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What if Putin Didn't Miscalculate?

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The conventional wisdom is that Vladimir Putin catastrophically miscalculated.

He thought Russian-speaking Ukrainians would welcome his troops. They didn't. He thought he'd swiftly depose Volodymyr Zelensky's government. He hasn't. He thought he'd divide NATO. He's united it. He thought he had sanction-proofed his economy. He's wrecked it. He thought the Chinese would help him out. They're hedging their bets. He thought his modernized military would make mincemeat of Ukrainian forces. The Ukrainians are making mincemeat of his, at least on some fronts.

Putin's miscalculations raise questions about his strategic judgment and mental state. Who, if anyone, is advising him? Has he lost contact with reality? Is he physically unwell? Mentally? Condoleezza Rice warns: "He's not in control of his emotions. Something is wrong." Russia's sieges of Mariupol and Kharkiv — two heavily Russian-speaking cities that Putin claims to be "liberating" from Ukrainian oppression — resemble what the Nazis did to Warsaw, and what Putin himself did to Grozny.

Several analysts have compared Putin to a cornered rat, more dangerous now that he's no longer in control of events. They want to give him a safe way out of the predicament he allegedly created for himself. Hence the almost universal scorn poured on Joe Biden for saying in Poland, "For God's sake, this man cannot remain in power."

The conventional wisdom is entirely plausible. It has the benefit of vindicating the West's strategy of supporting Ukraine defensively. And it tends toward the conclusion that the best outcome is one in which Putin finds some face-saving exit: additional Ukrainian territory, a Ukrainian pledge of neutrality, a lifting of some of the sanctions.

But what if the conventional wisdom is wrong? What if the West is only playing into Putin's hands once again?

The possibility is suggested in a powerful reminiscence from The Times's Carlotta Gall of her experience covering Russia's siege of Grozny, during the first Chechen war in the mid-1990s. In the early phases of the war, motivated Chechen fighters wiped out a Russian armored brigade, stunning Moscow. The Russians regrouped and wiped out Grozny from afar, using artillery and air power.

Russia's operating from the same playbook today. When Western military analysts argue that Putin can't win militarily in Ukraine, what they really mean is that he can't win clean. Since when has Putin ever played clean?

"There is a whole next stage to the Putin playbook, which is well known to the Chechens," Gall writes. "As Russian troops gained control on the ground in Chechnya, they crushed any further dissent with arrests and filtration camps and by turning and empowering local protégés and collaborators."

Suppose for a moment that Putin *never* intended to conquer all of Ukraine: that, from the beginning, his real targets were the energy riches of Ukraine's east, which contain Europe's second-largest known reserves of natural gas (after Norway's).

Combine that with Russia's previous territorial seizures in Crimea (which has huge offshore energy fields) and the eastern provinces of Luhansk and Donetsk (which contain part of an enormous shale-gas field), as well as Putin's bid to control most or all of Ukraine's coastline, and the shape of Putin's ambitions become clear. He's less interested in reuniting the Russian-speaking world than he is in securing Russia's energy dominance.

"Under the guise of an invasion, Putin is executing an enormous heist," said Canadian energy expert David Knight Legg. As for what's left of a mostly landlocked Ukraine, it will likely become a welfare case for the West, which will help pick up the tab for resettling Ukraine's refugees to new homes outside of Russian control. In time, a Viktor Orban-like figure could take Ukraine's presidency, imitating the strongman-style of politics that Putin prefers in his neighbors.

If this analysis is right, then Putin doesn't seem like the miscalculating loser his critics make him out to be.

It also makes sense of his strategy of targeting civilians. More than simply a way of compensating for the incompetence of Russian troops, the mass killing of civilians puts immense pressure on Zelensky to agree to the very things Putin has demanded all along: territorial concessions and Ukrainian neutrality. The West will also look for any opportunity to de-escalate, especially as we convince ourselves that a mentally unstable Putin is prepared to use nuclear weapons.

Within Russia, the war has already served Putin's political purposes. Many in the professional middle class — the people most sympathetic to dissidents like Aleksei Navalny — have gone into self-imposed exile. The remnants of a free press have been shuttered, probably for good. To the extent that Russia's military has embarrassed itself, it is more likely to lead to a well-aimed purge from above than a broad revolution from below. Russia's new energy riches could eventually help it shake loose the grip of sanctions.

This alternative analysis of Putin's performance could be wrong. Then again, in war, politics and life, it's always wiser to treat your adversary as a canny fox, not a crazy fool.

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