

# UKRAINE: SCENARIOS



A national and subnational analysis of potential developments affecting humanitarian needs and operations in Ukraine through December 2025





## EXECUTIVE SUMMARY

In the fourth year of the Russian Federation's full-scale invasion of Ukraine, hostilities remain concentrated along the front line in the northern, eastern, and southern oblasts of Ukraine, while more than an estimated three million people live under Russian occupation (SWP 09/2024; ISW 21/02/2025). Air, missile, and drone strikes continue to pose significant risks to civilians and critical infrastructure nationwide.

By the end of November 2024, Ukraine had more than 3.6 million IDPs, with displacement and mandatory evacuations continuing in frontline oblasts (IOM 17/01/2025). The country's 2025 Humanitarian Needs and Response Plan estimates that 12.7 million people in Ukraine will face humanitarian needs, down from 14.6 million in 2024 (OCHA 16/01/2025). That said, Ukrainians will continue to face uncertainty and hardship, primarily owing to the evolution of the war.

In February 2025, ACAPS convened context and humanitarian experts in two workshops in Kyiv to envisage how the context and humanitarian crisis may evolve in 2025. These workshops produced three scenarios, along with their regional implications, through the end of the year. The scenarios have been updated to reflect developments since the workshops (e.g. Ukraine's withdrawal from Kursk oblast on 16 March). Still, the scenarios and their regional implications remain aligned with the outcomes of the workshops. They are summarised below and detailed in the report in order of likelihood.

### Scenario 1: Continued war without resolution

Despite various attempts to end hostilities between Ukraine and the Russian Federation, an agreement remains elusive as both parties seek to negotiate from a position of strength. With no immediate reduction of or end to hostilities, both parties continue to fight a war of attrition, exhausting each other's military capabilities and resources to achieve slow, incremental territorial gains – with neither side achieving a decisive breakthrough. This leads to heavy destruction and civilian casualties in frontline areas. Ukraine continues to receive limited US and European financial and military support, and the Russian Federation also seeks to sustain its war effort.

### Scenario 2: Reduction of hostilities

Ukraine and the Russian Federation agree to a ceasefire as a precursor to a more comprehensive eventual peace agreement. However, weak enforcement of the ceasefire and lack of security guarantees lead to occasional and localised military clashes, threatening a return to full-scale war. Limited international aid supports a slow recovery in Ukraine, while unresolved issues around security and territory hinder the prospect of long-term stability and peace.

### Scenario 3: Escalating war

The US withdraws its military and political support for Ukraine, and European allies step in to fill some of the gaps. Critical delays in resupplying Ukraine provide the Russian Federation with a clear window for a significant breakthrough. Russian forces capitalise immediately, intensifying air, drone, and missile attacks across the country and achieving rapid – but limited – ground advances. The Russian Federation also expands its use of cyber and hybrid warfare to overwhelm Ukraine quickly, driving rapidly increasing risks and needs nationwide.

All scenarios foresee continued – or increasing – insecurity, negative socioeconomic impacts, and challenges in meeting existing and new humanitarian needs. Frontline areas will see the most acute needs, but the greatest number of people needing aid are outside the front lines.

The war and reduced humanitarian funding will limit the reach of humanitarian responders, particularly Ukrainian organisations. Longer-term IDPs will continue to require assistance, although humanitarian or government-run programmes may not meet these needs owing to insufficient funding and other gaps. Various factors, such as weather conditions, can also influence the extent of humanitarian needs across all scenarios. People in Russian-occupied areas will experience persistent needs and heightened risks in any scenario.

**Faced with humanitarian needs and continued access and service delivery challenges in all scenarios, workshop participants concluded that the humanitarian response must enhance coordination and prioritisation to maximise resources amid evolving funding and operational realities.**

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## Methodology

The scenarios detailed in this report consider three distinct yet plausible futures for Ukraine through the end of 2025. They focus on how changes in the situation in the country will affect people's ability to meet their basic needs and affect humanitarian operations in and around Ukraine.

The scenarios were developed between January–February 2025 with input from 40 national and international humanitarian and donor organisations, UN agencies, representatives from humanitarian clusters, working groups, and other coordination mechanisms, civil society representatives, and experts from academia, think tanks, and media who contributed through two in-person workshops and bilateral meetings and interviews. The collaborative process involved:

- 16 key informant interviews with context and sectoral experts,<sup>1</sup> during which the current dynamics and key drivers of change were identified and discussed. These insights, complemented by secondary data review, informed the identification and development of key variables, baseline assumptions, and preliminary scenarios for the evolution of the war and the resulting humanitarian implications in 2025.
- two in-person workshops in Kyiv, Ukraine: the first to develop the scenarios and their subnational implications with experts in humanitarian analysis and assessments, followed by a second workshop with operational experts to validate the scenarios and identify their impacts on people and humanitarian operations in each region in Ukraine.

ACAPS uses the chain of plausibility approach to scenario-building, as outlined in our [guidance note](#). Key terms used throughout the scenario-building process and the report include the following:

- A **scenario** is an imagined picture of a possible future state based on several assumptions about how certain variables will change. Scenarios describe both a future state and its impact and consequences on people and society.
- **Probability** is the extent to which something is likely to happen in the period specified. **Impact** speaks to the severity or level of the effects of a certain hazard or scenario materialising. The probability and impact per scenario are each scored between 1 (rare likelihood/insignificant impact) and 5 (almost certain likelihood/severe risk).
- **Drivers or variables** are factors that influence the direction the future will take depending on how they evolve.
- **Indicators** are events that serve as measures or predictors of change towards a given scenario. **Triggers** are events that, should they occur, will contribute to a scenario materialising. They are unique to each scenario. Indicators ([Annex 1](#)) and triggers ([Annex 2](#)) for each scenario can support humanitarian organisations to regularly monitor the context, understand which scenario it is heading towards, and adapt and plan accordingly.

<sup>1</sup> ACAPS consulted people and organisations with expertise on Ukraine, specifically the conflict, security, economy, sociology, energy, international relations, humanitarian operations, and regional dimensions.

## Limitations

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Scenarios are not forecasts or predictions of the future but rather frameworks for exploring possible futures and their impact on humanitarian needs and operations. They consider key differences in the security, political, economic, social, and international dimensions of the context in Ukraine, as well as the extent to which and how these differences affect the personal safety, needs, and coping strategies of people and the operating environment for humanitarian responders. This means that we do not consider all possible scenarios in Ukraine but rather plausible ones that are most useful for humanitarian decision makers, particularly because the context in December 2025 could likely reflect overlapping or sequenced elements from across the scenarios.

Some factors – such as a NATO-Russian Federation clash, the death of key government figures, or a nuclear escalation – are so highly unpredictable that their humanitarian impacts, while high, would be difficult to anticipate. These factors are not detailed in this report owing to the high level of uncertainty and the limitations of current forecasting tools in fully anticipating and assessing their impacts.

ACAPS was also not able to conduct interviews with key informants in or with insights on the Russian Federation or Russian-occupied territories of Ukraine.

## Acknowledgements

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ACAPS would like to thank all the participants and organisations that provided input on these scenarios, in particular those who participated in the scenario workshops and key informant interviews.

## INTRODUCTION

This report details three scenarios that consider how the context in Ukraine – particularly the war and its impact on people and humanitarian operations – might evolve by the end of 2025. The scenarios are built on several foundational assumptions, detailed below. These baseline assumptions are informed by secondary data review and interviews with key informants with a wide range of expertise in the Ukraine context.

### Map 1. Current situation nationwide as of 28 March 2025



Source: ACAPS using data from ISW (accessed 28/03/2025)

## Continued hostilities and military challenges

Hostilities will likely continue to some extent in 2025, and both Ukraine and the Russian Federation will face significant challenges. The trajectory of the war depends on a range of factors, including internal military capacity and external military and political support. That said, the underlying drivers and motivations behind the war – primarily the Russian Federation's long-term geopolitical ambitions and Ukraine's commitment to its sovereign and territorial integrity – are unlikely to change. This makes it unlikely for the fighting to stop completely this year and for a more permanent resolution to the war being reached in 2025.

