


Rusia y Ucrania
Perspectivas de un conflicto
que se transformó en guerra

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1991 **Independencia** Ucrania
 1994 acuerdos de Budapest
 2004 **revolución naranja**
 (Yuschenko vs. Yanukovich)
 2014 **Euromaidan**
 (AA con UE, salida de Yanukovich)
 2014 **ocupación de Crimea** por Rusia y guerra civil
 en Donetsk
 2015 acuerdos de Minsk
 2019 elecciones presidente Zelensky
 2021 **despliegue de tropas en frontera con Ucrania y**
exigencia de garantías de seguridad al Occidente
FEBRERO 2022 - guerra de Rusia contra Ucrania





■ Separatist-held areas

*Russia annexed Crimea in 2014

Desde el conflicto a la guerra

2014



2022

Latest troop movements and locations of attacks

- Key reported air strikes
- Nuclear power plant
- Russian military presence
- Key reported ground & naval attacks
- Russian-claimed control
- Ukrainian-claimed counter-offensive
- Under Russian control
- Populated areas
- Airfield



Sources: Institute for the Study of War, AEI's Critical Threats Project, WorldPop, FT research • Map shows events on Mar 14
 * Crimea was annexed by Russia in 2014 but this is not recognised by the international community © FT

Where Russia's troops are positioned

Permanently stationed and newly arrived units

■ Newly arrived units (numbers unconfirmed)



*Russia annexed Crimea in 2014
 Note: Some locations in Belarus are approximate
 Source: Rochan Consulting, 1 February

Argumentos de Rusia para la guerra:
 Expansionismo OTAN
 Población rusa en Donbas
 Armas nucleares, biológicas y químicas

Ukraine and Russia: Military strength

	Ukraine 	Russia 
Troops	1,100,000	2,900,000
Active 	200,000	900,000
Reserve* 	900,000	2,000,000
Attack aircraft 	98	1,511
Attack helicopters 	34	544
Tanks 	2,596	12,240
Armoured vehicles 	12,303	30,122
Towed artillery 	2,040	7,571

*Note: reserve includes people who have had military service within 5 years

Source: Global Firepower, IISS Military Balance



Dimensión bilateral
de la guerra:

Militar

Diplomática

Comunicación/Propaganda



Item 5 - Draft resolution A/ES-11/L.1

Aggression against Ukraine

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IN FAVOUR: 141



AGAINST: 5



ABSTENTION: 34

Dimensión humanitaria de la guerra

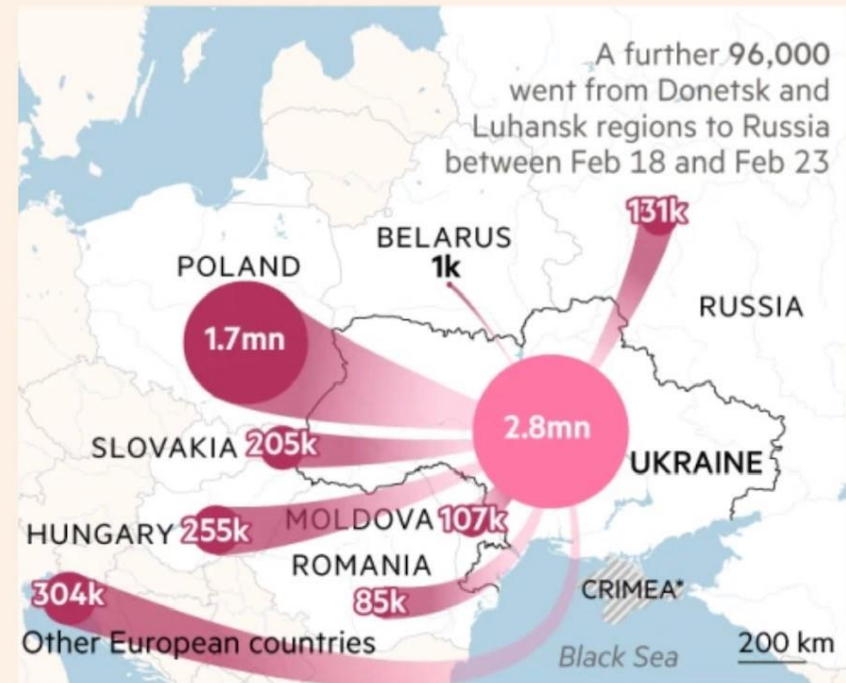
Russian military campaign has attacked predominantly civilian targets

- | | |
|---|--|
|  Hospital/medical facility |  Residential |
|  Transport |  University/school |
|  Infrastructure |  Oil refinery/storage |
|  Shops |  Civilian casualty |
|  Nuclear power station |  Military |



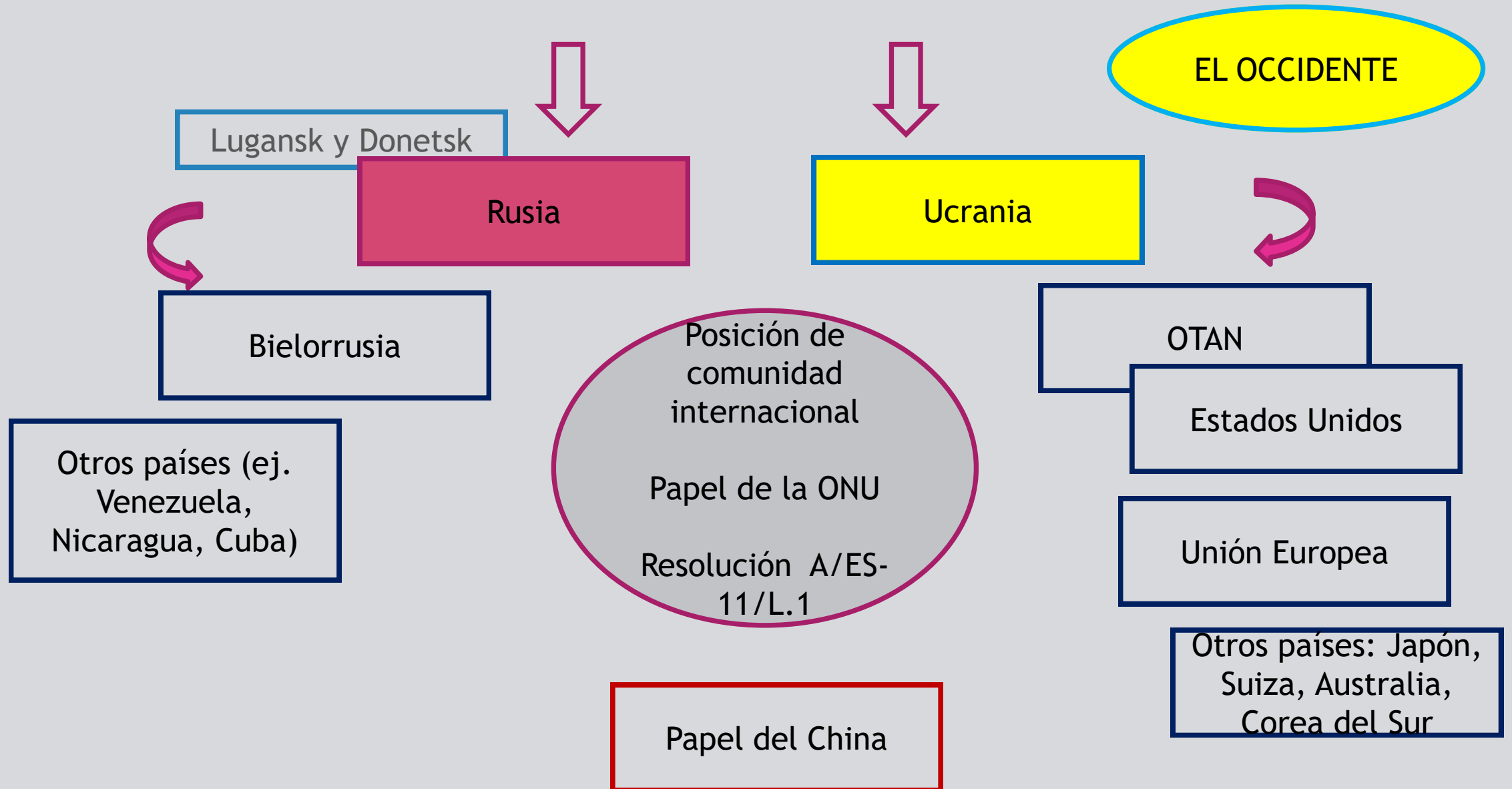
Refugees: total leaving Ukraine since Russian invasion nears 3mn

