

**GLOBSEC US Foundation**



# **Five Security Scenarios on Russian War in Ukraine for 2024-2025:**

Implications and Policy  
Recommendations to Western  
Partners



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# Preface

This study is a continuation of the previous work done on scenario building in November 2022 with a foresight analysis of potential short- and medium-term security developments in Ukraine and their further implications for European and global security. Our team have developed five possible scenarios of political and military transformations with varying degrees of likelihood.

In our approach, we have combined the elements of foresight, expert survey, brainstorming, and desk research to map possible transformations and changes in Ukraine's security environment. As in previous work, the project team anchored much of their framework building around a recent [article](#) by the Commander-in-Chief of the Armed Forces of Ukraine, General Valeriy Zaluzhnyi.

Forty-one influential Ukrainian experts have selected the top ten factors among 58 suggested for consideration, various developments of which drive different scenarios. This helped us project various positive and negative options for the transformation of Ukraine's security situation in 2024 and 2025. As in previous work, we have included probability scores for each scenario based on experts' reading of the current events in and around the Russian war against Ukraine. Nonetheless, for obvious reasons, we were not in a position to obtain full and comprehensive information from confidential sources.

All the proposed scenarios have a common denominator: Russia will never relinquish the idea of conquering Ukraine and destroying its statehood, regardless of changes in the political regime there (seeing Russia turning democratic in the immediate future is close to impossible). Therefore, many experts consider the factor of the “withdrawal of Putin from power” as less relevant to the analysis (ranking as far as number 37 out of 58 factors). Russia will never forget and forgive its humiliation in its *blitzkrieg* plans to conquer Ukraine, as Ukraine stands alone, and strengthens itself as a strong military state. Russia will be licking its wounds and preparing itself for another fight, be it in two or three years or more. With Russia being infamous for its careless breaches of the international legal order, no one should rely on its maturity to respect it in the future. With this in mind, strong mechanisms of deterrence, notably bilateral security arrangements with Ukraine in the immediate term, and membership of Ukraine in the EU and NATO in the medium term are considered to be the only viable instruments to bring down Russia's imperialistic appetites.

In contrast to our previous Scenarios 2022/23, this work foresees more in the way of negative or ambiguous scenarios. Nevertheless, our analysis aims to provide our partner countries with a clear understanding of all possible implications from each of them and to recommend a clear pathway to increase the probability of the most desirable positive scenario with the obvious beneficial outcomes to restore and preserve democracy on the European continent.

## On the Specifics of Considering Military Factors in the Analysis

When analyzing possible scenarios for the development of the situation in the Russian-Ukrainian conflict, the following military aspects should be taken into account:

1. **Quantitative parameters or indicators** cannot be considered as the most significant ones. The number of weapons, ammunition and personnel is not decisive. The analysis of the ratio of military capabilities must necessarily include qualitative indicators of weapons, the level of training and motivation of personnel, and the ability of the military leadership to quickly learn the lessons of operations and promptly introduce new ways and methods of warfare.
2. Therefore, assistance from partners **cannot be assessed** by the following indicators: a simple **request** of the Armed Forces – equipment **promised** – and equipment **received**. Each of these indicators is quite dynamic and not always objective. For example, the request of the Ukrainian Armed Forces has always been unrealistic to meet, as it was based on classical calculations of the need for weapons and ammunition for combat operations using the methods of the last century. As a rule, partners keep their promises regarding the amount of aid, but the problem is the unpredictability of the timing of its receipt. Therefore, when they say "We have received 40% of the promised amount", they mean a certain date.
3. **Technological superiority** over the enemy is important in two basic areas of modern warfare: situational awareness (knowing the location of the enemy down to and including the individual soldier, and providing each soldier with information about the location of the enemy in his area of responsibility) and the ability to engage targets with high-precision fire at distances of up to 200 km.

4. **Military assistance** from partners should primarily include systems that provide such a technological advantage. This will reduce the need for a larger quantity of classical means of warfare: non-precision artillery, armoured vehicles, and ammunition.
5. War creates a window of opportunity for **innovation**. Active support for new ideas and their rapid implementation can be more effective than spending resources on expanding the production of classical weapons systems.
6. Ukraine needs to eliminate Russia's **dominance in the air** (also, after receiving F-16 aircraft) and create a **reliable air defence system** both at the front and in the rear. These are the last strategic advantages of Russia, the loss of which will accelerate its defeat. All this is feasible and could be achieved by the end of spring 2024. Therefore, the scenario of a "frozen" conflict after 2024 is considered by many military experts as 'provisionally likely'.

Regardless of the situation in Russia itself and its external efforts, the **main military factors** that will determine a positive outcome of this conflict for Ukraine are:

1. **Increased and stable supply of military, technical and financial assistance** to Ukraine from its partners.
2. The ability of the military and military-political leadership of Ukraine to ensure **rapid transformation of the defence and security sector to achieve technological superiority** over the enemy.

# Five Scenarios and Top 10 Factors with the Most Crucial Impact on the Security Situation

## Breakdown of Scenarios' Probability

<b>Scenario 1</b> "Hybrid Type World War III: Acute Regional Conflicts and Wars Across the Globe with "Blurring" of the War in Ukraine by Wars in the Middle East, Caucasus, Balkans, Asia-Pacific, etc"	<b>27,26%</b>
<b>Scenario 2</b> "Focus: The Russian War in Ukraine. Prolonged War of Attrition (Beyond 2025)"	<b>31,02%</b>
<b>Scenario 3</b> "Focus: The Russian War in Ukraine. Stalemate/Freeze. Political and Diplomatic End to the War Under the Coercion of Third Countries"	<b>18,8%</b>
<b>Scenario 4</b> "The Liberation of Ukrainian Territories/Withdrawal of Russian Troops Without Accomplished Political and Diplomatic Settlement"	<b>18,8%</b>
<b>Scenario 5</b> "Russia's Military Defeat in Ukraine. De-Occupation of All Territories. Restoration of Control Over Ukraine's Internationally Recognised Borders. Reparations by Russia. Indictments and Justice on Russian War Criminals. Russia's Gradual Transformation"	<b>3,76%</b>

## Comparison of the Top Ten Factors with the Most Crucial Impact on Ukraine's Security Situation

### Top Ten Factors (in diminishing order of significance)

	Scenarios 2022/23	Scenarios 2024/25
1	The level of military (lethal weapons) support provided by international allies to Ukraine	Resource sufficiency of the security and defence sector of Ukraine
2	The operational-tactical achievements of Ukrainian forces within the active combat zones	Operational and tactical successes of the Ukrainian Armed Forces
3	The state of resources available to Ukraine's defence and security sector	Level of support for Ukraine with weapons by all partners (West+)
4	Russia's military capability to continue conducting active offensive operations and terror against Ukraine's civil population	The US presidential race in 2024
5	Solidarity among Ukraine's allies towards the sanctions against Russia	Increasing the production of weapons and ammunition by Ukrainian industry
6	Russia's nuclear terror: the use of tactical nuclear weapons + the acts of terror against Ukraine's nuclear energy infrastructure	The state of Ukraine's mobilisation resources
7	Shifts in US public opinion towards the support of Ukraine	The potential of Ukraine and Russia in unmanned systems
8	(De)stabilising sociopolitical processes within the EU and European states	Level of political and diplomatic support for Ukraine by all partners (West+)
9	China's support to Russia in the war/China's involvement as Russia's ally	Russia's military potential to continue the war
10	The impact of the Western sanctions on Russia's internal position regarding its invasion of Ukraine	Stockpiles of weapons and ammunition in the EU and other partners of Ukraine

*These factors have been selected on a rating basis as a result of the experts' surveys conducted by our team of 41 Ukrainian experts. We proposed that experts select ten of the most impactful factors from the 58 suggested in the questionnaire. In further scenario development, we followed the potential transformations within each factor and their impact on the overall scenario. The survey was conducted in November 2023.*

# Scenario 1

## “Hybrid Type World War III: Acute Regional Conflicts and Wars Across the Globe With “Blurring” of the War in Ukraine into Wars in the Middle East, Caucasus, Balkans, Asia-Pacific, etc”

(Probability Score – 27.26%)

### I. Scenario Description

Overall **dynamics of the military and security environment** will be characterized by the general vulnerability of the security landscape all over the globe. Encouraged by the prolonged resource-consuming ongoing war in Ukraine with no definite end, as well as ineffective efforts by Western countries to force Russia to stop hostilities in Ukraine, and the impotence of international institutions to hold Russia accountable for its war crimes, countries with similar imperialistic thinking will feel themselves encouraged to revive territorial disputes and will try to absorb smaller independent states/autonomies, thus giving rise to several other flickering (shimmering) conflicts all over the globe. These deep-rooted and hidden tensions will surface more visibly and will evolve into serious outbreaks of regional tensions growing into small regional wars with the potential to spread over a wider region. Higher risk zones are the Middle East (Israel-Iran), Asia-Pacific (China-Taiwan), and Balkans (Serbia-Kosovo).

Having been dragged into an impossible situation with its military adventurism in Ukraine, **Russia** will try to orchestrate some of these conflicts by either indirectly inducing them and supporting their like-minded assertive sides, or even directly plotting some

scenarios to get Western Allies overstretched to deal not just with several conflicts simultaneously, but also with some painful aftermaths like a sudden influx of migrants from the Middle East or North Africa.

For these reasons Russia will also resort to activities to further destabilise **global food, energy and ecological security**, evoking artificially created technogenic catastrophes (like Estonia with its Hydro Power Plant near Narva city or Zaporizhzhya Nuclear Power Plant in Ukraine) and/or attacking export grain routes from Ukraine (mostly, via the Black Sea). These actions, especially the distortion of global food security, will, however, have an adverse effect on Russia by further alienating it from implicitly loyal or neutral countries (mostly in Africa), which will be forced to reconsider their previously good relations with this assertive northern neighbour of Ukraine.

Regardless of the naturally decreased international focus on Ukraine and cuts in military support from the Partner Countries, **Ukrainian society** will remain resilient and ready to sustain hardships emanating from the war in full expectation of the eventual victory of the Ukrainian Armed Forces (UAF) over the enemy. There might be some attempts at social unrest,



mostly orchestrated through Russian psyops, then real disunity in Ukrainian society. Some of them will be driven through calls for presidential elections in Ukraine and supported by some opposition parties in Ukraine for their own vested political interests. This won't distort the unity of the country, as under this scenario Russia will be forced to play simultaneously on several different fronts and will be also outstretched with its resources: (1) inducing/plotting unrest in other regions; (2) interfering in US elections; (3) stimulating pseudo-Maidan in Ukraine; (4) trying to influence political electoral cycles in European countries and EU institutions.

Meanwhile, in the first half of 2024, **Russian political elites** will also be pre-occupied with the smooth re-election of Putin for another term and consequent re-establishment of their position within the 'decision-making' circle, as well as maintaining control over those returning from the combat zone in Ukraine. Their number will be growing, as well as their discontent with the absence of the promised benefits, as the Russian economy will be struggling to ensure an appropriate social package for them as the economy moves onto a more militarized basis.

**The situation in Europe/EU** will still be marked by high social support and solidarity with Ukraine from ordinary Europeans, despite a series of internal political changes in several EU countries and EU institutions due to the active political cycle in 2024. This factor has been considered to be relatively rigid and stable, and less relevant as an influence on changes between scenarios by most of the Ukrainian experts who participated in the groundwork survey for this analysis.

The bilateral negotiations track of Ukraine with key partners on **security guarantees** will be slowed down to some extent, due to internal political reshuffling as a result of political electoral cycles and respective adjustments of foreign policies in respective countries. Ukraine's security guarantees will mainly concern the provision of minimum volumes of military-technical and financial assistance, as well as the expansion of sanctions against Russia. Pressed by limited resources, partners will increase pressure on the Ukrainian leadership regarding more effective and rational use of aid, and the improvement of the management and decision-making system. One of the conditions will be the involvement of experts in operational planning. Ensuring an effective accounting system for military-technical assistance will be of very great importance.

Meanwhile, Ukraine will be struggling to get overwhelming support for its proposals for the **Peace Formulae** of President Zelensky partially because of the active electorate cycle worldwide in 2024, but also due to the rise of regional conflicts and re-

spective dispersal of attention from Ukraine. Peace talks with Russia will have no real perspective and will not be supported by almost the entire population of Ukraine.

The dynamics of Ukraine's process for **European integration** will not change. The emergence of conflicts in other regions of the world will not affect the start of negotiations on Ukraine's accession to the EU, planned for the first quarter of 2024. At the same time, the character, tempo and substance of these negotiations will depend on factors of an external nature (such as electorate cycles in individual countries, the EU, NATO etc) and the position of individual European countries. Against the background of the increasing intensity of multiple tensions all over the world and the static character of the Russian war in Ukraine, it will be extremely difficult for Ukraine to aspire to get an immediate invitation to membership in NATO at the Washington Summit in July 2024.

The position of **international institutions** (UN, IAEA, OSCE, ICRC) will remain completely irrelevant to the dynamics of the global and European security situation with these institutions remaining 'silent outsiders' or having a 'nominal voice' in international relations. In contrast, more intense activity will be observed within the UN ICC and on setting up a Special Tribunal on Crime of Aggression (STCA) for Russian political leadership, however, this dynamic might also be in a reverse direction

## Key Driving Factors

### ► PROVISION OF RESOURCES TO THE SECURITY AND DEFENCE SECTOR OF UKRAINE

The need to mobilise additional resources for the development of their economies in Europe and the USA will reduce the amount of external financial aid for Ukraine. This will create an additional burden on the Ukrainian budget to meet the current needs of the armed forces. Redistribution of available resources in favour of the defence and security sector will negatively affect the financing of other sectors of the economy and social programs. The government of Ukraine will have to adjust the planned budget expenditures and will be forced to reconsider it several times throughout 2024 and, possibly, 2025, foremost by resorting to extra external borrowing.

