



**EUROPEAN
LEADERSHIP
NETWORK**

Building better security
for wider Europe

Scenario-building workshop: “Europe after the war”

February 2023

Introduction

On 18-21 October 2023, in Istanbul, the European Leadership Network, in partnership with the Hanns Seidel Foundation, convened a two-day scenario-building workshop, “Europe after the war.” The event brought together experts from Ukraine, Russia, and wider Europe to discuss the practical implications of various outcomes of Russia’s war in Ukraine for European security, foreign policy, domestic politics, economy, and society.

The scenarios for war outcomes were the inputs to the discussion rather than the outputs, intended to stimulate a wider discussion about possible futures and the implications of the war for European security in the longer term. They were based on considering two main variables: whether or not there was a clear victory on the battlefield and whether or not there was a negotiated peace settlement. Some scenarios also considered whether or to what extent European institutions integrated Ukraine as a key determining factor. The scenarios are not mutually exclusive: they might overlap, or one might develop into another over time.

I. Scenarios

A. Scenarios where there is a clear outcome on the battlefield.

Either Russia or Ukraine wins the war, but will the other side acquiesce and accept defeat?

Scenario 1: Geopolitical Europe

Ukraine wins the war militarily and recovers most of its territory. Russia agrees to a negotiated settlement (in effect accepting defeat). European institutions integrate Ukraine.

Ukraine's victory advantages Europe and proves itself a significant geopolitical actor.

The European Union (EU) shows enough unity and commitment to grant Ukraine and several other Eastern European countries (e.g. Moldova or Bosnia) access to many of its areas. In the case of further enlargement, inequalities within the EU might emerge, with some member states benefiting at the expense of others. But the EU may also reform internally, improving its internal fund allocation and decision-making procedures.

Pressures on the European economy ease and Europe experiences significant economic growth. Economic integration between the EU and Eastern European countries intensifies.

Ukraine is being rebuilt and reconstructed. Some Ukrainian refugees return home. European countries are able to access rare minerals in Ukraine, which helps them make further progress in their green energy transition. Russian energy supplies resume, but Europe is not prepared to be as dependent on them as before.

European defence capabilities and military-industrial cooperation are strengthened, making the sustained 2% of GDP defence spending an effective tool. An arms control dialogue with Russia is possible. The arms control regime in Europe is dependent on Russia's willingness to cooperate, but some arms control dialogue is underway. Some moves towards strategic autonomy are being undertaken but as a complement to the US and not a substitute.

The relationship with Russia depends on the country's domestic politics. Russia may be weakened and less dangerous. On the other hand, humiliation on the battlefield may lead to more internal repression in Russia, which could result in new waves of emigration to Europe. Given the nature of Russia's political system, the risk of instability remains.

Scenario 2: Pyrrhic victory

Ukraine's military victory without Russian acquiescence (no political settlement with Russia). European institutions do not integrate Ukraine.

Although Ukraine wins the war on the battlefield, Russia does not accept defeat, and hence no political settlement with Russia has been achieved. Russia is weakened but humiliated and therefore dangerous ('Weimar' Russia).

Russia begins preparations for a revenge offensive and poses a significant military threat to Europe. This fractures Trans-Atlantic unity and leads to divisions within the EU on how to engage with Russia. 'Old Europe' calls for appeasement, which reduces the likelihood of Ukraine's accession to the EU or NATO. EU enlargement may be put on hold, as Eastern European members veto the accession of Western Balkan states without that of Ukraine.

This creates further challenges to cooperation with Ukraine, which is moving towards a stronger national identity and becoming a military superpower in Europe based on a post-Zelensky nationalist, militaristic government.

The recovery of the Ukrainian economy is stumbling. Without EU regulations and the EU's stamp of approval, the private sector is reluctant to invest despite some bilateral security guarantees. The flow of migration to Europe continues.

Ukraine has a bigger and more powerful army than its Eastern European neighbours. Together with Poland and the Baltic states, and with support from the UK, it forms a security alliance to contain the Russian threat, which causes fractures in the existing transatlantic security architecture.

China steps in more actively to support Russia and prevent it from collapsing or being deeply destabilised. Russia-China cooperation begins to challenge the current international system.

Scenario 3. Russia's victory

Russia wins the war.

Although a plausible scenario, it was not developed in detail during the workshop due to the lack of a robust definition. While Ukraine's objectives are clear, the Russian definition(s) of victory needs to be unpacked. What does "de-Nazifying" or "de-militarising" Ukraine mean in practice? How much further into Ukraine will Russia want to push before stopping? Would retaining the currently occupied territories be considered an unequivocal victory, or does the latter still imply a regime change in Kyiv?

