HOUSE OF COMMONS

Defence Committee

Oral evidence: One-off Session on Ukraine, HC 302

Tuesday 9 June 2026

Ordered by the House of Commons to be published on 9 June 2026.

Watch the meeting

Members present: Mr Tanmanjeet Singh Dhesi (Chair); Mr Calvin Bailey; Alex Baker; Lincoln Jopp; Emma Lewell; Mike Martin; Jesse Norman; Ian Roome; Michelle Scrogham; Fred Thomas; Derek Twigg.

Questions 1-46

Witnesses

I: Professor Kristen Harkness, Director of the Institute for the Study of War and Strategy, University of St Andrews, Professor Michael Clarke, Visiting Professor, King's College London, and Orysia Lutsevych, Head of the Ukraine Forum, Chatham House.

Examination of witnesses

Witnesses: Professor Kristen Harkness, Professor Michael Clarke and Orysia Lutsevych.

Chair: I call to order today's House of Commons Defence Committee evidence session on Ukraine. Before we start the evidence session, I want to send sincere condolences on behalf of the Committee to the family of Lance Corporal James Stewart Freeman, who was sadly killed in a training exercise on 31 May, and to the families of Lieutenant Lily-Mae Fisher, Lieutenant Commander Chris Gayson and Petty Officer Owen Green, who were tragically killed in the helicopter crash in Devon last week. We are deeply grateful for their service to our country.

I am sure Members would also like to join me in paying tribute to Sir Alex Younger, who passed away last week. He was a great public servant whose contribution to our country will not be forgotten. He gave evidence to our Committee during our recent inquiry on "Defence in the Grey Zone". Our thoughts and best wishes go out to his family.

I move on now to today's evidence session, which is a one-off session on Ukraine. Committee members felt that we needed, once again, to look into the details of the current conflict, and I am very pleased to say that we have an esteemed panel with us. Professor Michael Clarke is a visiting professor at King's College London—a warm welcome to you. You are also a visiting fellow at the Royal College of Defence Studies. Like myself, a number of Committee members are RCDS graduates. Thank you very much for your contribution there as well.

We also have with us Professor Kristen Harkness, director of the Institute for the Study of War and Strategy at the University of St Andrews—a warm welcome to you. Also with us today is Orysia Lutsevych, head of the Ukraine Forum at Chatham House. Thank you very much for giving your valuable time to help inform the Defence Committee's work on Ukraine.

Without further ado, let's move straight on to the questioning. We have a couple of hours for this session. Given that there is quite a lot of ground to cover, we may not direct every question at every panellist, and I would also request panellists to be as concise and sharp as possible. No doubt you will take that request on board.

Q1 **Michelle Scrogham:** Welcome, everybody. It is a pleasure to have you here. Would you like to lay out an update on the battlefield situation as it stands today?

Orysia Lutsevych: Thank you very much, distinguished Committee. It is an honour to be here, for the third time, I think. It is a special moment to pay tribute to the men and women who defend their homeland, to the many in Ukraine who are losing their lives on the frontline and to civilians for bravely withstanding the Russian invasion for what will soon be more than five years. I think that it is important to have a serious debate about

the defence of the UK, Europe and Ukraine together, because I do not think those are separate.

On the battlefield, especially in the spring of 2026 as we are convening here, Ukraine is turning the tide in its favour. Russia's full-scale invasion has morphed into a grinding war where Russia's technical capabilities are increasingly degrading. They are scaling up the number of assault attacks but are actually losing some territory, especially in the south. In the month of May, they gained the smallest percentage of Ukrainian territory—only 14 sq km. They have lost hundreds of thousands of men throughout this war—as many as half a million, as per a recent speech by the head of GCHQ, Anne Keast-Butler. We know that this war is not going to Putin's plan.

The question of what enables Ukraine's success is a good one. I would say that there are three things. The first is innovation: Ukraine's indigenous military production and the invention of new, modern weapons systems that are forging the revolution in military affairs. I am sure Professor Michael Clarke can talk more about that, but more than 2 million people in Ukraine are working in the defence industry. About 20% of Ukrainian unmanned forces inflict 80% of dead and wounded by using these autonomous systems.

The second important thing is the unity of purpose. Ukrainians are united in backing President Zelensky's vision for how the war should end: that it should be a just and durable peace, not just any kind of pause. They are not supporting any withdrawal from legally controlled territories by the Ukrainian army.

The third pillar of that success is European support, which has replaced American assistance to a large degree. The No. 1 country that has really stepped in is Germany: if you look at the numbers, in 2026, Germany plans to provide around €11.5 billion to Ukraine. If you compare that to the UK's support throughout the whole war—roughly £13 billion—you can understand the difference. The leading country backing Ukraine's success right now is Germany.

Q2 **Michelle Scrogham:** Last year, President Trump was saying that President Zelensky didn't hold any cards. How far would you credit recent reports that the dynamic is changing in Ukraine's favour? Do you think that he does hold cards now?

Professor Harkness: Yes, I think we are beginning to see a real shift in Ukraine's favour. I would point to four factors. First, Russian casualties are now outpacing recruitment—they can't replace their losses on the frontline. There is no indication that, without mass conscription or another round of mass mobilisation domestically inside Russia, they will be able to reverse that; that is important.

The second trend is that Ukraine is holding Russia to at least a stalemate on territory, if not net regaining territory. That directly undermines Putin's theory of victory—how he thinks he is going to slowly but surely win

Russian objectives in the war. On the degree to which Ukraine can continue to show that he can't inch forward, if they can carry on that trend, that is very important.

The third factor that I think has changed or is shifting is the intermediate-range strike campaign. That involves technological innovation as well as doctrinal and operational innovations, and it is just beginning to roll out. That is wreaking havoc on Russian supply lines in the back, which is having a strategic effect on their offensive and frontline capabilities. If more intermediate-range drone systems and more AI-enabled capabilities to operate within GPS denial zones up to 200 km come online, that effect will intensify throughout the summer. I think that will continue to shift things in Ukraine's favour.

Related to that is what we might call the "innovation gap" between Russia and Ukraine—the degree to which they are able to innovate and learn on the battlefield. That is widening, which makes it difficult for Russia to catch up. Russia has been very good at stealing and scaling: taking Ukrainian technologies that work and scaling them up. That does not mean it has not had its own innovations, because it certainly has—for example, glide bombs. However, it is less able to implement doctrinal, operational and tactical innovations, which we are seeing more and more of. All of that is shifting in Ukraine's favour, and I do not see Russia being able to close those gaps in the next six months.

Professor Clarke: To add to those points very briefly, I agree very much with Kristen on drones. Innovation in drones has done two things. First, it has created a kill zone of about 10 km, or sometimes 30 km, on either side of whatever is the frontline. There is this broad swathe across this 1,000 km frontline where nothing moves without being spotted—that goes for armour, vehicles and people. It is stalemated on the ground, although not in the sense that people are not fighting. As we have said, more than 1,000 Russians are dying a day and, on a bad day, 250 to 300 Ukrainians. There is a lot of fighting and a lot of death, but the frontline does not move much.

Secondly, as Kristen said, drones have attacked logistics. In particular, the FP-2, or Fire Point 2, drone that the Ukrainians have developed—and Fire Point is a terrific company that has produced three or four really groundbreaking drones—has a range of only 200 km, but it can get to the back of the battle. The FP-1 has got 1,600 km. They are accurately attacking logistics coming forward. So the drones have had that effect.

Remember that in February the Russians got knocked out of Starlink, which they had broken into, and have not been able to get back in. To Starlink's credit, it got the Russians out, who had broken into the system, and that had been doing it a lot of good. The Russians, for their own reasons, turned off Telegram channels domestically because of their own domestic pressures, without realising how much Russians on the frontline were using it to communicate with each other for tactical reasons. The Russians have gone blind in some critical ways, and that has been important.

Another thing to add, which we have referred to briefly, is the product cycle. The Ukrainians have developed the Brave1 system, where they reward units for kills with points that they can trade directly with the manufacturers to get what they want without having to go through the Ministry of Defence. The product cycle is sometimes seven or 10 weeks, whereas it would take us years. They can innovate very quickly, with the frontlines talking to the manufacturers.

That is not going to win them the war, but it gives them enormous tactical advantages. Take the western Excalibur 155 mm shell with wings. It was 70% accurate—70% hits—in 2022-23. It then went down to 6%—so the Excalibur came off the frontline. It was not good enough. All the innovation is being developed almost as it is required, so on a tactical level, that has made quite a big difference.

Q3 **Michelle Scrogham:** Briefly, what would you say the longer-term effects of all those developments will be on the conflict?

Professor Clarke: That is the problem: it will not win them the war. Drones prolong wars, because they make it very hard to attack. They give precedence to relatively inferior defences or allow a smaller defending force, if it uses drones and has enough of them, to blunt quite a powerful attack.

Drones will tend to prolong the conflict, which then has to be resolved in some other way—like a strategic breakthrough on some other basis. No one has yet come up with a way of breaking this drone zone except with more drones. That is a big, interesting question now: how do you break through this kill zone, which is now so deep on both sides? Either that has to be addressed, or there has to be some other way—some other strategic calculation. The Ukrainians feel now that with the strikes on Russian oil production and refining capacity, and their strikes on public morale, they can win the war more strategically, while they cannot win it on the battlefield.

Q4 **Lincoln Jopp:** How are things looking on the home front in Ukraine? We have seen the change in Russian operational tempo when it comes to semi-deep strikes on both infrastructure and civilian populations. Can you give us a trend analysis, rather than a snapshot, of support for the war, and national morale and resilience? Where are we up to on that continuum?