### ► OPERATIONAL AND TACTICAL SUCCESSES OF THE UKRAINIAN ARMED FORCES

Given limited resources, the military leadership of Ukraine will be forced to rethink the ways and methods of conducting combat operations and focus on

implementing solutions that should ensure technological superiority over the enemy. This particularly implies the improvement of situational awareness (the use of all types of modern sensors, their integration into a single system of processing, analysis and distribution of information and targeting) and the use of new means for high-precision strikes (drones, guided munitions and cruise missiles). This should compensate for the shortage of ammunition and artillery. Implementation of such systems will require more thorough training of specialists with the involvement of experts from partners. The success of the Armed Forces on the battlefield will depend on the rate of introduction of new technologies by the military, corresponding changes in the system of management and operation of headquarters, as well as improvement of the system of training specialists, which is a difficult and time-consuming process

#### ► **LEVEL OF SUPPORT FOR WEAPONS SUPPLY TO UKRAINE BY ALL PARTNERS (WEST+)**

The emergence of new conflicts will require the redistribution of US and European resources to support stabilization measures in crisis regions. This will reduce their ability to provide financial and military assistance to Ukraine. At the same time, the minimum critical volumes of arms and ammunition supply will be preserved. As an alternative, the mechanisms of sanctions will be more actively applied, as well as the withdrawal of Russian frozen assets to help Ukraine, including for the purchase of weapons and the development of military industry. However, it should be taken into account that the escalation of regional conflicts will reduce Russia's ability to receive weapons and ammunition from the countries that will be involved in them (Iran, North Korea, Syria, Egypt, etc.)

#### ► **THE US PRESIDENTIAL RACE IN 2024**

In 2024 during the election campaign, both major US parties (Democrats and Republicans) will be faced with a necessity to redirect their political attention to other parts of the globe, where new conflict zones may appear or gain in intensity. Under these circumstances, the political attention on the Russian war against Ukraine may be diminished. The recent outbreak of the war in Gaza will continue to demand a high level of attention from the Biden administration, and the potential redirection of weapons and materiel that might otherwise be sent to Ukraine.

With the possibility of the election of Trump as US President, the whole system of counterbalances between the EU, NATO and the US might well be undermined. Reverting to the isolationist policy, pursued by Trump during his first term, Euro-Atlantic unity may be undermined by Trump's decision to lessen or withdraw the US military presence in Europe. At the end

of the day, it might trigger direct military conflict between NATO allies and Russia.

In geopolitical terms, the policy of Trump may destroy the emerging coordination mechanism between the US, NATO and EU in providing comprehensive assistance to Ukraine. It will further erode the Ukrainian possibility of self-defence and reconstruction.

#### ► **INCREASING THE PRODUCTION OF WEAPONS AND AMMUNITION BY THE UKRAINIAN MILITARY-INDUSTRIAL COMPLEX**

The aggravated security situation in many geographical locations will demand close attention from core partners of Ukraine, which may result in further limiting of direct military support, including the top priority of ammunition both of NATO and Soviet-type standards. It will pose an additional burden on the Ukrainian defence industry to cover the existing demand from the Ukrainian Armed Forces. While being able to meet, in part, the need for ammunition of Soviet calibres, Ukrainian manufacturers will face some difficulties in filling the gap in NATO 155 mm standards. On the other hand, this will act as an accelerator for the Ukrainian industrial base to launch production lines for NATO standard ammunition. In other areas of military equipment, a wide range of products that Ukraine produces independently, domestic capabilities will still be not enough to meet demands for sustainable offensive operations.

#### ► **THE STATE OF UKRAINE'S MOBILISATION RESOURCES**

The mobilisation resources will remain limited and require rational use. Faced with the limited ability of partner countries to provide technologically advanced military assistance, as well as slower international financial assistance coming to Ukraine, the country will be forced to consider expansion of its manpower and to call more people under general mobilisation. It will have to build up its reserves more vigorously. The leadership of the Armed Forces of Ukraine will be forced into a careful 'balancing act': (1) to get more civilians and train them as reservists; and (2) to actively implement new technological solutions, as well as forms and methods of conducting combat operations to minimize the loss of personnel.

#### ► **UKRAINIAN AND RUSSIAN POTENTIAL IN UNMANNED SYSTEMS**

Against the backdrop of the shrinking of military and financial assistance to Ukraine, as new conflicts draw the attention of global Western actors, Ukraine may face difficulty in sustaining the governmental program "Army of Drones". It was resourced partly through in-

ternational and domestic fundraising. It could go so far as to put at risk the scale of envisaged production.

It could also negatively influence the mass production of long-range UAVs, which at the end of 2023 had the potential to grow into a powerful instrument for bringing war back to Russian territory. There is a possibility that deliveries of spare parts for FPV drones to Ukraine from China may also be jeopardised, either because Russia could buy up the stocks or a more restrictive policy of Beijing.

Lessened attention from the West to sanctions circumvention by Russia and its allies may lead to intensified attempts to localize the production of Shahed-type drones on Russian territory with the utilization of Western technologies.

► **LEVEL OF POLITICAL AND DIPLOMATIC SUPPORT FOR UKRAINE BY ALL PARTNERS (WEST+)**

**€237.9 BLN AID APPROVED FOR UKRAINE** TOP LEAD

Committed aid to Ukraine since the beginning of the full-scale war, € bln



Source: Ukraine Support Tracker. Data as of July 31, 2023.

t.me/uawarinographics

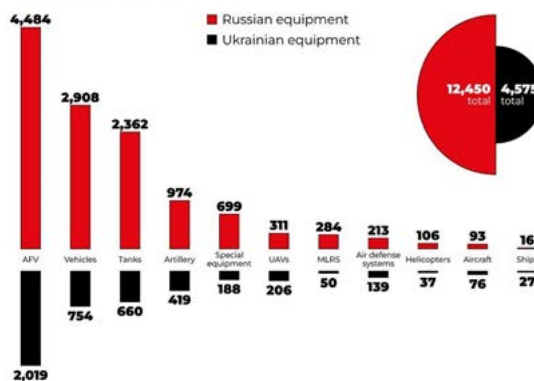
With the maintenance of political and diplomatic support to Ukraine from the partner countries, they will be distracted by getting engaged in political and diplomatic solutions to other conflicts emerging on the continent. The G7 Group of countries, the EU and NATO will still constitute the main driving force behind support for Ukraine. The position of the US will remain crucial for the positions of those institutions and Western support to Ukraine in particular, but it will naturally depend on the results of the US elections in November 2024.

At the same time, this international support to Ukraine will be conditioned (or, at least, significantly depend) by developments in the internal situation within Ukraine, namely, the ability of President Zelensky and his executive team to manage the country in the third and fourth years of the war. Particular attention will be given to internal reforms and transparency in government spending (especially of international assistance), a real fight against corruption, integrity of the military and defence senior management, and consolidation of political and military elites.

► **RUSSIA'S MILITARY POTENTIAL TO CONTINUE THE WAR**

**12,450 UNITS OF RUSSIAN EQUIPMENT WERE DESTROYED** TOP LEAD

Comparison of documented\* losses of Russian and Ukrainian equipment during the full-scale invasion, units



Source: Oryx. Data as of October 11, 2023.

\*Photo or video confirmation is available.

t.me/uawarinographics

**RUSSIAN DEATH CONVEYOR** TOP LEAD

Russia mobilizes approximately as many soldiers per month as they die during the month.

Number of mobilized in Russia per month



Average monthly number of Russians killed in the last 6 months



Source: Main Directorate of Intelligence of the Ministry of Defense of Ukraine, General Staff of the Armed Forces of Ukraine.

Data as of October 20, 2023.

t.me/uawarinographics

In the first four scenarios, Russia will benefit from the stalemate and will use this pause in active combat actions (however long) to resume its capacity to fight. In fact, it has started to prepare itself for a long exhausting war in Ukraine since the beginning of 2023 by reorganizing the Russian economy and its military-industrial complex. It has already learned lessons from

the first phase of the war in 2022/23 and re-adjusted its focus to vigorously develop modern electronic warfare (EW) means such as jamming communication and navigation signals. It has already been modernizing its EW forces over the past decade, creating a new branch of its army and developing around sixty new types of equipment<sup>1</sup>. Apart from Lancet loitering munitions and reconnaissance drones, Russia has increased production of precision-guided shells that can be aimed by ground spotters.

Manpower will remain of less significance when it comes to death tolls due to unlimited access to human resources and strong economic motivation factor to go to a warzone in Ukraine to receive a rather decent financial reward compared to the general poor salary level in Russia.

### ► **STOCKPILES OF WEAPONS AND AMMUNITION IN THE EU AND OTHER PARTNERS OF UKRAINE**

Stocks of weapons and ammunition in the warehouses of the armed forces of NATO and EU countries will be kept at the level necessary to ensure the tasks of collective defence. The transfer of weapons to other countries will be carried out only where supplies can be backfilled by new purchases and increasing the capabilities of the military-industrial complex of the EU and the USA. Investments in the production of ammunition in partner countries will begin to yield results in the second quarter of 2024. In the case of decisions to provide military aid to other countries in new regional conflict zones, the amount of weapons and ammunition for Ukraine will be reduced. There is some evidence that this is already occurring due to the war in Gaza and increased Israeli requirements for ammunition.

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1 At the beginning of the war in February 2022 it had a noticeable advantage over Ukraine, which possessed around 65% of jamming platforms produced in Soviet times.

## II. Scenario implications<sup>2</sup> for Western allies (foremost, the US, the UK, the EU, and CEE countries)

1. **Ukraine's potential failure in the war against Russia** might be caused by a sudden drop in Western military assistance and the West falling short of deterring Russia with effective pre-emptive measures.
  2. **Albeit minor, but still an actual nuclear threat in Europe, especially given Russia's withdrawals from major international treaties on nuclear deterrence.**
  3. **Actual World War III of the hybrid type**, with multiple centres of tensions of high intensity, leading to worldwide security and economic paralysis.
  4. Continuing **risks of nuclear contamination in Europe, caused by artificially provoked technogenic catastrophes (like on Zaporizhzhya NPP)** with consequent after-effects of humanitarian and ecological catastrophe on the entire continent.
  5. **Risks of possible Russian advances and attacks on NATO's Eastern Flank countries** (CEE region) when it can reconstitute military reserves capable enough to challenge NATO countries in the immediate neighbourhood (especially in case of the election of Trump and respective dysfunction of NATO). CEE countries become the primary target for further strikes.
  6. **NATO's potential engagement in a conventional war against Russia** with a nuclear component not being excluded (either on Ukraine's territory, the CEE region or elsewhere in Europe).
  7. **The paralysis and inevitable dissolution of all the international and transatlantic institutions and security alliances** (UN, IAEA, NATO, EU, OCSE, CoE). International vacuum for possible mechanisms of de-escalation.
  8. **The opening of new war theatres** in the Indo-Pacific (China-Taiwan, India-China, India-Pakistan), Middle East (Iran-Israel), Europe (Turkey-Greece) and others not visible at the time of writing.
  9. **Russia's attack on NATO** countries is not ruled out.
  10. Russia will win the time and **reconstitute its armed forces**, whereas NATO will not be able to match the same speed and remain vulnerable to a potential Russia's attack.
  11. Increased risks of a **conventional war of NATO** countries with Russia.
  12. Russia might feel ready at some point to **attack other states like Georgia, Kazakhstan and Moldova** (apart from directly confronting Baltic states).
  13. Potential emergence of **military and technical alliances of a hybrid nature** between Russia and North Korea and/or China, and/or Iran.
  14. Risks of a **'hanging conflict' before Russia is ready to attack** Ukraine again (Chechen wars 1 and 2 scenario).
1. **Reassessment of the level of military threats** from Russia towards NATO countries, and **psychological preparedness for a conventional war** of NATO countries with Russia.
  2. **A revival of military and defence production sectors** to being prepared for a potential conventional war; **replenishing of the stocks** in sufficient quantities in the NATO/EU member states.
  3. Development of more **sound security and defence components of the EU to the level of real strategic autonomy**.
  4. **Accelerated development of modern warfare tools (JAVs, EW etc), capacities and competencies**, based on Ukraine's experience and further needs.
  5. **Decreased dependency on Russia** in strategic products (energy).
  6. **Aligned commitments on increased military spending** according to NATO requirements (2% of members' GDP and over).

2 Negative implications are marked in red; positive in green.

# Scenario 2

## “Focus: The Russian War in Ukraine. Prolonged War of Attrition (Beyond 2025)”

(Probability Score – 31.02%)

### I. Scenario Description

The direction of the scenario will largely depend on which side (Ukraine or Russia) will be more successful in accomplishing its strategic objectives. The war will continue at the current level of intensity. In any case, a positional phase of the war will be a prelude before the next escalation, which will happen when either of the sides feels ready for successful advances. It will be a long and exhausting war with high human losses on both sides, partner Countries will have exhausted much of their resources all within a tense international political environment.

In those circumstances, **Ukraine** will be left with no choice but to keep the initiative by remaining on the offensive. With slower foreign assistance, Ukraine may slowly lose its capacity to advance and even might lose some territories. Military operations will continue, despite the exhaustion of both sides and numerous casualties. Ukraine will be striving to achieve a breakthrough of the frontline and de-occupation of Zaporizhzhia and Kherson regions with preparation for two separate operations - Crimean and Donbas (most likely in the Spring 2024 military campaign).