Ukraine's defence capacities have generally improved since February 2022, aided by allies' provision of heavier and more sophisticated weaponry. Regardless, the Ukrainian military continues to face resource, materiel, and ammunition shortages, including for air defence (ICG 17/12/2024; ECFR 26/11/2024). The Ukrainian military has used first-person-view drone interceptors in early 2025, suggesting it is exploring alternative air defence technologies amid persistent aerial threats and in light of fluctuating foreign military assistance (Militaryny 19/03/2025). At the same time, Ukraine's military effort has been costly in terms of human resources, and it has faced challenges with mobilisation. The war may then necessitate additional conscription or recruitment efforts.

Since late 2022, Russian forces have overcome some initial command and control issues and have focused on more deliberate and strategic advances rather than pursuing large-scale offensives across the front line. Along with slower ground movements that apply sustained pressure on Ukrainian defences and logistics (such as the use of smaller tactical assault groups in combination with artillery barrages and drone reconnaissance), persistent Russian air attacks countrywide continue to stretch Ukrainian air defences around the country. This has forced Ukraine to spend high-value interceptors on lower-cost threats, such as Shahed drones. The Russian Federation has also ramped up its production of missiles, drones, and artillery shells since 2022, outpacing Ukraine's ability to procure such supplies and allowing Russian forces to sustain steady attacks from entrenched positions.

Despite the Russian military's distinct advantages, it also faces its own challenges. Russian forces have sustained high battlefield losses. Though the size of its military outweighs that of Ukraine's, the Russian Federation is likely to continue relying on conscripts and foreign troops (such as North Korean forces in Kursk). The Russian Federation seems unwilling to conduct another round of mobilisation – which could undermine public support in the country for the war and weaken domestic stability – instead intensifying conscription efforts and providing further incentives for service contracts, as it did throughout 2024.

The long-term stability of the Russian economy remains unclear given the extent of the capital and human resources spent on the war in Ukraine, the impact of sanctions on the Russian Federation's access to key markets and reduced foreign investment, technology imports, and trade revenues. Still, some key informants suggested that the Russian Federation will likely remain economically and politically stable through 2025 (thanks to continued oil and gas revenues and the suppression of dissent). At the same time, domestic discontent over economic sanctions and war fatigue pose potential risks to economic and political stability in the longer term.

### The future of foreign assistance

Ukraine is heavily reliant on continued Western military and financial support. The US is the largest military donor to Ukraine, and while European countries are making large contributions, the US provides more than three times the amount of military aid than the next largest donor, Germany (CFR accessed 31/03/2025). The Russian Federation is also dependent on external resources from China, Iran, and North Korea to sustain its war effort. Given the reluctance of NATO and European allies to engage in direct military involvement with the Russian Federation, Ukraine will continue to depend on fragmented and delayed international support that may allow it to sustain defences but not achieve decisive military breakthroughs.

This support is also likely to be conditional on diplomatic concessions by Ukraine. In March 2025, the US Government paused military aid and intelligence sharing with Ukraine, which largely resumed after discussions between Ukraine and the US in Saudi Arabia led to an agreement to a limited 30-day ceasefire that is yet to be agreed to by the Russian Federation. Still, the pause in military aid and intelligence-sharing highlights the potential volatility of critical foreign support to Ukraine.

While European countries are likely to continue providing military and financial assistance for Ukraine given its economic and strategic importance in the region – and some experts interviewed noted that Ukraine could continue fighting for at least six months in the absence of US military aid – it is unlikely that other allies can fill all gaps in the US provision of air defence and artillery. For example, both the US and European countries – particularly France, Germany, and the UK – are facing stockpile challenges with their own air defence systems. Political developments and elections in some European countries could also affect future European support for Ukraine. Ultimately, however, Ukraine is unlikely to receive enough foreign assistance to achieve an outright military victory, primarily because the US and European countries are wary of actions that trigger a broader regional or even nuclear conflict with the Russian Federation.

### Negotiation prospects and potential leverage

Negotiations to resolve the war will continue and may result in different outcomes aimed at reducing or ending hostilities. While the US is pushing one track of negotiations, it is possible that parties other than the US, such as Türkiye or China, could establish alternative diplomatic avenues for negotiations and potential resolution. Back-channel negotiations, conducted outside official diplomatic efforts, could also occur.

The lack of a single vision for peace between Kyiv and Moscow jeopardises any negotiations and their potential outcome, be it a temporary ceasefire or a more comprehensive agreement. At the same time, it remains unlikely that the Russian Federation will agree to a meaningful peace agreement as it feels it has the momentum and advantage in the war.

Since January, the US Government has pushed for negotiations between Ukraine and the Russian Federation. Improving relations between Washington and Moscow increases the risk that Ukraine and its European allies and their interests are sidelined, particularly in US-led negotiations. The US has also been willing to pressure Ukraine to make concessions and advance US-led negotiations, such as pausing military aid and intelligence assistance, without clear guarantees for Ukraine.

It is unclear how any negotiations to resolve the war will proceed and what will result. More immediately, there are questions about the potential pause or end of active hostilities and agreements on both annexed and occupied territories. Ukraine is also pushing for greater security guarantees from its Western allies, including NATO and EU membership, support for Ukraine's military, and the deployment of a peacekeeping force, while the Russian Federation could seek non-interference guarantees from Western nations and may attempt to limit NATO expansion. As a result, it is unlikely that issues around security guarantees will be resolved and fully implemented in 2025.

Both parties to the war will continue seeking leverage for any peace negotiations, including using military, economic, and political levers to strengthen their positions and extract concessions, such as sanctions relief, in any negotiations. While Ukraine has lost a potential bargaining chip after Russian forces regained control of territory in Kursk oblast in March 2025, it might prefer renewed military efforts to losing territory in any agreement with the Russian Federation. The end of the natural gas transit agreement in December 2024 also means that the Russian Federation no longer relies on Ukraine for energy transit, removing another point of leverage for Kyiv.

Ukraine has other avenues for leverage in any negotiations that also implicate interests outside the war. Its continued strikes on Russian supply and logistics lines, particularly oil refineries, depots, and industrial sites in Russian territory, can exert some economic pressure on Moscow and global oil prices (Kyiv Post 09/01/2025; Reuters 13/02/2025). And while the Russian Federation can disrupt shipments via the Black Sea, Ukraine can leverage its crucial role in global food and grain supply to keep this important trade route open and safe.

## Domestic political and economic dynamics

Ukrainian public sentiment over the war and its prolonged impacts has evolved, with some parts of the Government retaining relatively high levels of trust. The Ukrainian military also retains high levels of public support – pointing to a significant degree of unity and cohesion within Ukrainian society despite fatigue and differentiated experiences with the war (Vox Ukraine 23/12/2024). Although trust in President Volodymyr Zelenskyy decreased from 77% in December 2023 to 59% towards the end of 2024 (with a slight increase to 68% in March 2025 following tensions with the US Government), he generally retains a comparatively higher level of support than other government institutions (KIIS 07/01/2025; TKI 07/03/2025). Overall, trust in most other government institutions, such as parliament, courts, and local police, remains low and is unlikely to change as the war evolves – pointing to a potential threat to political stability at the national and regional levels.

Elections have emerged as a key focus of negotiations to resolve the war, particularly as the elections planned for March 2024 did not occur owing to continued martial law. That said, it is unlikely that elections can take place in Ukraine in 2025 as the Government is likely to continue extending martial law given the war. Even if martial law were to end and elections were planned, key challenges would include, for example, the feasibility and perceived credibility of any elections, particularly with millions of Ukrainians displaced or otherwise residing in Russian-occupied territories, as well as logistical challenges (NV 13/11/2024).

