

PEACE AND SECURITY

# SCENARIOS AND TRENDS 2024

INTERNATIONAL RELATIONS

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In a short- and middle-term perspective innovation development and access to hi-tech, including microchips and rare materials for their production and the development of AI will be trend-setting factors for the development of the international system. The trajectory of the respective trends will pre-define the future of global security including the dynamics of relations between the US and China.



Ukraine's ability to influence the global process will also depend on the necessity to balance between the conflicting parties in other parts of the world (e.g. Israel-Arab countries, China-Taiwan, etc.). The appearance of new crises or the escalation of those developed in 2023 (e.g. Gaza, Red Sea, Venezuela-Guyana, Iran, Sudan, Mali, Ethiopia) may distract attention from the Ukrainian agenda.



Realistically, in the coming year Ukraine may reach noticeable progress in the spheres of maritime security, food security, nuclear security and further promote the idea of the reform of the UN as well as share best practices in combatting Russian hybrid warfare, including asymmetric warfare and cyber threats.



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Ukraine's toolkit to influence global processes

# 1.

## FOREWORD

The analysis of trends and scenarios in the development of the international political situation in 2024, presented in this publication, was conducted by the Foreign Policy Council "Ukrainian Prism" in partnership with the Representation of the Friedrich Ebert Stiftung in Ukraine upon the request of the Ministry of Foreign Affairs of Ukraine.

The research was carried out using elements of the TIA (trend impact analysis) and CIA (cross-impact analysis) methods by identifying trends, constructing scenarios, and considering them in the analysis of the prospects for developing the situation in areas of interest to Ukraine.

In the first stage, the research team evaluated five variables determined by the team's executive decision in coordination with the Ministry of Foreign Affairs of Ukraine:

- The situation in the European Union,
- The situation in the United States,
- The situation in the Russian Federation,
- The situation in the People's Republic of China,
- The situation in the Global South (focusing on Latin America).

The analysis considered events that would be significant for these five variables. An assessment was made of how the combination of events would influence the development of the situation within these variables. Factors shaping trends in the development of the situation within these variables were evaluated, both those influencing the situation in 2024 and those trend-setting for the next 3-5 years. The impact of each variable on global political and security situations was considered and verified within the interviews with the respective experts in Ukraine and

The results of this analysis can be utilized for developing practical actions and shaping policies in specific areas of Ukraine's foreign policy, as well as for further expert forecasting activities.

abroad. As a result, three scenarios for the development of international political and economic situations were outlined:

- A scenario where the integration and stability of the international system is maintained, and confrontation among its actors weakens;
- A scenario where the turbulence in the international system does not reach extreme levels;
- A scenario where the disintegration of the international system and confrontational trends dominate, and the system becomes unstable.

The factor of how well these scenarios align with Ukraine's interests was also taken into account.

In the final stage of the analysis, the research team applied variable analysis and developed scenarios to assess their impact on the following topics/areas relevant to Ukraine:

- Post-Russian international system,
- The new scenarios for the global security system,
- Existing alliances on the global geopolitical map,
- The place of Ukraine in the Global South issues (focusing on Latin America),
- Ukrainian toolkit for impacting the global processes.

The authors attempted to assess the likelihood of implementing the discussed scenarios and their impact on ensuring Ukraine's national interests and the development of the situation in the respective directions.



**NEW FORMS OF AMERICAN LEADERSHIP**

The U.S. charts a novel path in global leadership, embracing collaborative and inclusive approaches, redefining traditional models to address contemporary challenges on the world stage.



**(IM)BALANCE BETWEEN INTERVENTIONISM AND ISOLATIONISM**

U.S. foreign policy grapples with a delicate equilibrium between interventionist tendencies and isolationist postures, navigating evolving circumstances to determine its role in global governance.



**US-CHINA RELATIONS: FROM TRADE TO RIVALRY**

The U.S.-China relationship shifts from trade dynamics to heightened rivalry, driven by geopolitical tensions, economic competition, and divergent ideological stances, shaping one of the world's most consequential diplomatic relationships.



**ELECTION 2024**

Anticipation surrounds the 2024 U.S. presidential election, a pivotal event that will shape the nation's future policies and international engagements, influencing diplomatic strategies and alliances.