Total recorded arrivals from Ukraine between Feb 24 and Mar 13 2022



Cartography: Steven Bernard and Alan Smith
 Source: UNHCR *Crimea is annexed by Russia but this is not recognised by the international community
 © FT

Partes del conflicto sus aliados y relaciones



1. No hacer nada

2. Hacer poco

3. Pegar
económicamente a
Rusia

4. Guerra militar
(?)

Respuesta del Occidente:

Sanciones
Armas

Provocar aislamiento de
Rusia

Cortar propaganda rusa
Apoyo humanitario

Lo que no hará El Occidente :
Tropas de OTAN en Ucrania
No Fly Zone

Sanciones y sus consecuencias para Rusia

- Financieras
- Comercio
- Cierre de espacio aéreo para aviones rusos
- Personales
- Ámbito energético
 - *Nord Stream 2, embargo petróleo, gas*

Resultados de sanciones para el mundo

- Precios de materias primas (gas, petróleo)
- Precios de algunos productos agrícolas (trigo, maíz)
- Afectaciones a empresas/bancos/aseguradoras con actividades en Rusia
- Interrupciones de cadenas de suministro

Global companies exit Russia as Ukraine war continues

GLOBAL COMPANIES THAT ANNOUNCED BOYCOTT OF RUSSIA

While Russia's war on Ukraine continues, the world's leading companies in many sectors from technology to automotive, aviation, and energy are pulling out of Russia

TECHNOLOGY



AUTOMOTIVE



INDUSTRY



TEXTILE



ENERGY



LOGISTIC



FINANCE



AVIATION



MEDIA



TELECOMMUNICATIONS, CINEMA AND TELEVISION

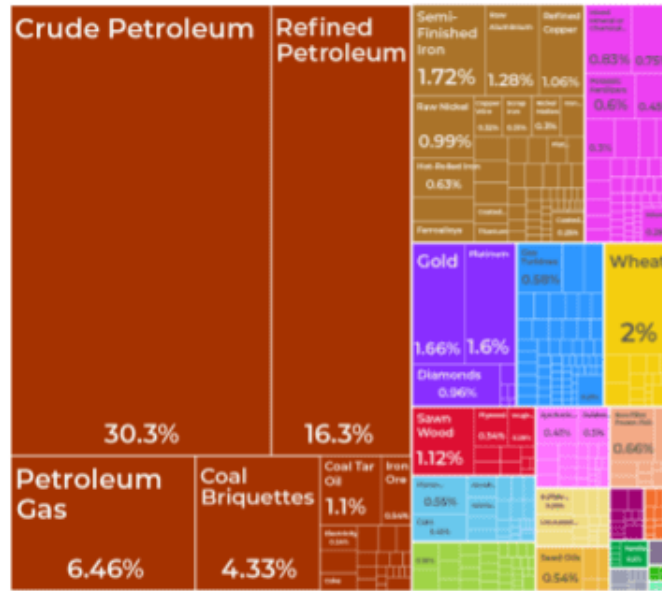


TRADE

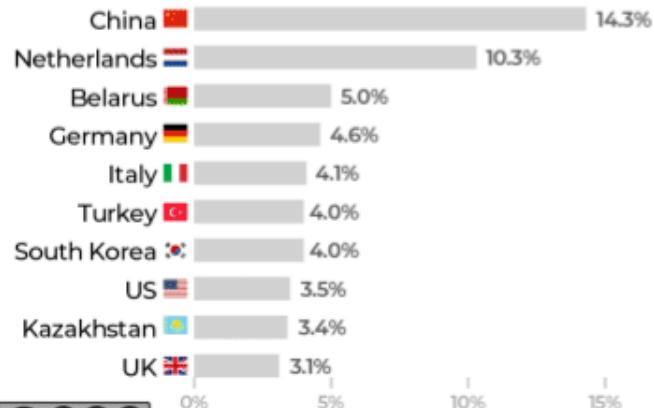
Russia and Ukraine's main exports

Russia exported **\$407bn** in products and **Ukraine \$49.5bn** in 2019.