However it develops, the war will aggravate Ukraine's economic challenges. The Ukrainian central budget has grown steadily since January 2022, with a significant increase in defence spending. While in 2024, foreign aid – of which European countries were the primary donors – accounted for 75% of the required funds to cover the budgetary deficit, the extent of future financial support from allies is unclear given political dynamics in European countries (Centre for Economic Strategy accessed 17/01/2025). While inflation declined throughout 2023 following a surge throughout 2022, it started to rise again in mid-2024, in part owing to cost increases in food given low harvests, energy (largely resulting from attacks on Ukraine's energy infrastructure), and labour (NBU 13/01/2025 and 28/11/2024).

While some of these pressures – such as last year's harvest – are temporary, and the National Bank of Ukraine anticipates that inflation will stabilise in 2025, the underlying drivers related to production costs will persist as attacks on Ukraine's energy infrastructure continue and migration and mobilisation drive labour shortages (NBU 11/02/2025; Centre for Economic Strategy accessed 17/01/2025).

## OVERVIEW OF SCENARIOS AND REGIONAL IMPLICATIONS

The scenario summaries below consider the overall context for Ukraine, followed by more specific regional developments and their impacts, including those on humanitarian operations. The scenarios are detailed in order of likelihood.

For the purpose of this report, three regions in Ukraine are considered based on OCHA's intercluster coordination schematic: east, north-central-west, and south. The intercluster coordination page for Ukraine provides more details on which oblasts are included in each region ([ReliefWeb accessed 05/03/2025](#)).

Indicators ([Annex 1](#)) and triggers ([Annex 2](#)) for each scenario can support humanitarian organisations to regularly monitor the context, understand which scenario it is heading towards, and adapt and plan accordingly.

### SCENARIOS

## 1. Continued conflict without resolution



Despite various attempts to end hostilities between Ukraine and the Russian Federation, an agreement remains elusive as both parties seek to negotiate from a position of strength. With no immediate reduction of or end to hostilities, both parties continue to fight a war of attrition, exhausting each other's military capabilities and resources to achieve slow and costly incremental territorial gains – with neither side achieving a decisive breakthrough. This leads to heavy destruction and civilian casualties, particularly in frontline areas. Ukraine continues to receive limited US and European financial and military support, and the Russian Federation also seeks to sustain its war effort.

The Russian Federation focuses on consolidating its occupation of Donetsk oblast and continues its supporting military efforts in Kharkivska, Khersonska, and Zaporizka oblasts. It also continues to use aerial attacks to wear down Ukrainian air defences and damage critical infrastructure countrywide – including in areas away from the front lines. While repairs mitigate the impacts of recurrent attacks on energy provision systems, scheduled and unscheduled blackouts continue to occur, causing limited disruptions to utilities and basic services. Russian forces and affiliated parties deploy new or modified weapons and intensify hybrid warfare, including cyberattacks and sabotage campaigns.

Ukraine faces continued shortages of military personnel, supplies, and ammunition as the military struggles with troop fatigue and rotations. Ukraine again lowers the mobilisation age in exchange for additional US military aid and diplomatic support amid high troop losses. Despite its own battlefield losses, the Russian Federation continues to seek alternatives to mobilisation – including contract soldiers, expanded conscription, foreign recruitment, industrial mobilisation, and private military contractors – to strengthen its people power advantage over Ukraine.

Continued war results in slow, localised displacement and evacuations, primarily from frontline settlements where Russian forces are advancing. People on the move remain in population centres as close as possible to their homes. At the same time, some people attempt to return home (or go back and forth) to check on their homes, land, or livestock as weather and security conditions allow.

Continued financial support from international allies bolsters the Ukrainian economy. While inflation stabilises, however, it remains higher in 2025 than in 2024, meaning people will still face the economic pressures of a protracted war. Despite increased overall spending, particularly on defence, the Government of Ukraine reduces social spending, affecting the provision and coverage of public services and benefits, particularly for IDPs and other people with heightened vulnerabilities. Ukrainian authorities face growing challenges in managing protracted IDPs – including meeting their needs with limited resources and managing social tensions with host communities – particularly in central and western oblasts.

The people in Ukraine, especially IDPs and those closer to the front line, face continued fatigue as the war takes a social, economic, and emotional toll and political negotiations are slow to materialise diplomatically and militarily. While no elections are officially scheduled, public rhetoric and political positioning continue in Ukraine in anticipation of possible elections in 2026 – heightening some frustrations with the Ukrainian Government as political parties instrumentalise the war and slow-moving negotiations for their political gain.

### East

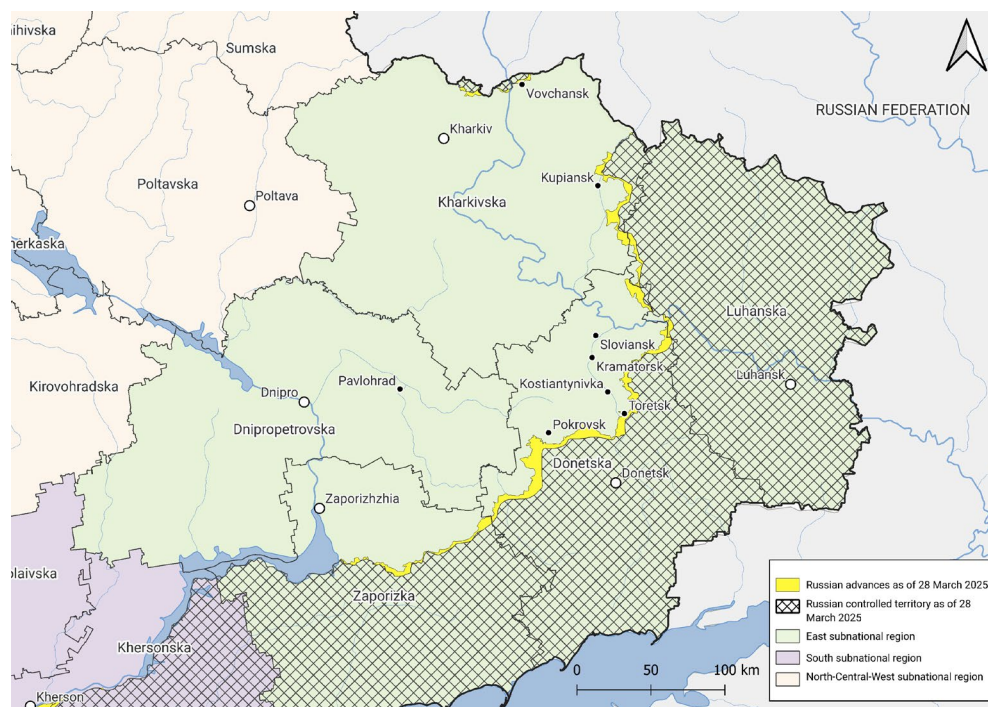
Russian forces capture Pokrovsk and Toretsk, followed by followed by Kostiantynivka, leading to mandatory evacuations from these areas, though some civilians fall under the expanding Russian Federation occupation of Donetsk oblast. Ukrainian defences slow the Russian military's advance towards Kramatorsk and Sloviansk, which experience intensifying aerial attacks.

In Kharkivska oblast, Russian forces fail to cross the Oskil River, halting their offensive at Kupiansk and surrounding settlements. Russian military operations also continue around Vovchansk but without significant territorial gains. As a result, Russian forces remain outside artillery range of Kharkiv city, though it continues to endure regular aerial and missile strikes, particularly targeting critical infrastructure.



Russian forces also increasingly target Zaporizhzhia city using glide bombs with enhanced range and precision that evade air defences and pose increased threats to civilians. Agricultural land and infrastructure remain vulnerable to attacks and mine contamination, further affecting people's livelihoods. Hostilities near the Zaporizhzhia Nuclear Power Plant persist, fuelling continued concerns about a potential nuclear incident.