Orysia Lutsevych: I travelled to Ukraine throughout the start of the war, and we should recall that for Ukrainians, the war started almost 12 years ago, with the annexation of Crimea, and the total war—the full intensity of it—will soon have started four and a half years ago. Of course, the population are tired. For many, there is a certain feeling of, "Where is the light at the end of the tunnel?" They have sleepless nights in bomb shelters, waking up in the morning and putting up a good smile for customers in a coffee shop. That takes a lot of effort, and their society demonstrates incredible fortitude.

Having said that, Ukrainians are not willing to capitulate, to take Putin's demands, which remain maximalist demands, and to submit to his control. They understand what that control comes with when they look at the occupied territories in Crimea and in parts of Donbas, in the south, where Russians are basically doing ethnic cleansing, banning anything Ukrainian and waging genocidal efforts, with deportation camps. The more than 1.6 million Ukrainian children who live in these occupied territories cannot be Ukrainians any more. That pure evil that Ukrainians have experienced from Russia makes them stand strong and defend their homeland.

Because, as we have described, Russia is failing to achieve any success on land, or even at sea, it lashes out against the civilian populations. We saw the enormous arial bombardment targeting the civilian energy grid and heating systems in December 2025 and January 2026. To be honest, when thinking about that, many expected a wave of refugees to come out of Ukraine. There were internal displacements—people moving from big cities to smaller towns where the systems worked better—but they did not leave Ukraine. That tells you that Ukrainians want to stay in Ukraine and defend it.

However, because of the impact of Iran, the shortage of interceptors means that we will be facing more damage to Ukrainian cities, and we are already seeing an increased number of civilian deaths and casualties as a result. If you compare this spring to the period in 2024, there is an almost 93% increase in civilian deaths. That is the danger that President Zelenskyy is warning of, and he is calling for partners to urgently work to secure interceptors, especially for Iskander ballistic missiles—to be honest, nobody has a solution to those, but the Patriot systems were procured, produced and provided by the United States.

Support in Ukraine for a ceasefire, for example, is growing, when compared with the start of the war. Ukrainians would accept a ceasefire along the current frontline, under the condition of there being the presence of a multinational force, which, jointly with Ukraine, would defend the rest of the territory to deter the next Russian invasion. Support for that is strong, at around 60%. Of course, if you start to subtract that multinational force and other security assurances, support for the ceasefire decreases, naturally.

I think Ukraine's main goal is to make sure that the next generation of Ukrainians will not fight against Russia again, but in public opinion polling, we still see a strong commitment to endure and to defend Ukraine for as long as it takes to degrade Russia's military capability. That is why I was saying that Ukraine, Europe and the UK are a strong alliance. We need to degrade Russian military capability because Russia will have an intention for a long time to cause harm. They should not be able to do that, thanks to bravery and the various strikes and strategies that we have described.

Q5 **Lincoln Jopp:** The Committee was there in November last year, and one of the more controversial areas was conscription. It is kind of a corollary to national resilience. Have the conscription rules changed in any way since we were there, in terms of age and gender?

Orysia Lutsevych: Conscription has not been changed much. The old system carries on. You have the national military roster from 18 to 60, but only those aged 25 can be mobilised into the armed forces, trained and deployed on the battlefield. The current size of the Ukrainian armed forces is 1 million. In Ukrainian society, there is an active conversation about justice and burden sharing among citizens, whether or not they are in the armed forces. It is about rotation, because people are spending a lot of time. It is also about renumeration, because the earlier people started to serve, the smaller the amount. Those who are mobilised later receive bigger amounts.

With the technological innovation that we have described, Ukraine is able to be quite successful with the current size of the armed forces. The new Minister of Defence, Mykhailo Fedorov, who was previously the Minister of Digital Transformation, has declared that one of his goals is to reform the system of mobilisation, training and reconstitution to extend the life cycle of Ukrainian service men and women in the army so that it is about not just the numbers, but how well they are prepared and how well they are taken care of. It is also about their families, who, if they are getting more assistance, are more inclined to have their sons and husbands serving. There are women as well; they constitute about 15% of the Ukrainian army. I would say that Ukraine has not yet found a magic solution, but it is quite a sustainable situation right now with the current level of mobilisation.

Q6 **Lincoln Jopp:** What about people avoiding the draft when their 25th birthday is coming round?

Orysia Lutsevych: First, it is important to note that quite a large number of people are officially protected from mobilisation. Those are people who are working in strategic industries—defence and energy systems—and in companies that pay a large share of taxes to the state so that the economy can function. If you subtract that number of women and mainly men, you already have a much smaller pool. There was also the controversial decision by Ukraine last summer to allow foreign travel for men aged 18 to 25 if they study abroad. There were quite a lot of people who left and did not come back, so Ukraine lost some of the human capacity that could have been deployed to the battlefield.

It is a tricky balance in the war of attrition, where the economy matters so much as well, to sustain the right proportions between the size of the armed forces and the size of the economy, especially the industries we talked about that are critical in technological warfare.

Q7 **Ian Roome:** I would like to turn now to Russia and the increasing frustration, particularly within the Russian elite, and the $28 billion overspend in the war cost that has been reported this year. Could you give us some idea of what the feeling is among the Russians about the war, and how that might affect the course of the war going forward?

Professor Clarke: The Russian economy is not going to collapse like a house of cards. It is a big economy so it will not collapse, but it is

stuttering. Last year, inflation was at about 10%, and interest rates were 21.5% to control that inflation. Inflation has fallen a bit to about 7.5% to 8%, but interest rates are still at about 14% to try to control it. The problem that the Russian economy has—this stuttering—is that all the cash and credit available has gone to the arms industries, which are not producing as much as they were expected to. They have hit a plateau, which we always knew they would; they increased quickly after 2022 and then they reached a plateau in 2024. There is not much credit or cash available—liquidity—for private enterprise, other organisations or anything other than the big, prime industries of the state, which are run and owned by the oligarchs. That is the problem that they have.

They have a deeper problem with labour shortages, particularly skilled labour. There is an immediate labour shortage of 1.5 million, which will grow to 3 million at least by 2030. You could add to that the half a million dead, probably another million or 2.5 million seriously wounded as a result of the war so far, and what that figure will be by 2030, plus about a million young people, mainly men, who left Russia in 2022—some have come back, but if there is any mobilisation again, even partially, they will leave again. The bottom line is that the Russians have a major labour shortage, which based on some independent analyses, will look something like 10 million by 2030. The economy will find it very difficult to pick up, aside from the war economy.

That is the structural problem that it has. The problem then is: how does that translate into morale and discontent? That is almost impossible to say, because ordinary Russians can complain—they complain about local things and mothers and wives not knowing enough about what is happening to their loved ones is a grumbling, understandable complaint—but people will not come out on the streets over that. The issue is the discontent among the elites and the oligarchs who will find it increasingly difficult to pursue their economic interests with the economy stuttering in the way that it does. That is the essence of the problem.

Professor Harkness: I would re-emphasise that we can understand some of the structural deficiencies and problems but translating that into what it means or what it is going to do in Russian society is very difficult in a closed, authoritarian system like Russia's, because we do not have public opinion surveys. People mask their true beliefs. It is a highly surveilled society where information is tightly controlled, so even at the very elite levels, we will not know true opinion, nor does anyone inside understand it. That is partly why these systems tend to collapse overnight or by surprise—it catches us off guard, because you do not really know the true level or extent of discontent until it begins to manifest, and then the state can clamp down, and if it does not successfully clamp down, it can explode.

Orysia Lutsevych: It is important to watch the sentiment of Putin and what he says, because he is pretty clear. In his speech at the St Petersburg forum, he was very ambitious. He reiterated that the war will

go on as long as it takes to achieve the goals of this operation, which we know are full control over Ukraine and pushing NATO to its 1997 borders.

Instead of putting pressure on him and creating dilemmas for him—some of the tensions that were described between economy and war—we are partially giving him a lifeline as a result of the strait of the Hormuz blockage and caving into the sanctions. To give you a number: the data from the Central Bank of Russia showed improvement in the current account position of a surplus of $10 billion, up from $1.5 billion in February. It was unfortunate timing for Russia when the deficit was growing, but it found ways to limit the deficit that did not touch social protections for veterans and war expenses—"Find anything else you can cut." He seems to still be on a very strong war footing, and any voices that are offering anything else are silenced, imprisoned or exterminated.

Professor Clarke: I think that all the analysts reckon that Putin will carry on regardless. Nothing will change his mind because this is his war. It is his place in history and if it does not go well then that is his place in history. There is no indication that he will change his mind. To put it colloquially, it is the Julius Caesar outcome for him. At some point, somebody is going to stab him, and when one person does, everybody will pitch in. Whether that stab is a physical stabbing or a political stabbing, we do not know. But whoever goes first must succeed. It was not a real coup, but the strange revolt of Prigozhin and the Wagner Group was very dangerous for Putin. In retrospect, it seems to have been more dangerous than it seemed to us at the time. Whoever goes first must succeed. As and when that will happen, nobody knows. What we are sure about is that Putin will not reverse policy on his own.

Q8 **Ian Roome:** We will ask you later what might change that course in your opinion. At the moment, all the panel are thinking that Putin will not change his mind and will carry on, and the resentment that is felt in Russia will not determine his initial thoughts of what he wants to succeed at.