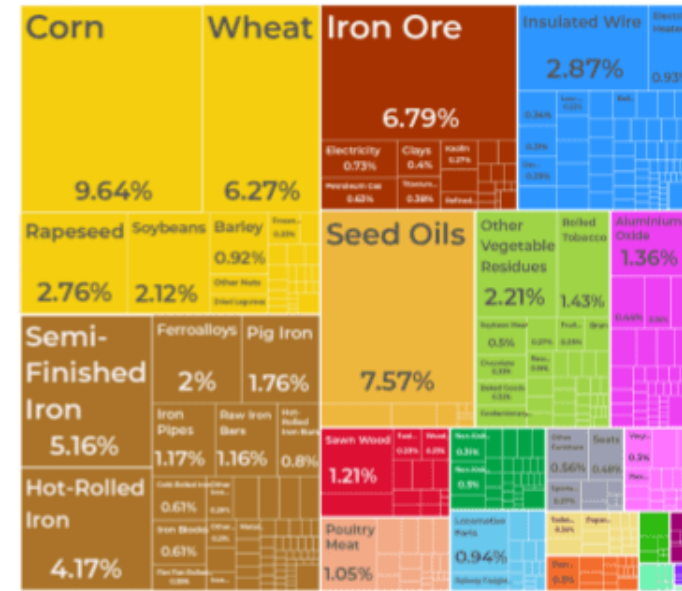
Russia



Top export countries



Ukraine



Top export countries



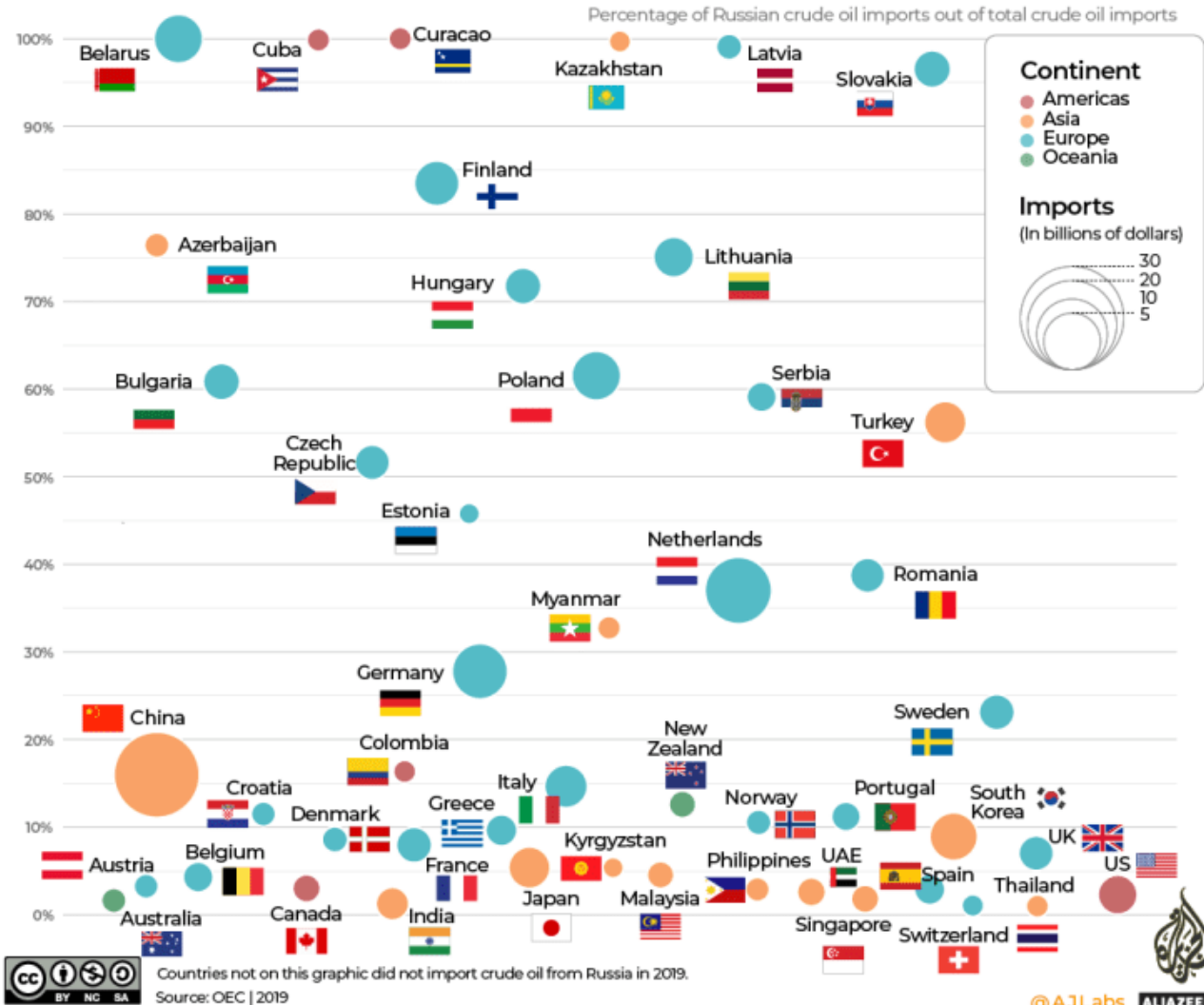
Source: OEC, 2019 | February 17, 2022



UKRAINE-RUSSIA WAR

Which countries rely most on Russian oil?

Russia is the **world's second highest exporter of crude oil**, after Saudi Arabia.
In 2019, **48 countries bought Russian crude oil worth \$123bn**.



¿Qué tan importante es exportación de gas para Rusia?

Export de Rusia en 2021

489 billones USD

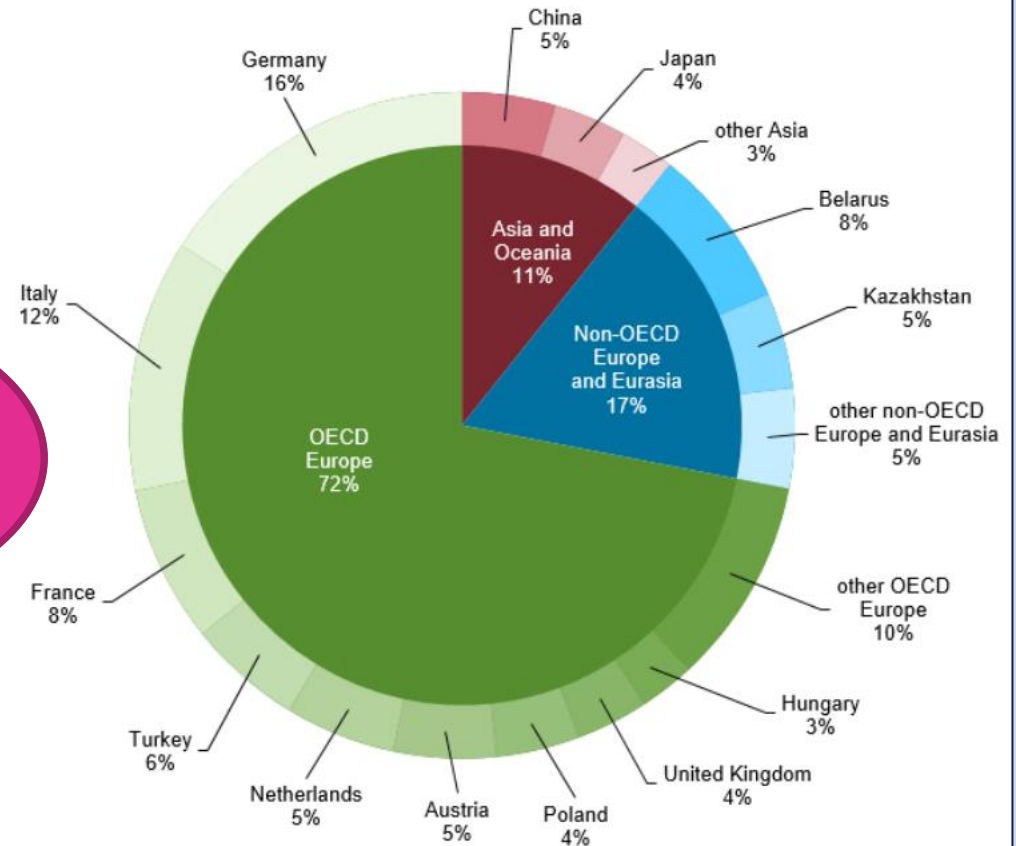
110 billones petróleo 22%
68.7 billones productos de petróleo 14%