## Map 2. East region



Source: ACAPS using data from ISW (accessed 28/03/2025)

By the end of 2025, up to 100,000 IDPs flee eastern regions to other areas of Ukraine because of Russian military advances and the impact of war on critical services and livelihoods. From areas near Pokrovsk, civilians flee to Dnipropetrovska oblast, transiting through Pavlohrad to reach Dnipro city. Kharkiv and Izium cities see arrivals from within Kharkivska oblast, as well as northern Donetsk oblast. Despite continued hostilities, some people attempt to return home as weather and security conditions allow or because of inadequate support in host communities.

Local markets and services in Dnipro, Izium, and Kharkiv face moderate strain as host communities with limited resources accommodate new arrivals, including for housing,

healthcare, and social services – particularly as many IDPs are unable to return home and are increasingly long-term displaced. Given IDP vulnerabilities related to age, mobility and disability, or health conditions, they also face specialised needs, including for healthcare.

Ukrainian authorities heavily restrict access to areas within 10km of the front lines, leading to reduced reach and higher delivery costs for humanitarian responders, particularly for evacuations and service provision in frontline areas. Evolving military activity, including Russian advances, forces rapid adjustments to evacuation strategies. Although displacement occurs in small waves owing to the slow movement of the front line, transit points and collective shelters, particularly in Pavlohrad and Izium cities, face growing pressures. Russian-occupied areas remain inaccessible to international and Ukrainian humanitarian organisations, though limited civilian crossings from occupied areas occur and require a specialised response, including legal assistance.

## North-Central-West

Attacks on energy and critical infrastructure, especially in Kyiv, Lviv, and other major population centres, lead to service disruptions, including energy provision, particularly during peak energy demand periods. While continued international military and financial support enables repairs and restoration to occur relatively quickly, occasional blackouts – both scheduled and unscheduled – occur, affecting access to water, heating, and healthcare services.

In Sumy oblast, Russian forces conduct occasional cross-border incursions to push Ukrainian forces back from Kursk and Belgorod oblasts and disrupt Ukrainian supply and logistics lines. Border areas of Sumy oblast face intense aerial attacks and shelling. At the same time, Sumy city experiences frequent aerial attacks, driving civilian harm and disruptions to critical services, including healthcare, protection services, banking, communications, and transport.

Despite limited displacement across the region, security risks in Sumy oblast drive continued evacuation and displacement. Displacement is pendular, with people moving back and forth between their host sites and homes to check on property and farmland. Most arrivals and evacuees, whether voluntary or mandatory, come to Sumy city, where growing displacement increases pressure on the housing and job markets.

Most IDPs from eastern oblasts stay within their oblast of origin or move to Dnipropetrovska or Kharkivska oblasts. Smaller numbers of people, primarily those dealing with protracted displacement and unable to meet their needs in host sites, gradually shift from eastern to central regions, particularly Kyiv and Kirovohradska and Poltavaska oblasts. Returns from abroad do not increase significantly as most host countries maintain temporary protection schemes for Ukrainian refugees.

Integration and social cohesion remain strong overall as resilience is higher in major population centres such as Kyiv and Lviv, but pressures persist. New arrivals and long-term displaced people lead to increased competition for jobs and pressure on existing services, including housing, psychosocial services, livelihoods, and healthcare. Tensions among IDPs and with host communities lead to small increases in criminality and armed incidents, aggravated by Russian disinformation and intelligence operations aimed at exploiting these tensions.

Amid limited resources and capacity, gaps in service coverage, particularly for IDPs, persist as the humanitarian response scales down in central and western oblasts to prioritise people closer to the front lines. Areas within 0–20km of the front lines in Sumska oblast, especially within 10km, remain operationally challenging owing to security and logistical issues. Some areas become newly inaccessible as they come under Russian Federation occupation.

Aid workers and civilians face incidental risks from continued violent incidents, particularly near military and government facilities, such as recruitment centres. As the war continues, NGOs do not receive critical status from the Ukrainian Government, affecting their ability to gain mobilisation exemptions for male staff, for example.

## South

With Russian forces' primary efforts focused on consolidating the occupation of Donetsk oblast, southern oblasts do not see large-scale ground operations. Still, Russian forces continue their attempts to cross the Dnipro River and advance to Kherson city but are unsuccessful. Continued and intense aerial attacks and shelling in frontline areas of Khersonska oblast and Kherson city continue, and local authorities continue limited voluntary evacuations in Khersonska oblast as conditions deteriorate in frontline settlements.

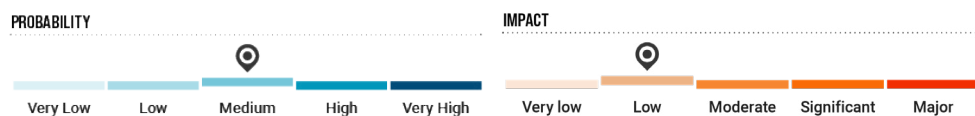
Aerial strikes continue to target Odesa and Zaporizhzhia cities, with critical infrastructure – such as ports, energy infrastructure, grain storage facilities, and the grain corridor through the Black Sea – in Odeska oblast targeted to disrupt the Ukrainian economy and hinder the summer harvest. This leads to safety risks and disrupted livelihoods in agriculture and logistics. Odesa city also experiences disruptions to utility services, including power and water, amid ongoing Russian attacks on energy infrastructure.

Despite slow ground advances, insecurity persists, but many people continue to move back and forth with the agricultural seasons to check on their homes and land. Some IDPs – especially those voluntarily evacuated – lack sufficient resources and opportunities to remain in their host communities, and they return prematurely to their homes despite the safety risks. These returns increase civilian exposure to war-related violence and mine contamination, particularly in Khersonska oblast. Disrupted agricultural activities and insecurity contribute to growing livelihoods and mental health needs, with trauma and stress especially acute in frontline areas.

Humanitarian operations face operational constraints, particularly in frontline areas of Khersonska oblast, where authorities also restrict access given security risks. With humanitarian responders prioritising programmes in Khersonska oblast, reduced humanitarian capacity in Mykolaivska and Odeska oblasts leaves gaps in services, including cash and healthcare – particularly for longer-term displaced people who remain without access to livelihoods and psychosocial support.

## SCENARIOS

## 2. Reduction of hostilities



Ukraine and the Russian Federation agree to a ceasefire as a precursor to a more comprehensive eventual peace agreement. However, weak enforcement of the ceasefire and lack of security guarantees lead to occasional and localised military clashes, threatening a return to full-scale war. Limited international aid supports a slow recovery in Ukraine, while unresolved issues around security and territory hinder the prospect of long-term stability and peace.

Despite the ceasefire and freezing of the front lines, tensions remain high amid the contested status of occupied and annexed territories and the people residing there, Russian naval presence in the Black Sea, and long-term security guarantees or resolution. The ceasefire also allows both parties to regroup militarily, leading to a military build-up and occasional localised military clashes, as well as sporadic shelling and aerial strikes, which threaten a return to full-scale war. The front lines move incrementally, involving both shelling and limited aerial attacks.

With the ceasefire, physical attacks on Ukraine's critical infrastructure, particularly energy facilities, end. Limited and slow international funding and support enable Ukraine to initiate some repairs and restoration to damaged infrastructure, minimising disruptions to utility provision. Still, the Russian Federation uses alternative means – particularly cyber warfare – to continue to undermine the energy sector.

Limited peace observer missions from European countries are deployed away from the front lines and contested areas to Kyiv, Lviv, and Poltava. Poor enforcement and an increasingly fragile ceasefire prevent Ukraine from demobilising, but the Government considers scaling back martial law in 2025, including relaxed curfews and fewer media restrictions. The Government considers legislation to mitigate the impacts of scaling back martial law, such as new regulations on military-eligible men leaving the country. Under pressure from Western countries, it also begins preparing for potential elections after 2025.

Under the ceasefire, gradual economic recovery begins slowly. Limited international financial support and government-led initiatives invest in some recovery and rebuilding efforts, particularly in eastern Ukraine and other oblasts that experienced more intense fighting.

