

The 3 scenarios for how war in Ukraine could play out | The Economist

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ANY SEASONED intelligence analyst might have scoffed had they been told in March 2022 that Ukraine would still be an independent state eight months later; that Ukraine's army would have killed or wounded 80,000 Russians; that the flagship of the Russian Black Sea Fleet would be at the bottom of that sea; and that Ukraine's air force would still be flying. Ukraine has defied expectations. It is winning the war. But winter is coming and Russia is mobilising. Consider three scenarios for the year ahead.

In the first, **Russia snatches victory from the jaws of defeat.** Russia's army stabilises the front lines over the winter months, while building new battalions with freshly mobilised recruits. Meanwhile, Republicans in America block new arms packages for Ukraine, as supplies from Europe run out. Russia's defence industry is starved of semiconductors and specialised equipment, but churns out enough basic armour and artillery to equip the new forces.

By the spring, the new Russian units go on the attack, forcing back a Ukrainian force that is weary from months of offensive action. Russian drones continue to hammer Ukraine's energy and water infrastructure. As summer arrives, Ukraine is on the back foot. Russia captures Kryvyi Rih, a key industrial town north of Kherson, and Slovyansk and Kramatorsk in Donetsk. Western countries urge Ukraine to accept a Russian offer of a ceasefire. Volodymyr Zelensky, Ukraine's president, has little choice but to accept. In the months, perhaps years, that follow, **Russia assiduously rearms for another attempt on Kyiv.**

A Putin ultimatum: stop, or face the use of nuclear weapons

Far more likely is a second scenario: stalemate. Russia mobilises hundreds of thousands of young men, but cannot turn them into effective fighters. All the best trainers are on the front lines. Experienced officers are dead or already deployed. The recruits are fashioned into basic light-infantry units, lacking armoured vehicles and unfit to go on the offensive—but able to fill trenches and man fortifications.



November 9th 2022

Assessed/claimed as Russian-controlled

Assessed Russian operations*

Claimed Ukrainian counter-attacks

*Russia operated in or attacked, but doesn't control
Sources: Institute for the Study of War; AEI's Critical Threats Project

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Russia, having announced a withdrawal from Kherson city in November, safely evacuates the 30,000 or so troops it had on the west bank of the Dnieper river. They retreat east, leaving huge amounts of weaponry behind. It is a triumph for Ukraine, but it ultimately puts Russia in a stronger military position, with the river protecting its left flank. **The Ukrainian advance slows to a crawl; Ukrainian troops take heavy casualties for each kilometre of territory won.**

Unable to win the war on the battlefield, Mr Putin then tries to prolong it long enough to undermine Ukraine's economy, sap its morale through strikes on civilian infrastructure and exhaust its partners. Europe struggles to fill its gas-storage sites during 2023, causing blackouts as winter arrives. Mr Putin aims to hold out until late 2024, when he hopes Donald Trump will retake the White House and end support for Ukraine. But it is a high-stakes gamble: Russian opinion turns against the war, its economy shrivels and Mr Putin looks ever more vulnerable.

The third scenario is the most encouraging—and perhaps the most dangerous. Ukraine keeps the initiative and the momentum, inflicting heavy damage on Russian forces as they leave Kherson and then bringing its long-range HIMARs rockets within range of Crimea for the first time. Russian lines in Luhansk collapse, with Ukraine recapturing Severodonetsk and then quickly moving farther east. As Russian casualties mount, new recruits refuse to fight. Western countries rush new air-defence systems to Ukraine, blunting the impact of Russia's terror tactics, based on its rapidly dwindling arsenal of precision missiles.

In the spring Mr Zelensky orders his army to open a new front in Zaporizhia. Five brigades slice through Russian lines, cutting Mr Putin's land bridge to Crimea and encircling Mariupol by the summer. Ukraine moves its HIMARs rocket launchers into the south, targeting ports, bases and depots in Russian-occupied Crimea. Ukraine threatens to enter the peninsula. **Mr Putin issues an ultimatum: stop, or face the use of nuclear weapons. Victory is within sight. But so, too, are the risks that it brings.**

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