



Drexel GPS Geopolitical Update

Zelensky's Tone Change at the U.N.?|U.S. Debates Allowing Deeper Ukrainian Strikes into Russia| Putin Rattles the Nuclear Sabre with New Policy Revision

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This week, the geopolitical center of the universe was in New York City as the United Nations General Assembly met for its 79th session.

Our long-standing GPS opinion has been that Ukraine will face increasing pressure from its coalition allies to negotiate an end to the war that does not involve a complete pre-February 2022 reclamation of territory. This view seems to be increasingly validated with recent events and remarks.

Drexel GPS Assessment:

- Take note of the new tone in sentiment being publicly expressed by Ukraine President Zelensky during his remarks at the UNGA this week regarding potential negotiations with Russia, along with the recent comments the president of the Czech Republic made to media outlets this week.
- The president of the Czech Republic, Petr Pavel, told the New York Times that Ukraine would have to be "realistic" about its prospects of recovering the areas in the east of the country which Russia has managed to gain over the last 31 months of war.

NOTE: Drexel GPS is not suggesting the conflict will reach a peaceful resolution in the near-term.

- Our early Drexel GPS opinion has been that as the conflict in Ukraine edged past its second-year mark, the robust levels of financial and military support for Ukraine from its coalition of allies at the start of the Russian invasion would diminish in the face of growing "War Fatigue" among its supporters.
- The majority of that "War Fatigue" stems from the de-facto stalemate status of the battlefield (there has been a lack of significant gains of Russian-occupied territory) combined with shifting domestic financial and political priorities among Ukraine's coalition supporters.
- Putin's strategy: After recovering from blistering initial losses of men and material through poor battlefield execution by his commanders, Putin war strategy is that he accepts a massive loss of personnel, as long as this prolongs the conflict. As time goes by, there will be increased "War Fatigue" that further erodes Ukraine's pools of support. This will force Ukraine to the negotiation table on uneven terms.

Putin AGAIN Revises Nuclear Weapon Policy

- The U.S. and the UK are currently debating granting President Zelensky's request to use the U.S. Army's MGM-140 Army Tactical Missile System (ATACMS) and the UK's Storm Shadow cruise missile systems to strike targets deeper into Russia, in some cases as far as 300 kilometers (190 miles).
- Putin has issued a revised nuclear weapon use policy in response to this pending Ukrainian request as means to exert pressure and deter the U.S. and UK from granting Ukraine permission to use these systems.
- In the new wording of the nuclear policy document, Putin now states that "aggression against Russia by any **non-nuclear state**, but with the participation or **support of a nuclear power**, will be considered a joint attack against Russia." This language is squarely aimed at the members of the coalition supporting Ukraine, and particularly the U.S., UK, and France.
- The previous revision to Russia's military doctrine provided for the use of nuclear weapons only in "extraordinary cases," when the very existence of Russia was under threat. Putin told Russia's Security Council that the country's nuclear doctrine has been revised in light of an "emergence of new sources of military threats and risks for Russia and our allies."
- The changes would mark a significant lowering of Russia's nuclear threshold at a time when NATO's three nuclear powers are debating allowing Ukraine to use missiles to hit targets deep inside Russia.
- Additionally, President Biden is also debating allowing Ukraine to strike deeper into Russia as long as they do not use U.S.-supplied weapons. Zelensky met with President Biden at the White House Thursday to present and outline his "Victory Plan" for Ukraine. Seeking approval for these deep-strikes is likely an integral part of that plan.

Should Ukraine be Allowed to Strike Deeper with ATACMS? Would Putin Actually Use Nukes in Ukraine?

- At this point in the conflict, the tactical value of allowing Ukraine to expand its targeting parameters deeper inside of Russia is debatable.
- Ukraine has had recent successes with military destabilizing operations and territory gains such as the raids into the Kursk region of Russia in mid-August. However, it remains to be seen if these recent successes will significantly contribute to Zelensky's current strategic goal of winning the war and expelling all Russian troops from Ukraine.
- The proverbial threat that crossing a "Red Line" could trigger the Russian use of tactical nuclear weapons has been hinted at on several occasions by Putin since the beginning of the war. He has sought to use that type of rhetoric to diminish the level of support provided to Ukraine by its allies. This type of "nuclear-saber rattling" cannot be ignored even if the possibility is remote.

- The use of a tactical nuke by Putin is a potential reality that cannot be completely dismissed. If Ukraine is able to strike deeper into Russia, Putin may engage in extreme “face-saving” measures to
- respond. If Ukraine attacks occur far away from the battlefield and “bring the war home” to the Russian public, this may portray Putin as being weak and unable to protect the Russian homeland.
- The new revision to Russia’s nuclear policy makes it plausible that strikes by Ukraine deep into Russia’s homeland would give Putin the political cover he desires on the geopolitical stage to legitimize the use of a tactical nuke somewhere in Ukraine. A nuke could possibly be launched from Belarus where the Russian army has relocated some of its tactical nuclear weapon assets.
- NOTE: Ukraine already has in its possession variants of the ATACMS. Currently, Ukraine is restricted by the U.S. on the areas and range to which they can target Russian territory. Ukraine is seeking permission to expand their use and strike deeper. Currently, the Russians have the luxury of launching attacks from areas they know are out of range of the parameters afforded to the Ukrainians.
- There is a finite supply and availability of the ATACMS for Ukraine to use, supply is limited as the U.S. must also maintain its own capabilities. The system is highly lethal, accurate, and very valuable on the battlefield.
- At this point in the war, it is likely that Russia has taken steps to reposition the aircraft and military assets that would be at risk by the missile systems. Additionally, it is debatable that deeper strikes into Russia would be the best use case for the ATACMS to truly effect positive change on the battlefield and achieve Ukraine’s strategic goals to have the upper hand at the negotiating table. However, the morale-boosting effect that using ATACMS to strike back on targets deeper into Russia’s territory is undeniable.
- Regardless of how the Russian citizenry feel about the war, if Ukraine begins attacking deeper into Russia and civilians are injured, there will be a coalescing of support by the domestic audience for Putin to take more severe measures.
- There is a school of thought that the valuable and short supply of ATACMS would be better used in Crimea and other areas of the battlefield to gain sustainable leverage. An undesired outcome would be if the ATACMS are used to affect a series of merely symbolic strikes deep into Russian territory (and no real tangible military value to Ukraine), providing Putin with increased level of domestic support to possibly go nuclear.

President Zelensky At the 79th U.N. General Assembly.



Russian forces can fire small nuclear warheads using conventional artillery, such as the "Malka" self-propelled gun.



Drexel GPS will continue to monitor these situations as they develop.

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