Orysia Lutsevych: I think he believes he can succeed and he is fed information that confirms his bias. We have seen from his latest statements that he is completely incorrect on Russian territorial gains in Ukraine. He believes that he can take Donbas, but it is clear that they are hitting a wall, as we described at the beginning.

One of the important factors is the Trump factor. Putin's strategy this year, and actually from the start of Trump's presidency, is for President Trump to deliver what Putin wants on a silver platter. He keeps waving this Anchorage consensus, or Anchorage agreement—the mysterious protocol that nobody has ever seen—as if there was something agreed between Russia and the United States. He hopes that decoupling the United States from Europe will give him a chance. He is not succeeding on the battlefield, so he plays this bigger game of splitting the alliance and pushing or persuading Americans to give up on Ukraine and Europe.

Professor Harkness: Orysia raises a really important point about Putin not necessarily believing the same analysis that we have or understanding the situation in the same way. That is not just him; it is systematic in an authoritarian regime where you have a distortion of information as it travels up the command hierarchy. Specifically, that is systematic within the Russian military, where you have a military culture of blame avoidance. As information travels up from low-level to high-level command, officers are attempting to avoid blame. That distorts understandings of how bad the battlefield situation may actually be and, more importantly, why things are failing. That leads to false perceptions and false assumptions, so Putin may not even be operating on the same set of information that we are analysing.

Q9 **Mike Martin:** Michael, I share your analysis that Putin will carry on doing what he is doing until we get to the grisly end. Therefore, are Ukraine and the European powers adopting the wrong strategy? At the moment, the strategy seems to be to come to the table with Russia and work out some sort of peace deal. But if we do not think that that will be the outcome, should we not be seeking to message and divide the Russian elite in a way that brings about that coup? I think the coup, when it happens, will end the war. That will be the narrative around the coup: "I am taking control to get Russia out of this." What are your thoughts on that?

Professor Clarke: I do not think there is a united European position at the moment on trying to create a peace settlement with Russia. That is because the consensus in Europe is that we cannot have a peace with Russia without containing Russia. At some point, we have to establish the red lines by force. If we say them, the Russians will keep pushing until we demonstrate them. We have not yet really demonstrated them, although Ukraine is now the object of trying to do that.

For political reasons—to stay roughly consistent with a shifting American position—the Europeans want to go with a ceasefire, if there is a ceasefire to be had, because that is what Zelensky has said since March last year. Zelensky has always said, "We'll have a ceasefire in place." He was pushed to that by the American negotiators at the beginning of the first round of discussions in the Gulf. He said, "Okay, we'll have a ceasefire in place," and that has been his position ever since—"Ceasefire in place, and then we'll talk." The Europeans are trying to back up that position by saying, "Fine, if that's what he wants." They want to put the onus on the Russians in the eyes of the United States, as the Russians are the ones who are preventing this happening. In their hearts, I do not think that European leaders think that that is going to be a satisfactory outcome, but it is a good position to take when we are trying to create a unified front that backs up President Zelensky's view of what he needs to do next.

Q10 **Mike Martin:** So, effectively, it is a phoney phase of the war before we enter the actual endgame. We have moved into a different phase of the war, but it is not the endgame.

Professor Clarke: It is certainly not the endgame. I have always said that the Russians will only get keen on a ceasefire when they start to lose

territory, which they are now beginning to do in a very marginal way. Only when Russian forces are being pushed back will Putin start to think seriously about a ceasefire. At the moment, he has no motive for a ceasefire, and it is not in his way of thinking.

I think Putin does have a strategy here in relation to the United States, which is that he thinks he can have a partnership with Trump—a broader strategic partnership—where Trump agrees to leave Ukraine to him, and put Ukraine to one side. That is evident in the national defence strategy that the US published in January, where they said that Ukraine is a European problem and that the United States are going for a broader partnership with Russia. That is very much the vision that Putin has: "Leave Ukraine to me, and let me develop this partnership with the United States."

It is a strategy of sorts. I do not think it is a very good one, but I think you can see consistency in Putin's thinking. He will not stop in Ukraine, and he will try to manipulate what happens in Ukraine in a way that allows him to pursue the partnership with the US, because that also would have the effect of splitting NATO and undermining the transatlantic relationship even further.

Q11 **Chair:** For the US Trump Administration, Ukraine is not a key priority any more. They are obviously looking at other things, whether it is homeland security, the Indo-Pacific, or the western hemisphere. We saw the devastating impact when Elon Musk decided that Starlink was going to be switched off for Ukraine. There are widely reported statements that the Ukrainians actually lost some of the territory, in the Kursk region for example, because they were fighting blind.

Our Committee has previously found that we have had an overreliance on the US for capabilities, hence why we need to build further on sovereign capabilities. The Europeans were scrambling around. Do you think that, in the absence of US support or reduced US support, the Europeans will be strong enough to support Ukraine—or how long do you think it will be before European allies, including the UK, will be in a strong enough position to support security on the European continent?

Professor Clarke: The support that Europe has given to Ukraine is now extremely important because American support has more or less ended financially and in terms of weapon flows. The €92 billion loaned to Ukraine—the EU long-term loan—is critical because it gives Ukraine at least a couple of years to continue fighting and functioning, if it wants to.

Ukraine is very advanced in terms of developing its own defence industrial base, as we have discussed. The situation is much more favourable in that respect than we might have imagined about a year ago. Next year, with their FP-7—the Fire Point 7—ballistic missile, the Ukrainians might have their own version of Patriot, at a fraction of the cost. The FP-7 is working towards this Freyja system. They have tested parts of it. In a year's time, they might have their own Patriot. That might be a bit optimistic, but they are certainly on the way, and that is really important.

They are not as dependent on Europeans for weapons as they thought they would be, but they are dependent on finance and on technological collaboration with European companies, which they are getting but they need more, and of course they need political support from Europe, which is really important given that American support is not completely absent, but is questionable and depends on the politics of the United States.

Q12 **Derek Twigg:** I am not sure whether it was you, Professor Clarke, or Professor Harkness, who made comments about Putin. If you go back to Hitler in the second world war, he completely lost his sense of reality and was moving divisions and armies around. Reinforcement was just not possible and he made some very bizarre decisions. How far along the line do you think Putin is on that level? Sometimes constituents say to me they are worried about pushing Putin too far and he might do something stupid and go nuclear in some way. What is your assessment of where we are on those sorts of themes?

Orysia Lutsevych: I think we are very far away from the risk of nuclear weapons because Putin is cornered. The level of attacks that Ukraine is able to inflict on Russia, mainly using FPV drones of different ranges, is of course lethal, but that is incomparable with the level of ballistic attacks that Ukraine faces from Russia. Still very much to a degree Russia has a stronger dominance in that specific sky domain. In a way, the nuclear sabre-rattling is part of the narrative war to deter Europeans from supporting Ukraine and to have that exact fear because there is very little left up Putin's sleeve. But we should take seriously his escalation in Belarus, where they are building an installation for strategic missiles such as the Oreshnik to be located there to threaten not Ukraine, but to threaten Berlin, Paris and Washington. We should understand that the longer the war lasts in Ukraine—it is a very imperialist, very 19th-century war, if I may say, with modern tools—the more costly it will be for your constituents and all our societies to defend ourselves, because we are giving Russia time to adapt. We are giving time for Russia to build military infrastructure in the Karelian peninsula, in Belarus, and in other places. That is not to threaten Ukraine; it is to threaten NATO, and we have to respond symmetrically to that. We should not give in to nuclear blackmail, because if we go into that world, we will all be living on a very dangerous planet.

Professor Harkness: I would just add that we should not forget the restraining role that China is playing. Russia is incredibly dependent on China now for oil and gas exports, for defence industrial parts, for component parts, for manufacturing drone engines, for chips, for all sorts of things, and China has been very clear on a no-first-use policy of nuclear weapons. If Russia did use some sort of nuclear weapon, they run the risk of really angering China and losing much needed support that is propping up their economy and defence industrial production, so I would not underestimate the restraining influence of China in this.

Professor Clarke: On one other tactical question or issue on the nuclear front, people ask all the time, "Do you think the Russians would use nuclear weapons?" I always say, "Ukraine is a very big place and the

battlefield is very big. What would you do with tactical nuclear weapons?" If you were to target a brigade that was foolish enough to come together in one place—5,000 troops with equipment—one tactical nuclear weapon of 5 kilotons would not destroy it. You would need two or three. If you were trying to create a battlefield advantage with the use of tactical nuclear weapons, you would probably use half a dozen, and you would be talking about maybe half a dozen or eight or 10 things that are Hiroshima-sized. The taboo against using nuclear weapons is very high, thankfully, and it is getting higher all the time, as we move into a world of greater nuclear proliferation. I suspect—I think—that the taboo will be broken—

Derek Twigg: For a sane person, maybe.

Orysia Lutsevych: He is sane; don't worry.

Professor Clarke: Yes, for a sane person. But I think there is a residual sense around who is going to break the taboo and what good it would do you.

In a sense, the only logical thing would be to drop a big nuclear weapon on a city—to pick a major city in Ukraine and bomb it in the way that Hiroshima was bombed, as some sort of object lesson. If Putin were to do that, he would go down as the greatest criminal of the 21st century and as the greatest criminal in Russian history, and he would lose all support from everyone in the world. He would have broken the taboo in the most explicit way. Anything less than that would not do him any good in tactical terms.

