UKRAINE: SCENARIOS

Update on scenarios and outlook into 2024.

29 FEBRUARY 2024

About this report

Aim: this report aims to update the probability of the original scenarios developed in 2023. It highlights key developments since July 2023 and the main events to watch in 2024. These scenarios and updates do not aim to predict the future but inform on a range of plausible and complementary futures to support humanitarian planning and decision-making. This report does not provide any new scenarios.

Methodology: this report was prepared with input from context and humanitarian experts, who participated in an either in-person or online workshop in January 2024. The sessions involved discussions of how the original scenarios have developed and what to watch for in 2024. The four scenarios' probability and impact levels have been reviewed and the time frame extended to the end of 2024, instead of the original mid-2024.

Scope and limitations: The scenarios do not describe the imagined futures in detail but consider key differences in the conflict, governance, and economic environments alongside the extent to which and how people's personal safety, needs, and coping strategies might change. As such, they do not consider exhaustively all the developments and events since 2023. They are not forecasts; they describe situations that could occur and highlight the possible impacts and humanitarian consequences of each.

ACAPS' scenarios methodology is outlined in our guidance note.

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INTRODUCTION

In July 2023, ACAPS, with the help of various experts, developed four scenarios for Ukraine highlighting the potential developments in people's basic needs and coping capacities. These scenarios envisioned how the conflict and living conditions in Ukraine could develop in 12 months, including (1) conflict escalation, (2) the increased turbulence of conflict as Russian forces and private military companies (PMCs) become more fractured, (3) the conflict becoming more protracted, and (4) a ceasefire. As the full-scale Russian invasion of Ukraine enters its third year in 2024, active conflict through both ground and aerial attacks indicates that it is becoming increasingly protracted (EIU 30/11/2023; RFE/RL 05/01/2024).

DEVELOPMENTS SINCE JULY 2023

Conflict dynamics

In the second half of 2023, the areas of control and front lines remained broadly the same as in midyear. Donetsk oblast remained a major conflict hotspot, with continued shelling resulting in significant damage and destruction, particularly in Avdiivka and Marinka cities (BBC 30/01/2024; UNN 02/12/2023; VOA 18/12/2023). Russian forces took control of Avdiivka city in February 2024, however Ukrainian forces prevented significant Russian military advances along the entire front line. The Ukrainian counteroffensive that began in June 2023 led to no significant changes in areas of control (BBC 17/02/2024; ISW accessed 21/02/22024). Critical infrastructure continued to sustain damage, notably the Kakhovka dam, seaports, export infrastructure (following Russia's withdrawal from the Grain Deal in July 2023), and energy infrastructure (ACAPS accessed 01/02/2024; Reuters 08/11/2023).

Aerial attacks on Dnipro, Kharkiv, Kyiv, Lviv, Odesa, and Zaporizhzhia cities increased significantly in December 2023 and January 2024 (Ukrainska Pravda 04/01/2024). Russia completed its tactical nuclear weapon deployment to Belarus in December 2023 and has continued to maintain military and administrative control of the Zaporizhzhia nuclear power plant (IAEA 26/01/2024; Bellona 07/12/2023).

Military capacity and support

Iranian and North Korean military support for Russia continued throughout 2023, and Russia has significantly increased its military spending in 2024 (SIPRI 13/12/2023; The Guardian 05/01/2024; Al Jazeera 12/01/2024; Politico 02/11/2023; WSJ accessed 23/01/2024). Russia's capacity to launch aerial attacks remains strong. The Russian army also continues to rely on PMCs.

Following the Wagner group's failed rebellion, all PMCs appear to be operating within the Russian military command structure (The Guardian 09/11/2023 and 01/02/2024).

Ukraine has allocated 50% of the 2024 state budget to defence (RFE/RL 09/11/2023). Despite significant military support pledges in late 2023, Ukraine continues to rely heavily on a few core donors, and the speed at which military support arrives limits its capacity (IfW Kiel 07/12/2023). As the EU's production capacity has yet to reach its pledged levels, Ukraine's need for one million shells by March 2024 will only be met by half (Politico 31/01/2024; Euro News 14/11/2023). Internal US political disagreement has blocked a USD 60 billion military package to Ukraine since December 2023 (Svidomi 12/01/2024).