54 billones USD gas 11%

7.6 billones LNG 1.5%

72% del gas ruso va a Europa

Figure 6. Russia's natural gas exports by destination, 2020



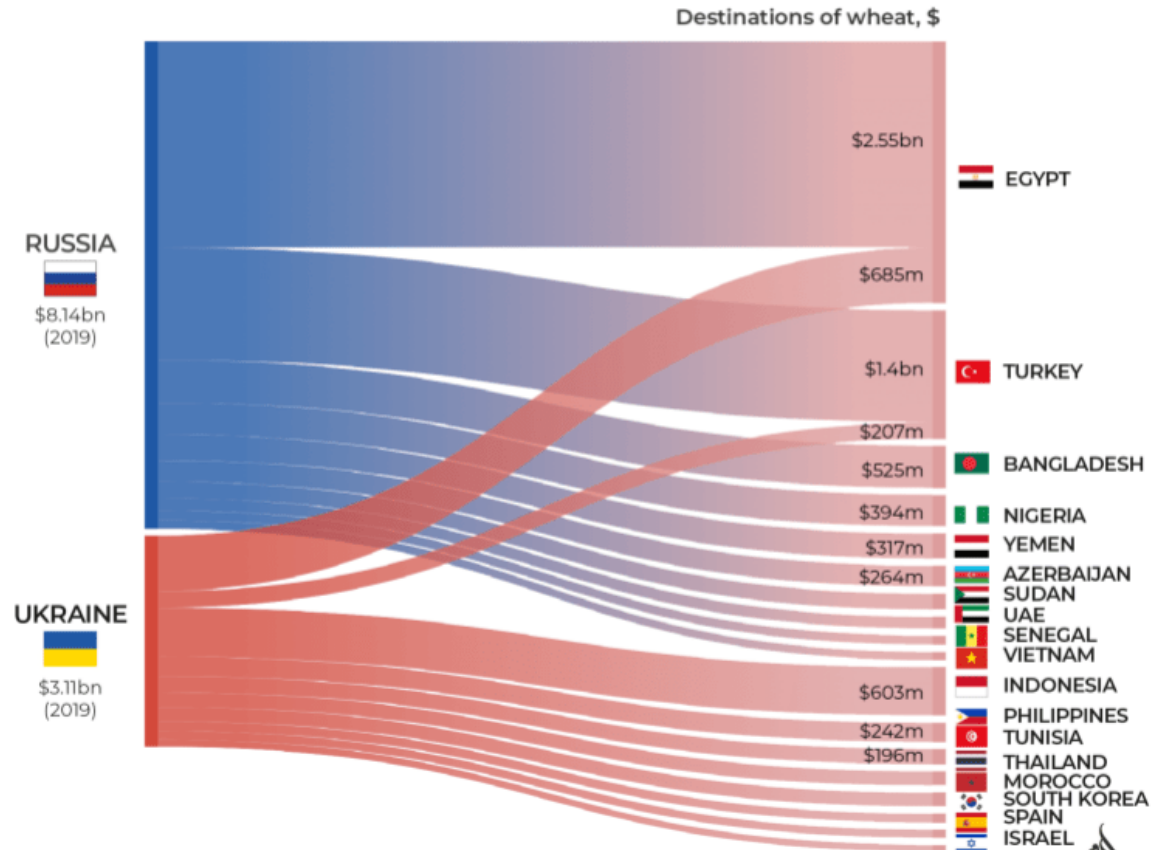
Source: Graph by the U.S. Energy Information Administration, based on Russian export statistics and partner country import statistics from Global Trade Tracker and on delivery statistics from Gazprom

[Factbox: Russia's oil and gas revenue windfall | Reuters](#)

TRADE

Who buys Russian and Ukrainian wheat?

A quarter of the world's wheat exports came from Russia and Ukraine in 2019.



Source: Observatory for Economic Complexity, 2019

@AJLabs ALJAZEERA

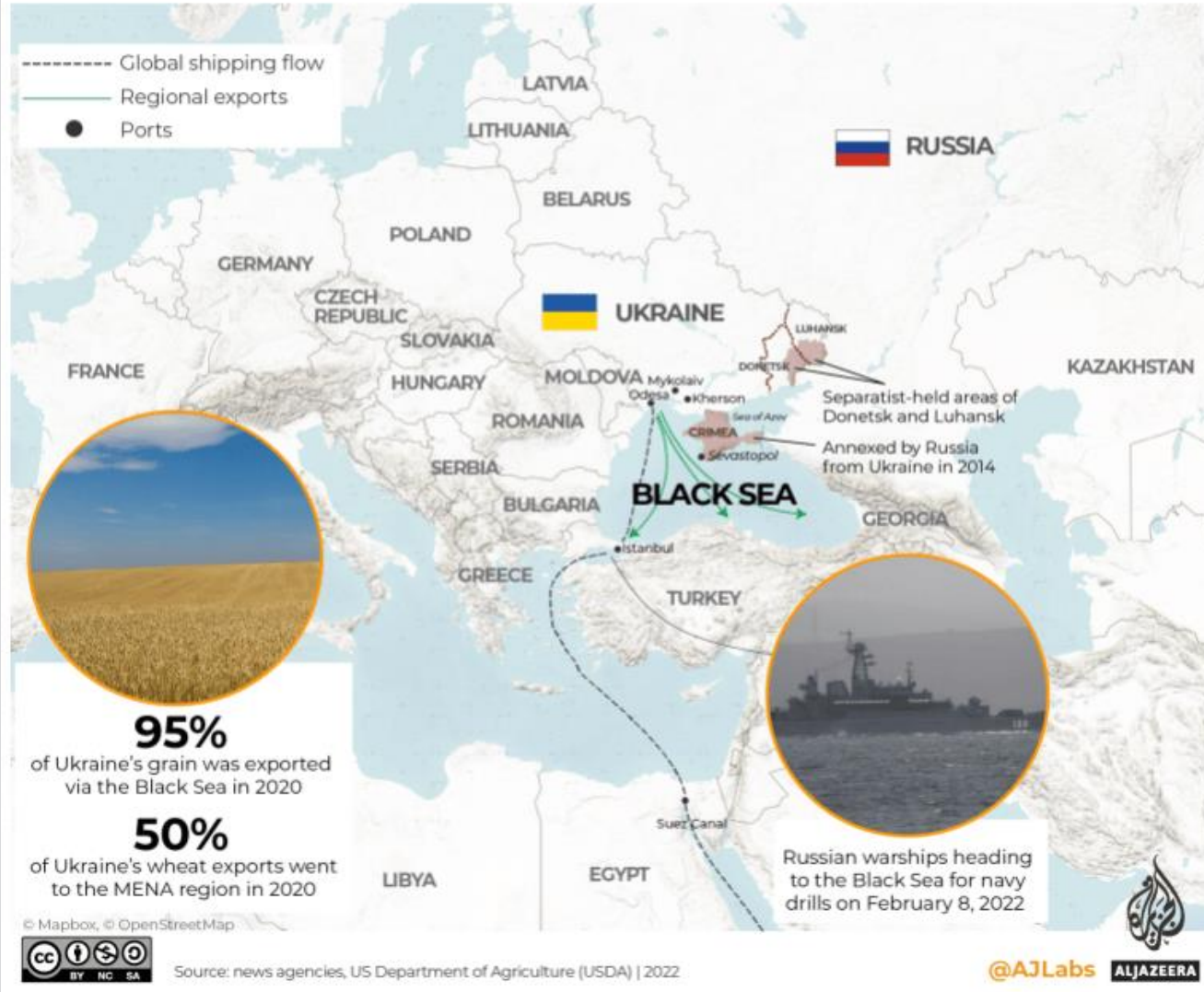
Principales exportadores de trigo:

Rusia 18%
EUA 16%
Canada 14%
Francia 10%
Ucrania 7%

TRADE

Geoeconomics of the Black Sea

Ukraine relies on **Black Sea ports to export** agricultural goods **around the globe**.