It was also noted that Putin has increasingly sought to portray the war in Ukraine as part of a broader contest with the West globally. One participant described this as

“neo-revisionist”: seeking to alter the distribution of power within the international system rather than to alter its fundamental nature. This contestation over where power sits in the current world order could be seen as a permanent confrontation in which no clear victory is possible. One participant said the only Russian victory they could imagine was a lose-lose outcome (in which Russia would at least be content that the West had not won). There was a risk that both Russia and the West would be degraded and disrupted. Another noted that there is no political structure to define or represent the “collective West” that Russia thinks it is at war with – it remains a nebulous concept.

B. Scenarios where there is no decisive outcome on the battlefield.

Both sides exhaust themselves on the battlefield and come to an armistice or a peace agreement.

Scenario 4: Peace for territory

Ukraine agrees to cede captured territory to Russia in exchange for NATO membership and an end to the war.

In this scenario, instability drains resources for Ukraine and Europe, and the risk of escalation is high. Will peace last? Can Russia be contained within its borders, or will it seek to regroup and attack again? Will NATO membership prevent Ukraine from seeking to recapture territory in future? Notably, participants from the countries involved were particularly sceptical about whether an agreement or NATO membership would suffice to ensure that conflict did not resume.

A long war of attrition has had heavy costs on Ukraine, Russia, Europe and the US. Europe's economy is in decline, and there is a premium on trade and investment in Europe. Economic disparities across Europe increase. Some countries seek to lift economic sanctions on Russia, especially oil caps, which would somewhat alleviate the oil crisis. However, geopolitical pressure on oil persists due to ongoing global conflicts, and the price remains high. This would also enable Russia to continue financing the war. Tackling climate change is consequently put on the back burner.

The EU pays for some reconstruction in Ukraine, but the territories under Russian control are redeveloped in a hastened ("a la Grozny") manner. Ukraine has been pushed into the deal by the West and cannot get what it wants from international jurisdiction regarding human rights accountability or reparations. Resentment ensues.

There is political turmoil and discontent at the ceding of territory inside Ukraine. Volodymyr Zelensky loses an election to a military figure or someone with a stronger nationalist ambition who promises to reconquer the lost territory.

To build guarantees preventing a new escalation, the West seizes a moment of opportunity to create "a space from Lisbon to Luhansk" and ensure Ukraine and Moldova (along with some Western Balkans countries) are part of European institutions. The question is whether these efforts will be enough to avert another confrontation or trigger a change in thinking in Russia.

Europe is disunited on the need to keep up the war economy, and its military-industrial base and production of weapons and ammunition declines. Some arms control is possible as part of the deal with Russia; for example, a new START treaty is agreed upon. The P5 format is used for nuclear de-escalation. There are some attempts to extend arms control to China through the P5, provided that the US government is willing to go along. Ukraine's membership of NATO also offers Russia a de facto guarantee that Ukraine will not attack Russian territory. However, Ukraine is an unhappy NATO member and potentially a troublemaker, sowing division within the Alliance in seeking support for its quest to reconquer its land.

The international norm that territory cannot be acquired by force is further challenged, with China potentially invading Taiwan and other territorial conflicts proliferating. More conflicts suck up bandwidth, and US attention pivots away from Europe. Western dominance declines along with the role of European institutions. Likewise, Europe's voice is weaker in multilateral institutions, but the UN Security Council is not as divided, and the multilateral system is more robust than in the "permanent war" scenario.

Russia holds the occupied territory but is unstable. One possibility is that Russia accepts a *tactical* retreat, displaying a continued revanchist attitude. The conflict is not over but protracted in a different way. Russia still sees Ukrainian territories as Russian in law and culture and looks for opportunities to defend its claims. The other option is a *strategic* retreat, implying as one possibility a territorial collapse of Russia. Although Russia will no longer be a geopolitical actor in this case, new challenges may emerge in this hypothetical 'post-Russian space.'

Persistent conflict: the war rumbles on, with neither side willing to give up.

Scenario 5: Permanent war

Russia retains the territory it has conquered, and there is a long war with varying levels of violence, sometimes "freezing" and sometimes escalating.

Military spending in Ukraine will continue to rise, including significant private investments. Some sectors of the economy will consequentially flourish, including defence and high-tech. However, the broader economy suffers from ongoing political risks, particularly in infrastructure, insurance, and transport.

Foreign trade is concentrated within the EU, and the continuing war constrains economic cooperation with Eastern European countries. Economic disparities between EU member states increase due to persistent geopolitical pressure.

Populism and corruption are on the rise as the EU tries to tackle its growing internal divisions and other problems, for example, migration from both Ukraine and Russia.