Throughout 2024, **Russia** will try to expand/fix the occupied territories as much as possible, prevent a breakthrough of the Ukrainian Armed Forces front, bring the military confrontation to a standstill, and, against the backdrop of the US election turbulence, put pressure on the West to stop helping Ukraine and force Ukraine to sign agreements in the spirit of the Minsk accords (destructive ambiguity). Meanwhile, forthcoming presidential elections in Russia will almost certainly force current political elites in the country to concentrate more on the internal situation and not resort to any active operations gambling on potential successes before the elections take place in March 2024. None of this will, however, prevent

Russia from making efforts to destabilise the global security order with hybrid attacks using man-made food, energy and technogenic disasters. It will also be trying to influence the outcomes of elections in several key global player countries and institutions like the US, EU, UK and others with sophisticated cyber-attacks. It will lack the capacity to perform all these tasks simultaneously with equal efficiency.

Even though the overall **dynamics of the military and security environment** will be less tense than in Scenario One, the global security landscape will remain volatile and sensitive to any potential provocations in different regions. One should not exclude the still growing assertiveness of China towards Taiwan against a background of the chain of elections in the US, EU, and even Russia. Small regional wars in a form of ‘managed chaos’ will still occur in the Middle East (Israel-Iran), Caucasus (Armenia-Azerbaijan), Asi-Pacific (China-Taiwan), and Balkans (Serbia-Kosovo), however, with less drastic and far-reaching consequences. The possibility of a nuclear conflict will remain low.

**Internally Ukraine** will remain resilient with a high level of belief in total victory over Russia. General support to the President, the government and the Ukrainian parliament is likely to fade slightly during the next two years, as Ukrainian society will become naturally exhausted from the war with no clear end in view. It will tend to find the reasons for this in mismanagement of the war-torn country. To improve the situation in the country and to reactivate frontline the Ukrainian President Zelensky might resort to some rotational “reformatting” of the government and military command. The next two years will be also characterised by a slow economic recovery in Ukraine, caused by the gradual militarisation of the economy. In the meantime, a complete reshuffle of political

authority in Ukraine will remain de jure impossible<sup>3</sup> and – without changes to the relevant laws – no elections will be conducted. As time goes on Ukrainian society will become more vulnerable to hybrid threads from Russia aimed at undermining unity within the country and with that ‘pseudo-Maidan’ perspectives may become more prominent in Ukraine.

Despite potential changes in American and European political elites caused by the electoral cycle in the US and the EU (and certain member states) with an expected surge of populist radical forces across Trans Atlantic, international support for Ukraine will generally remain stable. **The population of the EU and other European countries** will continue to show strong support and solidarity with Ukraine, which might, however, wane over a period of two years. Most people will get used to the fact of a long-lasting low-intensity war (like the one in Nagorno Karabakh). The positive dynamics of negotiations regarding **Ukraine's accession to the EU** will be maintained. At the same time, the length of this process will depend on Ukraine's success on the battlefield. Ukraine will also be struggling to receive an immediate invitation to **membership in NATO** at the Washington Summit in July 2024 as some member-states will be reluctant to open this issue for a country as big as Ukraine, which still has an ongoing bleeding conflict war aimed at recovering around 1/3 of its territory from the aggressor.

The bilateral negotiations track of Ukraine with key partners on **security guarantees** will be slowed down due to internal political reshuffling as a result of political electoral cycles and respective adjustments of foreign policies in respective countries. In this scenario, Ukraine's security guarantees will focus on ensuring the operational needs of the Armed Forces, maintaining the country's financial stability and expanding sanctions against Russia.

The conditions for providing guarantees will include requirements for the Ukrainian leadership regarding the more rational use of military-technical assistance, improvement in management systems and the operational planning procedures of the Armed Forces, taking into account the experience of military operations in 2022-23. One of the conditions will be the involvement of partner experts in the process of planning military operations. Ukraine will be gradually pursuing its **Peace Formulae** suggested by President Zelensky and will be relatively successful in gaining support for its proposals worldwide, even winning some of the important countries of the Global South. Still, this won't be sufficient to induce serious shifts in international order.

**Negotiations** with Russia will be off the agenda until the change of power in Ukraine and the changing

mood of the Ukrainian society (both seem highly unlikely), regardless of international pressure. Against the backdrop of slow changes and the lack of major victories, the domestic political situation in Ukraine might deteriorate to a certain extent.

The position of **international institutions** (UN, IAEA, OSCE, ICRC) will remain as unimportant and non-influential as in Scenario One with UN ICC and STCA for Russian political leadership showing more vividly.

## KEY DRIVING FACTORS

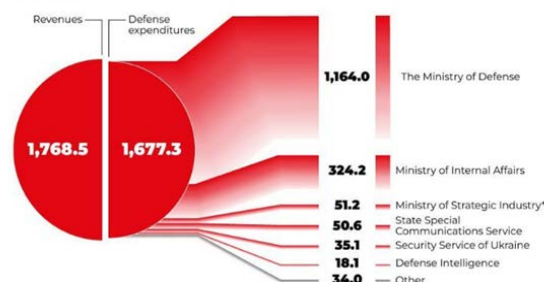
### ► PROVISION OF RESOURCES TO THE SECURITY AND DEFENCE SECTOR OF UKRAINE

#### 94.8% OF UKRAINE'S BUDGET REVENUES WILL BE SPENT ON DEFENSE

TOP LEAD

Ukraine's 2024 budget is another wartime budget. Most revenues will be spent on defense, while other expenditures, such as pensions, public sector salaries, or education costs, will be financed by Ukraine's partners.

Ukraine's state budget revenues and defense spending in 2024, UAH billion



Source: Draft Law on the State Budget of Ukraine for 2024

\*Development of the defense industry

t.me/uawarinographics

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Funding for the defence and security sector will remain unchanged, taking into account the state and dynamics of the country's economic renewal. At the same time, these resources will be able to cover only basic needs (salary, food, clothing, equipment, fuel, purchase of weapons and ammunition for domestic production). The dependence of the Armed Forces on the supply of ammunition and high-tech weapons systems from partners will remain. A critical challenge will be the limited mobilisation of resources to replenish losses in the medium term. This problem can be solved only through the mass introduction of new weapons systems and tactics that reduce the need for human resources and minimize risks to personnel.

### ► OPERATIONAL AND TACTICAL SUCCESSES OF THE UKRAINIAN ARMED FORCES

The counter-offensive, which Ukraine started in the summer of 2023 has reached its technological limits,

<sup>3</sup> It is prohibited by the Constitution of Ukraine to held elections in the time of martial law

which has placed both sides into a stalemate. Unless a massive technological leap to break the deadlock is undertaken there will be no significant breakthrough. In this scenario of a war of attrition, this element of technological advantage becomes the key to the victory of Ukraine. A stable supply of weapons and ammunition from partners will allow the Armed Forces to retain the initiative and stop Russian attempts to conduct offensive actions. To carry out effective counter-offensive operations, the Armed Forces of Ukraine must implement new weapons systems and models of warfare that compensate for the superiority of Russia in human resources, aviation and missile weapons. The campaign will centre around a combination of technological solutions in drones, electronic warfare, anti-artillery capabilities, demining equipment, use of robotics. The acquisition of F-16 aircraft and the corresponding weapons for them may eliminate the superiority of Russia in the air and will significantly affect the course of the war starting from May 2024.

In terms of other important equipment Ukraine would need modern advanced sensors that can identify the concentration of enemy forces, which then should be destroyed by modern precision weapons. In other words, Ukraine needs to make the 'sensor-shooter' chain even shorter. Ukraine is also forced to seek new solutions and/or to appeal to its partners for technologically advanced assistance in demining heavily mined fields as part of defence fortifications built up by Russians to prevent UAF from advancing.

The factor of timely supply of the much-needed equipment to enable Ukraine to continue with a successful counter-offensive will play a crucial role here, but the Partner Countries will still be lagging in timely deliveries, thus, tying Ukraine's hands and forcing the country to outstretch its production capacities to, at least partially, compensate for this time-lag, with the level of technological advancement of its conventional weapons remaining low.

#### ► LEVEL OF SUPPORT FOR UKRAINE WITH WEAPONS BY ALL PARTNERS (WEST+)

Despite the strengthening of war-weary rhetoric, the level of support for Ukraine from key EU and NATO countries will remain unchanged. This especially applies to countries that have the capabilities and resources to increase the production of weapons and ammunition (USA, Germany, France, Great Britain, Italy). Arms supplied by the West will remain sufficient to help Ukraine sustain the war. The supply of ammunition and precision weapons will gradually increase in 2024. Restrictions on the supply of modern systems to ensure the technological superiority of the Armed Forces, including aviation and air defence, will be gradually but partially removed. Western allies will remain overly cautious in supplying Ukraine

with the latest technology and more powerful weapons. This will be partially offset by an increase in defence spending in European countries (primarily in Germany, which has the most powerful economy in Europe) and the deployment of additional arms production capacities, which the partner countries will be offering to Ukraine in a form of compensation for the lack of the most advanced technologies of offensive weapons. The involvement of the resources of South Korea and Japan, mainly non-lethal systems, will be of great importance.

### ALL WEAPONS UKRAINE HAS ORDERED

TOP LEAD

The total number of weapons received, manufactured, and ordered by the Ministry of Defense from the beginning of the full-scale invasion to the beginning of September 2023.



Source: former Minister of Defense of Ukraine Olexiy Reznikov during his report to the Parliament of Ukraine on September 5, 2023.

t.me/uawarinographics

#### ► THE US PRESIDENTIAL RACE IN 2024

Despite the official start of the presidential elections in the United States in the fall of 2023, this study will be useful to divide this time into two subperiods. In 2024, during the election campaign, the assistance of Ukraine becomes a divisive political issue for both parties. Facing fierce political resistance from Trump's supporters in the Republican party and the US Congress, the Biden administration will have its hands tied regarding steady support to Ukraine. This will bring significant disruptions in military supplies, including much more needed ammunition for the US types of weaponry. The delays in batches of ammunition for the Ukrainian military may further conserve the existing frontline and make it difficult to initiate effective counter-offensives by the Ukrainian Armed Forces.

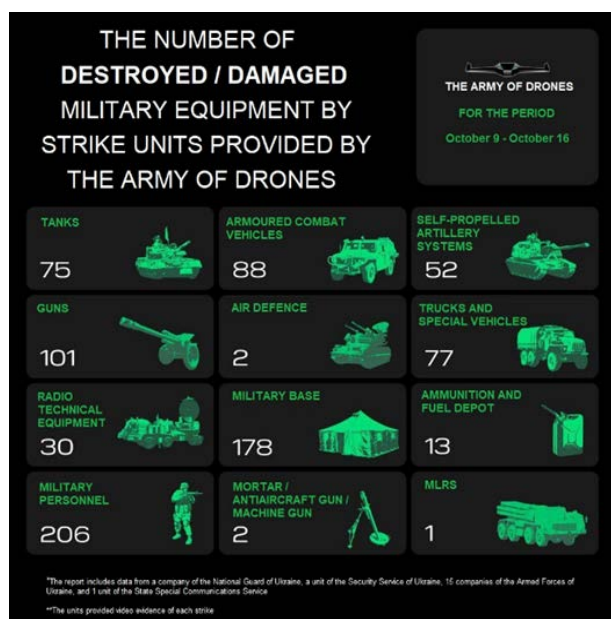
Disruptions in instalments of financial support for Ukraine will put additional brakes on the ability to finance the social and defence sphere and some cuts in budget expenditures may follow. Furthermore, Ukraine's ability to invest domestic resources in the Ukrainian military-industrial complex will be also under strain. In 2025, even if Biden is re-elected, the absence of significant military successes by the Ukrainian army will be further converted into the redi-



reduction of some part of finances from “the Ukrainian file” to domestic economic and social issues.

The same decrease in assistance would accompany the reappearance of Trump at the helm of the USA. While his attempts to end the war in “two days” will prove to be fruitless, the desire to cut Ukrainian security and defence assistance, provided by Washington, will be high on Trump’s agenda.

### ► INCREASING THE PRODUCTION OF WEAPONS AND AMMUNITION BY THE UKRAINIAN MILITARY-INDUSTRIAL COMPLEX



Ukraine will continue to prioritize its domestic production of ammunition and different types of military equipment. The task to cover the demand for vast numbers of artillery and mortar shells is still not met due to restricted volumes of budget support, although increasing in year-to-year comparison. Despite the appeal from Ukrainian authorities to conduct joint production of world-class military products and services, Western manufacturers are interested more in delivering to Ukraine their military products under long-term contracts from their national governments.

### ► THE STATE OF UKRAINE'S MOBILISATION RESOURCES

The level of mobilisation resources of Ukraine will remain limited compared to Russia's<sup>4</sup>, which will drive more incentives for the technological transformation of the Armed Forces of Ukraine. This will be aggravated

by the limited capacity of Ukraine to train reserves on its territory, as it cannot easily spare soldiers who are deployed to the front. Moreover, the risks of Russia's striking training centres on the territory of Ukraine will significantly limit the training capacity for recruits. On top of that Ukraine still be struggling with gaps in its legislation that allow citizens to evade their responsibilities.

### ► THE POTENTIAL OF UKRAINE AND RUSSIA IN UNMANNED SYSTEMS

Despite a large number of state and private manufacturers of unmanned platforms, Ukraine still suffers from a shortage of drones capable of hitting Russian military human resources and equipment. The batches of FPV machines, transferred to the combat units on the battlefield both by the state and private sector are not enough to change the situation in Ukraine's favour. Long-range drones, produced in Ukraine both in numbers and with high levels of sophistication, may not create a big problem for the Russian establishment. Along with the development of Ukraine's strategy for uncrewed platforms, Russia significantly increases its production of loiter warheads, both Lancet-type and FPV. The Russian side may well achieve parity in the number of UAVs by the end of 2024. Russian military units may also benefit from mass drone attacks on Ukrainian military positions. Loss of technological superiority in unmanned systems may result in an increased toll of Ukrainian casualties, as well as the preservation of the frontline and adoption of a defence strategy.