Economy

In 2023, Ukraine's economy and household purchasing power remained resilient, and inflation decreased (NBU 11/07/2023 and 11/01/2024; IMF accessed 01/01/2024). The growth of real GDP is estimated at 2% for 2023, and unemployment decreased in the last quarter of the year (IMF accessed 01/02/2024; IMF 12/12/2023; MOF accessed 23/01/2024; MOF accessed 01/02/2024). While the economy remained stable, it is not enough to make up for the economic shock of 2022. The increased share of the state budget allocated to defence also reduces funding for social services, further affecting the people most in need. As of 1 March 2024, the number of IDPs receiving cash assistance from the government will be limited to 170,000 people, down from 2.6 million (Glavkom 02/12/2023; Radio Svoboda 02/02/2014).

Despite the suspension of the Grain Deal in July 2023, Ukraine resumed its sea exports. In December, Ukraine exported 6.3 million metric tonnes of agricultural goods, similar to pre-invasion export levels in 2021 (The Economist 28/01/2024).

The Russian economy has withstood and largely evaded international sanctions (KSE 19/12/2023; KCL 19/09/2023).

International support

International support for Ukraine remains strong, with donors announcing multi-year funding in the first half of 2023 and the opening of EU accession negotiations (EC accessed 12/01/2024; EC 01/02/2024). Internal divisions across major donors, however, delayed some of the financial support in late 2023 (The Guardian 01/02/2024). The Government of Ukraine has warned of potential salary and pension delays if international financial aid does not arrive, as the state budget prioritises defence (The Kyiv Independent 27/12/2023).

The World Bank's recovery and reconstruction costs estimate increased from USD 411 billion in March 2023 to USD 486 billion in December 2023 (WB 15/02/2024). Ukraine's Humanitarian Needs and Response Plan requires USD 3.1 billion in 2024, as compared to USD 3.9 billion in 2023 (OCHA accessed 21/02/2024; OCHA 03/01/2024).

Humanitarian needs

14.6 million people in Ukraine are expected to need humanitarian assistance in 2024, a decrease from 17.6 million in 2023. This overall decrease does not mean that needs are less severe; people living in frontline areas are reaching 'extreme' and 'catastrophic' levels of need (OCHA 28/12/2022 and 03/01/2024; REACH 02/03/2023 and 13/12/2023).

Humanitarian access

As the front lines have not changed, humanitarian access remains similar to mid-2023 but varies across the country. No new areas have become accessible. In November and December 2023, access became more constrained in territories under Ukrainian control as a result of increased challenges in obtaining international visas for staff, severe winter weather, and increased attacks on major cities (ACAPS 06/02/2024). In Russian-occupied areas, access to and communication with people in need are risky and challenging (OCHA 25/10/2023). While remote cash assistance reaches some people in these areas, such assistance is becoming increasingly constrained by the conditions imposed by the Russian occupation authorities (OCHA accessed 21/02/2024).

Displacement

- As at December 2023, there were approximately 3.5 million IDPs, down from approximately 3.7 million in June 2023 (IOM 14/07/2023; ACAPS accessed 01/02/2024).
- As at December 2023, there were approximately 6.4 million refugees abroad, up from just over six million refugees in June 2023 (ACAPS 03/07/2023; UNHCR accessed 01/02/2024).
- As at December 2023, 4.4 million people had moved back to their places of origin, a quarter of whom moved back from abroad (IOM 21/02/2024).

Public support

In Ukraine, public support for continued fighting remains widespread but has somewhat decreased from 2022. Support for negotiations to end the conflict has increased slightly, with those living closest to the front lines in the south and east being more in favour (Gallup 09/10/2023). While almost all Ukrainians continued to trust the army, the level of trust in the President and Government decreased in 2023.

In Russia, public support for continued fighting remains high, but it is the Russian leadership's commitment to continuing the conflict in the coming years that is the main indicator (Atlantic Council 09/01/2024; RUSI 13/02/2024).

THE FOUR SCENARIOS AT A GLANCE

In the original report, the scenarios were numbered 1 to 4: (1) Escalating, (2) Turbulent, (3) Protracted, and (4) Ceasefire.

Scenario 1: escalating

Ukrainian military successes and internal tensions within Russia lead to a more aggressive Russian military strategy. Conflict escalates across Ukraine, and Russia indiscriminately targets civilian infrastructure.

Scenario 2: turbulent

Conflict intensifies locally, affecting new regions. Front lines shift, particularly in the east and south, while new areas in the north come under attack. The increased use of private military companies (PMCs) prolongs the pressure on Ukraine and ramps up uncertainty around conflict developments.

Scenario 3: protracted

Conflict in Ukraine remains at a similar level as in early 2023, with occasional localised escalations and minimal territorial gains by both sides. Aerial attacks continue to cause damage, while front lines remain heavily shelled, impeding access to essential services.