**TAIWAN AND MIDDLE EAST: NEW, BUT FAMILIAR POINTS OF BREWING CRISIS**

Taiwan and the Middle East emerge as pivotal global concerns, echoing historical patterns while introducing novel complexities, requiring adept foreign policy strategies to navigate familiar yet evolving crises and maintain global stability.

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**PROUD EAGLE.  
STABLE SYSTEM**

U.S. leadership is characterized by a commitment to setting an exemplary standard, prioritizing ethical conduct, responsible governance and vast cooperation with its allies. The electoral landscape reflects a controlled competition, where candidates engage within established norms and regulations. A meticulous balance is maintained in the formulation and execution of doctrines, ensuring a strategic equilibrium in policy approaches. Regarding Taiwan, the focus remains on preserving the existing status quo, contributing to stability in the region. In the context of China, the emphasis is on fostering mutual trade and interdependence through diplomatic agreements, promoting a cooperative and mutually beneficial relationship.

**FIGHTING EAGLE.  
ORBITALLY STABLE SYSTEM**

In this scenario, leadership emerges from the "backbench", suggesting a less traditional and more nuanced approach to governance. The 2024 election unfolds within a democracy quagmire, presenting challenges and complexities that question the foundational principles of the electoral system. Trade is wielded as a strategic weapon, influencing diplomatic relationships and global dynamics, while European strategic autonomy becomes a focal point, reshaping alliances and geopolitical considerations.

**FALLEN NEST.  
UNSTABLE SYSTEM**

In this envisioned scenario within U.S. politics, there is a notable absence or denial of clear leadership, leading to a vacuum in effective governance both domestically and abroad. The upcoming 2024 election unfolds in a crisis scenario, marked by uncertainties and challenges that potentially disrupt the electoral process. Isolationist tendencies in executive and legislative power prevail, shaping policy decisions that prioritize internal matters over active engagement in global affairs.



# 2.1.

## US TRENDS

### 2024

#### KEY INDICATORS

United States political trends lie within three key dimensions: leadership type, stability of the election process and stance towards competitors and threats.

- The rhetoric of President Biden, such as "rule-based order" and "America is back", provided insight that the USA will continue being a leader of the free democratic world. Furthermore, leadership by example is what the United States is eager to sustain. Such an approach implies broad cooperation with allies worldwide and, more importantly for American citizens, higher expenses for maintaining unquestionable leadership. That's one of the reasons for the possible shift in the US geopolitical position: from leadership by example to leadership from the backbench. This concept allows the US to pay less. However, the gains will also decrease, meaning the hard security burden should be redistributed between US allies. It also raises the issue of European strategic autonomy: as the USA will decrease its involvement, and the EU should be prepared to face security threats with less help from the outside. A denial of leadership is much more concerning than backbench leadership: such a situation is possible under, for instance, Donald Trump's presidency, when the USA may adopt unilateralism and mostly leaves geopolitical competition.
- The election process in the United States this year has, in fact, more impact on the future of the international system than any other electoral event in 2024. While controlled competition is the most adequate scenario, Trump dropping

out from a ballot seems like a utopia. As Donald Trump and his electoral campaign remain factors of instability, they may shift the 2024 elections towards a democracy quagmire: a situation in which Trump is legally allowed to participate, but numerous lawsuits and state-level prohibitions heavily damage his image and ratings. Correspondingly, a crisis scenario is possible in case civil unrest is caused by lawsuits and seemingly "out-of-politics" methods of electoral battle. This scenario has an opportunity to emerge as it implies a repetition of the 6th January Capitol Hill incident, the aptitude of participating in which Trump has already proven.

- In dealing with international security challenges, the US balances interventionism and isolationism. The exact state of this balance moves forward and backwards not only after the new president is elected but also during the incumbent's term in office. It is hard to predict the exact proportion, but it is quite safe to say that until Trump enters office (if he enters), there should be no hard shift towards isolation. Apart from direct intervention or quiet isolation, the third option lies - an opportunity to use trade as a weapon - an increasingly prominent trend in American strategy: sanctions can be an example. This approach allows goals to be achieved with fewer political risks and expenses. Still, its effectiveness may remain insufficient in 2024, especially against Russia.