### ► LEVEL OF POLITICAL AND DIPLOMATIC SUPPORT FOR UKRAINE BY ALL PARTNERS (WEST+)

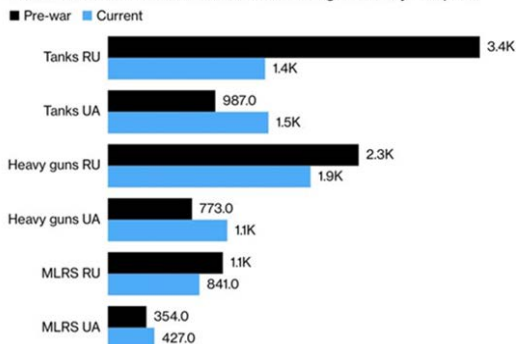
Political and diplomatic support from the partner countries and more widely will be preserved – roughly – at the same level. However, it might have an impact on the development of internal political processes in the partner countries and those coming to power. Over the course of time, this political support might also fluctuate, not least depending on the developments within Ukraine itself, especially when it comes to good governance and combat corruption. It will also be contingent upon the ability of political elites to consolidate in the face of a powerful enemy and to ensure steady and productive cooperation with the military command. The main driving forces that will define the vector of the political and diplomatic support will remain in G7 format, the EU and NATO as institutions, the US, the UK and others.

4 Now all Ukrainian Defence Forces, which are called off to defend the country constitute around 1.3 mln people

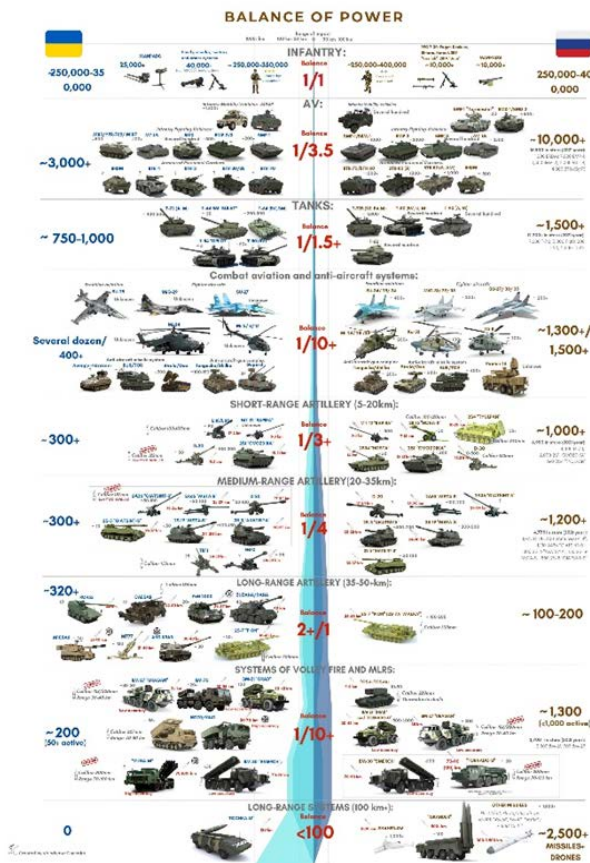
## ► RUSSIA'S MILITARY POTENTIAL TO CONTINUE THE WAR

### Balance of Arms

War and aid have reduced Russia's advantage in heavy weapons



Source: Kiel Institute Ukraine Support Tracker; IISS; Oryx; Bloomberg  
 Note: Current figure is an estimate based on confirmed lost and captured equipment, plus weapons sent to Ukraine. No data available for new Russian production. Heavy Guns are 152/155 mm howitzers.



Russia will become one of the largest beneficiaries of the war of attrition, taking advantage of the stalemate to re-generate its capacity to undertake attempts for new advancements in Ukraine, likely, in the Summer-Autumn 2024 campaigns after the presidential elections in Russia and respective re-configuration of the government. The current ratio of all military resources combined is 1 to 4 to Russia's advantage.

In 2024 military expenditures in the Russian federal budget will increase by another 45 bln USD and will constitute a record 112 bln USD (around 6% of GDP). For the first time in history, they will exceed expenditures allocated for social needs.

New waves of mobilisations will not be called until after the elections in order not to increase the potential for social discontent – so far unseen. Russia will continue with its strategy to exhaust Ukraine with quantities of troops as their capacity for the production of high-precision weapons will be limited due to Western sanctions and restricted access to advanced technologies. Meanwhile, it will take advantage of the pause in active combat actions to improve training capacities for recruits.

Russia will maintain superiority in weapons, equipment, missiles and ammunition for a considerable time, also by continuing to increase the output of its defence industry. It will still maintain an advantage in an aerial warfare with a bigger fleet of fighter jets and air-defence systems, mostly in quantitative terms, thus, making it harder for Ukraine to advance. Before the next phase of resumed hostilities, Russia will be energetically developing its EW capabilities, counter-battery fire and intelligence.

## ► STOCKPILES OF WEAPONS AND AMMUNITION IN THE EU AND OTHER PARTNERS OF UKRAINE

NATO, EU and other partners (Japan, Australia, South Korea, etc.) will increase defence spending against the background of the prolongation of the war in Ukraine and other regional threats. In this regard, starting in 2024, we should expect a gradual increase in the production of weapons and ammunition in these countries. This will allow replenishing of European stocks to a level that meets the existing threats and operational needs of the Armed Forces.

## II. Scenario implications<sup>5</sup> for the Western allies (foremost, the US, the EU, and CEE countries)

1. **Protracted war is an indefinite attrition** of all of Ukraine and its Western partner's resources. Ukraine will be thrown into a prolonged stand-off with Russia with no clear victory strategy, visible both for Ukraine and its allies of the Trans-Atlantic community.
  2. **Russia will become the main beneficiary** of this scenario, by winning considerable time to rebuild its military power. It will regroup and build up its arsenal for another attack at an appropriate time (likely, Autumn 2024, when most of US and EU political life will be concentrated around electoral processes and consequent political re-configuration).
  3. European security **instability will be set in place for years**, specifically on NATO's Eastern flank.
  4. Constant **high-level number of hybrid threats emanating from Russia towards NATO countries**.
  5. Russia's **attack on NATO countries** is not ruled out.
  6. Russia will win the time and **reconstitute its armed forces**, whereas NATO will not be able to match the same speed and remain vulnerable to a potential Russia's attack.
  7. Increased risks of a **conventional war of NATO countries with Russia**.
  8. Russia might feel ready at some point to **attack other states like Georgia, Kazakhstan and Moldova** (apart from directly confronting Baltic states).
  9. Potential emergence of **military and technical alliances of a hybrid nature** between Russia and North Korea and/or China, and/or Iran.
  10. Risks of a **'hanging conflict' before Russia is ready to attack** Ukraine again (Chechen wars 1 and 2 scenario).
  11. Gradual **erosion of the international legal order**.
  12. **Discredited authority of international organizations**, such as the UN, OSCE, ICRC, IAEA, and CoE.
  14. **Exhaustion of the economies** over the long run with the **distraction of resources for increased military spending in the Trans-Atlantic community**.
  15. Potential rise of internal political crises and **social instability in Europe**. Growing public discontent due to the indefinite economic costs and pressure on the national governments.
  16. **"War fatigue"**, which will make it more difficult to defend the case of providing military support to Ukraine to Western leaders.
  17. **China's growing assertiveness** towards the West with **escalating tensions in the Asia-Pacific**.
  18. New **waves of refugees from Ukraine** to Europe leading to renewed migration challenges, as a result of potentially successful Russia's advancements.
  19. The **resurgence of ethnic conflicts** in the Western Balkans.
1. Reassessment of the level of military threats from Russia towards NATO countries, and psychological preparedness for a conventional war of NATO countries with Russia.
  2. A revival of military and defence production sectors to be prepared for a potential conventional war; replenishing of the stocks in sufficient quantities in the NATO/EU member states.
  3. Development of more sound security and defence components of the EU to the level of real strategic autonomy.
  4. Accelerated development of modern warfare tools (UAVs, EW etc), capacities and competencies, based on Ukraine's experience and further needs.
  5. A more resilient EU energy sustainability as a result of diversified energy supplies to Europe, with minor dependency on Russia.
  6. Aligned commitments on increased military spending according to NATO requirements (2% of members' GDP and over).

5 Negative implications are marked in red; positive in green.

# Scenario 3

## “Focus: The Russian War in Ukraine. Stalemate/Freeze. Political and Diplomatic End to the War Under the Coercion of Third Countries”

(Probability Score – 18.8%)

### I. Scenario Description

Among the scenarios, this is the one which has a preponderance of political and diplomatic drivers over military ones. The absence of a visible breakthrough of UAF by Spring 2024, the inability to ensure for/together with Ukraine a convincing technological superiority in the war, the re-election of Putin as president in Russia, visible tensions and a neck-to-neck US presidential race will give rise to strong sentiments in the Partner Countries for reconsidering their strategy towards the Russian war in Ukraine from sound military support to Ukraine into a negotiated settlement.

Whereas before there have been hopes and expectations for a miraculous breakthrough by the UAF in Spring-Summer 2023, cautious optimism throughout Fall/Winter 2023/24, after the re-election of Putin in Russia different kinds of ideas for a negotiated solution will begin to sound more loudly. There will be a full spectrum of frames and settings for a solution, which have already been in circulation for some time, like (1) ‘two Koreas scenario’; (2) ‘FRG-GDR’ with subsequent inclusion of Ukrainian controlled territories into NATO; (3) return to pre-Feb 2022 borders (with might require painful concessions from Ukraine to Russia, if the UAF won’t have advanced over the previous line of contact. (4) ‘Donbas in exchange for Crimea’ (in case Ukraine will be however slowly advancing on the Southern front) and many more.

In exchange for its inability to help Ukraine win over its territories with timely supplies of technologically advanced military equipment requested by Ukraine, the Partner Countries (especially the US and the EU, but also a wider circle of those aligned themselves to the G7 Declaration for bilateral security arrangements/

commitments to Ukraine in July 2023) might be offering more substantive security assistance packages to Ukraine. The Partner Countries will be forced to provide Ukraine with broader **security guarantees**. These will include financial and economic assistance, investments in the defence and security sector, and maintaining and expanding sanctions against Russia. The conditions for providing aid will include requirements for further reform of the defence and security sector, the fight against corruption, implementation of NATO standards in planning and decision-making processes, and personnel policy. For the same reason, we shall see a visible increase in the pace of international work around the **Peace Formulae** of President Zelensky, where the UN, OSCE, ICRC, IAEA and others will eventually find their ‘meaningful’ place within the system of international relations. Forthcoming re-elections to the UN SC will give an impetus to repeated talks on the necessity to reform the UN Security Council and to limit veto power. But all these discussions, as before, will be declarative only.

The dynamics of the **Euro-Atlantic integration of Ukraine** will follow the same logic of ‘compensatory political mechanisms’. The accession talks with the EU will be launched in the first quarter of 2024 and will be very active up until the election campaign to the European Parliament in May 2024. Then all the processes will be slowed down in substantive political terms caused by the formation of the new European Commission and the election of the President of the EU (while watching the US electoral race). The Partner Countries will also be offering Ukraine different surrogate solutions of ‘constructive ambiguity’ in the language on the invitation to membership in

NATO at the forthcoming jubilee 70th NATO Summit in Washington. Or they may be straightforward in attempting to buy off Ukraine with 'partial membership' similar to that of the old West Germany.

All these 'inventive solutions' will fall short of understanding the constraints within which they are placing the President of Ukraine in 2024-2025 and the risks that they impose. The Ukrainian society will NOT be ready to accept any kind of concessions from the side of Ukraine, which Russia is likely to demand. The spirit of resilience will remain strong since for the Ukrainian nation it is an existential fight and another attack from Russia is only a matter of time. Also, there will be huge resentment in Ukrainian society about the morality of these decisions taking into consideration the high toll of deaths since February 2022. No decision which provides less than an advance far beyond the pre-Feb 2022 line will be accepted by Ukrainian society. Further pressure with other hybrid solutions will inevitably lead to cracks in the unity of society, government, and the military and will make the country particularly vulnerable towards any kind of hybrid threats emanating from Russia. Such threats will be actively engaged in different scenarios to try to undermine this consolidated force of resistance that has been formed in Ukraine since the very first days of the full-scale Russian invasion of Ukraine in 2022.

An 'introversion' of many countries into their political cycles domestically in 2024 will bring about relative 'stability' in the international **military and security environment** with most regional conflicts being kept 'in a sleeping mode' till the final results of the US Presidential election and a new administration coming to power in January 2025.

In sum, the scenario bears a lot of similarities in drivers and implications with the two others where another attempt of Russia to attack Ukraine is only a matter of time.

## KEY DRIVING FACTORS

### ► RESOURCE PROVISION OF THE SECURITY AND DEFENCE SECTOR OF UKRAINE

Financing the defence and security sector will be limited by the capabilities of the economy. The available resources will be sufficient only to meet the basic needs of the Armed Forces. Ukraine can receive additional funds for these purposes in the event of the successful implementation of plans to confiscate Russian assets in European countries and the United States. The manpower mobilisation resources remain limited. The leadership of the Armed Forces of Ukraine is not actively implementing new technolo-

gies and methods of conducting combat operations that would exclude large losses of personnel.

### ► OPERATIONAL AND TACTICAL SUCCESSES OF THE UKRAINIAN ARMED FORCES

The freezing of the conflict may be the result of the impossibility of ensuring the offensive capabilities of the Armed Forces due to a shortage of weapons, problems with personnel (morale and psychological state, level of training) and insufficient motivation/initiative of the military leadership to find alternative ways of achieving superiority over the enemy, primarily technological. The existing level of support, equipment, training and management of the Armed Forces will be sufficient to maintain a certain initiative at the tactical and operational levels and at the same time deter the enemy's attempts to conduct offensive operations.