This, when combined with the heightened risks of Russian (and Chinese) disinformation and grey zone efforts, could lead to the restriction of some freedoms and a worsening of the general environment for human rights in Europe.

The enlargement process encounters multiple hurdles. Could the EU expand without enlarging into Ukraine? Some member states promote accession of the Western Balkans as a counterbalance to Russia, but Eastern EU countries reject it - "No Ukraine, no Balkans." As a result, the EU tries to leverage its funds to support Ukraine by promoting the partial accession of Ukraine to some EU areas but falling short of a full enlargement.

The transition to a green economy is slow, and some countries depend on Africa and Asia for wind and solar energy, whilst Russia exerts influence in those regions, too. Climate change is a significant challenge, and Russia uses climate as a weapon (e.g. by spreading disinformation that climate change is good for Russia). As Russian exports to grey markets continue, geopolitical pressure on oil prices remains.

The military relationship between European countries becomes stronger as common military activity increases. Political ties between the US and NATO ebb and flow depending on the election cycle, domestic politics, etc., but the military relationship remains strong. At the same time, a rift between East and South European states emerges as the South is preoccupied with problems besides the war in Ukraine, such as migration, the Sahel, and the Middle East. European security, as reflected in the OSCE mechanisms, is near a total collapse, and conventional risks rise as an arms race progresses. Nuclear risks are high but stable, leading to a permanent "5 minutes to midnight" situation.

The West has achieved some progress in countering Russia by providing continued, albeit limited, military support to Ukraine, but the lack of decisive victory has weakened Europe's voice in multilateral institutions. Multilateral institutions are also under more general strain as more conflicts persist globally. US attention to Europe wanes and pivots to the 'hot spots' and Asia. The US and Russia can live with an ongoing war of attrition, although it has costs for both. Whilst the West is preoccupied and Russia is exhausted, China is emboldened.

No "revolutionary" change is taking place within Russia despite new conscription campaigns and growing casualties on the battlefield.

Scenario 6: Creeping escalation

Although the war rumbles on for years, the situation grows unsustainable for either side and commands change, which could depend on several variables (e.g. the arrival of Donald Trump to power or a re-thinking of policy in Ukraine or Russia).

Escalatory events are happening on the margins of the conflict: bombs and missiles are dropped in a variety of places in Ukraine or Russia (similar to Hizballah's attacks on Israel), sometimes near the NATO border; strategic corridors are potentially attacked (similar to the Lachin corridor, e.g. the Suwałki gap); or Russian aircraft

flying over NATO states. However, NATO and the EU are not under pressure to intervene. Occasional ceasefires take place when advantageous to both sides.

Creeping escalation leads to extended European disunity, particularly if Donald Trump is in power in the US: west versus east, and north versus south. The EU is no longer a union of values but an intergovernmental confederation. It manages to hold together due to its proven history of overcoming crises but is less effective. The EU's enlargement is problematic. It stumbles or may halt altogether, as member states do not wish to go to war with Russia over Ukraine. Inequality grows, and populism is on the rise. Ukrainian refugees are sent home or to third countries.

Ukraine is also divided internally. As war rages on, reconstruction efforts are sporadic. The European economy chugs along, but it is not an economy on a war footing. De-globalisation trends continue. Trade disputes between the EU and the US escalate, and the WTO might cease to exist.

European security is weakened. NATO takes the biggest hit, becoming de facto meaningless and disintegrated. New alliances emerge, such as between the UK, Poland, and the Baltic states. France and Germany might join too or start their own. The mood is grim: 'What can we do to stop a war raging in Europe, short of joining it?'

China invades Taiwan, and the US's attention is diverted away from Ukraine and Europe. The Middle East's conflicts blow hot and cold. Africa benefits under this scenario, as it has the least to lose.

Scenario 7: Massive escalation

Russia significantly escalates with the view to winning the war.

In this scenario, Russia threatens a nuclear strike or a conventional attack on a NATO country. It may also perform a major hybrid operation with strategic effects, such as taking out the energy grid in Europe. Alternatively, Russia goes into high gear and uses tactical nuclear weapons in Ukraine or attacks a NATO country with conventional arms; the latter might be in response to NATO stepping up military assistance to Ukraine.

NATO retaliates, potentially going into a full-fledged war with Russia, either kinetic or nuclear. Both NATO and Russia suffer damage, and Russia is likely defeated.

The colossal shock unites Europe, but Western dominance and the role of European institutions have irrevocably declined. Multilateralism has crumbled. Who is going to mediate? This would, in turn, produce new ways of thinking about the international order, leading to a new EU and a new global system, which could benefit China. The latter might take over world leadership, offering a modest 'Marshall Plan' to the West.

