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How do we measure defeat?

Years of war in Ukraine have shifted global power away from the West. This may not yet represent a defeat, but it is certainly not a victory

It is not just Kyiv that must consider the parameters of a possible victory or defeat for Ukraine in its war with Russia, as well as the interim results of the conflict more generally. The West will have to ask itself similar questions, too.

In both Ukraine and the West, the optimistic expectations articulated during the first year of the war have given way to gloomier forecasts. A return to Ukraine's 1991 borders and the restoration of a rule-based order – the latter being the most frequently mentioned strategic goal of the West in its support for Ukraine – now appear equally remote. In place of these expectations, the focus of the conversation is now on freezing the conflict under conditions resembling those set out in Donald Trump's various proposals as well as on introducing a new global order based less on rules and more on a balance of power, like in the (not so) good old days of classical realpolitik.

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There is no doubt that the war is ongoing, and at this stage, it is impossible to say for sure under what conditions it will end. However, certain trends are already visible. In Ukraine, there has been a long-standing debate on the acceptable terms for the end of the conflict and where to draw the line between victory and defeat. In the West, the focus of the discussion has been different, becoming, over the four years of the conflict, the very rules on which the international order is built.

From the very start of the Russian invasion, this war has been built on a logic of power transition, a struggle for hegemony and global redistribution of power. It is a unique moment of truth, establishing a true balance of power and re-examining our strategy for the future. The West entered this conflict in the stronger position. Yet, after four years of

full-scale war, this has not translated into political results: sanctions have failed to force Russia to retreat; arms deliveries to Ukraine are not proving sufficient to change the direction of the frontline; and ending the war by restoring a fair status quo is increasingly unrealistic.

Yet, a defeat for Ukraine is not tantamount to a defeat for the West, though many Ukrainians would disagree with this assessment. Such a defeat does not mean the war will automatically shift to the territory of Ukraine's Western neighbours. Indeed, in general, the stakes in the war for Ukraine and the West are fundamentally different. Ukraine risks losing its sovereignty, while the biggest risk faced by the West is a new, much less favourable post-war security architecture and more serious challenges in the future.

No victory, not yet defeat

However, the alternative scenario on the agenda for 2026 – freezing the war under conditions similar to those set out in the US administration's proposals or continuing it under circumstances that are unfavourable to Ukraine – strongly resembles a temporary defeat for the West. The war has turned out to be excessively long, exhausting, hopeless and politically costly — and all too much like a strategic impasse. This perception is becoming increasingly widespread: Washington speaks openly about it, while European leaders prefer to opt for tactical solutions such as allocating money to Ukraine for another two years of war instead of devising a strategy. While Europe is relying on inert policy, the Global South is consolidating and improving its position in key areas of global competition.

One of the indicators for distinguishing between winners and losers is the question of whose side time is on. Between 2022 and 2024, the USA's share of the world economy (measured in PPP) declined from 15.1 per cent to 14.9 per cent and the EU's from 15 to 14.3 per cent, while China's grew from 18.7 to 19.3 per cent. These dynamics are quite revealing when it comes to questions about who pays more or has adapted better to the new conditions and formats of international security. The global balance of power has shifted to the detriment of the West. This may not yet represent defeat, but it is certainly not victory.

This war has also become a test of the ability to uphold existing standards, rules and institutions — such as territorial integrity, sovereignty or democracy. The West has invested considerable effort and resources in the conflict, but the results have been mixed at best. Some might even interpret them as disastrous, which has led to the decline of the institutions and organisations that have been involved in supporting

international security. The majority of these institutions were created within a Western-centric world order, making their decline indicative of the West's weakened position.

There might also be some good news for the West: Russia has not won either.

One of the criteria for victory in a war is a change for the better in the balance of power with potential rivals. In this sense, there might also be some good news for the West: Russia has not won either. The war has cost it a significant amount of its potential, influence and authority; it has achieved far less than intended. Of course, if the war ends on terms close to those that are currently on the negotiating table, the Kremlin can sell it as a victory — albeit predominantly to an audience inside Russia. It is unlikely to realise its dream of returning to the club of the great powers and fully restoring its sphere of influence.

However, the West is not only competing with Russia in this war. The loss of hegemony – a long and painful process – did not begin with the Russo-Ukrainian war, but the conflict did speed up events and increase the risks. Internal divisions, a lack of resources, an inability to exert sufficient pressure or isolate Russia and the critical weakness of Western institutions are all more visible today than in 2014, when the annexation of Crimea also presented the West with complex dilemmas. The last decade has not made these dilemmas any easier, but the position of the West is now stronger.

It is probably too early to talk about the defeat of the West — though trends and interim results are not very optimistic. The war has become another crisis, deepening lines of division, challenging unity and exposing vulnerabilities. Security and a rule-based world order obviously have a price — and not only in monetary terms. The end of the war will define the winners and the losers and will also show whether the West is capable of paying that price.



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