### ► LEVEL OF SUPPORT FOR UKRAINE WITH WEAPONS BY ALL PARTNERS (WEST+)

Regardless of the development of the domestic political situation in the USA and European countries in 2024, the minimum level of aid to Ukraine in arms and ammunition will be provided, but it will not satisfy the needs of the Armed Forces of Ukraine for active offensive actions. The transfer of F-16 aircraft and additional air defence systems will eliminate the superiority of the Russian Federation in the air and reduce the threat of attacks using cruise and ballistic missiles. This will prevent a sharp change in the operational situation at the front in favour of Russia and deprive the enemy of the ability to conduct offensive actions on the territory of Ukraine. At the same time, the partners will stimulate the development of the military industry of Ukraine to ensure the basic needs of the Armed Forces. An increase in non-lethal aid (transportation, engineering, medical equipment, communication, and air defence) from Japan and South Korea is expected.

### ► THE US PRESIDENTIAL RACE IN 2024

The US Congress will endorse the support for Ukraine for 2024 to cover financial and military requests from Kyiv. This support will be one of the election manifestos of the Democratic party and Biden's reelection campaign. But this will be dependent each and every time on political movement in Washington. The assistance may be delayed or blocked in some parts due to political criticism from the MAGA wing of the Republican Party. With the worsened domestic economic situation in the US, the Biden Administration will face difficulties in explaining to his potential voters why they have to spend this huge batch of money without clear-cut successes on the battlefield

in Ukraine. Against this backdrop, the POTUS team directly or via partners will try to exert pressure on Ukrainian authorities to join the negotiation table with Russia. This trend may be aggravated with Trump being elected as the US President. From 2025 onwards the traditional level and frequency of assistance to Ukraine may be put under question by Trump despite the budgetary outlines in late 2024 being already approved by Congress. Facing shortages in military deliveries to the UFA, an additional burden may be placed on official authorities in Kyiv with pressure to give concessions in territory or other issues of sovereignty (imposing of neutral status etc.).

### ► **INCREASING THE PRODUCTION OF WEAPONS AND AMMUNITION BY THE UKRAINIAN MILITARY-INDUSTRIAL COMPLEX**

The process of recovering the domestic military-industrial complex started in 2022 and brought results both in collaborative defence production with global partners and localization of production, including arms and military hardware. Core priorities for the Ukrainian state defence industry are the following: ammunition, unmanned military platforms, armoured materiel, portable anti-tank missile systems, and air defence systems. Ukraine started producing artillery and mortar shells and tank gun rounds in consortium with manufacturers of weapons and military equipment from NATO allies. Despite the significant boost in production, the total number is still way beyond the production capacities of Russia in relevant types of ammunition. The Ministry of Defense of Ukraine has significantly reduced the timeframe for delivering equipment and weapons to the Armed Forces. In wartime, Ukraine adapts more streamlined procedures for the inclusion of new types of weapons via the adoption of shortened production cycles and simplified testing processes. At the same time, security risks prevent foreign producers from investing in Ukraine's defence industries. The security risk is complemented by fear of large-scale corruption in Ukraine, especially in the defence sector.

### ► **THE STATE OF UKRAINE'S MOBILISATION RESOURCES**

The mobilisation resources remain limited and will require rational use. The leadership of the Armed Forces of Ukraine will be forced to actively implement new technological solutions, as well as forms and methods of conducting combat operations that minimize the loss of personnel. New initiatives for mobilisation will be introduced in 2024 in Ukraine to form new waves of trained reservists. These include (i) an expanded list of categories of civilians; (2) the creation of an electronic register; (3) 'combat internship' etc.

### ► **THE POTENTIAL OF UKRAINE AND RUSSIA IN UNMANNED SYSTEMS**

Significant success has been achieved on the sea, where Ukraine has developed serious capability to deter the Russian Navy in the Black Sea. A Ukrainian fleet of marine drones is actively operating in the sea basin, ousting Russian warships from occupied Ukrainian water areas. The Armed Forces of Ukraine (AFU) regularly receive new batches of Ukraine-made UAVs under the government program "The Army of Drones". State and private producers are capable of delivering a wide line of UAVs. Governmental and state arms manufacturers actively assist in scaling up the production of FPV drones and their licensing for combat use. The number of FPV-kamikaze strike drones, produced in Ukraine, doubles or triples each quarter. Despite some localization of spare parts in Ukraine, many core elements for FPV come from China. At the beginning of 2024 the number of FPVs, sent to the battlefield, may reach 30-40 thousand. But still, this scope is not enough to cover the potential needs of the Ukrainian military on the battlefield. To a large extent, Ukrainian combat units rely on volunteers to cover basic needs in assault drones. Russia, in its turn, starting from the second half of 2023, tries to catch up with assault UAVs, both doubling down on the production of Lancet-type drones and creating facilities for mass assembling of FPVs. The scale for use of the Russian UAV kamikaze and strike drones is incrementally expended but Ukraine preserves the upper hand due to strategic attention being placed on the governmental level and multi-stakeholder approach. But, counter to Ukraine, Russia has dominance in several long-range Shahed-type drones, which it uses to terrorize Ukrainian people, destroy objects of military and critical infrastructure, as well as exhaust the stocks of air and missile defence ammunition.

### ► **LEVEL OF POLITICAL AND DIPLOMATIC SUPPORT FOR UKRAINE BY ALL PARTNERS (WEST+)**

Politically and diplomatically most of Ukraine's partners will remain supportive of the position of the country and its needs for international military assistance, and will continue to show that this political commitment to support Ukraine 'as long as it takes' is still in place. Meanwhile, with the absence of a military breakthrough throughout Spring-Summer 2024, Western partners of Ukraine (as well as China and many countries of the Global South) will start to press Ukraine to consider a diplomatically negotiable solution with Russia. Some of them will be even ready to act as intermediates in this process. Against that background, this political and diplomatic support of the partner countries might be conditioned by the readiness of Ukrainian political leadership to listen to the partners' advice.

## ► **RUSSIA'S MILITARY POTENTIAL TO CONTINUE THE WAR**

By all means - regardless development of general security and military situation around the war in Ukraine - Russia will be further reconstituting its military power to be able to use it against Ukraine and to threaten Western allies along the Eastern flank. DGAP estimates that Russia will be able to restore its military power sufficiently enough to attack Baltic states in six to nine years.

Hidden mobilisation will be continued with no visible resentment from the population of Russia. Regardless of the war getting into a more advanced technological phase in 2024/25, Russia will strive to increase the production of UAVs, artillery shells, missiles etc. However, Western sanctions will impact the precision and efficiency of Russian missiles, and their detrimental effect, especially on civilian residential areas and infrastructure in Ukraine, will be preserved.

The financial burden for military spending in 2024/25 on the Russian federal budget will remain non-critical as this deficiency is being covered by the National Prosperity Fund, which has around 12 trillion rubles on its accounts collected from extra revenues for oil sales in recent years. The activity of thousands of foreign companies operating in Russia will remain another substantial source of revenue, as well as loose sanctions imposed on diamonds and precious metals.

## ► **STOCKPILES OF WEAPONS AND AMMUNITION IN THE EU AND OTHER PARTNERS OF UKRAINE**

Stockpiles of weapons and ammunition in EU countries and the USA will be replenished by already approved plans. For some time, the available stocks of ammunition will not be enough to fully satisfy the operational needs of the Armed Forces. Projects to increase ammunition production launched in 2023 will begin to yield results in 2024.

## II. Scenario implications<sup>6</sup> for the Western allies (foremost, the US, the EU, and CEE countries)

1. Pre-mature negotiations (with Russian troops still occupying Ukraine's mainland) leading to **imperfect decisions on half-way measures for peace settlement** (same trap as in the Minsk Accords).
2. **Russia will become the main beneficiary** of this scenario, by fixing status-quo of a new division line in (partition of) Ukraine (with newly acquired territories in Kherson, Mykolayiv and Zaporizhzhya regions), creating a destructive ambiguity using imperfect language of agreements and dragging Ukraine and partner countries into a meaningless dialogue on peace settlement. This trick will be done to win time to rebuild its military power and to attack Ukraine again when conditions allow.
3. **Russia's attack on NATO countries** is not ruled out.
4. Russia will win the time and reconstitute its armed forces, whereas **NATO** will not be able to match the same speed and remain **vulnerable to a potential Russia's attack**.
5. Increased risks of a **conventional war of NATO countries with Russia**.
6. Russia might feel **ready at some point to attack other states** like Georgia, Kazakhstan and Moldova (apart from directly confronting Baltic states).
7. Potential **emergence of military and technical alliances of a hybrid nature** between Russia and North Korea and/or China, and/or Iran.
8. Risks of a **'hanging conflict' before Russia is ready to attack** Ukraine again (Chechen wars 1 and 2 scenario).
9. **European security stability is not achieved** in the medium term.
10. The international legal order remains on paper only, leading to a **gradual erosion of international institutions like the UN and others**.
11. **Challenged (and distorted-?) solidarity** among European member states.

12. **The exhaustion of economies over the long run** with a reallocation of resources for increased military spending.
13. **Internal political crises and social instability in Europe**, with growing public discontent about the indefinite economic costs; and pressure on national governments.
14. **"War fatigue"**, which will make the case of defending military support to Ukraine harder for Western leaders.
15. **China's growing assertiveness** towards the West with **escalating tensions in the Asia-Pacific**.

1. **Reassessment of the level of military threats from Russia** towards NATO countries, **psychological preparedness for a conventional war** of NATO countries with Russia
2. **A revival of military and defence production sectors** to be prepared for a potential conventional war; **replenishing of the stocks** in sufficient quantities in the NATO/EU member states
3. Development of more **sound security and defence component of the EU** to the level of real strategic autonomy
4. **Accelerated development of modern warfare tools** (UAVs, EW etc), **capacities and competencies**, based on Ukraine's experience and further needs Economies' reactivation as a result of increased activities of the military and defence sector
5. **Decreased dependency on Russia** in strategic products (energy)
6. Aligned commitments on **increased military spending according to NATO requirements** (2% of members' GDP and over).

6 Negative implications are marked in red; positive in green.



# Scenario 4

## “The Liberation of Ukrainian Territories/Russia's Withdrawal of Troops without a Complete Political and Diplomatic Settlement”

(Probability Score - 18.8%)

### I. Scenario Description

The rising level of military support from Western partners as well as a boost of the national defence industries in **Ukraine** will facilitate a gradual liberation of the occupied Ukrainian territories by the end of 2025.

The availability of long-range and high-precision artillery will help to hit core military infrastructure and command and control centres as well as large ammunition depots in Crimea. Thus, the ground counter-offensive operation will meet no major resistance from the Russian side. Russia will be unable to reproduce and recover a sufficient number of hardware to fill the gaps, created by losses on the battlefield.

UAV and terrain unmanned systems will significantly enable the use of combat tanks and other sophisticated military systems and platforms, at a time when the Russian fleet is made to leave its bases in Crimea. Although Ukrainian forces will succeed in moving Russian military units from Ukraine, Ukrainian territory will remain at risk of missile and drone attacks. Ukraine will manage to develop and integrate the air and missile defence systems, which can intercept more than 80% of Russian attacks, still, some casualties, will occur in both the military and civilian parts of Ukraine. Although with quite a limited number, the newly enabled F-16 capability will effectively assist both counter-offensive operations and air defence purposes.

The Ukrainian economy will demonstrate modest signs of recovery, while still being unable to cover the costs of the military and social burden. The EU at the levels both of the international financial organizations and of individual member states will deliv-

er significant support to Ukraine. The reconstruction process will still not be in place due to the high risks for private investment and uncertainty about the resumption of military hostilities by Russia.

Under the political pressure of Western states, the USA, France, and Great Britain, as well as China and India, **Russia** will be fearful of triggering a nuclear escalation. The Kremlin will also be concerned with the possibility of internal turmoil as a result of the usage of nuclear means. But still, Putin will be able to retain control over Russian society and finance social expenditures at the present level, which makes any social tensions unlikely.

Newly elected European institutions, from 2024 on, will prefer to focus their assistance more in the financial domain and preserve the current level of sanctions on Russia. They will still not be able to formulate a unified position towards the end of the war. The issues of a special tribunal for the crime of aggression, Russian asset freezes as well as deepening of sanctions on energy will remain decisive for **EU members**.

The military success of Ukraine will not be underpinned by the political and diplomatic track. The **Peace Formulae** will not be universally accepted, while alternative plans from third states will propose different types of concessions from the Ukrainian side.

Russia will try to use its leverage in the region of the so-called Global South, putting significant efforts to alienate Latin American and African states with US and EU members. China will be still interested in supporting Russia financially, through trade and re-

orientation of trade routes of Russian main export commodities.

While the Israeli-Palestinian war will reduce in intensity it will still draw a lot of attention from the international community, both in capitals and at the level of international organisations. In 2024-2025 new conflicts might spark in the MENA region, in some African countries. On the European continent, Russia will be able to provoke conflicts in the Balkans region.

Ukraine will start **accession negotiations with the European Union** in 2024, implementing its national plan during 2024-2025. At the same time, a clear invitation to NATO will remain a distant prospect. The **Washington NATO Summit** will not bring any significant changes in the political level of relations between NATO and Ukraine. Elections in the USA will not change the overall approach of the White House for military support of Ukraine. The assistance will be further deepened in areas of precise long-range missiles and artillery rounds, air fighter jets. But Washington will still consider Ukraine's admission to NATO as a red-line issue for Russia.

Russia will still be in a position to block unfavourable decisions of **international organisations**, including the UN Security Council, and OSCE.

## KEY DRIVING FACTORS

### ► RESOURCE PROVISION OF THE SECURITY AND DEFENCE SECTOR OF UKRAINE

The provision of defence resources is kept at the current level, taking into account the limitations of the economy. The use of part of Russian assets confiscated in Europe and the USA for the purchase of weapons for Ukraine and the maintenance of a high level of combat readiness of the Armed Forces in the medium term. Personnel resources are used more rationally with the maximum implementation of technological solutions that minimize the risks of losses during combat activities.