Unclear mandates between humanitarian, development, and government stakeholders create coordination gaps that leave needs unmet, especially for longer-term IDPs. The high level of destruction and insecurity also slows recovery. Agricultural activity picks up, though still very limited in areas affected by mine and unexploded ordnance (UXO) contamination.

Recovery programmes facilitate re-employment and support some businesses, although localised escalations and distrust in the ceasefire hamper investment. Ukraine encourages returns from abroad and migration into the country to compensate for labour shortages, but most refugees remain in their host countries. Some countries wind down or limit support schemes for Ukrainian refugees with a ceasefire in place. While there is no free movement for men out of the country, the lower risk of mobilisation allows more men to (re)enter the formal economy and legal employment.

The reduction of large-scale hostilities accentuates underlying needs, particularly related to psychosocial trauma and economic hardship. While the reduction of hostilities prompts limited returns of IDPs to their homes, persistent security concerns driven by low confidence in the ceasefire, heavy housing and infrastructure damage, mine contamination, and lack of economic opportunities limit returns – particularly to eastern and southern regions. The Ukrainian Government also discourages large-scale returns to frontline areas for security reasons, while more than 1.8 million IDPs from occupied or partially occupied areas also cannot return to their homes and remain eastern regions, as well as in and around Kyiv (IOM 03/2025). Continued long-term displacement and high levels of needs among IDPs lead to low-level social unrest.

Amid preparations for elections after 2025, disagreements over negotiations to resolve the war and the political road map trigger increased political and social tensions and fragmentation, particularly among military, veterans, and displaced people from frontline areas. Populist groups and movements also gain traction in this environment. The proliferation of small arms, stress from years of war, lack of demobilisation, and tensions over IDPs or returns heighten social and political tensions, leading to some criminality and individualised violent incidents.

Ukraine and the Russian Federation both seek to influence information spaces and control narratives around ongoing peace negotiations and any violations of the ceasefire – leading to continued hybrid warfare and political destabilisation measures, including cyber warfare, disinformation campaigns, and economic pressure. The Russian Federation attempts to destabilise Ukraine, including by supporting populist political actors to undermine support for the Ukrainian Government and using proxies and Ukrainian collaborators to create instability in Ukraine.

## East

Cautious and very limited recovery and demining efforts begin in frontline areas, but localised clashes and security risks pose security risks for civilians remaining within 20km of the front line. Some services gradually improve in areas beyond and within 20km from the front lines, but near-term recovery is extremely limited given the severe extent of damage to critical infrastructure and the need to restore critical services first, such as power and water provision. People in these areas still require humanitarian aid, including specialised assistance for older people and people with disabilities, mobility issues, and other health conditions.

Improved safety pushes some IDPs, particularly those struggling with accommodation and livelihoods in their host communities, to move back from Dnipro, Kharkiv, and central-western oblasts to frontline areas, but they will need food and shelter. The level of destruction and fragility of the ceasefire limit returns to areas near the front line. Given the slow and uneven recovery, IDPs and returnees struggle to regain livelihoods and access critical services, including psychosocial support, while markets face a shortage of essential goods. In frontline communities, social tensions brew over concerns about suspected collaboration with Russian Federation-affiliated parties.

Russian Federation authorities continue integrating occupied territories, including passportisation, economic integration, and other administrative, legal, and social efforts. This provokes increased resistance activities by those living in these areas, contributing to a low-level but persistent security risk and increased civil and human rights abuses of civilians (e.g. surveillance and information restrictions). Civilians living under ambiguous governance in occupied areas also lack legal clarity and support concerning property rights and healthcare access, for example – though the Russian Federation allows some civilians to leave occupied territories.

Access to frontline areas remains challenging as Ukrainian authorities conduct security operations and clearances, limiting the ability of humanitarian responders to reach people in need of aid. Given the sensitivity of the ceasefire, humanitarian responders face increased checkpoints in these areas or the pressure to deliver aid using military escorts. The need for humanitarian assistance – particularly as local authorities lack the resources to provide services to meet needs – provides opportunities for humanitarian responders to negotiate access.

Some crossline access to provide humanitarian assistance in occupied territories is possible but with severe restrictions, including bureaucratic requirements. Crossline activities provoke tensions with Ukrainian and Russian Federation authorities over disagreements about the modalities of such assistance, presenting bureaucratic challenges for humanitarian responders.

## North-Central-West

Ukrainian authorities focus on recovery activities, particularly in major cities in western and central regions, such as Kyiv, Lviv, and Poltava, where economic activity and the job market are gradually improving. Reduced attacks on critical infrastructure and limited utility disruptions also mean fewer disruptions for businesses, although security risks related to localised fighting persist in border areas of Sumska oblast.

As security conditions gradually improve, some people return to areas closer to the front line in Sumska oblast and eastern regions, but many IDPs in central and western Ukraine choose to remain in their host locations. While there are limited returns from abroad, those who do come back stay in central and western oblasts as a precaution against future escalation.

The Government prioritises livelihood and recovery programmes in central and western Ukraine, particularly in major population centres, including Kyiv and Lviv. Humanitarian organisations face pressure from donors and the Ukrainian Government to prioritise stabilisation and recovery initiatives in western and central Ukraine, away from the front lines, as the security situation improves, and humanitarian donors increasingly prioritise frontline aid delivery.

Many IDPs are unable to return home and are increasingly left out of recovery programmes. They still need housing, psychosocial, and protection services – which are limited in their host communities as recovery activities are prioritised away from the front lines. The protracted displacement in central and western regions, as well as the arrival of some returnees, also aggravates social tensions through increased pressure on housing, services, and local economies – leading to localised violence and criminality.

## South

With the ceasefire in place, security concerns generally decrease, though occasional clashes and continued safety risks for civilians along the front lines persist in Khersonska oblast. Limited demining, which requires Ukrainian security clearances, progresses slowly in right-bank Khersonska oblast and parts of liberated Mykolaivska oblast, far from the front lines. UXO and mine contamination persist, particularly in rural and agricultural areas, alongside protection and livelihood constraints for civilians.

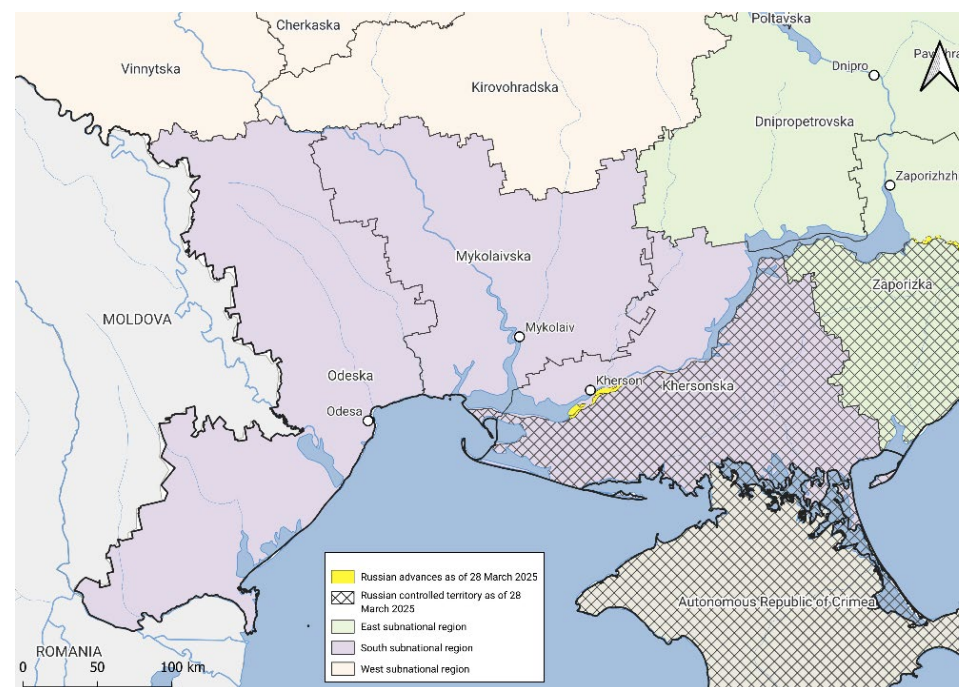
The Russian naval presence in the Black Sea heightens risks in coastal areas, particularly around Odesa city. The rehabilitation and rebuilding of critical infrastructure, particularly port infrastructure, proceed slowly, providing some limited economic recovery and employment opportunities in urban areas of Odeska oblast. Increased investment in agriculture boosts capacity, bringing more people back to work and supporting increased agricultural production, although UXO and mine contamination continues to limit recovery.