I don't take the nuclear sabre-rattling terribly seriously, as far as Ukraine is concerned. I am given to understand from those who keep a good eye on this that there is no evidence that any tactical nuclear weapons have been in any way activated since 2022. It would take a couple of weeks to get tactical nuclear forces prepared and in the right place. Nothing has happened anywhere to indicate that anyone has given any orders to that effect, but there is a great deal of rhetoric about it in everything Putin says.

Q13 **Jesse Norman:** Thank you very much indeed to all of you. Of course, the war in Ukraine has always been at some level the war for Europe. That is becoming particularly obvious as you get longer-range missiles and as the norms of war change in relation to the use of those missiles and drones.

Can we talk a little bit about how you think Ukraine has changed the nature of modern warfare and what the lessons are that the UK and NATO can derive from that? I think a simple analysis would say that it is all about drones, but there may be a whole range of other questions.

Professor Clarke: Briefly, it is the innovations of sixth-generation warfare. We talk about drones in Ukraine because they are so obvious, but they are the tip of an iceberg of robotics. Sixth-generation warfare is robotics.

Going back to something I mentioned before, the evidence is that drones prolong conflicts. If we look at the ubiquity of drone use in conflicts in Africa, for instance, it has prolonged them. They have been used in half a dozen different conflicts in Africa. We tend to concentrate on Ukraine, and we think about the Azerbaijan and Armenia war in 2020, but they are ubiquitous.

As we said, they allow a smaller side to defend itself efficiently against a stronger side.

Q14 **Jesse Norman:** By creating kill zones and creating areas—

Professor Clarke: Exactly, and the use of robotics in order to preserve life. The Ukrainians have developed drone stretchers. I was looking at some figures last week. There is a drone trolley that somebody can put themselves on to, and the trolley can bring you out of the battlefield. It was used 26,000 times in the three months between January and March this year—26,000 recoveries.

Q15 **Jesse Norman:** This is ground-based drones operating inside the kill zone and pulling soldiers out.

Professor Clarke: Exactly, inside the kill zone. They are very efficient. The Russians don't seem to use them—maybe they don't care very much—but the Ukrainians have certainly made great use of them.

As to the effects that is having on us, we know that staff colleges are looking very carefully at all this and at how to integrate sixth-generation warfare into our warfighting. I see lots of the framework for sixth-generation warfare, particularly in current Army programmes, but I don't see the numbers. That is the point.

Q16 **Jesse Norman:** Do you think that we need to fundamentally rethink the assumptions behind the strategic defence review or is it—and the defence investment plan, if it ever rolls up—an adaptable framework that would allow us to implement these changes?

Professor Clarke: I think the conception is very different. It is the 20:40:40 model that the military talk about. The first 40% are drones, or robotics, that are dispensable—you don't expect to get them back. The next 40% are the drones that you do want to get back—that do a job. The final 20% is armour, boots on the ground—the spearhead forces that then move into an area and take possession of what the robotics have created the conditions for.

That is the theory and it is completely different from the theories we would have had 10 years ago, when we thought about integrating robotics into the old conception. So the conception is new; whether the implementation is far enough along is obviously a difficult question.

Q17 **Jesse Norman:** Kristen, you are a professor of war. Have you thought about these issues in relation to the UK? How are we adapting? Are we going fast enough? What should we be doing more?

Professor Harkness: I think there are important lessons coming out of this war for the United Kingdom. Some of them are new, and some of them are old lessons that we cannot seem to learn. That goes to some of the enduring nature of warfare.

One of those lessons is the need to produce—that the stockpiles you have at the beginning of a war like this get eaten up really quickly, and exhausted. Then it is about what you can make, and that is a hard thing for the United Kingdom because we are not a manufacturing-based economy; we are a service-based one. In an extended conflict, if lengthy, extended conflicts are what we are looking at in the era of technology we are in, where are we going to get our armaments from as that conflict endures? Who are we dependent on? Can we make our own? If we do not have the defence industrial base to produce, then we are reliant on allies and partners, and that gives them leverage over you and your war aims. Ukraine has learned that the hard way. They have had to create a very large defence industrial base, but they probably started off further along than we are here. So that is an old lesson. It goes back 100 years at least.

I think there are lessons in air defence that are not being picked up by Western militaries, which we saw in the opening phases of the war with Iran or in the middle east. Despite four years of air defence in Ukraine, we were still shooting at Shaheds with Patriots. Some of the Gulf states shot two Patriots at a single drone in places. Don't quote me, but the statistic I heard is that we burned through seven years of US production of Patriots in 10 days. That is just not a sustainable way to defend. I would hope the RAF is looking carefully at the echelon air defence, at strike drones, at how you combine and use different platforms and systems, and how you combine that with intelligence on identifying incoming—

Q18 **Jesse Norman:** Okay, but if that is true, what you are really talking about goes much wider than just military strategy or the DIP. It goes to the whole question of what the British industrial economy should be doing to support a next-generation potential warfighting capability. If we can't industrialise and it is all going to be about robotics, we need to move very quickly to try to fill that gap as a nation. Is that right?

Professor Harkness: Yes. That is modern warfare. Modern warfare is fundamentally your economy and what you can leverage from your economy to fight.

Q19 **Jesse Norman:** Your manufacturing economy in particular, is what I think you're saying?

Professor Harkness: Yes.

Q20 **Jesse Norman:** Orysia, pick up on that if you would like, but I would also like to talk about resilience and social lessons from Ukraine.

Orysia Lutsevych: One complementary component to what colleagues have said is that modern warfare is fundamentally about speed of software adaptation and iteration of your technology. It is about software engineers, production, and their connection to the battlefield and the

brigade. The Ukrainian defence industry talks about clients; client use. A lot of these drone manufacturers have brigades they are working with, so they get an immediate loopback of information and data, they adapt the model, produce the new variation and send it back to the battlefield, and it is endless. Russia is doing the same. Our adversary will be doing the same against us in electronic warfare, software, robotics, satellites, in everything. So this is about building an ecosystem of all these different parts that are working seamlessly together, fast, that also have component sovereignty as much as possible. That is something interesting for the UK to look at.

I think how Ukraine used the model is insufficiently understood here. For example, techUK, which is a big Government-funded effort, does not have a dedicated defence tech fund working with Ukrainian Brave1, unlike some other countries: Germany, the Finns, the Poles. You will be missing out on understanding that whole ecosystem in action and on trying some of the indigenous technologies on the battlefield. Ukraine is offering partners—and the UK is one of the top partners of Ukraine—that technological collaboration, which is priceless. I think we should jump on it without hesitation and invest some seed money in being there, present and part of the revolution that we are talking about. It spans from space to air, to land, to sea and to undersea. It is all integrated, and it is about how you manage that.

Briefly, on resilience, that is where society comes in. Resilience is about the economy, as Kristen said, and about the understanding in the private sector of Ukraine, because where did all this come from? It did not come from the Ministry of Defence; it came from Ukrainian software engineers and IT companies that, before the full-scale invasion, generated about 4% of Ukrainian GDP. That is not very big, but it was a sector. The people who were mobilised or volunteered to fight the Russians back in 2014 were already using the drones. That also came a lot from the agricultural sector. I remember that the first drones for territorial defence were received from farmers who said, "You can attach an explosive and destroy a Russian tank heading to Kyiv."

In the civilian understanding, it is critical that the private sector understands that it will also have to protect some of its critical infrastructure. That protection will not all be from the state; that would be impossible, so some of the drone interceptors must be purchased privately. That is why some of the big companies in the Gulf are already doing that.

You need to have preparedness for information operations. We often underestimate the role of big data companies and big technology companies. When the spread of disinformation is much faster than any fact or truth, you can lose the war even before going into the fight, if society does not have the stamina, morale and determination and does not understand what the war is about. The private sector, societal information resilience and local self-governance—local councils, local communities—really made a difference in Ukraine because in a war you

cannot direct everything from the centre. You need to have people who are empowered to take the right decisions for civic protection, spanning from fire to emergencies. They have to be trained, have resources, and do tabletop exercises on how to do it. There is a base level. You look at the country as a team of teams, because that is what resilience is about. You also have to bring different sectors together—the voluntary sector, the private sector, local government and some military protection units. Only together, with that kind of networked warfare that penetrates all of society, is there a chance to win.

Professor Clarke: In essence, Mr Norman, your question is really important. Ukraine has brought back to Europe the spectre of industrial-age warfare. For us, that means we have to change some perceptions because, within the last 40-odd years, we were always prepared for day-one warfare. NATO was originally based on that idea: we fight from day one and Britain will be there with its allies on day one—"fight tonight" was always the phrase. We now have to think in different terms, particularly if the Europeans are going to find themselves without the United States in looking after their own security. That changes the dynamics completely. If we are thinking of industrial-age warfare, we are looking at strategies that are not to win quickly, but to avoid losing early. Our strategies were always to win quickly. We cannot do that. We are not likely to be in that position, so we have to have strategies to avoid losing early so that we can gear up. We are not naturally militarised societies, but we have to buy ourselves time to gear up to industrial-age warfare.

Jesse Norman: That is extremely helpful; thank you all very much.

Q21 **Mr Bailey:** I want to ask more explicitly what we take from the DIP. What you point out does not actually sound like modern warfare; it is just warfare. Warfare has always been about out-costing the enemy, whether in people, via material or, through the Soviet age, via technology. It is just a different form of technology, so nothing has changed. But what is different about what we are seeing in Ukraine is that there is an end user and there is a flow and a return. Without that flow and return, you cannot innovate at pace. So the lesson I would take is this: the only difference in what we are seeing right now is that there is a customer, a user of the technology, which allows it to reprocess. In the absence of being part of that, what should we expect in the DIP to make our technology companies able to simulate or emulate that return process, which allows us to innovate quickly?