Scenario 4: ceasefire

Russia and Ukraine reach a ceasefire agreement amid strong external and internal pressures, leading to a decline in conflict levels. Access to occupied territories remains constrained, but some inhabitants and a few humanitarian organisations are allowed limited entry.

Between July 2023 and February 2024, the Protracted scenario unfolded in all aspects except the economy, which remained resilient along the lines envisioned in the Turbulent scenario. Despite intense fighting in some frontline areas and increased aerial attacks, there were no major changes in territorial control or conflict expansion to new areas as envisioned in the Escalating and Turbulent scenarios. Although Russian PMCs continued to operate, private fighters were firmly under Russian military control, and none began unilateral operations in Ukraine as imagined in the Turbulent scenario. There were no developments towards a Ceasefire scenario.

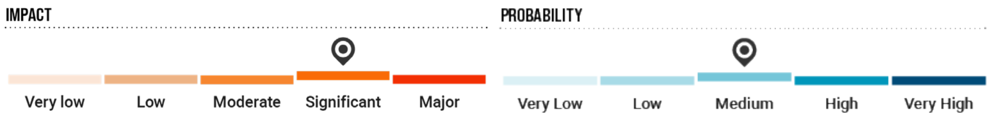
For updates to all scenario triggers, see Annex 1.

2024 SCENARIO UPDATES

This update describes the likely outcomes should each scenario unfold.

The four scenarios below are reorganised from more to less probable as follows: Protracted (medium probability, with significant impact), Escalating (low probability, with major impact), Ceasefire (low probability, with significant impact), and Turbulent (negligible probability, with significant impact).

Protracted



This scenario remains at a medium probability in 2024, and its impact level remains significant, but the economy is no longer envisioned to decline as fast or as much as previously described.

Russia and Ukraine have strong defensive positions along the front lines, meaning taking control of territory is difficult on either side. Hotspots will continue along the front lines with little change in control. Aerial attacks and artillery strikes will continue, and Russia can be expected to continue attempting to increase the frequency of intense aerial attacks on cities and critical infrastructure across Ukraine. The cyberinformation space will become more unstable in Ukraine as Russian cyberattacks sporadically disrupt telecommunications and Russian propaganda efforts increase disinformation.

For this scenario to continue to unfold as envisioned, military support for Russia and Ukraine must remain similar to 2023 levels. Without significant additional foreign military assistance, Russia is unlikely to succeed in any ground offensive and will continue to wage a conflict of attrition. Many countries have already committed multi-year funding to Ukraine, and military support for Ukraine is expected to remain strong, albeit not strong enough for a major withdrawal of Russian forces.

As foreign aid payments are delayed and remain sporadic, Ukraine will struggle to maintain public expenditure levels, reducing spending on pensions and social services. The lack of military progress, increasing number of people fearing conscription, and continued decline in living conditions will reduce support for the President, Government, and conflict. Russia will use the continued martial law and postponing of presidential elections in Ukraine initially scheduled for 2024 to spread anti-Ukraine disinformation despite the postponement's constitutionality.

Ukraine's improved corruption index will result in the return of some private and major investors to the western part of the country.

An expected decrease in media coverage of the crisis towards the end of 2024 will coincide with (or result in) reduced support for refugees from Ukraine in host countries. Some countries may redefine financial aid eligibility. This may cause reluctant movements back to Ukraine, increasing the number of IDPs, as only some will be able to return to their areas of origin.

Impact

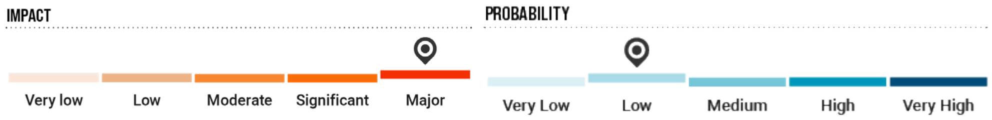
While the conflict's impact on the economy has not been as severe as previously described in this scenario, living conditions can be expected to deteriorate for many in 2024. The Ukrainian economy remained resilient in 2023, but increased challenges to imports and exports by land, infrastructure degradation, increased conscription, and reductions and delays in bilateral assistance may slow the economy in 2024, even if agricultural and other exports remain reasonably strong. In 2022, the poverty rate increased from 5.5–24.1%. It can be assumed that poverty is increasing in rural and frontline areas as well as areas not protected by the air defence system (WB accessed 06/02/2024). Increasing poverty will further erode trust in the Government.

