



Victory? Stalemate? Escalation? Possible developments of the Russian war of aggression against Ukraine by 24 February 2024

Ukrainians are fighting for a future in peace and freedom. This also affects us, because what we do or don't do today has a direct impact on the people of Ukraine, on security in Europe and on the international order. For the sake of being better prepared for possible developments in the course of the war, we have devised four scenarios with experts from 13 European countries.

24 February 2022 marked the beginning of Russia's full-fledged invasion of Ukraine one year ago. While many ruled out a victory for Ukraine in the first few days, the impression changed over the past summer so that many considered Ukraine invincible. However, in this war many developments are still conceivable: The victory of Ukraine, a victory of Russia but also, various other scenarios are possible. Since Ukraine's successes depend to a large extent on international support and Western arms supplies, it is partially up to the West which scenario becomes reality – action, late action, or inaction not only determine the course but may also settle the outcome of the war.

The Russian invasion of Ukraine caught Germany completely unprepared. Germany had become too comfortable: since the end of the Cold War and the collapse of the Soviet Union, we no longer wanted to concern ourselves with the possibility of a war of aggression on the continent. As a result, less and less was invested in defense and security. The foreign and security policy threat posed by Russia since 2008 was merely acknowledged and did not lead to a change of policy. This mistake must not be repeated! In the future, we in Germany and Europe must be better prepared for international challenges. This begins with us becoming clear about possible further developments in the course of the war in Ukraine and about the risks and opportunities of various options for action.

To this end, the Konrad-Adenauer-Stiftung held a workshop in Berlin together with the European Center of Excellence for Countering Hybrid Threats from Finland. At the event, more than 20 experts from 13 European countries, primarily from Central and Eastern Europe and countries of the Eastern Partnership as well as Russia, developed and discussed scenarios. The task and goal of the workshop was to outline four possible scenarios for the progress of the war in Ukraine in exactly one year. Specifically, it was necessary to (1) define criteria for all scenarios (e.g., "What does 'victory' actually mean?") and (2) find out which prerequisites for the occurrence of a scenario would have to be met by 24 February 2024.

In a second step, concrete recommendations for political action were derived from the scenarios. There is no question that the Konrad-Adenauer-Stiftung and all authors of this document are committed to the unconditional support of Kyiv to make a Ukrainian victory possible. To maintain the international rule-based order and to restore security in Europe, Russia's war of aggression must not be a success!

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The four scenarios:

Scenario 1: “Democracy prevails” – Ukraine would have won by 24 February 2024

In the first scenario of the workshop, the group addressed the question of how to define a Ukrainian victory. In a second step, the group determined what the prerequisites for Kyiv's victory would have to be. A Ukrainian victory was defined by three cornerstones: (1) preservation of national unity, and (2) state sovereignty, and (3) secure borders on their internationally recognised course of 1991. The state institutions of Ukraine would be functional, the infrastructure intact, and general services secured. The prerequisites for this would be: International support in the form of financial, humanitarian, and military aid. The latter through the supply of weapons and materials, intelligence information and training that would not only have to be maintained but increased. The Russian Federation would have been pushed back militarily by Ukraine, isolated internationally due to its own misconduct (e.g. unacceptable further escalation), and weakened by sustainably effective sanctions (which are constantly reviewed for closing evasion loopholes). Due to the strong unity and sustainability of Western support (politically, militarily, and economically) for Ukraine, Russia would not be able to continue the war. The West would also set clear conditions for resuming cooperation with Russia, with reparation payments and the extradition of war criminals to an international war crimes tribunal being the basic requirements.

Scenario 2: “The end of the end of history” – on 24 February 2024, Russia would have won

For scenario two, the group has identified two possible variations:

- a) A Russian victory would be if Moscow was able to (1) achieve substantial territorial gains in Ukraine and militarily push back the Ukrainian defenders. The premise for this scenario would be (2) that Western support for Ukraine waned. At the same time, the entire economy in Russia would have to be converted to a war economy.
- b) A second variant for a Russian victory would be if (1) Moscow negotiated a peace treaty and was allocated areas within the de facto borders – thus defined by the course of the front. The prerequisite for this would be that (2) the West would negotiate directly with Putin, effectively bypassing Ukraine.

Scenario 3: “Kinda Minsk III” – as of 24 February 2024, there would be a stalemate situation

A battlefield stalemate would prevail if (1) the fighting between Ukrainians and Russians was of lower intensity. Russia would gather new strength and would not have abandoned any of its war aims. A new attack would remain likely. A stalemate should therefore not be confused with a ceasefire or even peace. The prerequisites for the stalemate situation to occur would be (2) that the announced Russian spring offensive would fail and that a Ukrainian counter-offensive would come to a standstill. An agreement between Zelenskyj and Putin would be out of the question. In this scenario, Ukraine would continue to receive weapons from the West, but not in the quality and scope needed to completely push Russia back from Ukrainian territory. At the same time, Russia would not have switched to a war economy but would continue to threaten nuclear escalation. Western governments would be indecisive and vulnerable to Russian intimidation. Ukraine would face a domestic political crisis.