### ► OPERATIONAL AND TACTICAL SUCCESSES OF THE UKRAINIAN ARMED FORCES

The Armed Forces conduct active offensive operations given the following: - stable supply of the appropriate amount of artillery and ammunition from partners; - active implementation in the Armed Forces of new ways and methods of conducting combat operations, and modern weapons systems, which should ensure a technological advantage over the enemy; - improvement of the personnel selection and training system to meet the needs of the army, taking into

account the limitations of the mobilisation system; - achieving superiority over the enemy in the air and increasing the effectiveness of the defence of the military and civil infrastructure against missile attacks (obtaining and mastering modern aviation and air defence equipment); - acquiring the ability to destroy the enemy's logistics throughout the occupied territory (situational awareness and high-precision impression systems at distances up to 300 km). Ukraine will be able to partially resume its "manoeuvre" warfare of movement and speed in the Spring-Summer 2024 military campaign, but not enough to achieve a significant breakthrough. Both sides will be outstretching their resources.

### ► LEVEL OF ARMS SUPPLY TO UKRAINE BY ALL PARTNERS (WEST+)

Increasing the supply of weapons and ammunition. Expansion of training programs for the personnel of the Armed Forces at the training grounds of partner countries. Improvement of the intelligence exchange system. The transfer to Ukraine of modern weapons systems to ensure technological superiority over the aggressor, including fighter aircrafts (F-16, Gripen etc), cruise missiles and air defence systems. Funding by partner countries of contracts for the purchase of arms and ammunition for Ukraine in third countries. Special emphasis will be placed on supporting the development of the military industry to meet the needs of the Armed Forces. Stimulation of foreign investments in the defence-industrial complex of Ukraine. Simplification of procedures for granting permits for the transfer of critical components and technologies for the production of weapons in Ukraine.

### ► THE US PRESIDENTIAL RACE IN 2024

Despite some political turbulences, connected to the start of the political season of preparations for both presidential and parliamentary elections, 2024 will be still the year of guaranteed support for Ukraine in political, financial and military terms. The new support for Ukraine may equal 46-60 billion US dollars.

New meetings of the Ramstein format in 2024 will adjust support to the changing needs of the Ukrainian Armed Forces. The military and financial component will be underpinned by streamlined US-Ukraine consultations, and possibly, agreements to grant US security guarantees for Ukraine. At the same time, provided the election period, for POTUS it will be crucially important to confirm his robust military support with real success on the ground in Ukraine.

From January 2025, when the new President-elect is sworn in and allowed to officially enter the Oval Room in the White House, the situation will differ dramatically depending on the outcomes of the election in the USA. With the reelection of J. Biden as the POTUS, it

might be expected that the level of military support will rise to allow the Ukrainian armed forces to continue destroying the Russian Army in Ukraine and gradually repelling Russians from the occupied territories.

### ► INCREASING THE PRODUCTION OF WEAPONS AND AMMUNITION BY THE UKRAINIAN MILITARY-INDUSTRIAL COMPLEX

The seven-fold increase in the defence budget in 2024, compared to 2023, resulted in the continuation of the rising trend (62% rise in 2023, year to year) in the production of priority types of Ukrainian arms and materiel, including the Soviet-calibre of ammunition for artillery, mortars and tank guns. The so-called Coalition for Defense Industries development, proposed by the Ukrainian MoD in fall 2023, makes incremental progress in engaging international defence industries to launch production lines in Ukraine or joint facilities abroad. The Ukrainian state defence manufacturer will also manage to build and launch the cartridge production facility to close the shortage of small arms rounds till the end of 2025, which may cover a large part of the domestic requirement for firearms.

The increased number of domestically or jointly produced ammunition will be not enough to achieve parity in artillery potential with Russia but significantly eases the situation on the battlefield. The missile program will also demonstrate breakthroughs that give additional advantages in terms of long-range high-precision capabilities. Combined with Western types of longer-range arms it will provide a good possibility to hit targets behind the enemy line.

### ► THE STATE OF UKRAINE'S MOBILISATION RESOURCES

Ukraine will be successful in applying the skills of over 100,000 UAF service personnel, who have already been trained in over 30 partner countries by mid-November 2023 and will have commitments for another wave of training of its military personnel, especially in 2024, during a winter pause in hostilities. Bringing in newly trained F16 pilots will significantly alter the situation on the battlefield in the Spring-Summer 2024 military campaign. While Ukraine will still be struggling with recruiting more people through a general mobilisation, more technologically advanced military supplies from the partner countries will help it balance Russia's superiority in manpower.

### ► THE POTENTIAL OF UKRAINE AND RUSSIA IN UNMANNED SYSTEMS

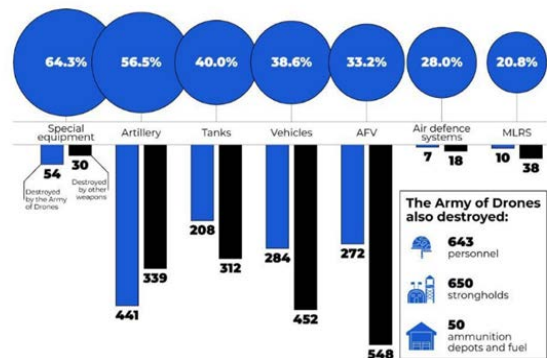
Facing the huge difference in the scale of military manpower with Russia, Ukraine continues focusing its attention on the development of unmanned

ground, marine and air platforms. It helps to dampen the asymmetry in human resources and change the situation in the different operational theatres.

## THE ARMY OF DRONES DESTROYS 42.6% OF THE ENEMY'S EQUIPMENT

TOP LEAD

Share of Russian equipment destroyed by the Army of Drones, October 2023, %



Sources: M. Fedorov (Vice Prime Minister and Minister of Digital Transformation of Ukraine), General Staff of the Armed Forces of Ukraine.

t.me/uawarinographics

While preserving leadership in the development of new types of uncrewed military platforms, Ukraine will be effective in scaling up the production and delivery to the Ukrainian Armed Forces of both copter and aircraft-type drones, used for reconnaissance and assault (kamikaze and reusable bombers). By 2025 Ukrainian government will be capable of substituting the volunteers in securing the requested number of FPV and reusable strike drones. These numbers are enough to prevent Russian massive military assaults, inflicting colossal losses on the enemy in manpower and hardware.

At the same time, Ukraine can generate mass production of long-range UAVs with flight distances up to 1000 km. This fleet is used to undertake massive attacks on the military and infrastructure sites of strategic importance deep inside the territory of Russia.

The Russian military tries to increase the number of strike UAVs delivered to the battlefield, but that scope is far behind Ukrainian indicators. However, Russia is still capable of launching long-range drones to target facilities of military or civil critical infrastructure in Ukraine.

### ► LEVEL OF POLITICAL AND DIPLOMATIC SUPPORT FOR UKRAINE BY ALL PARTNERS (WEST+)

Political and diplomatic support for Ukraine will remain rather strong, especially coming from the most powerful partners like the EU and NATO, G7, and bilaterally, the US, the UK, Japan etc. Meanwhile, political cycles in many countries in 2024-25 may significantly alter this picture. Ukraine will be struggling to get back to normal relations with some key strategic

partners (like Poland), which will negatively impact the overall landscape of those supporting Ukraine. The crucial issue will remain the ability of Ukraine to follow its commitments and continue with the reform on the way to the EU (especially, transparency and fighting corruption), which will be considered (and/or used as a justification against) supporting Ukraine, pending on the perceived success of actions taken. Ukraine's Western partners will pay close attention to whether President Zelensky's team can maintain the unity of the top political and military elites of the country.

### ► **RUSSIA'S MILITARY POTENTIAL TO CONTINUE THE WAR**

On top of the characteristics of the factor expressed in scenarios 1-3, which still remain relevant for this scenario, Russia will be playing the more strategic longer-term game by establishing lasting partnerships with loyal countries that could enhance its capacity for restoring military might sufficient enough not only to attack Ukraine, but also NATO countries. To achieve this Russia will be developing its military and technical cooperation with China, which will receive a new dynamic in 2025 after the results of the presidential elections in the US are known. This cooperation will be expanded further to include new R&Ds in anti-air defence and military space cooperation.

China will remain attractive for Russia as a producer of 122mm and 152mm calibres, as well as missiles for 'Grad' and 'Smerch' MRLS, which Russia possesses in sufficient quantities. With non-transparent China support Russia will be able to meet most of its military needs (especially, when it comes to semiconductors and chips for guided missiles like "Iskander", 'Kinzhal', 'Kalibr' or H-101 and other ammunition of higher precision). With expanded trade and joint production with Iran, Belarus, and North Korea Russia will be able to build up its arsenal in artillery shells, armored vehicles, guided missiles and UAVs.

### ► **STOCKPILES OF WEAPONS AND AMMUNITION IN THE EU AND OTHER PARTNERS OF UKRAINE**

The increase in stocks of weapons and ammunition in the leading countries of the EU and the USA is a result of a significant increase in own production and an increase in defence spending. Obtaining access through partners to stocks of ammunition in third countries.

## II. Scenario implications<sup>7</sup> for the Western allies (foremost, the US, the UK, the EU, and CEE countries)

1. **Preserved sensitivity** (*read: vulnerability*) of the Western partners **to nuclear blackmail** from the Kremlin, which will prevent them from making clear-cut decisions on long-term solutions to the war, thus leaving **'destructive ambiguity' in Trans-Atlantic security**.
  2. **No unity** on issues of a Special Tribunal for the Crime of Aggression, the future of Russian asset freezes, and sanctions on energy **among EU members**.
  3. **Russia's ongoing impunity**, being capable of blocking unfavourable decisions of international organisations, including the UN Security Council, and OSCE.
  4. **Ukraine's need** for significant support from its partners is getting **more difficult to meet** in the long run.
  5. Russia's exerting pressure on the EU to shift some of the crucial sanctions as being not relevant to the war on the territory of Ukraine, will undermine the unity of the Union and will cause ever-growing **divergence in the position of the member states**.
  6. **No long-term solution to the war** in Ukraine, which will **prevent** the creation of a new security architecture globally and in Europe **more suitable for modern security challenges** (the Peace Formulae of President Zelensky will not be universally recognised as the basis for sustainable peace).
  7. Ukrainian territory remains exposed to risks of missile and drone attacks any time with Russia potentially striking facilities and infrastructure throughout all territory of Ukraine with missile and long-range drones, thus **undermining and preventing proper reconstruction process**.
  8. Ukraine is stuck in a **'waiting lounge' in its accession process to NATO**, due to strong living perceptions in Washington, and some European capitals 'not to cross final, but real redline for Putin'.
  9. **Russia's attack on NATO** countries is not ruled out.
  10. Russia will win the time and **reconstitute its armed forces**, whereas **NATO** will not be able to match the same speed and **remain vulnerable to a potential Russia's attack**.
  11. Increased risks of a **conventional war of NATO** countries with Russia.
  12. Russia might feel ready at some point to **attack other states like Georgia, Kazakhstan and Moldova** (apart from directly confronting Baltic states).
  13. Potential emergence of **military and technical alliances of a hybrid nature** between Russia and North Korea and/or China, and/or Iran.
  14. Risks of a **'hanging conflict' before Russia is ready to attack Ukraine again** (Chechen wars 1 and 2 scenario).
1. The expulsion of the Russians from Ukrainian territory will provide a **good ground for Biden's reelection** and secure steady military support for the Ukrainian Army.
  2. **Ukraine** continues to effectively **boost its own military and industrial complex**, being capable of to **shift partially this burden** from its partners' shoulders.
  3. Ukraine will manage to **develop and integrate the air and missile defence systems**, which can intercept more than 80% of Russian attacks.
  4. Ukraine and its partners will **secure and restore main trade routes in the Black Sea**, which will enable to resume supplies of agricultural products to traditional consumers all over the world (**decreased tension of a global food crisis**).

7 Negative implications are marked in red; positive in green.

# Scenario 5

## “Russia's Military Defeat in Ukraine. De-Occupation of all Territories. Restoration of Control Over Ukraine's Internationally Recognised Borders. Payment by Russia of Compensation for the Damage Caused. Bringing Russian War Criminals to Justice. the Beginning of Russia's Transformation”

(Probability Score - 3.76%)

### I. Scenario Description

Continued support to **Ukraine** in ammunition and weapons deliveries will help to withstand the war of attrition and put unbearable pressure on Russia both in terms of manpower and providing the battlefield with modern pieces of weaponry in sufficient numbers. Ukrainian tactics on the battlefield to cut main logistical hubs and routes for Russian military supplies as well as constantly targeting command and control units of the Russian army not only on occupied territories and the battlefield but also deep inside the territory of Russia. Ukraine will be able to produce long-range missiles and use them to strike military sites of strategic importance for Russia.

Ukraine will build a significant societal resilience that features strong support for the liberation of Ukrainian

territories, and European and Euroatlantic integration of Ukraine. The Ukrainian government will manage to stabilize the financial and economic situation in the country. Ukraine will experience small but steady growth of GDP and undisrupted work of the social welfare system. The political and military establishment in Ukraine will demonstrate a position of unity on major objectives and tasks of Ukraine's plan on the battlefield and post-war economic and social recovery.

Russian societal approval of the “special military operation” will drop drastically till the end of 2025 due to huge losses of human resources, the necessity of new waves of mobilisation in relatively rich regions and big **Russian** megapolises. An acute shortage of

manpower ready to die in Ukraine against the backdrop of public approval fall for Putin will prompt him to adopt a withdrawal strategy from Ukrainian territory for all the units of the Russian army.

It may not prevent the separate regions or ethnic communities from actively and publicly protesting against the Kremlin policy of genocide of ethnicities in the Russian Federation. The process may well start in 2024-2025 with further expansion beyond the indicated timeframe.