## SCENARIOS

### STABLE SYSTEM. PROUD EAGLE

Leadership by example. Incumbent President Biden's policies fit neatly into the "grand strategy" of the US foreign policy that has spread within the American establishment for most of the time since 1991. The cross-cutting themes of this approach are "leadership by the principle", the active participation of the USA in the settlement of international conflicts and the levelling of the consequences of the crisis, the support of allies and partnership formats of cooperation, and the wide use of foreign diplomacy to fight the global crisis.

Under a stable system scenario, the continuation of a steady trend in support of such a course of American geopolitics will be observed. Without an obvious European direction, this scenario envisages the continued expansion of regional and transregional cooperation formats within the Indo-Pacific region (such as AUKUS, the Trans-Pacific Partnership, and bilateral alliances with the region's states), which will become a tool for relaying American influence and serve as a deterrent against China's strengthening.

However, wider cooperation of the US with European allies in the field of security, expansion of partnerships in the Asian region, and readiness to implement more joint projects are expected.

Election-2024: controlled competition. The US presidential and congressional elections are already the most anticipated political events in 2024. They will become decisive for the entire democratic world, and, in this context, can be considered a stability factor for a wider thematic circle. Within the United States, the main destabilising factor remains Donald Trump's presidential campaign, which, due to legal problems and the generally scandalous environment surrounding this politician.

Under a stable system development scenario, two alternative indicators are considered within the limits of this factor. The first is that the trials against Donald Trump (primarily the trial regarding his participation in the riots on January 6, 2021) may end in a guilty verdict, which, under the third part of the 14th Amendment to the Constitution, prohibits him from holding elected office in the United States. The corresponding decision will also require approval at the level of the Supreme Court because an appeal and reconciliation

with the legal framework in the case of a similar precedent is inevitable. The second alternative indicator implies that Trump will be banned at the level of individual states - either by the Supreme Courts of individual states or at the level of state secretaries of states - to participate in the elections. In a situation where a sufficient number of states make a similar decision, the scenario of the Republican Party rejecting Trump's candidacy is likely. An impossibility of being represented in a particular state leads to the automatic loss of the votes of that state's voters. Thus, a situation is created in which candidate Trump will receive a technical defeat and inevitably lead the party to a loss in the presidential elections, even if de jure he will be able to participate in them. In the case of both or either alternative occurring, the destabilising factor of the Trump campaign will be nullified.

A balance between interventionism and isolationism. The 2016 presidential election showed a return to isolationist trends and the formation of public demand for "America First." As a result of the crises of the 2010s, this request was embodied in the narrative principles of Donald Trump's policy. It involved abandoning the United States from proactive leadership and the role of a "world policeman", a reorientation to surplus as a key category of international relations, and reduced multilateral cooperation at the expense of bilateral relations and personal contacts development at the highest level. This strategy starkly contrasts classical American interventionism, which ruled over its foreign policy decisions for over three decades.

However, the period of 2016-2020 showed that the US political system could find a balance between interventionism and isolationism - weighing and re-evaluating its external responsibilities and leadership but not rejecting them completely. Under a stable system development scenario, such a balance will be preserved. By balancing the position of the executive power (represented primarily by the Department of Defence, the State Department, and the Department of Commerce) and the legislative power (which in recent years has shown a tendency to isolationism more than other parts of the establishment), it will allow conducting a stable foreign policy. That does not necessarily mean that the US will remain stable on its own as a political system, but rather, the level of predictability will allow for a medium-range prognosis to be conducted if need be.



Taiwan status-quo. Provocations by both the People's Republic of China and the United States regarding Taiwan have been one of the major factors in relations between the two countries in recent decades. China's preparations for the so-called "solution of the Taiwan issue", which began after the last major meeting of the Chinese Communist Party and became one of Xi Jinping's foreign policy narratives, set the course for confrontation with the United States, who are still willing to support their ally within their doctrine of "strategic uncertainty".

