be more of the same: heavier indiscriminate bombing of Ukrainian cities and infrastructure.

But a more disturbing possibility is that, boxed in and humiliated, Putin might consider a tactical nuclear strike.

The threshold for such an extreme step is still high, not least because China, Russia's most important global partner, strongly opposes nuclear use. But even if this scenario remains unlikely, it is likelier than it was before June 1.

Moreover, Putin has been emboldened by the belief that the West – particularly Donald Trump's America – fears direct military confrontation more than anything.

If he concludes that Russia's position in the war is becoming untenable, or that its conventional deterrence is crumbling, his calculus could change.

Ukraine has just reminded the Kremlin – and the world – that it can shape events, not just react to them. This doesn't put it on a path to victory, nor will it bring the war to an end.

But by showing that it has leverage, and that Russia has more to lose than Putin thought, Ukraine has altered the strategic equation and opened a narrow window for diplomacy – even if the endgame remains as elusive as ever.

The alternative is a deeper and more

unpredictable conflict that grows more dangerous the longer it drags on.

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