Continued targeting of critical infrastructure will disrupt electricity, heating, and water supplies, preventing return movements, making displacement more protracted, and causing new displacement. The entrenched front lines will enable demining activities, improving access to recently regained territory in Ukraine.

While many Ukrainians will continue to live and work despite continued air strikes, a growing segment of the population will become more socioeconomically vulnerable as they exhaust their coping strategies. The housing shortage will drive rent higher, and many more Ukrainians will be less able to afford essential services and, during the winter, heating. Overall, humanitarian funding could decline as other crises take priority and receive more international media attention, while remote cash assistance to people in need in occupied areas will remain constrained. People in occupied territories who refuse the Russian passport will lack access to services, and more will be forced to leave their homes and become displaced in 2024.

Both IDPs and people in need of assistance will gradually increase in numbers throughout 2024. Most of those returning to Ukraine as a result of a decline in host country support will require financial humanitarian assistance, as state social protection is unlikely to cover their needs sufficiently upon return (IOM 08/12/2023 and 15/11/2023).

Escalating



This scenario remains low in probability, and impact remains at a major level. Several factors could lead to conflict escalation, including significant changes on the front lines and in large towns, with either Russian or Ukrainian armed forces advancing.

For the conflict to escalate, one or both parties will need sufficient strength to make territorial advances.

In Russia, if Putin wins the presidential elections, he will be able to pursue a more aggressive military strategy as long as additional military support from Iran and North Korea is sustained or increased (ISW 15/01/2024). Increased conscription, coupled with sufficient armaments, will allow Russia to initiate a new large-scale ground and air offensive capable of significant territorial advances. Decreased US military support for Ukraine will likely contribute to a Russian advance.

For Ukrainian forces to retake more occupied areas, international military assistance will need to increase, with munitions arriving faster and at a greater scale than in 2023. The provision of long-range missiles, fighter jets, and tanks is required to enable a successful Ukrainian military advance. Increasing conscription will also be necessary.

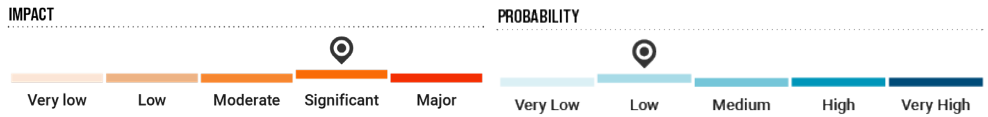
Impact

The impact of this scenario will be the same as described in the original scenarios report; the severity of need and the number and geographical spread of people in need will increase considerably. Many conflict-affected people have exhausted their capacities, and reliance on harmful coping strategies will likely increase. The prioritisation of military expenditure will continue to reduce the Government's ability to provide social protection, aggravating the situation. Social safety nets programmes will become increasingly insufficient, and the loss of production assets – particularly in the most conflict-affected areas – will lead to aid dependency. As humanitarian needs increase in some areas, the focus on development and recovery will decrease, reversing the resiliency gained during 2023. Interruptions to agriculture and manufacturing will harm the economy, but it will not contract as much as originally described.

While displacement increase is gradual overall, it will be mostly from areas near the front lines. Lack of available shelters and assistance for IDPs will be an issue, while increased pressure on host communities will enhance social tensions, particularly in areas where host communities are not included in cash assistance. Additional displacement abroad will be seen if electricity, heating, and water supplies are repeatedly disrupted.

Men at risk of conscription will likely experience worsening mental health, and there will be an increase in post-traumatic stress disorder cases among combatants. Men remain vulnerable to poor mental health outcomes because they are less likely to seek therapy or support than women (IOM accessed 09/02/2024). The Government will struggle to cover support for combatants. Increased casualties will further strain the health system, particularly in oblasts adjacent to conflict-affected areas.

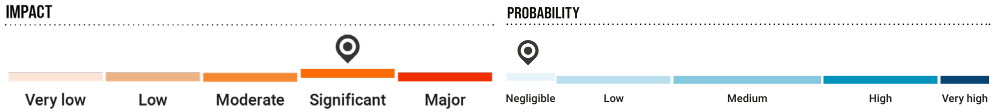
Ceasefire



The probability of this scenario remains low with a significant impact. Within Ukraine, close to the front lines, support for the conflict has slightly decreased. Calls to end the conflict both within Ukraine and abroad may grow as life becomes more difficult and as the conflict becomes more protracted.