European security has collapsed, nuclear weapons proliferate, and so does the arms race. Europe is unable to deal with other threats, such as climate change.

II. Comments on the scenarios

- All scenarios are contingent, complex and non-linear, with an immense number of variables and even further levels to those variables. “Switching” between scenarios is also probable.
- The most optimistic scenario for Europe from a variety of perspectives would be the one in which Ukraine recovered its territories with Russian acquiescence, assuming a certain degree of Russian defeat. This scenario would drive European unity, while Russia’s nuclear threats would have failed. Yet a few participants were of the opinion that if Ukraine recovered territory, European unity would fray, and the security risks would be high.
- Although Ukraine’s military victory with no settlement with Russia would be less positive for Europe, some saw this scenario as more stable than an armistice between the two countries, since many participants did not believe an armistice would be sustainable. A Russian defeat would be positive for Ukraine’s economic prospects, while an armistice would inflict higher economic costs.
- At the same time, participants had different views about how Russia and its leadership would be affected by a defeat and withdrawal from Ukraine. Some take the view that the Russian leadership cannot afford to lose; conversely, it was argued that a Ukrainian victory would not determine the fate of Russia.
- Full Ukrainian victory with Russian acquiescence or an armistice appear to be rather unrealistic scenarios. A lot would depend on Europe; for example, under an armistice, European leaders may feel that the job was done and lose focus on Ukraine. Both scenarios would probably also entail a severe change in Russia’s domestic dynamics. This would become a significant variable of its own with unpredictable consequences.
- “Permanent war” (frozen conflict) would only be a temporary outcome – there would be escalation over the course of a few years.
- Although nuclear applications were considered in detail, participants agreed that the risk was low in all scenarios except “Massive escalation”.
- Negative scenarios, such as Russia’s victory and Europe’s disunity, call for much further and deeper thinking. For example, how can Europe fight Russia and at the same time defend its own system?

III. Policy recommendations

- European leaders should define what the war is about and seek an appropriate solution to the challenge posed to the rules-based order by Russia's leadership. For Russia's president Vladimir Putin, the war is no longer about Ukraine but about establishing a 'new world order' in opposition to that of the West's. Europe should "signal the outlines of the future European security architecture". The offer of a pathway to EU membership will have a significant impact on Ukraine's prospects as it is a long-term, open-ended commitment.
- At the same time, decision-makers must be more aware of conflict dynamics and understand how these might affect developments inside Ukraine, Russia, and Europe. European countries would be better prepared for international competition and confrontation with Russia if they adopted a more consistent approach to conflicts around the world. Russian criticism of Western double standards finds a ready audience in much of the world; in other regions, the war and Russia's role are often perceived differently than in Europe.
- European policymakers should take note of how united the EU is and whether it is willing to integrate Ukraine. This will have significant ramifications for the extent to which the war destabilises Europe. Even under scenarios where Ukraine cannot win a military victory, European integration of Ukraine reduces the risks and costs compared to other scenarios that produce a Ukraine that is both militarised and isolated.
- Policymakers need to get smarter about politics in Russia. Russian politics has a significant influence on all the scenarios' dynamics. However, there is a tendency in the West to oversimplify the debate about internal developments in Russia. European decision-makers need to dive deeper into the subject and develop greater Russian expertise. Russia's problem is systemic and broader than the leadership of Vladimir Putin. What drives Russia's external behaviour, and what is it looking for internally? Russian thinkers themselves have struggled to develop ideological principles for the 'new world order' they seek.
- European policymakers need to address the question of isolating Russia. Having Russia as a neighbour requires a strategic approach to the threats the country poses to Europe. Cutting people-to-people contacts would only empower the current thinking in Russia and isolate those who disagree with it. In its role as the most direct communication channel with anti-War/Putin Russians available at the moment, Europe should welcome the Russian diaspora and build strategic partnerships with it. Back-door dialogue with those closer to power should also be maintained with the view to 'understanding the adversary' better.
- European policymakers should devote more attention to analysing the broader context of the war. For example, the role and interests of China, Iran and other anti-Western states. The impact of the war and its implications for the various

EU elections (state, local and European Parliament) and the dynamics of the US elections in this regard must also be better understood.

- Decision-makers should recognise scenarios' contingency, complexity and "switchability" and anticipate unexpected change. They need to learn to think simultaneously in the short, medium, and long term. Policymakers should test their assumptions rigorously to avoid groupthink, as bias is dangerous. They need to give more consideration to those scenarios that they might not wish to see materialising, such as Europe's disunity and disintegration or Russia's victory and massive escalation.

Feedback? Questions? Please reach out to Jane Kinninmont –
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