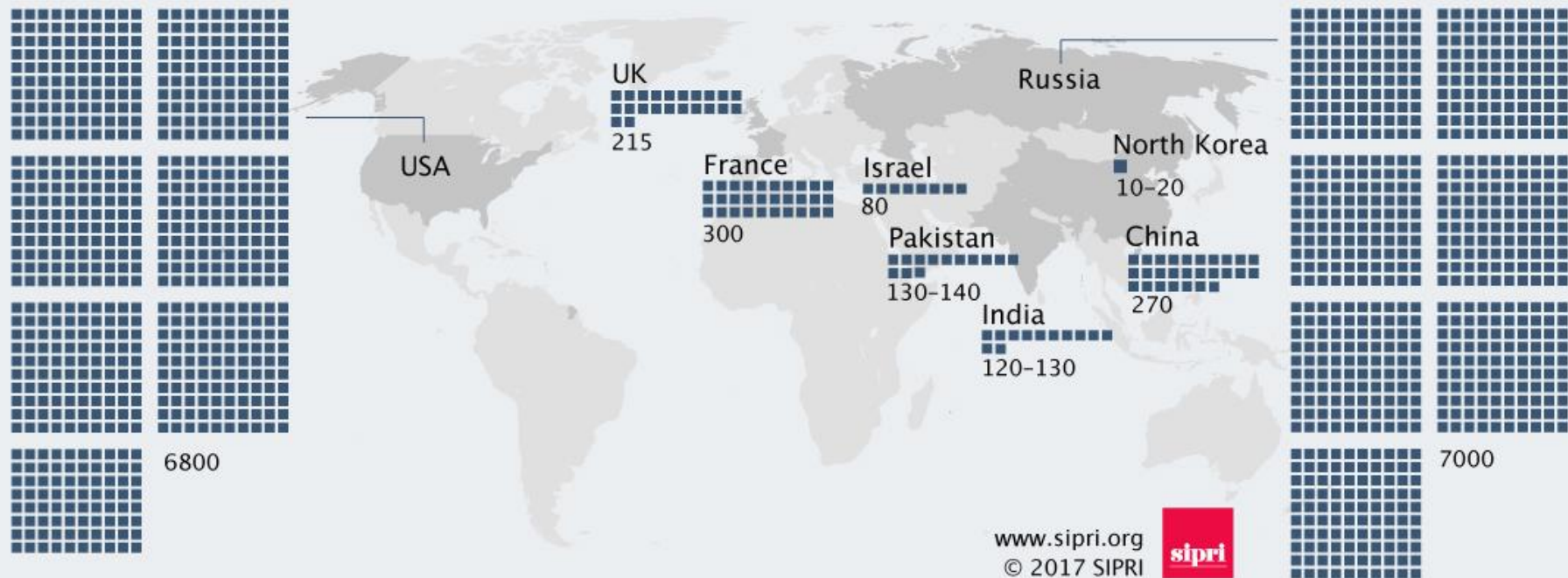


Infographic: Russia, Ukraine and the global wheat supply | Infographic News | Al Jazeera

Dimensión nuclear, armas químicas y biológicas

Estimate of global nuclear weapons in January 2017

■ = 10 nuclear warheads



¿Hay perspectivas de una solución negociada?

Escenarios del desarrollo de la guerra

1.
Salida de fuerzas armadas rusa de Ucrania

Desaparecerían sanciones

2.
Ocupación de Ucrania por fuerzas armadas rusas e imposición del gobierno pro-ruso

Se mantienen o refuerzan sanciones

3.
Ocupación parcial de Ucrania por Rusia y negociaciones que finalizan en acuerdo o “congelación” de guerra

Se mantienen o disminuyen sanciones

4.
Transformación de guerra Rusia - Ucrania en guerra Rusia - OTAN

Guerra a mayor escala con fuertes implicaciones económicas para el mundo

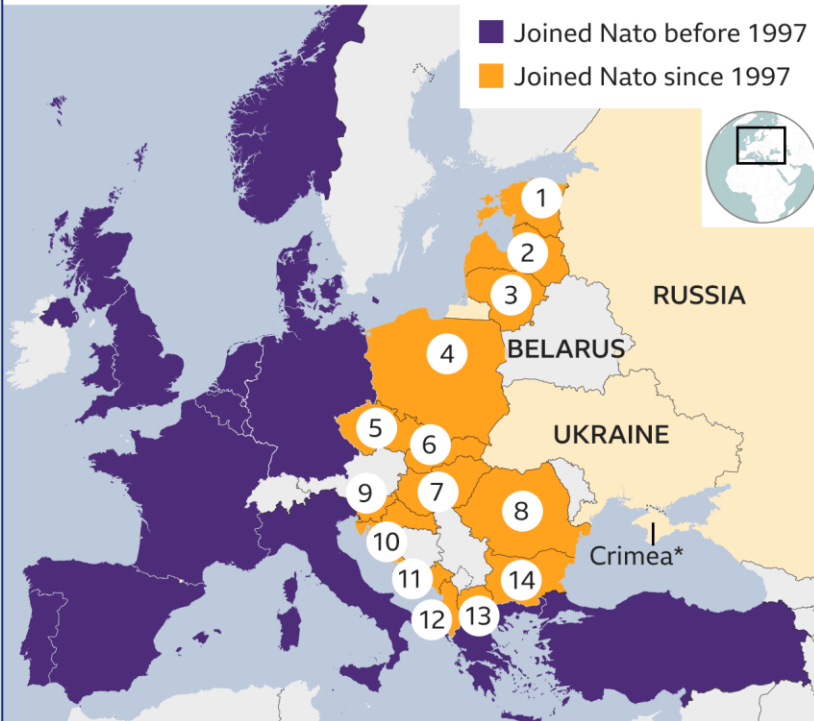
Dra. Beata Wojna

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Nato's expansion since 1997



- | | | | |
|-------------|------------------|--------------|-------------------|
| ① Estonia | ⑤ Czech Republic | ⑨ Slovenia | ⑬ North Macedonia |
| ② Latvia | ⑥ Slovakia | ⑩ Croatia | ⑭ Bulgaria |
| ③ Lithuania | ⑦ Hungary | ⑪ Montenegro | |
| ④ Poland | ⑧ Romania | ⑫ Albania | |

*Russia annexed Crimea in 2014

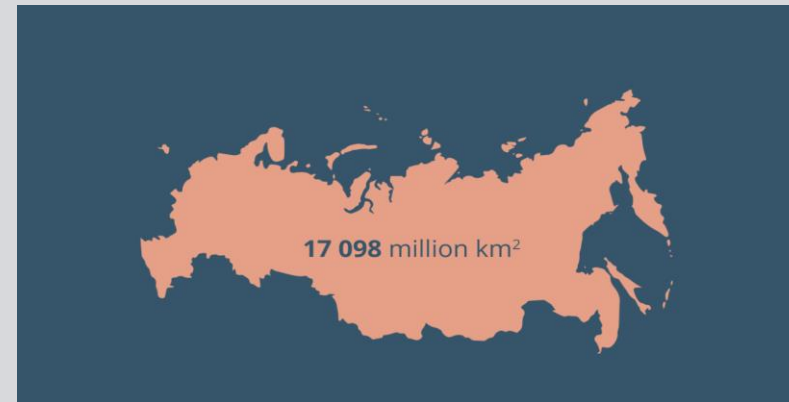
BBC

Seguridad militar de Europa. La OTAN y sus relaciones con Rusia





Unión Europea versus Federación Rusa



Territorio

UE - 27 países; Rusia es 4 veces más grande que UE

Población

UE tienen 3 veces más población que Rusia

Sistema político

Democracia vs autoritarismo

Economía

UE es 16% de economía global; Rusia es 3.2% de economía global

Fuerzas armadas

UE no tienen FA, son países miembros y OTAN los que garantizan seguridad. Rusia - fuerzas armadas no.5 en el mundo