Orysia Lutsevych: Briefly, because colleagues may have more to say, it is important to have local production, so that it is an ecosystem for innovation in defence and technology. I think that is where you need to have localised production. You need to have components as clean as possible. You need to have training—you need to ensure you invest in people, in engineers—that is related to the defence industry. Also, it is important to train your forces, almost to do seed funding for some of the brigades to start innovating around this, to build the relationship, which is so far quite insulated, between procurement and military units. This, I

think, could make a big difference in creating a culture of private sector and military collaboration.

We do not have solutions yet. The solutions will have to be invented on the go. So I would say that looking at whether the DIP includes the components of the infrastructure will be critical, and it would be so important to speak about investment in Ukraine-British joint stock ventures, because Ukraine is willing to share technology with partners from the G7 countries, who were standing together with Ukraine. It will be an opportunity missed if that funding is not included in the investment plan.

Professor Harkness: Procurement processes are really important. That often gets overlooked in strategies and documents like this, which is more about allocating money or funds. As Orysia said, among the things that have been vital in Ukraine and that have been mandated in some of the procurement processes is the involvement of frontline users. Their feedback is actually mandated to be incorporated into the next generation of the product in order to continue getting funding. So there are mandates about bringing frontline brigade soldiers into technological development. Also, these processes can be fast. Our peacetime procurement processes are not designed for a six-week innovation cycle, but you have to think forward—not just about how we procure now and produce now, but about how we are going to procure and produce in a wartime environment.

Professor Clarke: When we see the DIP, I will be looking for two things, which are of great interest. One is what the investment is in the whole kill chain, because that is going to be vital to the way in which we can conduct operations in all domains.

The second thing, as was said, is procurement. Certain things have to be, effectively, top down. It is difficult to think of shipbuilding in any other way than, essentially, top down, if you are looking at the major capital ships. GCAP, the global combat air system, is essentially top down. But then if you think about ground-based air defence, that ought to be more bottom up; that ought to be more flexible. I am interested in the balance between procurement, that needs to be 80% top down, and the procurement, that can be effectively 80% bottom up, which is what the Army is looking at at the moment very strongly—get something on to the battlefield and just innovate it. I suspect that what will happen with Ajax—the troubled Ajax—is that we will get it on the battlefield and get it right, one way or another. There is nothing wrong with the insides of Ajax. It is just the biscuit tin itself that is the problem; it's the vehicle. If only they could get the damn vehicle right, the command matériel inside it and the armament of it are fine.

Orysia Lutsevych: I will just add that we should not forget the existing systems, such as Storm Shadows. We have talked about the war's range expanding and Ukraine bringing it to Russia's territory, which is necessary to undermine their capability to wage war, so increasing the production of Storm Shadows should clearly be in the defence investment plan.

Q22 **Alex Baker:** I am really interested in what you said about the importance of the economy in all this. One of the lessons learned that I have been thinking about is how you create a wartime economy. You can definitely see that in the context of how Russia has mobilised. I am interested to know what your thoughts are on the lessons learned from how both sides have mobilised their financial sectors.

Orysia Lutsevych: This is a protracted war of attrition—I don't know whether that is a tautology, but that is what it is. As Professor Clarke set out, these new systems are protracting war. We understand that armies will win battles, but economies will win us wars. What has been critical is Ukraine's defence industrial base, which existed there to a degree. It was depleted after the collapse of the Soviet Union, but let us remember that Ukraine was a powerhouse of Soviet military production, including turbines and motors. Ukraine was launching satellites at the beginning of the '90s, but then the programme was unfortunately underfunded.

Today, you have to think about how you develop your industrial military base, and how that relates to the available funding. Some of it will come from the private sector. Some private family offices and venture funds are already looking at investing in Ukraine. They understand that it is a good return on investment—it is not just charity or a fight for democracy.

I would encourage you to have strong conversations with the financial industry, but they need a strong signal that the UK is serious about its defence. We understand that our homeland is already, to a degree, under attack—there are all kinds of liminal examples. I emphasise the importance of innovation that comes from the market because of the speed at which it can generate the product and because of that innovation.

I am thinking about public finances too. I mentioned the City and budgets, but it is important to communicate to societies. Right now, of course, Ukraine is at war, so it is spending more than 40% of its GDP on war. If a country enters into warfare, that is what happens, so it is better to avoid that phase and to increase defence spending incrementally. Perhaps that conversation is a bit lacking. It is difficult to find cuts to redirect to defence, partially because constituents do not understand the risks already coming from underwater, cyber and other attacks on the United Kingdom.

Q23 **Emma Lewell:** Morning all. Professor Harkness, in recent weeks there has been a resurgence in the aerial bombardment of infrastructure on both sides. Could you give me your current assessment of Ukraine's ability to defend itself against long-range Russian missiles?

Professor Harkness: We have seen an increase. We have been seeing an uptick for a while: 2025 saw a great increase over prior years, and now we are seeing a greater increase. I think that trend is likely to continue, particularly if Russia gets more desperate on the battlefield. That energy—that desperation—may turn toward more and more civilian targeting. That is a trend that we often see in warfare.

On the struggles that Ukraine may be having to defend itself against that, it is facing a saturation. Even if you shoot down 85% or 90% of an

incoming barrage, if the barrage is two dozen missiles and 600 or 800 drones, some is going to get through. That is a problem that Ukraine has been facing. That has been complicated by the shortage of Patriot missiles. Ukraine has moved past the point of shooting Patriots at drones. It is not that its air defence is going to collapse—it can still take out drones with drones, and some of the missiles with surface-to-air and air-to-air systems—but we are going to see an increased struggle to take out the most exquisite Russian missiles and systems. Those will have a greater probability of getting through, and those are often targeted at military, Government or energy infrastructure, and not at residential buildings; the Russians send the Shaheds largely at civilians. You will therefore see increasing damage unless we can solve the Patriot problem.

Q24 **Emma Lewell:** Is it the Patriots that are needed to shoot down the exquisite Russian missiles?

Professor Harkness: Patriot or Patriot-equivalent systems.

Q25 **Emma Lewell:** Is the current situation sustainable, with Europe providing those in the absence of the States? How sustainable is that? For how long can that be done?

Professor Harkness: Europe is basically buying Patriots from the United States and supplying them to Ukraine. Those are all on back order, because the US spent so much of its supplies in and around Iran and the Gulf, so it is not able to fill even the current contracts that we bought to pass on to Ukraine. There is a global shortage, particularly a shortage coming out of the United States. Germany's production facilities are not yet on line, in my understanding; it is not expected to be able to deliver Patriots until early next year. I think that France has some almost equivalent systems, which may be an option, but I have been told that the best bet for reserves might be in east Asia—if the situation can be helped diplomatically. Japan and South Korea have the largest stockpiles of missiles, but it has been difficult for Ukraine to get them to sell to it.

Professor Clarke: I did some calculations last week on some of those incoming missiles. Last week, the Ukrainians faced 656 drones and 73 missiles, and they managed to get 91% of the drones, but only 54% of the missiles. They got just over half of the 73 missiles, but they got most of the drones. Of those missiles, eight were Zircons, and every one of them landed, so the Zircon is pretty good—it is a cruise missile, a hyper missile, that goes very fast, and is almost impossible to defend against. If the Russians had more Zircons, they would use them, but they used what they had and all eight got through. The Ukrainians are doing very well against the drones, but less well—necessarily—against missiles. The strategy always is to overwhelm the defences with drones, hundreds of them, and some of the missiles will get through, as they do.

Orysia Lutsevych: That is why it is important to for Ukraine to be able to go on the offensive to destroy Russia production capabilities. Ukraine calls that "kinetic sanctions". Ukraine has been doing that partially—some of the electronic production places that feed into Russian missile systems—

and is trying to identify more through its intelligence. I think that that should be a very concerted effort too, in addition to the air defence that we have spoken about. We should make sure that there are those longer-range missiles that could enable Ukraine to take down some of the missile production capabilities. Also, we have to be more vigilant about the parts that go into missile production in Russia. The sanction evasion routes are now mapped, but they require stronger enforcement.

Q26 **Emma Lewell:** Professor Harkness, you said that the Ukrainians are struggling to get Japan and South Korea to sell to them. Is there any particular reason?

Professor Harkness: Until very recently, Japan had a complete—it might have been a constitutional—ban on exporting weapons. That has only recently changed. I am not an expert in the diplomacy of those countries, but South Korea in particular, since the start of the war, has been very reticent to become involved directly through direct sales, although it has been willing to sell to third parties. There are ways that Europe might be able to help or to solve that diplomatic issue. I do not know whether concerns about China or alienating China are driving that, or whether they are keeping their stockpiles to defend against China.

Professor Clarke: When the US was supplying Ukraine with 155 mm artillery shells, South Korea was sending artillery shells to the American inventories, which they are allowed to do, and the Americans were giving an equivalent amount of their 155 mm shells to Ukraine. That is the way it worked.

Q27 **Emma Lewell:** It was a way around it.

Professor Clarke: It was.

Emma Lewell: That's helpful. I will leave it there, Chair.

Q28 **Mike Martin:** Another example of that is sending tanks to Poland, and then Poland sending tanks to Ukraine.