IDPs return gradually with the decrease in security risks and some improved economic opportunities at home, particularly as business and agricultural activities resume. The return of IDPs and partial economic recovery offer some relief. Still, vulnerabilities persist in rural and agricultural areas, where markets face shortages of essential goods, basic services are slow to resume, and economic hardship continues. Given the slow recovery, social tensions and armed violence emerge, for example, over competition for jobs.

Some international and national NGOs reopen offices in the region. While there is increased pressure from donors and the Ukrainian Government to move towards transition or development activities, the need for humanitarian assistance – particularly as local authorities lack the resources to provide services to meet needs – necessitates continued humanitarian aid, particularly for those living in rural areas, older people, and people with disabilities and mobility and health issues.

Occasional fighting and Ukrainian security clearances limit humanitarian access. The sensitivity around the ceasefire leads to increased checkpoints – particularly in frontline areas – or administrative and bureaucratic requirements, affecting the timely delivery of aid. Crossline access for humanitarian aid into occupied territories slightly improves with the ceasefire, though Russian forces continue to highly restrict and control access. Both Ukrainian and Russian authorities impose competing restrictions on how crossline aid can be delivered – for example, whether responders can enter Russian-occupied territories from Ukraine or the Russian Federation.

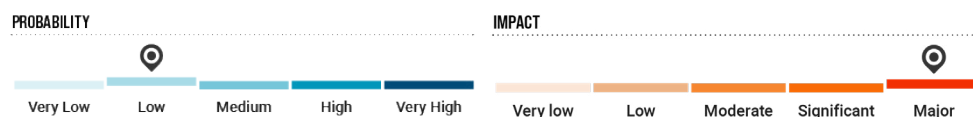
### Map 3. South region



Source: ACAPS using data from ISW (accessed 28/03/2025)

## SCENARIOS

### 3. Escalating war



The US withdraws its military and political support for Ukraine, and European partners step in to fill some gaps. Critical delays in resupplying Ukraine provide the Russian Federation with a clear window for a significant breakthrough. Russian forces capitalise immediately, intensifying air, drone, and missile attacks across the country and achieving rapid but limited ground advances. The Russian Federation also expands its use of cyber and hybrid warfare to overwhelm Ukraine quickly, driving rapidly increasing risks and needs nationwide.

Ukraine's offensive abilities immediately decrease amid the US withdrawal, so the military focuses on maintaining defensive lines and fortifying its positions with existing resources. It also adapts current strategies, particularly asymmetric warfare and precision strikes. European allies step up to limit Ukraine's military and political losses, including ramping up domestic weapon production and buying weapons from other markets, such as Türkiye. Still, they cannot replace all US military support, particularly for air defence and artillery, and weapon provision is too slow to bolster Ukrainian military efforts.

Without US-supplied air defences and given low European stockpiles of their air defence systems, Ukraine struggles to defend itself against aerial attacks, leading to greater destruction of critical infrastructure, increased safety risks to civilians, and further depletion of military assets. Heavy and sustained bombardment of major population centres across Ukraine severely degrades critical infrastructure, and the pace of repairs is unable to keep up with the frequency and severity of attacks. The greater unpredictability, frequency, and duration of blackouts and power outages disrupt business activities, leaving people with deepening economic and humanitarian needs.

Growing destruction of critical infrastructure and rising insecurity lead to supply chain disruptions and economic contraction. With exports (particularly of grain and steel) reduced, Ukraine is forced to rely on more expensive land routes, intensifying economic pressure and tensions. For example, Ukrainian goods become less competitive on the global market, leading to reduced revenues and an inability to finance the war effort and support social programmes. Reduced spending on social services also leaves gaps in social protection for people with heightened vulnerabilities, including IDPs and low-income communities. Protests occur in EU countries where local markets are affected by Ukrainian exports, leading those countries to implement economic protectionist measures, further affecting Ukraine's economy.

Persistent inflation and slight GDP contraction also fuel deepening poverty, though it is somewhat mitigated by additional financial support from international stakeholders. Although popular support for Ukrainian political leadership and the military increases, the escalation causes political instability, leading to occasional personnel changes in key government positions at the national and regional levels. The escalation also leads the Government to broaden martial law and mobilisation efforts, including mandatory conscription or participation in local defence support groups.

#### East

Rapid advances, aided by delays in military assistance to Ukraine, lead to Russian forces capturing Pokrovsk, followed by Kostiantynivka, Kramatorsk, and Sloviansk. These cities and surrounding settlements face intensifying shelling and aerial attacks. While Ukrainian defences somewhat slow the offensive, Russian forces ultimately fully capture Donetsk oblast.

Following its consolidation of Donetsk oblast, the Russian military renews its ground offensive in Zaporizka oblast. Zaporizhzhia city experiences intensified air, missile, and drone strikes, while frontline settlements – particularly in eastern Zaporizka oblast – face increasing and intensifying shelling, prompting displacements and evacuations to Zaporizhzhia and Dnipro cities. Settlements in eastern Dnipropetrovska oblast come under intensified shelling amid fighting in areas bordering Donetsk and Zaporizka oblasts.

Russian forces advance in northern Kharkivska oblast to establish a buffer zone at the border and come within artillery range of Kharkiv city, which faces increased shelling and aerial and missile strikes, particularly targeting critical infrastructure. They also establish bridgeheads on the Oskil River but advance incrementally in eastern Kharkivska oblast because of Ukrainian defensive fortifications on the right bank.

Rapid Russian advances in Donetsk oblast and renewed offensives in Kharkivska and Zaporizka oblasts trigger large-scale population movements, primarily owing to insecurity, severe housing damage, and disruptions to utility services. Up to 50,000 people flee Donetsk oblast and eastern settlements in Dnipropetrovska oblast, moving west to Pavlohrad and Dnipro cities in particular. Additionally, at least 100,000 people leave northern Donetsk oblast, primarily from Kramatorskyi raion, for Kharkivska oblast, with the majority arriving in Kharkiv city. Many of those displaced in this scenario displace multiple times owing to insecurity in major IDP hosting cities, meaning they have fewer resources as they move further west.

Large-scale displacement strains the capacities of host communities and local authorities in Dnipro and Kharkiv cities, prompting some people to head further west or south. Infrastructure, services, and resources, including housing, psychosocial and protection services, health services, financial services, and WASH services, come under increasing

pressure. In Kharkiv city, intensified shelling further disrupts critical services and heightens the safety risks to civilians. Increasing insecurity in new frontline areas leads to business and market disruptions, reducing the availability of essential goods, such as food and fuel.

Humanitarian responders lose access to areas newly under occupation. Service delivery in areas near evolving front lines or under increasing threats to safety face major constraints from insecurity and as local authorities impose security-related access restrictions. Shifting frontlines lead to additional people – including those fleeing occupation – with needs for basic services and legal aid, as well as disrupt supply chains and transport networks, further complicating aid delivery. Given the limited operational footprint in Zaporizka oblast, humanitarian responders reestablish offices and programmes despite the security risks.