Scenario 4: “No peace in our time” – as of 24 February 2024, intense fighting remains

This scenario is characterised by the continuation of fighting at today's intense level (“War of Attrition”). The result would be heavy fighting in the east and south of Ukraine with correspondingly high losses, without any major gains in the territory on either side. The group identified the following factors as prerequisites for the occurrence of this scenario: Negotiations between Kyiv and Moscow would still be impossible because Russia would not give up claiming power over Ukraine, on the one hand. On the other hand, negotiations would also be unthinkable in view of the unbroken high morale of the Ukrainian population, who would use all their might and resources to oppose the ongoing Russian campaign of annihilation in their own country. In addition, in this scenario, no third countries would have entered the conflict and there would be no policy change among key actors such as the USA.

Findings from the scenarios:

The systemic classification of the four developed scenarios has shown that indecisive support or even non-action on the part of the West, has the most serious consequences. In fact, only a Ukrainian victory along with a robust European security architecture can bring reliable stability and lasting peace back to Europe. If Western support for Ukraine remains at today's too-scarce level or even decreases, in a year's time, Ukraine would either be locked in a standoff with the Russian aggressor at home or the war would rage in the same unchanged intensity as today, combined with high civilian and military casualties – the latter on both sides. Simply carrying on is a bad option with high risks.

As the scenarios have shown, both a stalemate and the continuation of the war at the current, intense level are extremely unstable conditions. The risk of escalation is very high in both scenarios. The longer the fighting lasts, the more likely it is, that the war will spread to neighboring countries such as the Republic of Moldova.

The scenario of a Russian victory cannot be ruled out and the developments on the battlefield are not the only decisive factors. The impressive resistance of the Ukrainian army against the Russian invaders should not hide the fact that the Russian armed forces can mobilise enormous resources, especially infantry and (older) weapon systems.

Russian propaganda and disinformation are noticeably successful and aim in particular to increase the fear of a nuclear escalation that is widespread among the German (and other Western) population(s). Another aim of Russian propaganda is to propagate the false assumption that states would become a war party by supplying arms. This is not in accordance with international law. In the medium term, Russian propaganda and disinformation can result in the population's support for Ukraine waning. It must therefore be communicated to both the German and the European public that Russia has no interest in a confrontation with NATO. However, if the West does not support Ukraine in the comprehensive manner necessary for its victory and Russia resolutely converts its domestic economy to a war economy, a Russian victory is closer than many people in the Western can believe.

A Russian victory would mean a return to the “right of the strong” in international politics. The rule-based world order would be severely weakened. The Russian dictatorship would emerge stronger from its aggression and the threat of nuclear weapons would have lost its stigma. Russia would be encouraged to continue the hybrid war against Western Europe and to invade more states. Therefore, support for Ukraine must be maintained and significantly increased.

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A Ukrainian victory under the given assumptions and conditions is therefore the only scenario that allows for stability in Europe. Any status other than a clear Ukrainian victory against the Russian aggressor on Ukrainian territory would be unstable. Instability means not only that Russian aggression could spread to more Ukrainian areas but also that Russia could attack more countries. A Ukrainian victory according to the definition of the first scenario comprising preserved national unity – defended state sovereignty – secured borders (1991) is only possible, if the international community massively increases its support for the Ukrainian defensive struggle and, above all, signals its readiness for the long term. It must provide the weapons, weapon systems and appropriate ammunition necessary for victory. This is the only way for the Ukrainian army to overcome the very well-developed Russian defense systems and reconquer the Ukrainian territories. Toward Russia it must be clearly communicated that we in Europe are ready and willing to support Ukraine in the long term. Time is against Putin. The willingness to cooperate in the future – after the war – must be tied to very specific conditions: These include compliance with international law, cooperation with the newly created tribunal, and a substantial contribution to dealing with the material and immaterial consequences of the war in Ukraine (reparations).

The required support for Ukraine causes high financial burdens. However, these amounts are negligible compared to the enormous sacrifices and costs of not taking action or merely continuing aid to Ukraine at current levels. Aid must be directed decisively and strategically. Germany's historic responsibility obliges the federal government to do everything possible to prevent war crimes in Ukraine. There is no time for hesitation!

Recommendations for action:

1. Germany must accept and fulfil its leadership role!

Berlin should use its political weight more in the most important international organisations to support Kyiv. Our partners in Central and Eastern Europe, who are leading the way on these issues, expect this above all. Ukraine and its people must be supported by a speedy accession process to the European Union. The German government should work to ensure that Ukraine is quickly integrated into the structures and processes of the EU by means linked to clear criteria, even before regular EU membership. The first successful steps have already been taken: Ukraine is granted access to the EU internal market and is involved in cooperation programs in the areas of economic development, energy, research and development, and reconstruction. This brings stability to the political and economic reform processes and will enable Ukraine to recover more quickly from the consequences of Russian aggression.