This one if for you, Orysia. We have touched on the longer-range strikes into Russia, which are getting more ambitious. There are three things I would like to explore. How have those come about? What are the things that Ukraine has had to bring together to enable those progressively more ambitious strikes? Also, what effect is that happening in Russia, politically, militarily and economically? And how will we see that develop over the next two years? There is a sense of a boiling of the frog going on. Could you comment on how you think that is going to develop over the next few years?

Orysia Lutsevych: First, Putin's promise to Russia was that the war in Ukraine would be somewhere distant; it would not be fought on Russian territory. Ukraine was always determined that, if it stays like that, Russian society would be more insulated, Russia's economy would be able to function and sanctions would have a marginal effect on it.

So that was part of the Ukraine strategy: to bring the war on to Russian territory. They could do that only by developing new capabilities, because of the reluctance of Ukraine's allies even to have a conversation about it. Do you remember the beginning of the war? Even attacking Crimea, which is Ukraine's legitimate territory, was causing nightmares in different capitals. So Ukraine has developed its own indigenous capabilities, and there are several leading companies that really have the best engineers. They are also trying, to a large degree, to create parts in Ukraine, so that they are more secure and do not have that dependency on China for more serious systems.

There is now a kind of strategy of choosing which targets, because these systems are very precious, expensive and not so numerous, so Ukraine has to be very systemic and strategic in choosing targets. It has chosen to focus on oil refineries, as a big source of Russian budget revenues, and on military production. It is deploying some of these more asymmetric and interesting drone operations like a spider web.

You can see that it starts biting the economy, because it is quite consistent, and Russians do not have time to repair some of the refineries. Ten out of 18 were systematically attacked and Russian's oil refinery capacity is dropping. There are already shortages of petrol and rationing in some regions. It is almost hard to imagine that Russia would have such a problem, because oil was almost dripping from the tap, but that is not the case any more.

That is significant because it also creates a dilemma in perceptions in Russian society about how well this war is going. Ukrainians scored an important perception and narrative victory with these long-range strikes, when Russia was cautious about organising a parade on 9 May. Russia thought in three weeks they would have a parade in Ukraine, but now they had to ask the Americans to ask the Ukrainians for permission to have a parade in Red Square. That is where we are with this war. That is what these strikes are achieving: economic damage, military damage and reputational damage to Russia.

Q29 **Derek Twigg:** There is concern about the impact of the middle east conflict and the war in Iran on the Russia-Ukraine war, with focus being taken away, particularly that of the Americans. That is an obvious concern, but I am also picking up on advantages. The Gulf states are paying greater interest to Ukraine and turning to agreements and deals with it, particularly on new technology, drones and so forth. What is your take on the advantages and disadvantages of what is happening and the impact on the Russia-Ukraine war? Is there actually some advantage for Ukraine in that US is listening to it more because it has all the experience on the battlefield? Is that helping the relationship?

Professor Clarke: I will start with that. The Iranian war is bad for Ukraine in the sense that it takes attention away from Ukraine, which is exactly what happened when the Gaza operation started on 7 October 2023. That was very bad for Ukraine, because it took the attention of the American establishment.

It is bad for Ukraine in that respect, but it is also bad in the sense that the United States, because of the burn rate of Patriots, is now telling all its allies, "You're not going to get your orders." Ukraine is pretty well bottom of the list anyway, so the orders that go to the Europeans and then pass to Ukraine are being severely restricted.

It is also bad for Ukraine in the sense that it is good for Russia. I have always said that the Iranian war is good only for two countries: Israel and Russia. Everyone else—Iran, America, Europe, the Gulf and the global south—loses. Everybody loses apart from Israel and Russia, and Russia gains from it because of the easing of sanctions and the increase in the price of Brent crude from $58 or $60 up to $100. That is getting the Russian economy off the hook, at least this year, in the short term.

In those ways, the war is bad for Ukraine, but the advantages or silver linings may turn out to be quite interesting. One is that the Ukrainians have demonstrated to their Gulf allies that they have something to offer, and that what they have to offer is, if not an alternative to American systems, a useful corrective to the problems that American systems create, including their cost and their lack of economic effectiveness against cheap drones.

The Ukrainian innovation has helped. Zelensky has actually made some useful diplomatic headway in showing that Ukraine can offer what it can offer. It is also now conventional wisdom that the most effective European army is the Ukrainian army. It is the best army in Europe, because it is fighting, and it is fighting very effectively. It is showing the rest of us what the future of warfare is going to look like. All that is an advantage, and the balance of those two advantages and disadvantages will depend on how long the Iranian war goes on.

Professor Harkness: I would add just one detail to support all that—I agree with it all. In January or February, the regional governments in Russia were going bankrupt, and they could no longer pay their recruitment bonuses to soldiers, but the rise in oil prices combined with the weakening of sanctions has solved that problem for them. What we are seeing now—the struggle to recruit—could have been catastrophic at that moment had they been unable to pay those recruitment bonuses. The war did that.

Q30 **Derek Twigg:** I have been concerned by the ability of our armed forces to learn the lessons and adapt the technology and tactics from Ukraine. Only the Army has some framework, but it has not made any great progress in adapting that. One of my concerns, from talking to people from Ukraine, including serving officers in the Ukrainian army, is that we are still way behind, and that we really have to learn these lessons, put them into practice on the ground and be able to produce en masse this drone and anti-drone warfare, including all the technology that is needed. Is it really as bad as I am being told? Has no real progress been made on the ground?

Professor Clarke: No, I do not think that is true; progress is being made on the ground. One problem we have is that the progress is not as quick as it could be, partly because of decisions being made in central Government and the lack of DIP, which holds up small and medium enterprises that could otherwise be pushing into this, as well as private capital that wants to invest in defence but does not know where to invest until we get the DIP. That private capital could be very important. There is progress being made. My worry is that, first, the progress could be quicker—it is a lot quicker in Ukraine—and secondly, if we have the framework for a proper kill chain, the number of units we will need is not dozens but thousands. There is no settled plan for creating thousands—

Q31 **Derek Twigg:** That is exactly my point. We are way behind on that.

Professor Clarke: We are very far behind. The NATO Joint Analysis Training and Education Centre recently conducted cyber-warfare exercises. About a third of the staff at the NATO centre are Ukrainian, so they are there working all the time. The Ukrainians only just failed to overcome NATO in cyber-war context. Through the exercises, NATO just about beat them.

Q32 **Lincoln Jopp:** This is a really niche question about the middle east. The Ukrainians have two Sandown-class minehunters, which we gifted them, but they cannot go back because of the Montreux convention. When President Trump was saying that he was going to open the strait of Hormuz, I suggested in the Chamber that Zelenskyy offer them. I thought that that would be quite a neat bit of military diplomacy. Do you know if anything ever happened with that?

Professor Clarke: I understand that the offer was made. I think he said it at one point—I might need to check on that—but it does not seem to have been taken up.

Q33 **Alex Baker:** The UK has been one of the leading donors of military assistance to Ukraine—credit both to the previous Government and to this Government, who have done right by Ukraine. They have now taken this leadership role in the Defence Contact Group after the US pulled out. Huge amounts of work are going into working out how we can support Ukraine. I want to mention my community; I represent Aldershot. Serving personnel in my community have been a big part of Operation Interflex, where more than 62,000 soldiers and officers have been trained. Where does the UK add the most value to the Ukrainian war effort?

Orysia Lutsevych: There are two major components. One is the military support that we talked about, and the capabilities that the UK can provide: its technology, Storm Shadows, some of the air defence interceptors and some of the drones. Ukraine is eager to develop joint venture partnerships that would build on some of the UK technology such as AI and acoustics—components that would strengthen the defence of the UK and Ukraine.

Another thing is financial assistance to Ukraine's economy. I was pleased to hear that President Zelensky is now raising the question of frozen proceeds from the sale of Chelsea football club—that £2.4 billion has been

dormant here. That should be quickly directed to what is necessary. It could be decided whether that goes to the air defence system, or to Ukraine's roughly €195 billion of direct damages. That includes housing for people for winter, and schools and hospitals. This cannot wait before winter, because if there is no hospital or school, a community cannot exist.

The question of financing Ukraine is incredibly important, and in addition to budget finance and some of these private assets, there are also Russian sovereign assets. If we are hearing from the intelligence community that Russia is not planning to end the war and that it is maintaining its maximalist objectives, instead of putting the burden on our taxpayers, we should seriously look at confiscating these assets, repurposing them for the defence of Europe and building that new air defence shield. Ukraine is now proposing partners—the UK, France and Germany—because we cannot fully rely on American assistance after the impact of the war in Iran. The US has clearly communicated to Europe that it has to defend against Russia on its own. The Ukrainian combat-ready army, with its technology and skills, can be an important asset in that.

We must also have a serious conversation within the coalition of the willing. In this report, which is quite an interesting read, if you have time, of course—or you can just read the executive summary—we say that the coalition of the willing, which Britain and France coalesced, has to become a coalition of the able. I understand that the UK is overpromising participation in this multinational force, so especially if there is a ceasefire, the Ukrainians expect those troops to stand shoulder to shoulder with Ukraine, defending the new frozen line of conflict and deterring a future Russian invasion. Is the UK prepared for such a deployment? What should be done in Ukraine ahead of time to build the infrastructure if there is such a deployment? Perhaps there is a better way to direct these resources.

I hope that serious conversations about the tangible participation and the contribution to the coalition of the willing are taking place. To be honest, it would be devastating for Ukrainians if that were overpromised and underdelivered, and if Ukraine was abandoned as a grey zone and not defended, with Putin constantly threatening to reinvade the country.