#### Map 4. North-Central-West region



Source: ACAPS using data from ISW (accessed 28/03/2025)

### North-Central-West

The Russian Federation undertakes cross-border operations in Sumska oblast to establish a 20km buffer along the Ukrainian border after retaking Ukraine-held territory in Kursk oblast. They also seek to push Ukrainian forces back from Belgorod oblast. This leads to intensified shelling in border communities, as well as air and drone attacks throughout Sumska, and Chernihivska oblasts. Sumy city faces continued aerial strikes, disrupting public services and driving civilian casualties.

Border areas come under Russian Federation occupation, driving displacement within Sumska oblast, with most people arriving in Sumy city. People remaining in occupied territory make the risky journey through the Russian Federation and Belarus to reach central or western Ukraine, with arrivals at the Ukraine-Belarus border – which is officially closed and where there is no humanitarian corridor – increasing in warmer months.

Ukraine faces intensified attacks targeting energy and critical infrastructure across the country. Kyiv and other major population centres experience more frequent, prolonged, and severe impacts owing to weakened air defences, with critical infrastructure severely degraded. The pace of repairs is unable to keep up with continued strikes, and supply constraints limit the restoration and strengthening of the energy system. As a result, these regions face severe power outages and utility disruptions to heating, water supply, and healthcare. In response, some businesses and international organisations, including embassies, relocate from Kyiv to safer areas, such as Lviv.

With increasing insecurity elsewhere and major evacuation hubs such as Dnipro and Kharkiv cities struggling to accommodate large numbers of new arrivals, some IDPs from these areas and Sumska oblast move to central and western oblasts, particularly Kirovohrad, Kyiv, and Poltava. Many arrivals have been multiply displaced and have heightened needs and fewer resources. Reductions in social spending, while less pronounced in these areas, leave IDPs facing gaps in social protection amid needs for support with housing, food, healthcare, livelihoods, and psychosocial services.

Insecurity and the impacts of the large-scale damage and destruction of energy infrastructure deepen economic insecurity. Major population centres, including Kyiv and Lviv, experience growing business disruptions and a lack of economic opportunities. Inflation, the cost of living, and the prices of basic goods increase, aggravating economic pressures – particularly for IDPs, who already face service gaps. Social cohesion fractures amid growing pressures on local systems and services in areas with large numbers of IDPs, such as Kyiv and Lviv, potentially leading to small-scale civil unrest and criminality that targets government or public facilities.

As more people move to central and western Ukraine, humanitarian organisations face increased pressure from rising needs among a growing number of people while also reconfiguring or scaling down operations in less affected regions. Coordination challenges, particularly around registration, evacuation, and supply chain and logistics, arise as the humanitarian situation evolves rapidly. These challenges are made worse by large-scale infrastructure damage and limited access to affected areas in Sumska and Chernihivska oblasts, which cut some people off from critical assistance, while aid responders struggle to adapt to rapidly changing dynamics and resource gaps.

## South

While Russian ground advances in southern oblasts are limited owing to the natural barriers of the Dnipro River, the security and humanitarian situation in the south grows more urgent. Russian forces continue their attempts to advance in Khersonska oblast, and Kherson city remains vulnerable to artillery, air, and drone strikes. Local authorities implement mandatory evacuation measures as the security situation deteriorates.

The escalation in the Black Sea intensifies, with increased attacks targeting critical infrastructure, including energy, agriculture, grain silos, and marine transport in Odeska oblast – particularly in the second half of 2025, when harvest season ends and agricultural export picks up. The damage to port infrastructure and grain silos severely disrupts Ukraine’s ability to store and export its crops, further straining the economy by affecting national revenue and local livelihoods tied to agriculture and logistics.

The attacks heighten the vulnerability of civilians, with Kherson and Odesa cities facing continued air and drone strikes, leading to civilian casualties and disruptions to essential services. Asymmetric warfare by Russian Federation-affiliated parties leads to individual attacks against military sites and personnel that also degrade the overall security situation in southern oblasts.

As fighting intensifies in Zaporizka oblast and the overall security situation in Khersonska oblast deteriorates, some people flee insecurity to Mykolaivska oblast – particularly Mykolaiv city. The arrival of new IDPs places pressure on local systems and services – particularly housing – in Kherson, Mykolaiv, and Odesa cities, while mental health challenges are likely to rise from prolonged insecurity, displacement, and economic hardship amid intensified Russian military operations.

Access to frontline areas in Khersonska oblast becomes increasingly constrained for humanitarian responders. Permit systems, curfews, and evolving evacuation orders limit humanitarian presence in zones within 10km of the front line, while mine contamination and damaged infrastructure further restrict movement and aid delivery. With the humanitarian response prioritising people in frontline areas, humanitarian organisations face challenges in scaling up programmes for IDPs in the southern oblasts, particularly in Mykolaivska oblast, where humanitarian capacity remains limited.

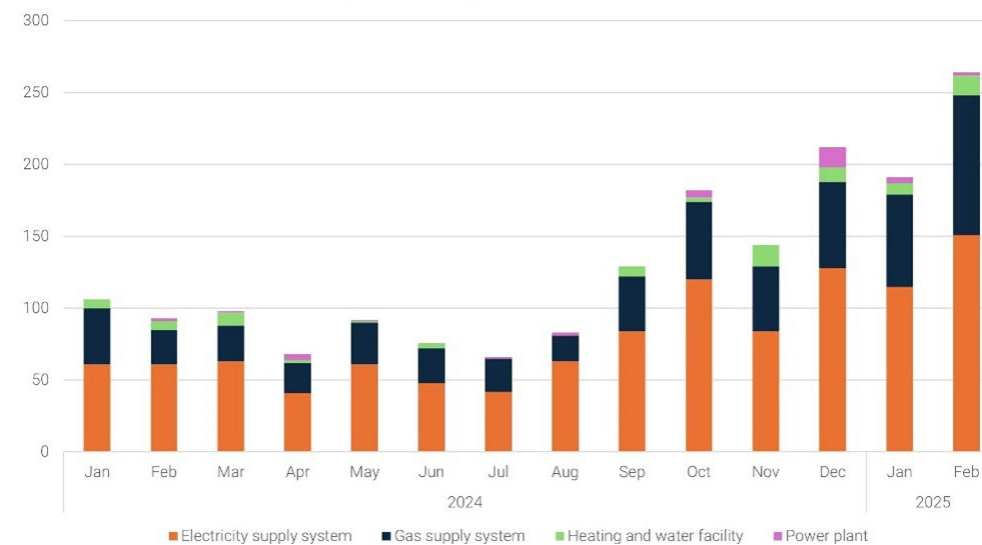
## COMPOUNDING FACTORS

Regardless of how the scenarios unfold, other developments could influence the humanitarian situation in Ukraine. The most relevant of these factors are detailed below.

### Attacks on energy infrastructure

Ukraine’s energy sector remains vulnerable across all scenarios, as do services reliant on energy provision, including heating, water supply, healthcare facilities, and schools. Disruptions to these critical services are particularly acute in frontline areas, especially where critical infrastructure is degraded and older people, children, and IDPs are more severely affected.

Figure 1. Energy infrastructure damage in Ukraine



Source: ACAPS damages dataset accessed 18/03/2025

The Russian military’s systematic attacks on energy infrastructure will likely continue, as will targeted cyberattacks by Russian Federation-aligned cyber groups. USAID has also effectively halted most of its programmes amid the funding freeze (see more below), leading to a reduction in its operational presence and support activities in Ukraine. This will affect the Ukraine Energy Support Fund, which will have reduced funds to procure equipment for and continue maintenance of the country’s energy sector.



A notable escalation in physical attacks since mid-2024 led to the reintroduction of countrywide scheduled blackouts and some unplanned power cuts between May–December 2024, though the situation did not reach the worst-case scenario of 20-hour blackouts (DiXi Group 02/01/2025; ACAPS 19/02/2025; OHCHR 09/2024). This was mainly because the restoration of sufficient production capacity and international support, including the provision of equipment and funding for emergency repairs, assisted Ukraine’s efforts to stabilise the energy situation and meet most demand (IMPACT Initiatives/REACH 06/12/2024; ACAPS 19/02/2025).