International support for Ukraine is currently strong, but uncertainty regarding continued US military support – in light of political tensions in the US – will increase calls to push for a negotiated ceasefire. A ceasefire, however, may only be a pause in active conflict, as the Russian leadership remains set on taking control of the entire Ukrainian territory (RUSI 13/02/2024). The impact remains largely as envisioned in the original report.

Turbulent



The probability of this scenario has decreased from medium to negligible, while the impact remains significant. The threat of Russian PMCs becoming more autonomous and the conflict more turbulent has receded after the failed Wagner rebellion. Despite Russian armed forces constituting the majority of fighters in Ukraine, the Russian Government continues to rely on PMCs to achieve its aims abroad. The impact remains largely as envisioned in the original report.

WHAT TO WATCH IN 2024

The following developments will influence how each of the four scenarios may unfold in 2024.

- Russian presidential elections are set for March 2024, and President Putin is widely expected to be re-elected in for another six-year term and is planning to continue the conflict on Ukraine (CBS 08/12/2023; Al Jazeera 08/12/2023; Nikkei 28/12/2023). If Putin secures another term, mobilisation across Russia could increase. Russia may launch an offensive in 2024, likely aimed at capturing the entire Donetsk and Luhansk oblasts.
- Russia's ability to manufacture and procure weapons will determine whether it can scale up its offensive or continue the current war of attrition. Russia received 400 ballistic missiles from Iran in early 2024, and will likely receive more (Reuters 21/02/2024).
- Elections globally will increase Russian disinformation against financial, military, and diplomatic support for Ukraine, including in the EU, where most refugees from Ukraine reside. In the US and EU, domestic issues will be a priority for voters over other concerns, such as global security.
- Political tensions within the US Government will continue and become increasingly polarised in the lead-up to the November 2024 presidential elections, and may continue to affect support for Ukraine (The Kyiv Independent 19/01/2024; CBS 08/11/2023; CNBC 08/03/2023; The Japan Times 28/10/2023).
- Tensions in the Middle East and elsewhere (Taiwan, the Korean peninsula) may increase, demanding international attention, possibly affecting the scale and timeliness of military support for Ukraine (KEI 30/01/2024; USA Today 10/01/2024).
- Protests against agricultural exports from Ukraine could continue to expand across the EU, resulting in unilateral restrictions and adding a strain to Ukraine's economy (EC 31/01/2024; France 24 31/01/2024; European Pravda 14/11/2023).
- The level of international military support for Ukraine could increase, but few countries seem able to increase production and supply the level of required munitions. Reduced aid from the US or further delays from the EU would shift the military balance in Russia's favour (Air & Space Forces 24/01/2024; Politico 08/02/2024).
- International financial assistance to Ukraine will help the Ukrainian Government meet its citizens' growing needs, dependent largely on how much of its budget is needed for defence. The increase versus decrease in the National Bank of Ukraine's level of foreign-exchange reserves will be a relevant indicator of the level of international financial support for Ukraine (NBU accessed 16/02/2024).
- Humanitarian assistance may decrease in 2024. The global conflict level increased in 2023, and El Niño's expected negative impact on the global economy and humanitarian crises in the southern hemisphere may translate into reduced humanitarian funding at the same time that more countries need it (Vision of Humanity accessed 17/01/2024; STC 12/07/2023).
- The global economy may experience spikes in certain commodity prices given continued attacks on the Red Sea trade route and tensions in the Middle East (IMF 30/01/2024; Marine Link 24/01/2024).

ANNEX 1: SCENARIO TRIGGERS UPDATE

This is an update of all the triggers used in the original Ukraine: scenarios report.

Scenario 1 = escalating; scenario 2 = turbulent; scenario 3 = protracted; scenario 4 = ceasefire