Habitantes
447.3 millones

Habitantes
144.4 millones

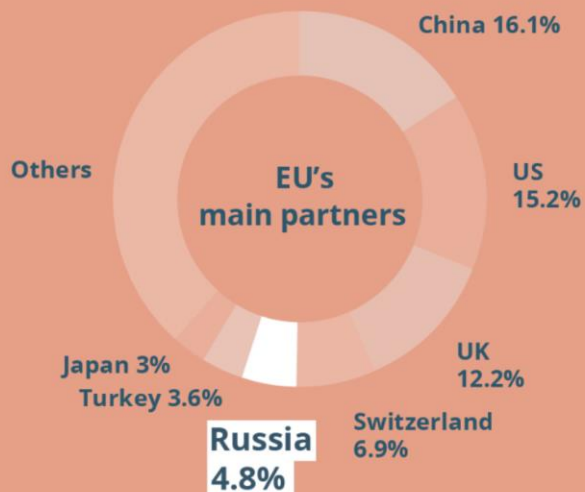
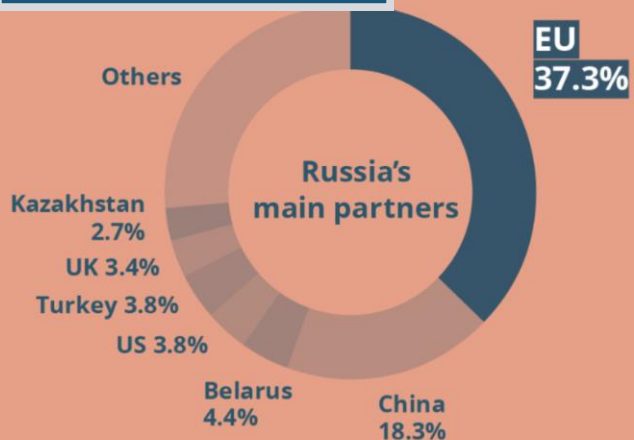
PIB/per capita
29 227 euro

PIB
13
trillions euro

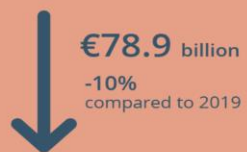
PIB
1.39 trillion euro, no. 11 en el mundo, cerca de economía de Brasil, Australia, España

PIB/per capita
17 822 euro

Comercio total
174.2 billones
de euros

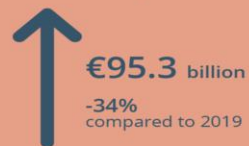


2020 EU EXPORTS
TO RUSSIA



(+ other manufactured products)

2020 EU IMPORTS
FROM RUSSIA



Relaciones económicas de UE con Rusia

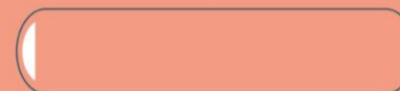
Inversiones

FDI in RUSSIA



75% from EU

FDI in the EU



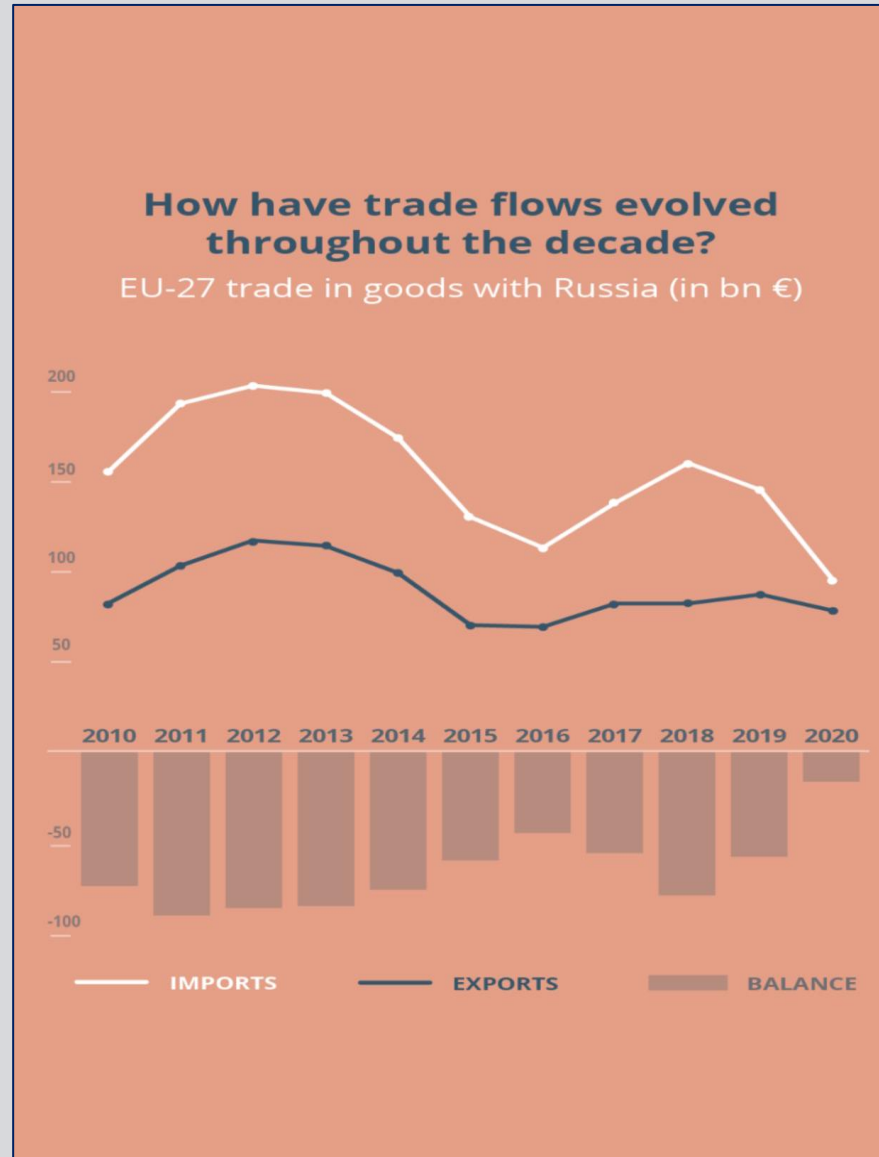
1.9% from Russia

UE es no. 1
inversionista en
Rusia (75%) 311.4
billones en 2019

Rusia aporta solo
1.9% de inversiones
en UE. Equivale a
135.9 billones euro
en 2019

Comercio total
UE - China 800 billones
Rusia - China 146 billones

Consecuencias de las sanciones caso del comercio



Relaciones energéticas de UE con Rusia

EU imports of crude oil

by partners 2019 (%)