A pro-European coalition will be formed in the new convocation of the European Parliament in June 2024. New top executives of the European Council, and European Commission together with EU member states will be ready to ramp up defence production to catch up with the needs of Ukraine as well as replenishment of domestic stockpiles in the EU members. Further actions to strengthen the Defense Union as a part of the strategic sovereignty of the EU may appear in the new Strategic Agenda for 2024-2029. EU institutions will also be ready to advance the initiatives for the investigation of crimes of aggression as well as war crimes. Progress also may be traced in the issue of transferring frozen Russian assets for the reconstruction of Ukraine. At the same time, the domestic opposition of Hungary and some other members alike may be counterbalanced.

The support of Ukraine's strategic partners the **Peace Formulae** may gain traction, introducing new outlines for future security architecture. With significant efforts from G7 partners as well as other EU members, the Formula track will be further introduced in countries of the Global South. China, India, and Brazil will opt for selective involvement in the implementation of the 10 points of the Formulae.

Along with military defeat in Ukraine, Russia will face a gradual but irreversible loss of politico-diplomatic leverage in the international arena. Belarus, Iran and North Korea will remain core strategic allies for Russia.

A fall in Russian political and military presence in other regions of potential conflict may result in the scaling down of the current international and domestic conflicts in MENA, Africa, Central Asia and the South Caucasus. It will create additional opportunities for international conflict resolution and peace-keeping initiatives.

Ukraine will be able to actively deliver on its commitments in the framework of the accession negotiations, including the transposition of the *acquis communautaire*. EU will open its defence programs for Ukraine to increase its capabilities. Ukraine will also face some advancements on the Ukraine-NATO track

as many pessimist allies, including the US and Germany, will see less threat of escalation from Russia.

The initiatives of the **Peace Formulae** and **Special Tribunal** for the crime of aggression will receive developments under the UN umbrella, further advancing a new outline of the security architecture of global nature.

## KEY DRIVING FACTORS

### ► RESOURCE PROVISION OF THE SECURITY AND DEFENCE SECTOR OF UKRAINE

The existing level of funding of the defence and security sector at the expense of the budget is maintained. The receipt of additional resources due to the transfer to Ukraine of the confiscated assets of the aggressor, which were frozen in the countries of Europe and the USA. Increase of external investments in the defence-industrial complex of Ukraine. Mobilisation resources remain limited. The need for its rational use prompts the leadership of the Armed Forces to implement new ways and methods of conducting combat operations using technological solutions.

### ► OPERATIONAL AND TACTICAL SUCCESSES OF THE UKRAINIAN ARMED FORCES

Ukraine will be successful in its continued and intensified attacks on the Crimean peninsula, where it will be in the position of not only using drones and medium-range missiles effectively but also eventually launching several effective attacks on the Kerch bridge to cause serious damage and disrupt critical logistics of Russian forces. This, in turn, will create a deep moral failure of Putin's regime and will signal its vulnerability and incapability to ensure its security on self-proclaimed 'Russian historical territory'.

### ► LEVEL OF SUPPORT FOR UKRAINE WITH WEAPONS BY ALL PARTNERS (WEST+)

Increasing the supply of weapons and ammunition due to the existing stocks in the warehouses of the armed forces of Europe and the USA and increasing its production starting in 2024. Transfer of modern weapons systems to Ukraine to ensure technological superiority. Increasing the amount of assistance from other partners (South Korea, Japan, Israel, etc.) to ensure the critical needs of the Armed Forces in non-lethal means (engineering equipment, vehicles, medical evacuation vehicles, communication equipment). Assisting Ukraine in increasing the production of weapons and ammunition at its enterprises of the defence-industrial complex.

## ► THE US PRESIDENTIAL RACE IN 2024

In 2024 Biden's administration will manage to continue supporting Ukraine in the security and defense domain via traditional instruments: Ukraine Security Assistance Initiative (USAI), Foreign Military Financing (FMF) and Presidential Drawdown (PDA), Replenishment of U.S. weapons stocks. The MAGA minority within the GOP in the US Congress will not hamper the natural flow of requested resources to Ukraine. The US will accelerate its deliveries of long-range missiles, and high-precision ammunition to support offensive operations starting in spring 2024. The F-16 coalition will reinforce the military capabilities of Ukraine.

The success on the battlefield provides additional support for the incumbent POTUS to win the re-election. The US security guarantees, proposed by Washington and other G7+ partners will signal to the Kremlin to abstain from nuclear escalation.

The US administration and EU institutions will further streamline their coordination efforts to help Ukraine in terms of rebuilding its infrastructure and economy as well as fostering new security architecture based on the premises of the Peace Formulae.

In 2025 the issue of Ukraine's NATO membership is back on the agenda as the only possible security guarantee from future Russian aggression in the long term.

## ► INCREASING THE PRODUCTION OF WEAPONS AND AMMUNITION BY THE UKRAINIAN MILITARY-INDUSTRIAL COMPLEX

Collaborative defence production is growing in 2024-25, both on the territory of Ukraine and in partner states. Ukraine appears to be successful in attracting global arms manufacturers "to build the arsenal of the free world alongside Ukraine".

Ukrainian arms producers incrementally master the production of some types of 155 mm shells, to facilitate further substitution of the degraded Soviet-type hardware with NATO standard equipment.

Being unable to cover the demand for ammunition of the Ukrainian Armed Forces, the European Union starts also contracting Ukrainian and joint ventures to fill the gap in artillery rounds. Companies of the Ukrainian military-industrial complex are admitted to European defence programs.

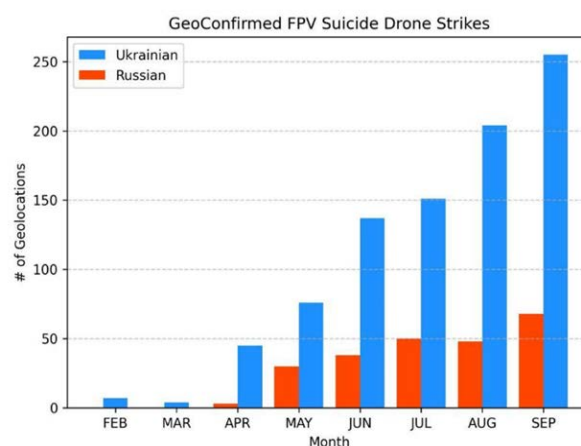
The availability of the domestic missile program with competitive long-range high-precision products will be complemented with more robust deliveries of

Western types of missiles from both sides of the Atlantic.

## ► THE STATE OF UKRAINE'S MOBILISATION RESOURCES

During 2024 Ukrainian political and military leadership might consider an option of calling for a total mobilisation to generate all the resources available for a decisive counter-offensive. Combined with the achievement of technological superiority over Russia, Ukraine will be able to allocate its manpower resources optimally and sufficiently to achieve a breakthrough in several areas of the front with minimal losses of military personnel. Training at the facilities of the partner countries will be ongoing and streamlined.

## ► THE POTENTIAL OF UKRAINE AND RUSSIA IN UNMANNED SYSTEMS



With mass marine drones Ukraine takes military control over the seas around Crimea and the adjacent coasts of Ukraine. Russia cannot use the Black Sea to terrorize the Ukrainian population nor to endanger the transit routes for cargo vessels from Ukrainian ports.

Global manufacturers of unmanned platforms are interested in deepening cooperation with Ukrainian producers, drawing from experience of the most successful products, tested by war. To diminish the influence of China in the development of FPV drones, localization of elements production is secured via partnership with Western manufacturers.

UAVs of different types are present in all military units, while tactics of modern warfare will be transformed. The digital dimension of the combat will be more articulated. Ukraine will be able to conduct massive strikes using decoy and attack drones to overload Russia's air defence systems. It will also develop its hunter drones equipped with nets to hunt down Russian drones. Signal-emitting decoys to attract Rus-



sian glide bombs and strobescopes to blind Russian drones' thermal cameras at night will be in sufficient quantities to ensure this technological superiority over Russia.

► **LEVEL OF POLITICAL AND DIPLOMATIC SUPPORT FOR UKRAINE BY ALL PARTNERS (WEST+)**

Ukraine will be able to internationally generate political and diplomatic support to such an extent that it will get a substantive number of bilateral security agreements to help the country develop a high degree of confidence in its ability to defend itself. NATO and integration into the EU will be on track. G7 and international financial institutions will be ready to consider generous assistance packages for Ukraine for the longer term. Ukraine will be successful in ensuring overwhelming support to the Peace Formulae of President Zelensky (with an impressive number of the countries from the Global South aligning with this view), thus, setting new standards for the international legal order and security architecture.

► **RUSSIA'S MILITARY POTENTIAL TO CONTINUE THE WAR**

Under this scenario, Russia will not be able to use its military quantitative advantage over Ukraine and replenish its worn-out resources and reduced stocks of arms in a term of 1-2 years. The overstretched federal budget will not allow to provision of timely and full compensations to families of dead or wounded

combatants, which will become more visible in the course of the next two years and might steadily lead to growing resentment in Russian society. On top of that, a growing number of neglected veterans of the Russian war in Ukraine with developed complex post-traumatic stress disorders (which by the end of 2024 might exceed 1 mln people) will become ever more difficult to control. This group will become the most rebelling part of the society, which may provoke several social unrests internally or give rise to organized crime and a volatile security situation within Russia itself like it was after the 'Afghanistan war' of 1979-1989. Under these circumstances, it will become very difficult for the Russian political elites to maintain control within the country and to mobilise extra manpower to the frontline in Ukraine. Social unrest evoked by this category of the Russian population will give a surge to efferent processes, leading to further defragmentation of Russia.

► **STOCKPILES OF WEAPONS AND AMMUNITION IN THE EU AND OTHER PARTNERS OF UKRAINE**

European countries and the USA are increasing their defence spending and investing in their production of weapons and ammunition. This will lead to the gradual accumulation of stocks of weapons and ammunition in the warehouses of the armed forces of the partners starting in 2024. Greater access to arms stocks in third countries.

## II. Scenario implications<sup>8</sup> for the Western allies (foremost, the US, the UK, the EU, and CEE countries)

1. **Potential risk of revanchism** in the long-term perspective **in Russia** if Putin's regime is not changed as a result of failure in the war or internal developments, provoked by any kind of social resentment.
2. Future of defeated Russia may **trigger tensions between major global powers**, namely the USA, and the larger Western community, on one hand, and China, India, and Brazil on the other.

1. The defeat of Russia and the active participation of the US in supporting the Ukrainian Army on this track may serve as a **serious deterrent for China** in its intent to escalate the conflict with Taiwan.
2. Russia is weakened by military defeat and is **unable to actively participate and pour resources into other regional and international conflicts**. It may prove efficient to start **conflict-resolution and peacekeeping operations in conflict and war zones**, where Russia previously denied or hampered such initiatives.
3. The European Union is capable of setting a **long-term defence industries development strategy**, which may guarantee for European arms manufacturers stable demands on military equipment and ammunition. As a result, there will be a **boost in defence production in the EU**, sufficient to replenish national stockpiles and be able to provide military assistance to partners.
4. **The New Strategic Agenda of the EU for 2024-2029** has a long-term objective of being a credible security partner worldwide with a **set of long-term instruments, including a meaningful conflict-resolution toolkit**.
5. The EU Defense Union will generate some tractions as one of the manifestations of the **EU's strategic autonomy/sovereignty**, including **defence partnerships** with important states, like Great Britain, and Ukraine.

6. The **Peace Formulae** is actively discussed as a stable precondition of the sovereignty and territorial integrity of Ukraine, as well as a **future framework for global security architecture**. Some points of the Peace Formulae gained institutional and procedural development, including mechanisms for Russian assets freeze and transfer to reconstructions of Ukraine, Special Tribunal for the Crime of Aggression, a mechanism for returning home of Ukraine prisoners of war, etc.
7. **Ukraine's Euro-Atlantic integration** track will become more **clearly articulated**. In 2025 NATO allies may agree to set in motion preparatory action plans for Ukraine to be in line with the Alliance's political and military requirements.
8. The prolonged discussion about **reform of the UN Security Council** may have a new impetus with decreasing Russia's political leverage.

8 Negative implications are marked in red; positive in green.

# Policy Recommendations:

## US

1. In the short-term perspective, the efforts of the US Congress and White House should be focused on renewing the financial and military support for Ukraine.
2. The US should lead the process of intensification of military support for Ukraine within the Ramstein Group. The reference point here is that at current level of support Ukraine inevitably bogs down in attrition war, with time not in its favor.
3. Despite it has been not used previously, "Lend-Lease Act for the Protection of Democracy in Ukraine" has to be readopted. This mechanism may serve as a strong signal to Putin, that US assistance to Ukraine is guaranteed on multiple levels, including lending of military equipment to Ukraine.

## European Union

4. EU has to acknowledge the limits of its current strategy towards Ukraine. The present levels of military support are not matching the level of challenges and needs on the battlefield in terms of military support. New strategic Agenda of the EU needs to provide more robust approach to assistance to Ukraine.
5. EU member states have accept a necessity and to develop a long-term strategy for support of Ukraine militarily. In this regard it is of utmost importance to secure long-term framework of the European Peace Facility worth of 20 billion Euro for 4 years. It might serve as a clear signal to Putin that the EU will really stay with Ukraine 'as long as it takes'.
6. Provided that Russian war against Ukraine has entered the phase of attrition the European Union should take additional steps in order to expand training capacities of the EU Military Assistance Mission in order to address increasing needs of Ukraine in prepared manpower.
7. Provided that the EU has committed itself on the bilateral level to assist with promotion of the Peace Formulae, EEAS, European Commission along with EU member states need to be more actively engaged in communication with states of Global South and third partners.

8. Admitting realistic limits and inability to meet the set target of production of one million of artillery rounds for Ukraine till March 2024, the EU members states have to demonstrate political will and to develop practical solutions in securing outside production capacities in reliable partner states.