In addition, Ukraine must quickly be tied more closely to NATO structures through wide-ranging consultations and extensive training and education programs (such as the Defensive Engagement and Enhancement program).

Furthermore, the German federal government should campaign for a reform of the UN Security Council. The aim must be to restrict the right of veto of the five permanent members of the Security Council, so that they too are held accountable, if they violate the principles and the charter of the United Nations. This way, in the future, Russia – or any other aggressor – can also be condemned. The procedure could be based on the “Uniting for Peace” mechanism to strengthen the role of the UN General Assembly in cases where a veto power is directly involved in wars that violate international law.

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2. Germany must communicate strategically!

Since the start of the Russian attack on Ukraine, the German government's communication has been incomprehensible and inadequate. The German decision-making and deliberation processes are not transparent for our international partners and for the German population. Germany has stuck to an outdated Russia policy for too long and lost trust, especially among its eastern partners.

Berlin must set its course and communicate more and more clearly, to become an understood and reliable partner once again. The federal government must issue clear statements and, above all, formulate goals. The impression must not arise that Germany is not mobilising all its support out of fear and is not striving for a clear victory for Ukraine. Because Ukraine's victory is also in Germany's greatest interest. At the same time, the government must communicate clearly with the population and not personify the war: It is not Putin's war – it is Russia's war.

3. German defense capability must be sustainably strengthened!

The Bundeswehr lacks personnel, modern equipment, supplies, ammunition, and weapons. The German defense industry must also be made responsible through a targeted arms industry policy. The priority is to ensure that ammunition stocks are quickly replenished to be able to continue to provide targeted support to the Ukrainian armed forces in a timely manner.

By sustainably strengthening Germany's ability to defend itself, the Federal Republic is also sending a clear signal to Russia: Germany is ready and willing to work with its partners to preserve the rule-based world order and will support Ukraine to win the war. Communicating this, cannot only serve as a signal to Russia.

4. Germany must support a holistic EU strategy for Ukraine!

In particular, the financial support (to date a total of 67 billion Euro) from the EU and its member states to Ukraine has so far been too selective in individual areas. A holistic strategic approach to European support is still lacking.

Brussels must develop a strategy for this that will endure after the fighting has ended. This plan must show clear guidelines and ideas on how the social and economic reconstruction of Ukraine can be supported and protected by the EU. This includes a credible and realistic roadmap for Ukraine's swift membership of the EU. This strategy must also consider the neighbors. There can only be long-term and sustainable security for Ukraine if the EU also has a clear position on Ukraine's neighborhood and the countries of the Eastern Partnership, especially the Republic of Moldova, but also Belarus and the countries of the Black Sea Region (Georgia!).

5. The EU member states must invest more in common security structures!

The EU has numerous instruments and institutions (e.g., the Permanent Structured Cooperation in defense, PESCO and the European Peace Facility, EPF) that are intended to strengthen pan-European security but have not yet been sufficiently used.

The German federal government should take the initiative within the EU and work to ensure that the states invest significantly more in the European Defense Fund. With the help of these resources, security, and defense capabilities can be strengthened and, in the future, an adequate European conventional deterrent can be built up.

6. Europe must become more resilient to autocracies and dictatorships!

Aggressive autocracies and dictatorships are increasingly trying to discredit the value-based Western political and social model and weaken it with hybrid methods. The German federal government should support the development of a holistic European resilience strategy. Close coordination among the member states and bundling of the respective capabilities (strategic communication against disinformation, uniform protection standards for critical infrastructures, defense centers against cyber-attacks, etc.) is crucial for improving resilience. An EU security commissioner should lead the pooling of national capabilities.

The German federal government should support the development of a holistic European resilience strategy.

This summary with policy recommendations reflects the considerations and results of the scenario workshop on February 11 and 12, 2023 in Berlin, which was attended by: Dr David Darchiaschvili, Ferdinand Gehringer, Pavel Havlicek, Dr Peter Hefele, Professor Eugenia Hernandez, Olha Husieva, Dr Łukasz Jasiński, Wilfried Jilge, Dr Christina Krause, Olha Lykhnenko, Stephan Malerius, Sönke Marahrens, Vladimir Milov, James Nixey, Dr Aleksander Piroznikow, Dr Viktorija Rusinaitė, Dr Hanna Smith, Professor Dr Margarita Seselgytė, Mykhailo Samus, Alexander Schuster, Vanessa Vohs, Dr Kristin Wesemann, Dr Jan-Philipp Wölbern, Jakob Wöllenstein



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