Q34 **Alex Baker:** In what has the UK added most value? We have strayed into other things that we could do better. Could you answer both points?

Professor Harkness: In addition to training and military aid, I have observed on the ground in Kyiv that the United Kingdom is also—correct me if I am wrong, Orysia—something of a most trusted ally. We are the most trusted ally, and that comes from Prime Minister Johnson being the first to call and being the first on the ground. It comes from the extended partnership—the 100-year partnership. It also comes from a respect for Ukraine and Ukrainian agency, and a restraint in imposing our own objectives and goals in the way that other allies have done or have tried to do.

On the ground, in addition to the security force assistance, the defence attaché and the embassy, the UK has played a mediating role and a leadership role with other allies, particularly in smoothing relations as things deteriorated with the United States. They were running go-between. All that is really important and is a base upon which to build. The United Kingdom, in a coalition of the willing, is the natural leader. It is the most trusted leader for Ukraine. It is important that our commitment to that is solid and credible.

Professor Clarke: The only thing I would add to that is that the UK does not have much hardware that it can give to Ukraine to make a difference. We gave NLAWs—the anti-tank system—Starstreak, Storm Shadow and some Challenger 2 tanks. We gave pretty well everything we could, and it served the purpose of helping to galvanise our European partners. As Kristen said, we took that political role very importantly.

Technologically, from now on, Germany will take on a bigger role in supplying Ukraine with the hardware that it may use and need, but Britain can play a bigger role in collaborating—particularly its technology sectors with technology sectors in Ukraine—on innovative systems. There are lots and lots of them. Every month, I see British companies and concerns working with Ukrainian partners or trying to establish partnerships to create something quite cheaply that might have great value. That technological linkage is probably the biggest contribution that Britain is likely to play in hardware terms, since we do not have large amounts of hardware that we can donate anymore.

Orysia Lutsevych: Because we talk so much about resources, I would just add something about the shadow fleet. I think that is something from which Russia still gets a lot of income, but the UK has the military capability, the warships, the boarding teams and the customs. We have more than 200 of those ships passing right here under our noses, but there has not been a single UK-driven operation around them. That would send a strong signal to Russia that there is no freedom to bypass sanctions.

Chair: Thank you. We are fast running out of time, so please make sure that the answers are concise and to the point.

Q35 **Mike Martin:** Kristen, I want to delve a little bit more into the question of a ceasefire. Do you think we can get one, and what is the pathway to that from where we are now?

Professor Harkness: Right now, it would be very difficult, because Russia does not want a ceasefire. I think Russia pushes for a peace treaty because it wants, through negotiations and through a potential caving of the western allies, to get through those negotiations what it cannot get on the battlefield. It wants more territory than it currently de facto controls. It wants juridical sovereign control over Ukrainian territories, which it cannot get through military force; it wants international recognition around that.

There is therefore a lot that Russia wants out of going through any agreement that it cannot get from a ceasefire, so unless the battlefield situation changes dramatically, and Putin's evaluation of that changes dramatically, it has no interest in a ceasefire.

Q36 **Mike Martin:** Okay. It sounds like the mutually exclusive red lines that we had 12 months or two years ago are still there and nothing is going to change.

Professor Harkness: The bargaining positions are still far away from each other.

Q37 **Mike Martin:** Thank you. Orysia, in your paper, you speak about a bad ceasefire. What would that look like, and what would the pathway be? Can you tell me a little story about how we might end up in that space?

Orysia Lutsevych: Russia is a master at manipulating these ceasefires, which it designs to its advantage to continue imposing its will or to wage war by other means. That has been taking place from Transnistria in Moldova to Ossetia and Abkhazia in Georgia, to Ukraine's own experience with the Minsk protocols and Normandy format after the annexation of Crimea, where, as Kristen described, Russia is trying to achieve at the negotiating table what it fails to achieve on the battlefield.

Basically, the bad ceasefire scenario is where Ukraine remains in limbo, undefended, and Russia has a say on Ukraine's sovereign decisions—about the army, about its alliances, about whether it can join the European Union—and also on its domestic affairs, such as the use of the Russian language or the Russian Orthodox Church, which we know Russia uses to subvert Ukraine's sovereignty. Last but not least, a bad ceasefire kind of compels Europeans to withdraw assistance to Ukraine and not make it, as we have discussed in this session, one of the keystones of European security on the eastern frontline.

In the paper, we are urging policymakers and diplomats not to confuse a ceasefire, if there is one—because there may be an inflection point where Putin decides that it is in his interest to have a ceasefire, and we know Ukrainian society would also agree to a ceasefire under certain conditions—with a resolution of the war, or with undermining Russia. Russia will also try to mislead about the type of Russia we are dealing with. It is very important to have clear eyes about what kind of regime Russia's is, and to have criteria on ideology, militarisation and its intention vis-à-vis Ukraine and Europe.

Q38 **Mike Martin:** Professor Mike, in navigating between a good ceasefire and a bad ceasefire, a bad ceasefire is basically a pause before the conflict continues. We have recently seen surfacing in the press this idea that, under Trump, the US is going to step back from the role it has been playing, and maybe the E3 or some sort of collection of European partners will step into that. If you were advising the leaders of the E3, what should they be doing to help Ukraine navigate that space and get to somewhere where they want to be and we all want to get to?

Professor Clarke: The first requirement, as I think we said before, is that Russia has to start to lose significant territories in Ukraine, and look as if it might continue to lose them. Then it will become keen on a ceasefire. A ceasefire being in place would result in a Ukraine that is—to guess—10% smaller than it was before. At the moment, it is 20% smaller if you take Russian occupation, but let's say that it was 10% smaller. The essence for the Europeans is then on ensuring that Ukraine has a viable future as an economically viable, democratic European state. The ceasefire would then be a sort of career scenario where it would be some sort of long-term ceasefire accepted de facto but not de jure.

We would then move to the future where we would look to a better relationship with Russia sometime after Putin. That is the sort of scenario that we are talking about: how to stabilise a Ukraine that would have given up some territory. But the essence is not how big Ukraine is so much as how viable it is after a ceasefire—if a ceasefire is plausible.

Q39 **Mike Martin:** Could you each give me a one-word or short and snappy answer to the following question? We have spoken of the dangers of Russia losing the war and Putin getting deposed or killed. If we get to this good ceasefire model, as outlined by Professor Michael, should we be offering some sort of face-saving measure to Putin, or should that not be part of it because he is a war criminal, has been indicted and all the rest of it? What would your advice be to the E3?

Professor Clarke: There is a sweet spot somewhere whereby Putin is able to say to his own people, whether they believe him or not, "This is now part of our new Russia, the Novorossiya. Here it is, we have now recovered whatever it is we have recovered of those territories."

Professor Harkness: It is a double-edged sword. If you give Putin enough face-saving measures that he feels he can claim victory out of this, he may be emboldened to try again in the future.

Orysia Lutsevych: I am more aligned with Kristin. I think that first Russia must see, and its society must understand, that this policy is dangerous for Russia and that it is a bankrupt idea to rebuild an empire in the 21st century. I think that this is worth fighting for otherwise we will have no peace in Europe, not just in Ukraine.

Mike Martin: Fascinating. Thank you very much.

Q40 **Lincoln Jopp:** I think this may be one for Professor Michael—but please do all chip in. On the coalition of the willing, I would love to hear what numbers you are hearing as to the British contribution. I have not checked the defence planning assumptions recently, but I assume we can still do one medium-scale endurer—a fully swept-up brigade. My first question is to the political and military viability of that.

Secondly, when the Committee was in Finland last year and people there were deeply concerned at the prospect of the coalition of the willing. They foresaw that any sort of ceasefire would release 850,000 trained and battle-hardened Russian troops who are ready to go up there while we

were busy fixing our most mobile and capable forces down in Ukraine as part of the coalition of the willing. Could you comment on that within the wider strategic context?

Professor Clarke: The coalition of the willing was always a dual-track idea. One track is that it was supposed to be what it said it was: a planning process to produce a force that could help to stabilise a ceasefire. However, the other purpose was really to do some planning for when the United States turned away from the whole process. That is probably where we are now. We have been around the same circle three times: first in March last year, then we went around again in August last year with the Alaska summit and then we went around a bit longer between the end of October and the end of January this year. We are back where we started and the United States look as if they are probably going to turn away.

All the planning for the coalition of the willing was for the idea of a force with an unspecified purpose, but at least it was the beginning of planning for some other eventuality. I think that is probably where it is. Your friends in Finland are absolutely right to be concerned because, if we take a combat brigade as one thought, if a combat brigade is deployed somewhere as a reassurance as part of a multinational force in Ukraine, that would tie up an awful lot of what we have available, given that we have a long way to go before we can provide NATO's basic requirement, which is a core. The idea of us being able to put together three combat brigades to provide NATO with a strategic reserve core is some time in the future. Any deployment in this coalition of the willing would be a blow to that ultimate requirement.

Orysia Lutsevych: I have mentioned the naturally high expectations in Ukrainian society; Ukraine is tired of fighting and facing off Russia on its own and is hoping that these security guarantees as they were described will be tangible, unlike the Budapest memorandum. We should clearly take preparedness for the coalition of the willing task seriously. I hope that there are conversations in the Ministries of Defence here, in Paris and in Berlin about what this task should be, because one possible suggestion for the effective use of such collaboration could be the Sky Shield and operation in the air rather than on land. We could also look at officer training and the reconstitution of the Ukrainian army, because Ukraine will not demobilise immediately after the ceasefire.