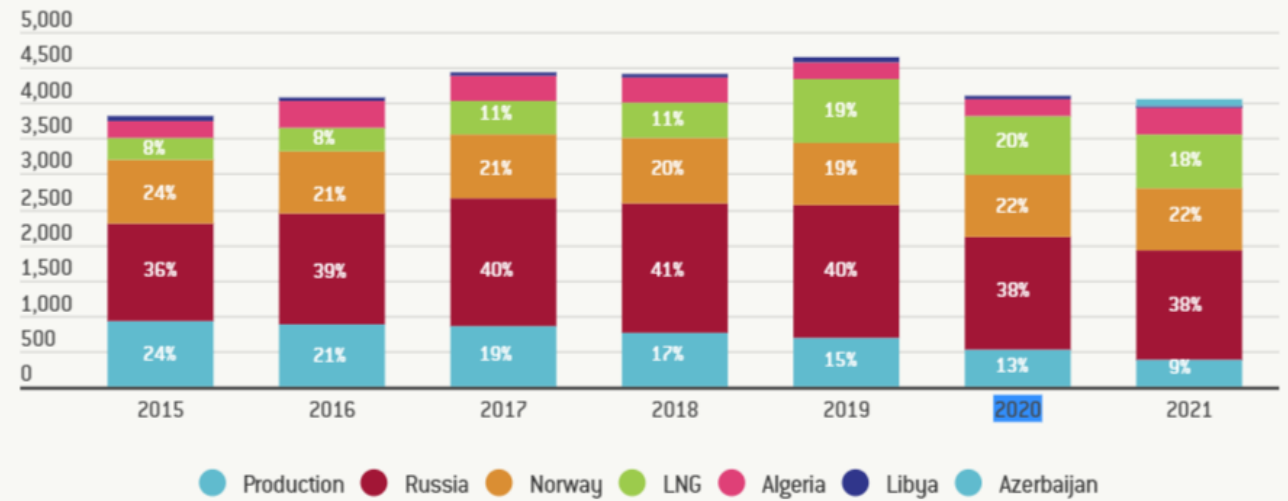
EU imports of natural gas

by partners 2019 (%)



Shares based on million cubic metres
Imports from not specified countries excluded
Source: Eurostat

Figure 1: Annual EU27 natural gas domestic production and imports (TWh)



Source: Bruegel based on ENTSOG, GIGGNL, GIE, NPD.

Gas pipelines and LNG carriers

- European Union in 2019
- Gas producer supplying EU

- Alliances and bypasses**
- Three Seas Initiative country
 - Country bypassed by Russia
 - Country with gas pipeline agreement with Russia

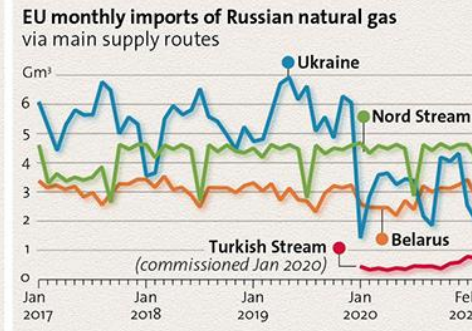
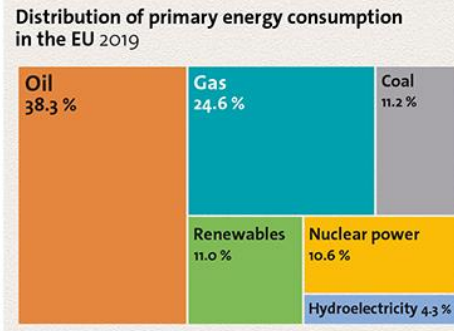
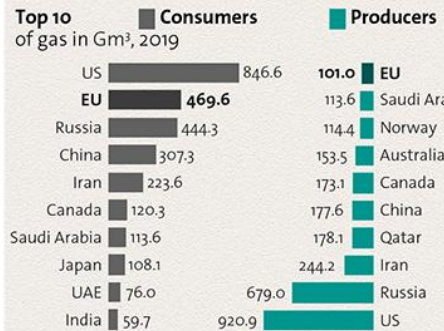
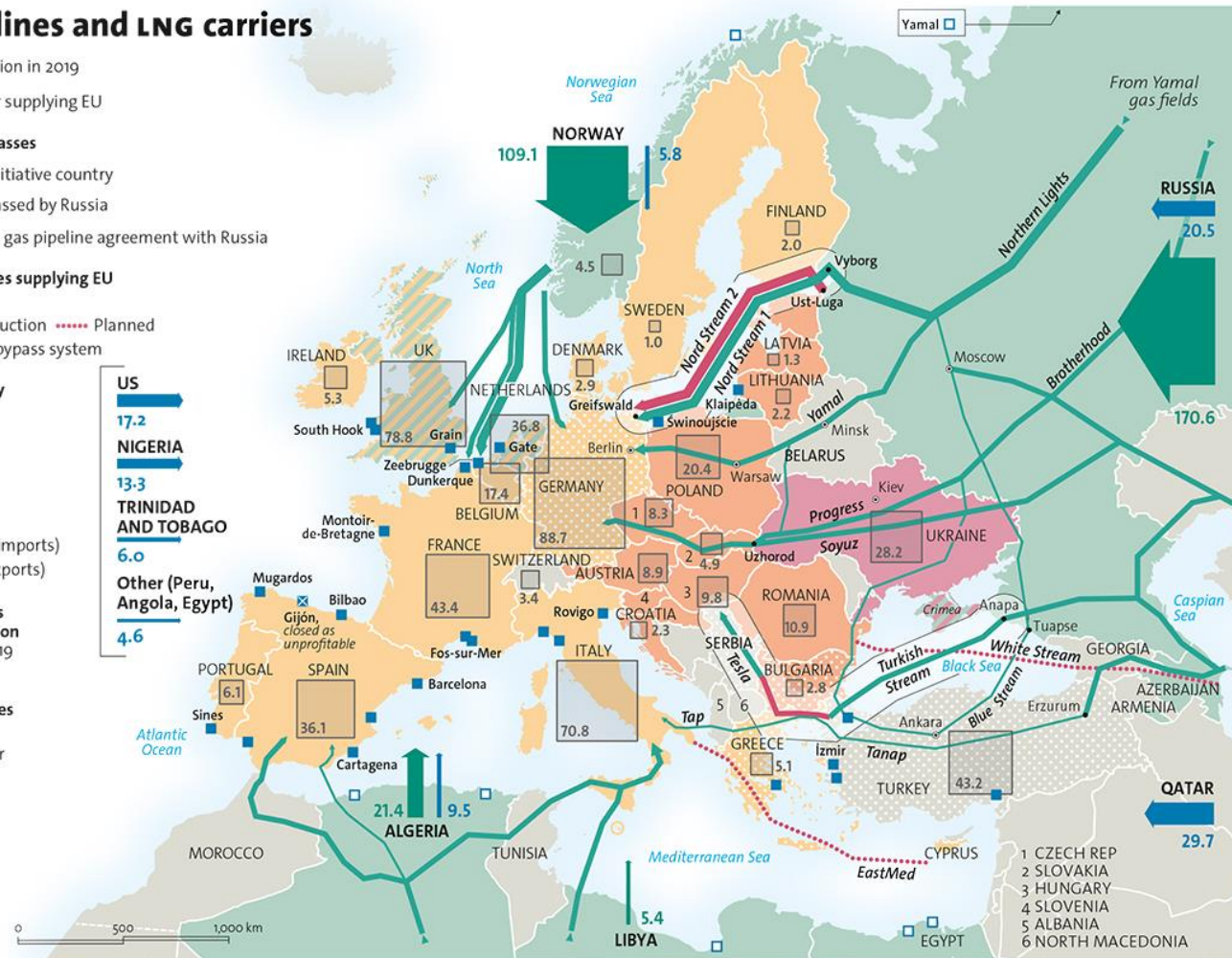
- Major gas pipelines supplying EU**
- Existing
 - Under construction
 - Planned
 - Ukraine bypass system

- Transport capacity in Gm³/year**
- Over 50
 - 20 to 50
 - 5 to 20

- LNG terminals**
- Regasification (imports)
 - Liquefaction (exports)