Conflict

TRIGGER	1	2	3	4	STATUS	UPDATE
A successful Ukrainian counteroffensive retakes significant parts of occupied territory.	X			X		The 2023 Ukrainian counteroffensive did not retake significant parts of occupied territory.
A Ukrainian counteroffensive has limited impact and does not change the front line significantly.			X		Materialised	The Ukrainian 2023 counteroffensive did not significantly change the front lines.
International military assistance (assets and funding) to Ukraine increases.	X	X				International military assistance to Ukraine has not increased significantly.
International military assistance (assets and funding) to Ukraine does not increase significantly.			X		Materialised	International military assistance to Ukraine has not increased significantly.
International military assistance (assets and funding) to Russia increases.	X	X			Materialised	Russia has received significant military supplies (ballistic missiles and shells) from North Korea.
Russian military capacity does not increase.			X	X	Materialised	Russia continues to mobilise at the same rate.
The number of Russian PMCs fighting in Ukraine increases.		X				Russian PMCs remain operational, while Wagner fighters have been absorbed into the Russian military after the rebellion.
Biological and chemical agents are used as weapons.	X			X	Materialised	Russia has not used biological weapons, but between February 2002 and February 2024, Ukraine had recorded over 800 incidents of Russia using munitions equipped with poisonous chemical substances.
Russia increases nuclear coercion by moving its nuclear attack capacities closer to the Ukrainian borders.	X			X	Materialised	Russia has deployed nuclear weapons to Belarus while continuing to militarise the Zaporizhzhia nuclear power plant.
Russia targets energy infrastructure during winter.	X	X	X		Materialised	Russia has targeted infrastructure across Ukraine during winter, and while Ukrainian air defence is minimising damage, some cities have less protection than others.
Belarus enters the conflict directly with Russia against Ukraine.	X					Belarus has not entered the conflict directly.
Belarus is used as a base for PMC attacks to Ukraine.		X				There were no PMC attacks from Belarus between July 2023 and February 2024.

Economic

The proportion of Ukrainian revenue spent on the military increases.	X		X		Materialised	Ukraine has increased military expenditure in 2024 to 50% of the state budget, up from 40% in 2023.
Infrastructure repair and services provision costs increase.	X	X				The winter bombing of heating and electricity infrastructure will increase damage costs, but in the meantime, repairs can still keep up with new damage, except in the most heavily conflict-affected areas.
International funding to Ukraine increases.	X	X		X	Materialised	In 2023, Ukraine received USD 42 billion in financial assistance compared to USD 31 billion in 2022 (MOF 07/02/2024).
International funding to Ukraine stabilises or decreases.			X			International funding is less certain for 2024. US political tensions and the November 2024 presidential elections may significantly decrease US support for Ukraine.
The Black Sea Grain Deal is continuously renewed.		X			Void but irrelevant	The Black Sea Grain Deal has been suspended, but Ukraine has unilaterally implemented its own corridor in the Black Sea.
The Black Sea Grain Deal is suspended.	X		X		Materialised	The Black Sea Grain Deal has been suspended, but Ukraine has unilaterally implemented its own corridor in the Black Sea, and exports are largely unaffected.
EU countries embargo Ukrainian grain exports via their territory.			X			In October 2023, the EU lifted the temporary grain embargo requested by Bulgaria, Hungary, Poland, Romania, and Slovakia, which was enforced in May 2023. Several countries have continued the ban.
Global economic recovery stalls.	X		X			The global economy is slowly recovering.
Global inflation increases.	X		X			Inflation is still higher than normal but did decrease in 2023. High production costs and wage increases drive inflation and a cost-of-living crisis in many countries.
Other humanitarian crises emerge, competing for international humanitarian funding.			X	X		Humanitarian crises continue in Gaza, Sudan, and Yemen.
Sanctions have an increased effect on the Russian economy.				X		Sanctions affect the Russian economy to some extent, but Russia largely evades them.

Political

Tensions and divisions within the Kremlin increase, and Putin loses power.	X	X		X		No tensions and divisions are visible within the Kremlin. Putin is expected to be elected president again in March 2024.
Domestic criticism of Putin grows and becomes more vocal.	X	X				Domestic criticism of Putin decreased after the Wagner rebellion.
Putin mobilises more PMCs to fragment the opposition and revive the Russian conflict strategy.		X				Russian PMCs remain largely operational. After the Wagner rebellion, its fighters were absorbed into the Russian military.
Ukrainian Government and society remain unified around the conflict effort.	X	X	X		Materialised	Ukrainian Government and society remain unified around defence.
Ukrainian popular support for the conflict decreases.				X		Popular support remains strong despite falling slightly in areas closer to the front lines. There are mobilisation issues and some protests around the lack of rotation of frontline soldiers.
International diplomatic attempts fail to end the conflict.	X	X	X		Materialised	International diplomatic attempts have not ended the conflict.
China and other aligned countries increase pressure on Russia to end the conflict.				X		China and other aligned countries have not pressured Russia to end the conflict.
NATO/EU increases pressure on Ukraine to end the conflict.				X		No NATO or EU member states have increased pressure on Ukraine to end the conflict.
The US/NATO re-evaluate conditions for ceasefire negotiations.				X		Neither the US nor any NATO members have re-evaluated conditions for ceasefire negotiations.