Within the framework of the scenario of the stable operation of the system, the Taiwan issue will be considered by both sides within the background of the final communique of the meeting between Joseph Biden and Xi Jinping (November 15, 2023). The communique declared support for the status quo, refrain from serious provocations, respect the national interests and positions of both states, and strive for a non-military solution to the Taiwan issue. Thus, the struggle for Taiwan will continue in the format of a low-intensity political conflict with short-term exacerbations in the form of mutual military provocations. Under such a scenario, the issue of armed resolution of the Taiwan question, which was previously predicted for the period of 2025-2027, is postponed to a longer historical perspective (2030-2035).

Semiconductors' semi-independence. The dependence of US markets and technology development on supply significantly affects the economic relations of the two states. Nearly 36% of the US semiconductors came from China, reflecting the mutual dependence of Chinese manufacturers and US buyers on this cooperation. It is also obvious that such dependence can become a manipulation tool and be used as an element of political bargaining in relations between Beijing and Washington.

However, under the conditions of stable system development, the trends launched during the high- and highest-level contacts in 2022-2023 will be observed. They primarily aimed at strengthening the dialogue with maximum avoidance of mutual provocations. Thus, the issue of semiconductors, as well as rare earth metals and broader economic cooperation, which are decisive for the economic development of both countries, will remain the same element of stability that will keep the relations of both states at the predicted level.

Atlanticism as a cornerstone of security architecture. In light of the full-scale Russian aggression against Ukraine and the beginning of the largest war on the continent since World War II, the issue of European security has again become relevant for the United States. After rather tense years of Trump's presidency, the Biden administration has shown an inclination to cooperate with European partners to form a more inclusive and adaptive security system.

In this scenario, Washington's course of strengthening its own involvement in European security will be observed, particularly due to an increased number of defence orders, a strengthening of the personnel training system in Europe, and more proactive participation in political initiatives. Primarily, such activity will be related to fulfilling the goals and objectives set in the memorandums of the NATO Madrid and Vilnius summits. It is worth noting that this scenario also assumes the continued support of European strategic autonomy, which will involve strengthening its security capabilities and, thus, reducing the costs of the United States for the defence of Europe.

Middle Eastern continence. The Hamas's terrorist attack on Israel on October 7, 2023, disrupted the delicate stability in the Middle East region that the United States had been building over the previous year. Negotiations between Saudi Arabia and Israel, which were supposed to be a polite factor of stability in the region, fell apart after the aggression of Hamas. Jordan was the only state in the Arab world that relatively quickly supported US measures for stability and settlement in the region. At the same time, Egypt, which relied on similar hopes due to previous negotiations regarding the normalisation of relations with Israel and a series of security agreements with the United States, remained mostly neutral.

Within the stable system scenario, Israel's military operation will bring the expected results, and further US activity in the region will be reduced to necessary military presence and diplomatic measures to bring Israel and the Arab countries closer together.

## ORBITALLY STABLE SYSTEM. FIGHTING EAGLE

Leadership from the backbench. While the United States is already generally committed to a more passive type of leadership, an orbital stability scenario will see an even greater shift



away from active leadership. Thus, it should be expected that the geopolitical confrontation with China will primarily involve compromise approaches and attempts to contain mutual provocations. In matters of containing the Russian threat, the United States will increasingly rely on the support of other allies (primarily European) regarding support for Ukraine. However, this does not mean at all that the US will be forced to give up its ambitions in the global arena - this type of leadership is rather a more balanced and chosen distribution of resources that will mean less inclination to initiative within its own sphere of influence. It does not mean giving up certain leadership positions. It is also worth emphasising that such leadership will be reactive and, therefore, capable of activation in the event of a direct external threat to Washington's leadership positions.

Election-2024: democracy quagmire. In the conditions of an orbitally stable scenario, court decisions that could have stopped Donald Trump's candidacy would not bring the result. Given the conservative majority in the Supreme Court and the reluctance of some states to take on the obligation of non-admission, Donald Trump gets the de jure opportunity to participate in the election as a candidate. However, a series of court decisions and/or decisions at the executive level (State Secretaries of State) block him from participating in elections in specific states. Under such a scenario, the chances of Trump winning, as well as the potential instability caused by them, are minimal. Though, it is also worth noting that in these conditions, the American establishment and the political system will not be able to respond promptly to external and internal stimuli. Accordingly, the adaptability and resistance of the system will significantly decrease due to unstable elections.