That said, continued attacks on and damage to energy infrastructure could lead to the reintroduction of nationwide blackouts, particularly as annual maintenance, which begins once the cold season ends in April, may also reduce energy input from nuclear power plants (Oil & Gas of Ukraine 25/11/2024). The continued intensification of Russian attacks on Ukraine’s natural gas infrastructure could affect natural gas storage and hinder electricity production and provision later in the year, when freezing and cold temperatures, as well as peak energy demand, aggravate the effects of attacks during the next cold season. Expanding hybrid methods (e.g. electronic warfare, cyberattacks, supply chain disruptions) or widening funding gaps could also rapidly degrade energy resilience heading into the next cold season.

### Severe weather conditions

Given the existing damage and destruction to Ukraine’s energy infrastructure, and irrespective of future trends in Russian attacks, weather conditions can also worsen the impacts of energy shortages and affect people’s needs. For example, winter temperatures pose risks for people in damaged houses or temporary shelters, where heating is often unreliable. Severe weather events could also disrupt humanitarian operations, for example, by making transport routes inaccessible or inoperable, particularly in frontline areas where the war has damaged roads and bridges.

In colder months, prolonged low and freezing temperatures increase energy demand, adding pressure on power, gas, and water systems, particularly in eastern and southern regions with high levels of war-related infrastructure damage (DiXi Group 19/11/2024; Oil & Gas of Ukraine 25/11/2024). Since the full-scale invasion, Ukraine has also experienced summer heatwaves, with temperatures reaching 40°C in 2023, and wildfires. The anticipated shift to El Niño-Southern Oscillation-neutral conditions in spring/summer 2025 will likely result in drier conditions, which are conducive to wildfires and disruptions to agricultural growing conditions (Reuters 13/03/2025).

Ukrainian authorities have implemented mitigation and coping strategies during the winter, such as power curtailment measures and energy conservation calls. The gradually rising temperature and improved solar energy production towards April will also help ease pressure on Ukraine’s energy system (MeteoFor accessed 13/02/2025; Severe Weather EU 19/01/2025). That said, warmer-than-average temperatures in the spring and summer could increase the

demand for energy supplies from an already vulnerable system. This is especially true in major population centres with a high number of IDPs, as the increased need for cooling in concentrated urban centres puts disproportionate stress on a fragile system.

War-related damage to people’s housing during colder months remains a persistent risk in areas closest to the frontline. This will expose people to severe weather elements and respiratory illnesses, particularly as attacks usually occur during the night and early morning hours when temperatures are lowest (Suspilne 17/11/2024; TSN 28/11/2024; Health Cluster 23/01/2025). Gaps in power services disrupt water supply and heating and affect businesses and essential services, including IDP shelters, schools, and healthcare facilities, disproportionately affecting people with vulnerabilities, including older people, IDPs, and people with disabilities.

### Humanitarian funding

On 20 January 2025, the US Government suspended US-funded foreign aid globally through USAID for 90 days. On 24 January, it also began enforcing stop-work orders for existing contracts, significantly affecting the operational environment in Ukraine for international and Ukrainian organisations. If the USAID freeze continues and Ukraine receives reduced financial assistance from international stakeholders, it could also affect government-run social services, further heightening humanitarian needs and increasing pressure on government systems and humanitarian responders. Humanitarian organisations could also face community tensions as they scale back programmes and services and people grow desperate for assistance.

Ukraine is one of the highest-funded humanitarian responses globally, and while European countries contribute the largest overall share of funding in Ukraine, the US has accounted for 25–30% of funding annually since the full-scale invasion. The reduction in US contributions – along with anticipated reductions from other humanitarian donors – will severely affect the ability of humanitarian responders to meet critical needs (OCHA accessed 11/03/2025; Chatham House 03/03/2025; RI 19/12/2024).

The USAID freeze and uncertainty around its future and implications have disrupted humanitarian operations in Ukraine. For example, some programmes have been pre-emptively suspended given fears that incurred costs would not be reimbursed. Many organisations will likely scale down operations to some extent in 2025, leaving people in hard-to-reach areas and those with vulnerabilities with limited or no assistance. For example, people living in the frontline areas and areas most affected by the war will be particularly affected by the decreased capacity to support safe evacuations, one of the main anticipated gaps resulting from the freeze.

## ANNEX 1. INDICATORS FOR SCENARIOS

| DESCRIPTION  | SCENARIO 1 | SCENARIO 2 | SCENARIO 3 |
|--|------------|------------|------------|
| No significant increase in the frequency and intensity of Russian missile, drone, and air strikes on major cities  | X          |            |            |
| Sustained gaps in Ukraine's defensive capacity, including shortages of personnel, equipment, supplies, and ammunition                                    | X          |            |            |
| No major change in the Russian Federation's overall military capacity or strategy  | X          |            |            |
| No change in Russian military recruitment/conscription policies or usage of foreign recruitment and private military contractors                         | X          |            |            |
| Increased reports of Ukrainian military desertion and mobilisation avoidance   | X          |            |            |
| The US and European countries increase or intensify sanctions against the Russian Federation   | X          |            |            |
| Slow replenishment of Ukrainian military supplies by allies  |            | X          |            |
| Increased international diplomatic engagement in ceasefire implementation and peace efforts  |            | X          |            |
| Increased pressure by the US or other parties on Ukraine to prepare for elections after 2025   |            | X          |            |
| Increased public statements from Ukraine, the Russian Federation, and/or third parties about concessions for peace                                       |            | X          |            |
| Increased intensity and frequency of Ukrainian aerial strikes on Russian military supply lines and infrastructure  |            | X          |            |
| Increased from host and Ukrainian governments about potential returns from abroad  |            | X          |            |
| Increased social or political tensions in the Russian Federation (e.g. rhetoric against a ceasefire within the Kremlin or from Russian military figures) |            | X          |            |
| Worsening economic conditions in the Russian Federation (e.g. rising inflation, increasing interest rates)   |            | X          |            |
| US and Europe decrease or withdraw military and financial aid to Ukraine   |            | X          | X          |
| Political and diplomatic disagreements strain Ukraine's relationship with the US   |            |            | X          |
| The Russian Federation amasses troops and material near Donetsk, Kharkiv, Sumska, and Zaporizka oblasts  |            |            | X          |
| Accelerated Russian advances in Donetsk oblast   |            |            | X          |
| Russian advances in Kharkiv, Sumska, and Zaporizka oblasts accelerate  |            |            | X          |
| Increased Russian military attempts to cross the Dnipro River in Khersonska oblast   |            |            | X          |
| Sharp increase in conscription or recruitment in the Russian Federation, suggesting preparation for prolonged conflict                                   |            |            | X          |
| Significant increase in the frequency and intensity of Russian missile, drone, and air strikes   |            |            | X          |
| Worsening energy infrastructure damage, along with increased frequency and intensity of frequent blackouts   |            |            | X          |

## ANNEX 2. TRIGGERS FOR SCENARIOS

| DESCRIPTION   | SCENARIO 1 | SCENARIO 2 | SCENARIO 3 |
|---|------------|------------|------------|
| Russian forces do not advance in northern Kharkivska oblast   | X          |            |            |
| No major developments on negotiations to resolve the conflict   | X          |            |            |
| Ukraine and the Russian Federation agree to a temporary cessation of hostilities  |            | X          |            |
| Collapse in negotiations to resolve the conflict  |            |            | X          |
| Failure to meet interim ceasefire agreements  |            |            | X          |
| Russian forces cut off a critical Ukrainian military supply line  |            |            | X          |
| Ukraine reduces mobilisation age or pursues other emergency recruitment measures, indicating troop shortages                        |            |            | X          |
| Collapse of Ukrainian defensive positions in Donetsk, Sumska, Kharkivska, or Zaporizka oblasts, leading to further Russian advances |            |            | X          |