We are running a civil society survey in Ukraine that asks what people feel the impact of ceasefire will be, and I think that 64% of Ukrainians believe that the army will have to remain large and defence spending will have to stay big because Ukraine will have to rely on itself to a large degree. If Ukraine has that land force, this coalition of the willing should be complementary. There is the training of the Ukrainian air force—the F-16 programme—and the Gripen contract that Ukraine has received, and I think that expanding that air dominance for Ukraine could be a good task for the coalition of the willing—it may be better than ground force.

Lincoln Jopp: Interesting. Thank you.

Professor Harkness: It might be helpful to switch mindset a bit from thinking about the coalition of the willing in terms of a traditional peacekeeping force to thinking about it in a deterrence framework. The size is less important than the fact you are there, even with a small force. The point is that, if the Russians reinvaded, that force would be engaged; they would need the core to come and back them up and they would need the air defences to come in. That credibly commits you to Ukrainian peace and you do not need a large force to do it.

Q41 **Fred Thomas:** I obviously hope, and I am sure that many others do too, that Ukraine expels every last invading Russian troop off its land, including Crimea, the Donbas and so on. If that does not happen and we have some kind of de facto rather than de jure ceasefire, what are the likely next steps for Russia? Professor Harkness, you alluded to this in one of your earlier answers, and our colleague Mike Martin has written about this in the UK national media only in the last day: internal instability and an emboldened Russia from a ceasefire that ends up with it occupying quite a lot of the land it wanted to occupy. Looking at this from a wider NATO and Europe point of view, what happens next?

Professor Harkness: I do think that you have to be concerned if Russia is able to achieve major territorial expansion right into greater Russia through this operation. They are pretty beaten up right now, and they may need a bit of time to reconstitute their forces; how fast they can do that depends on the sanctions regime and the degree to which it remains it place, and on their economy. There are a lot of factors that go into that timeframe.

All Russia's neighbours that have ethnic Russian populations and are perceived as part of greater Russia have to be concerned. In terms of where Putin or the inner circle of Putin falls or may gravitate towards next, it could be a re-invasion of Ukraine—that could remain their top foreign policy priority—or it could be Kazakhstan or the Baltics. There are a lot of places they could go, which makes for a difficult defensive problem. They are opportunists, so they will probably go to what looks like the greatest opportunity, which is the most weakly defended opportunity.

Q42 **Fred Thomas:** Which is?

Professor Harkness: It depends on where we put our forces, if we join in.

Q43 **Fred Thomas:** But right now?

Professor Harkness: I have heard quite a bit about the Caucasus or Kazakhstan and that area.

Orysia Lutsevych: It is important to watch what Russia is doing on its western flank, including where it is creating new infrastructure and for what. In Karelia, near the Finnish border, it is building capacity to host 80,000 troops—obviously, it is not a summer camp.

The Swedish intelligence community is also worried about a possible operation on one of the islands. Some are more cited than others, but

there are plenty of islands. If you recall, the battle of the Black sea started with the quick operation on Snake island. If Russia decided to do that, it would not even have to wait for the ceasefire, as the assumption is that it could do something like that even now to test NATO's cohesion, and to see how we respond.

If the outcome in Ukraine is inconclusive, which would be a kind of ceasefire, there is the political risk that we could hold off investing in our defence at that moment. People will say, "Well, there is a ceasefire in Ukraine. Why should we be spending our resources?" If we fail to communicate the danger that remains of a possible re-invasion of Ukraine, or even a NATO ally, I think that would be a very dangerous moment.

Q44 **Fred Thomas:** Professor Clarke, if there is a de facto ceasefire but Russia wants to do something else, how can we mitigate that risk?

Professor Clarke: Only by deterrence, or by showing that we are prepared and able to fight the war we aim to deter. That also involves being able to confront Russia at the point at which we think we are prepared to dig in our toes—for example, over the shadow fleet, which we are not prepared to do at the moment.

The Russians will push until they feel confronted, and they will then make a calculation and scale their ambitions accordingly. It may sound very alarmist that we are assuming a Russia that is relentlessly expansionist, but Putin actually does not believe in peaceful co-existence. That is very clear from everything he has written and said for the last 30 years. The Russians do not believe in peaceful co-existence; they believe—the elite around Putin believes—that the nature of Russia's history means that it is either pushing forward or being pushed back. There is a dynamism in it, and they do not see any natural stability in that. It is also an internal empire, so there is a degree of momentum about everything.

We have to think through where the pressure points are. I personally suspect that the first pressure points will be at sea, rather than on land, but there will be pressure points coming up in the next few years, and then possibly a land pressure point. Moldova is one possibility, which is of course not a NATO member, and a crisis in Estonia is also highly likely in the sense that if the Russians could put a little hole in NATO and not have article 5 invoked, or have article 5 invoked but for nothing to happen, that will take the guts out of NATO's deterrence. I think that all those challenges are coming quite soon, and at the point of confrontation, we have to be able to over-match what the Russians are prepared to put into it. However, at the moment we cannot, or do not.

Q45 **Mr Bailey:** Amusingly, the question about challenging the orthodoxy will come from me. As you may have picked up in some of the questioning, or in my retorts to you, I think that some of our thinking or pervading narratives are very orthodox. They are unchanged, and we have fallen in line with them very quicky.

The Centre for Strategic and International Studies produced a report that showed that the community, as a whole, failed to predict or identify short

war fallacy, overrated Russian might, dismissal of Ukrainian resistance and neglect of national will, which resulted in a hesitancy in western aid. With all that in mind, do you have any reflections on that criticism? Does more need to be done to promote a culture within your community that will challenge those expert and orthodox views?

Orysia Lutsevych: The other capitals should set up a Ukraine forum in their think-tanks, because the UK was first to be in Kyiv and believe in Ukraine. Partially, it is because of an understanding and shared history of what it takes to resist an invasion. There is the history of the United Kingdom in the second world war, our relationship, and understanding the power of democracy.

We in Chatham House are trying to focus on explaining and researching Ukraine's strength and vulnerabilities. There is a legacy from the Soviet studies and analysis focused only on nuclear states and big powers, and not understanding the agency of other countries. We need to invest in studies of regions—central Asia, the Caucasus, the middle east and other places—because we are fundamentally missing some of these subterranean changes that are happening in societies, such as what enabled resilience in the case of Ukraine. It is coming very often from a domestic political culture and from history as well. In the case of Ukraine, it was centuries of resisting Russian imperialism. We did not know that, but we should have known the history and how important the Ukrainian contribution was to the creation of the Russian empire.

I remember, before the big invasion, all the embassies were already evacuated to Lviv and were warning Ukrainian civil society leaders and other activists of possible threats to their life, hoping that they would flee. The next day, in the hotel, there were newspapers saying: "Ukraine will resist. Russia is the colossus on clay feet." There was confidence in Ukraine. Where did it come from? It came from its history of standing up to the bully and of mobilising and building on its strength.

We should study nations and what is happening inside Russia's regions. Russia is not a nation-state. It has its internal empire, as Professor Clarke said. It is constituted of many different nations and ethnicities. If we miss the constituent parts of the Russian Federation, we will miss a very important process already under way inside Russia that will decide, together with the outcome of the war on Ukraine, its future.

Q46 **Mr Bailey:** Professor Harkness, do you have an opinion on challenging orthodox thought within the community?

Professor Harkness: I am not hopeful. In the aftermath of this giant analytical failure, there was an opening. Whether it is academia, the intelligence community or think-tanks, we tend to get siloed in narrow areas. That feeds—not in a malicious way—into a shared set of assumptions that become unquestioned, and we stay in these little silos. I saw that break apart in 2022 and, all of a sudden, all sorts of people were talking to each other who had not been previously. Over the last three years, I have watched those silos reform in a discouraging way.

We have to continue to talk across those lines and to bring in expertise that maybe we do not think is expertise. When we are looking at what Russia might do, we must bring in not only the experts on Ukraine, Kazakhstan, Estonia or whatnot, but the experts on China, the political psychologists or the historians. We want to cross these lines in ways that we might not even think we have to. The incentives to do that are just not there.

We are now at a crisis point across different sectors. The UK higher education sector is in crisis with funding. We do not have the resources to do a lot. The Foreign Office analytic community is in crisis. It is facing roll-backs in personnel. They do not have people covering important key areas and cannot replace those positions right now. I will not speak to what is going on in the UK intelligence community, because I do not know, but in the US intelligence community, things are in crisis—40% to 50% of staff have left the State Department and the intelligence community. We rely on US intelligence. We are seeing this crisis in the analytic community all over that is restricting our resources and ability to get out of these silos and cross these lines.

Professor Clarke: I think the CSIS report was a bit unfair in a way. It reflected the American situation much more, where Washington is a one-industry town. All the bright young things coalesce on one or two issues and then tend to argue within that. I think that in the UK and in London, there is a much greater diversity of view, but there is a problem of coalescing at the policy level around certain ideas. There is no shortage of challenge within the UK community. There are not enough people doing it and there is not enough back-up for it, but I am more hopeful that there is a more honest debate about defence and security in the UK than there has been for quite a long time, partly because we are in such a difficult situation.

Chair: Thank you very much, Ms Lutsevych and Professors Harkness and Clarke, for a fascinating, thought-provoking discussion. I hope that the wider public has benefited from an intellectually stimulating discussion. With that, I bring today's hearing to an end.