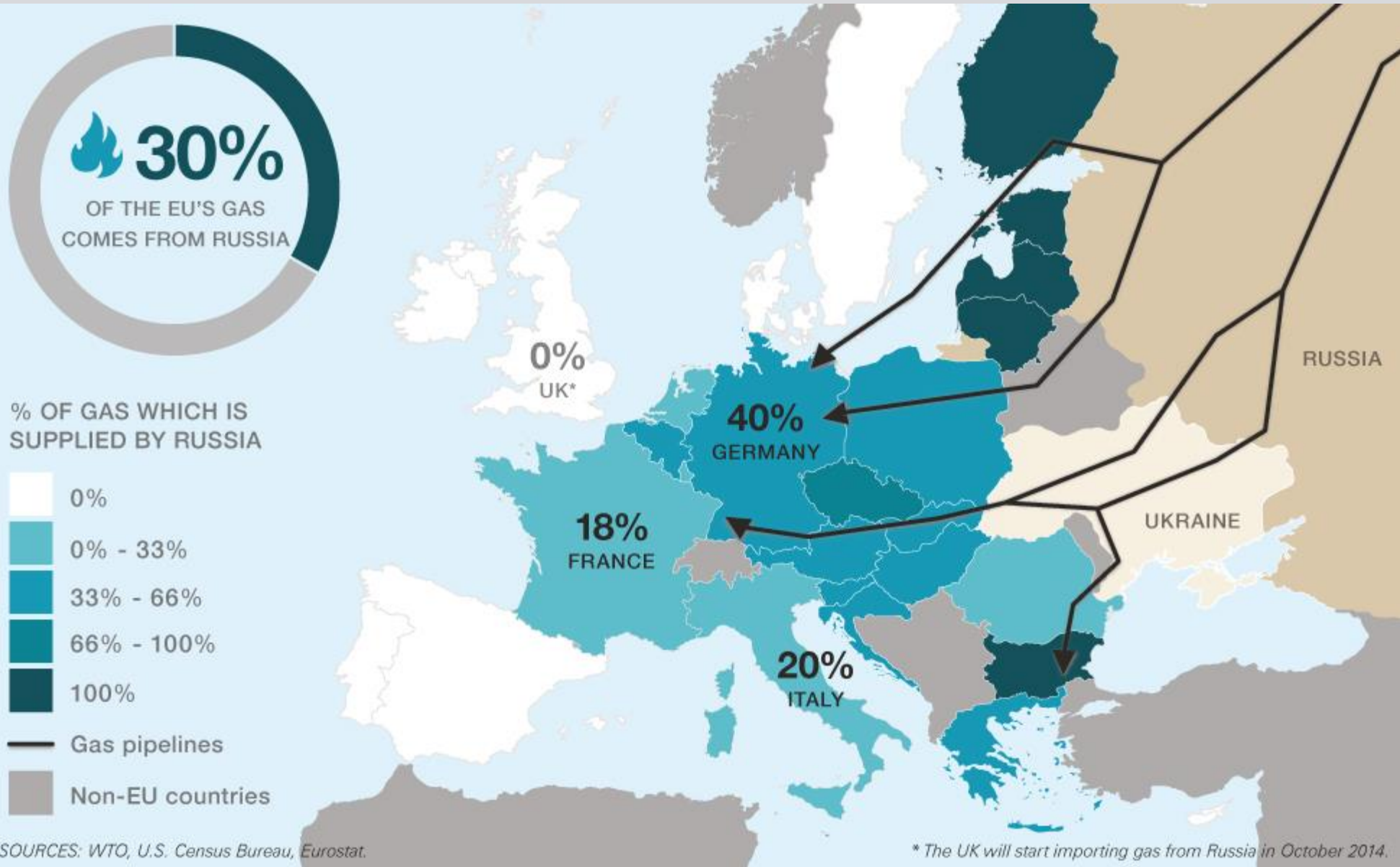
Annual gas consumption in Gm³, 2019

- EU imports from non-member states in Gm³, 2019**
- By LNG carrier
 - By pipeline



¿Gas como arma en las relaciones de Rusia con el Occidente?

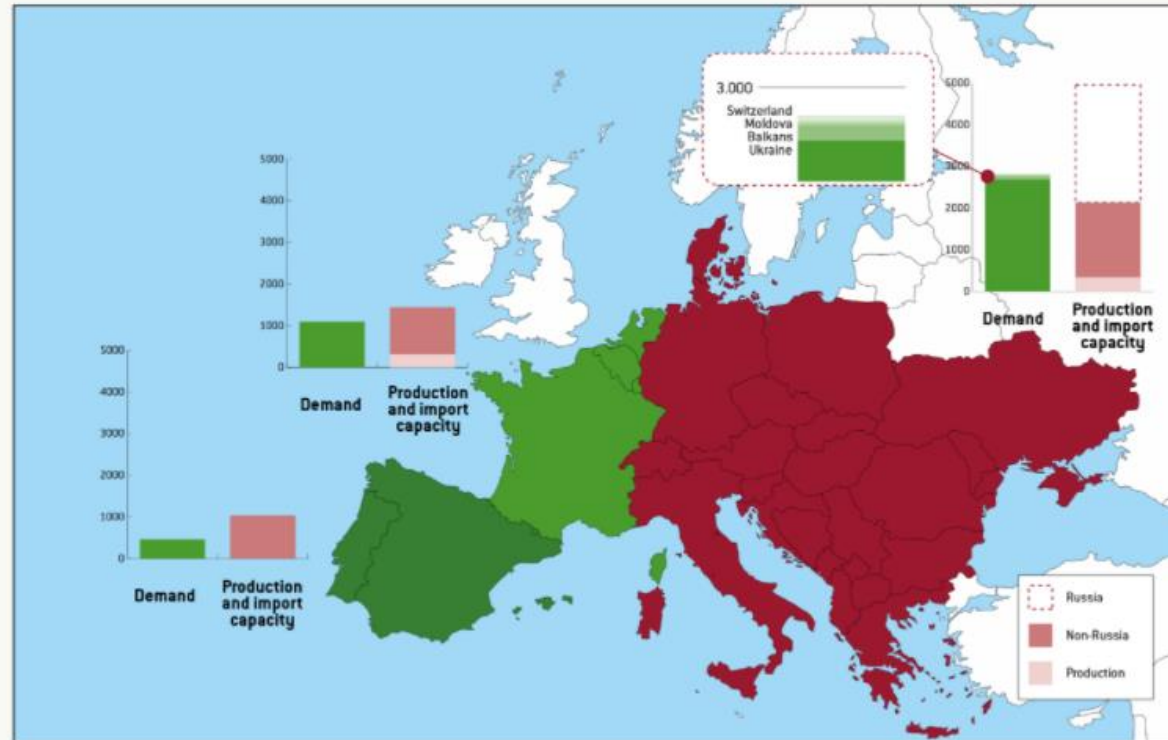
Gas pipelines and LNG carriers, by Cécile Marin (Le Monde diplomatique - English edition, May 2021)



How dependent is Europe on Russia for gas? - CNN.com

¿Puede UE sobrevivir sin gas ruso?

Figure 2: Direct exposure to a gas disruption from Russia differs across Europe



Sources: Bruegel based on Eurostat (nrg_cb_gasm), ENTSOG, GIE, GIIGNL, GIE, NPD .

Can Europe survive painlessly without Russian gas? | Bruegel