## NATO

9. At the Washington Summit in 2024 NATO allies have to go further and define a more coherent approach to the invitation of Ukraine to NATO accession. The ambiguity of the NATO Vilnius Summit 2023 Final Communiqué appeared to be an encouraging signal to the Kremlin to continue aggression in Ukraine.

## Ukraine Defense Contact Group (the Ramstein group)

10. To provide Ukraine with assistance in order to achieve military technological superiority over the enemy in three key areas: situational awareness, precision strike capability, force protection.

## Wider international community

11. G7 and the coalition of the willing states have to be more active in developing substantive components of bilateral security agreements and commitments, stipulated for under the respective Memorandum signed in Vilnius in July 2024.
12. Access to financial instruments to invest in Ukrainian defense industries is of acute importance now to support the capacity and initiative to produce military equipment and ammunition. International financial institutions should develop special credit lines with favorable conditions which might be utilized by international and Ukrainian entities for developing mil-tec initiatives and setting production lines and facilities jointly with Ukrainian arms manufacturers.

## Ukraine

13. Ukrainian authorities should increase its communications outreach with core partners, including targeted campaigns for political establishment and society. More efforts are needed to reach out to societies in strategic partner states, including the United States, EU member states and NATO allies. Specific attention also to be paid to “sitting-on-a-fence” states in a wider region (eg. the Global South).
14. With a view to the presidential race in the US in 2024, state and non-governmental institutions have to intensify its advocacy work with members of the US Congress (both from Democratic, and Republican parties) with special focus on US financial allocation for Ukraine.
15. Ukrainian authorities have to transform and modernise its mobilization and military recruitment system, introducing transparent digital instruments, eliminate every sign of corruption in Territorial Centers of Recruitment and Social Support.
16. Till the end of 2024 Ukrainian industrial complex should increase its capacity to meet the demand of the Ukrainian military units along frontline with necessary quantities of ammunition for artillery, mortars and combat tanks.
17. The state has to keep investing heavily into production of FPV kamikaze drones. All procedures of licensing, importing and producing should be simplified and directly connected to cover the needs, indicated by the General Staff of Ukraine.
18. Long range and high precision missile and UAV programs should also find a right place within the Ukrainian defense industries agenda. Mass production will require cooperation and synergies with Western defense companies and allocation of large investments.
19. Joint R&D programs with the Western partners in mil-tech industries should be launched and developed.

## Annex I

# Methodological Approach to Scenario Building

**Time horizon:** We deliberately limited the horizon of our search to 2024-2025. Our team recognizes that Russia's war against Ukraine, especially given the current trend and the calculations of our experts, has a high probability of lasting longer. Meanwhile, we have set up this two-year timeframe to make distinctions among different scenarios that might evolve within the given period.

As in previous Scenarios from 2022/23, we focused on exploring the core drivers for the security situation in Ukraine, likely to be most impactful upon the scenarios. To map them, we took a five-step study approach.

**Step 1.** Based upon a brainstorm-format situation analysis of the developments around the war in 2022/23, as well as the previous 45 factors used for analysis in 2022/23, we have identified 7 potential scenarios and 58 relevant factors with a potential to influence the war's dynamics and outcomes.

**Step 2.** All these factors, as well as seven scenarios, have been indicated in the questionnaire designed for the expert survey. Within the expert poll, we approached 41 Ukrainian experts with profound expertise in international relations, military sciences, and diplomacy (see Annex III for the list of those experts who gave their permission to disclose their names and affiliations) and asked them to indicate the five most likely scenarios and to rate the above-mentioned factors from the perspective of their impact on the security situation in Ukraine.

**Step 3.** As a result of the survey, we have selected five main scenarios with assigned probability scores. These are based on the voting of our experts, as well as ten factors from the proposed 58, receiving the highest scores of the aggregated weighted votes of experts. These accordingly are considered the most crucial when it comes to the impact on the current situation in Ukraine's military, political, diplomatic and other realms (see next Chapter for a detailed overview and analysis of factors). These factors (those drivers, whose performance could trigger switches among the scenarios) were ranged according to the significance of their impact (i.e. the capacity to drive the switch among scenarios), based on aggregated scores of weighted votes in diminishing order of significance (weight of each factor is given in Annex II).

**Step 4.** From more general factors of the second dozen (political, diplomatic and military) our team has elaborated a general overview and description of each of the five selected scenarios. Each scenario also considers potential variability within each of the top ten factors. At the same time, the spectrum of possible changes has been drawn based on the open data provided by reliable Ukrainian and foreign institutions with expertise in security and defence, as well as our interviews with senior officials in foreign policy, defence, military and foreign intelligence, given upon the condition of anonymity.

**Step 5.** We have defined positive and negative implications for the international community for each of the five scenarios, which may occur if a specific scenario unfolds in real-time. While evaluating implications from different scenarios, we have encountered some which are relevant for more than just one scenario. Therefore, they might be reflected several times. Scenarios were given the sub-characteristics of "negative" and "positive" from the considerations of the aggregated weight of negative and positive implications for the Western partners and particular countries and regions in Europe.

## Annex II

# Factors that will Drive the Security and Defence Situation Around the Russian War in Ukraine in 2024-2025

Military
External political for Ukraine
Internal for Ukraine (political)
Bilateral/multilateral political (Ukraine and international community)
Other internal for Ukraine (non-military and non-political)
Internal for Russia
Other (non-military) factors with impact on European and global security

Factors	Votes
1. Resource provision of the security and defence sector of Ukraine	191
2. Operational and tactical successes of the Ukrainian Armed Forces	189
3. Level of support for Ukraine with weapons by all partners (West+)	188
4. The US presidential race in 2024	185
5. Increasing the production of weapons and ammunition by the Ukrainian military-industrial complex	185
6. The state of Ukraine's mobilisation resources	183
7. The potential of Ukraine and Russia in unmanned systems	182
8. Level of political and diplomatic support for Ukraine by all partners (West+)	177
9. Dynamics of the military and security situation	177
10. Russia's military potential to continue the war	176
11. Stockpiles of weapons and ammunition in the EU and other partners of Ukraine	175
12. Public attitudes towards the war, trust in the government's actions in Ukraine	172
13. The state of the Russian economy (budget-forming industries), the transition to the military mode of the Russian economy	169
14. Dynamics of Ukraine's Euro-Atlantic course, receipt/absence of an invitation to NATO	167
15. Internal political stability in Ukraine	167
16. Energy sustainability (globally and in Europe)	163
17. Outbreaks of regional conflicts around the world (domino effect)	157
18. Diverting attention to new conflict zones (Serbia/Kosovo, China/USA over Taiwan, war in the Middle East, war between Azerbaijan and Armenia, etc.)	157
19. Scope and conditions of security guarantees to Ukraine by partners	156
20. Results of the European elections in 2024/ retention of the pro-European coalition in the European Parliament	156
21. Contradictions between Ukraine's political and military leadership	156
22. Dynamics of the European integration course, the start of negotiations on Ukraine's accession to the EU	153
23. China's position on supporting Russia	152
24. State of the Ukrainian economy (unemployment, inflation, budget)	152
25. Missile and drone strikes on strategic targets on the territory of Russia that have symbolic significance	151
26. Consolidation of external players on sanctions against Russia	150
27. Resilience to Western sanctions	147
28. Vulnerability of partner countries to nuclear blackmail from Russia	146
29. Economic and military blockade of the Black Sea	145

30.	Pressure on Ukraine to negotiate with Russia	142
31.	Elections in Ukraine	140
32.	International legal pressure on Russia (ICC, issuance of arrest warrants for the top political leadership of Russia; recognition as a state sponsor of terrorism, genocide)	138
33.	Support for the war by political and security elites of the Russian Federation	136
34.	Iran's position on supporting Russia	136
35.	Changes in the political situation in several strategic partners as a result of the elections (Poland, the UK)	134
36.	The state of the EU energy market	134
37.	Putin's departure/withdrawal from power	134
38.	Man-made environmental disasters provoked by Russia	134
39.	Russia's targeted sabotage against NATO countries	133
40.	Strengthening of anti-European trends in CEE countries (Slovakia, Hungary)	132
41.	Formation of new sub-regional security and defence alliances with Ukraine	131
42.	Russia's active play in military theatres in the Middle East and Central Asia	129
43.	Changes in Russia's strategic goals for Ukraine	127
44.	Russia's attempts to influence the top military and political leadership of Ukraine	127
45.	Increase in incidents of Russian missiles hitting the territory of NATO's neighbouring states	125
46.	The state of international community involvement in the development and content of the Peace Formulae	124
47.	North Korea's position on supporting Russia	121
48.	Level of illegal migration to the EU from regions of potential food crisis (Africa, Middle East)	117
49.	Military rebellions of PMCs according to Prigozhin's scenario	115
50.	Position of the countries of the "Global South" on Russia's war against Ukraine	114
51.	Public sentiment in Russia, trust in the government	111
52.	Humanitarian situation in the temporarily occupied regions in Ukraine	109
53.	Increased flow of Ukrainian refugees to Europe	107
54.	Internal situation. Intensification of national movements	106
55.	Russia's withdrawal from international "nuclear" treaties	103
56.	The role of Belarus	103
57.	Position of international organisations on Russia's war in Ukraine (UN, OSCE, IAEA, Red Cross)	93
58.	Position of allies within the Collective Security Treaty Organization	68

### Other factors, suggested by some experts to be considered in the analysis:

- Disintegration of the Schengen zone under the influence of new migration inflows.
- Presence/absence of a long-term strategy towards the Russian Federation in Ukraine.
- Regional political contradictions in Eastern Europe.
- Factor of Turkey (its zone of influence in the Black Sea and support for the Crimean Tatars).
- Understanding that this war should only be accomplished with Ukraine's victory.
- Demographic crisis in Ukraine.
- Consolidation of Ukrainian society with zero tolerance to corruption.
- Ability of Ukraine to strengthen support among strategic partners.
- Military coup or coup-d'état in Russia.
- Development of UA mil-tech sector with the use of the latest technologies in weapons.
- Construction of Ukraine's military underground factories.
- Changing policy towards Russia by the United States and the West in general: conceptualisation of Russia's defeat as their security interest that outweighs the risks involved.
- Dynamics of Ukraine's implementation of reforms within the European integration package.

## Annex III

# Experts, Who Took Part in the Survey

1. **Babin Borys**, Association of Reintegration of Crimea
2. **Baienkov Oleksandr**, International and EU Sanctions Platform
3. **Basarab Mykhailo**, political analyst
4. **Bogush Denys**, serviceman of the Media Centre of the Strategic Communications Directorate of the Chief Commander-in-Chief of the Armed Forces of Ukraine
5. **Vdovychenko Viktoriia**, Associate Professor, Borys Grinchenko Kyiv University
6. **Veselovskyi Andrii**, Ambassador Extraordinary and Plenipotentiary of Ukraine
7. **Gaber Yevheniia**, Non-resident senior fellow, Atlantic Council IN TURKEY
8. **Haran Oleksii**, Ilko Kucheriv Democratic Initiatives Foundation
9. **Davymuka Oleksandra**, Chief Consultant, National Institute for Strategic Studies
10. **Zhdanov Ihor**, PhD in Political Science, Head of the Information Defence Project at the Open Policy Foundation, Minister of Youth and Sports of Ukraine (2014-2019)
11. **Zhelikhovskyi Stanislav**, Hennadii Udoenko Diplomatic Academy of Ukraine
12. **Zhovtenko Taras**, Ilko Kucheriv Democratic Initiatives Foundation
13. **Zahorodniuk Andrii**, Chairman of the Board, Centre for Defence Strategies
14. **Zolkina Mariia**, DINAM Fellow (2022-2023), London School Economics and Political Science
15. **Zolotukhin Dmytro**, Institute for Postinformation Society
16. **Kazdobina Yuliia**, Ukrainian Foundation for Security Studies
17. **Kalinichenko Oleksandr**, a lawyer specializing in international law and head of the “Atlantist Notes” project
18. **Kapitonenko Mykola**, Associate Professor, Institute of International Relations of Kyiv National Taras Shevchenko University.
19. **Karakuts Andrii**, Centre for International Security
20. **Klymenko Andrii**, Head of the Monitoring Group, Institute for Black Sea Strategic Studies
21. **Konstantinova Vira**, independent expert
22. **Kryvdyk Ostep**, Chair, Ukrainian Strategic Initiative
23. **Lutsevych Orysia**, Ukraine Forum at Chatham House
24. **Magda Yevhen**, Institute of World Policy
25. **Makobriy Oleksandr**, Head of the Sector for Implementation of the Information Security Doctrine, Ministry of Information Policy of Ukraine
26. **Ogryzko Volodymyr**, Head of the Centre for Russian Studies, Ambassador Extraordinary and Plenipotentiary of Ukraine
27. **Petrenko Ihor**
28. **Samus Mykhailo**, Director, The New Geopolitics Research Network
29. **Sergiy Solodkyy**, First Deputy Director, New Europe Center
30. **Triukhan Vadym**, deputy commander of the company, Volunteer Battalion Boryspol 1
31. **Faraponov Vladyslav**, Head of the Board, Institute of American Studies
32. **Khandogiy Volodymyr**, Ambassador Extraordinary and Plenipotentiary of Ukraine
33. **Chornogor Yaroslav**, Russia and Belarus Study Program, Foreign Policy Council “Ukrainian Prism”
34. **Shelest Hanna**, Co-editor-in-chief, UA: Ukraine Analytica
35. **Shynkaruk Kateryna**, Senior Lecturer, Bush School of Government and Public Service in Washington DC,
36. **Yakovliev Maksym**, Head, Department of International Relations at NaUKMA

*Plus 5 more high-ranking experts have expressed their wish to participate in the survey under the condition of anonymity.*



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