Trade as a weapon. In the conditions of intensified political and security confrontation, it should be expected that the issue of semiconductors, rare earth metals and, in general, the significant economic and trade interdependence of Washington and Beijing will once again be weaponized for geopolitical rivalry. The most likely is a return to the active use of tariff diplomacy as an element of chatter and political bargaining. Given the level and activity of political contacts, a new full-scale trade war is unlikely, but a conglomerate of accompanying destabilising factors will affect economic cooperation and push both sides to the weaponization of trade relations.

An additional marker of this confrontation and the realization of such a scenario can be considered the expansion of the primary and secondary sanctions regime in relation to Chinese companies that are involved in the sanctions circumvention system (both for Russia and for other dictatorial countries that are China's economic partners).

European strategic autonomy. As domestic political confrontations and narrative battles worsen as the November elections approach, US allies will also find themselves in a situation of political and security uncertainty. Although, in general terms, these relations will not undergo significant changes, and the US will remain committed to the idea of alliance and mutual support within the framework of NATO, European allies will increasingly insist on an embodied course regarding European strategic autonomy. Thus, under an orbitally stable scenario, US foreign policy concerning European allies will require a change in approach and a redistribution of resources in view of Europe's capabilities strengthening. This is where the element of controlled instability inherent in this scenario will grow.

## UNSTABLE SYSTEM. FALLEN NEST

Denial of leadership. By analogy with 2016, the prevailing theme in the foreign policy discourse of the US establishment is unilateralism - a doctrine aimed at maximizing one's advantages and assets in the field of international relations while simultaneously minimising obligations and the sphere of responsibility. In this vein, the United States, as much as possible, is reducing its own expenses for supporting allies, involvement in multilateral political and security formats, and its contingents abroad, in addition to their involvement in security maintenance operations.

Under the unstable scenario of the system's development, we should expect the departure of the USA from leadership positions both within the Western bloc and in the field of wider foreign contacts. That does not necessarily mean a complete withdrawal from cooperation or apocalyptic scenarios, such as the proposed withdrawal of the US from NATO. Still, the uncertainty regarding the US's future role and the lack of consensus among the US elites will make the process of medium and long-term forecasting almost impossible.

Election-2024: crisis scenario. Attempts to stop Donald Trump's candidacy through lawsuits at the federal and state levels could cause significant social unrest and eventually lead to protests. Given the age, social and ideological structure of Donald Trump's power pool, such protests risk quickly turning into direct confrontation with law enforcement and political opponents.

Isolation prevails. The rejection of the "world policeman" status, announced by Donald Trump during the 2016 election campaign and confirmed in a series of his foreign policy statements in 2017, found its support among part of the US population and the political establishment in the wake of the return of the ideological narrative of isolationism. First of all, Trump's policy was oriented towards creating a system of economic autarky, which would be based on strengthening economic independence and creating its industrial capacities at the expense of revising the tariff policy and withdrawing foreign investments.

Within the unstable version of the system's development, regardless of the specific Republican candidate for the position of the US president, the dominant position of the isolationists in the meads of Congress and the gradual drifting of the party elite in the direction of this doctrine will be observed. Thus, the main party funds will gradually be switched to the side of the isolationists, which will inevitably provoke a significant strengthening of the Trumpist wing of the party.



**EUROPEAN ELECTION 2024**

Although opinion polls show that pro-European coalition might be preserved in next convocation, populist parties and far right and left have chances to strengthen their position.



**TRANSATLANTIC UNITY**

In foreign policy, it is important for the EU to rely on transatlantic solidarity and to form a stable democratic coalition in defending important issues on the international agenda.



**REINVIORATION OF THE EU ENLARGEMENT AND CSDP**

The EU policy towards potential new members has been activated by the start of full-scale aggression. It will feature the internal divisions and coalitions between member states, as well as the relations of member states with EU institutions.



**EU DECISION-MAKING PROCESS**

A number of internal political tensions and crises put the issues of reform of decision making process within the European Union.



**STRATEGIC RESPONSIBILITY**

Keeping the balance between values and interests in cooperation with authoritarian regimes, reducing dependence on third parties in strategic issues such as energy, high technology, critical natural resources, etc.

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**EUROPEAN RENAISSANCE. STABLE SYSTEM**

The European elections will not bring significant surprises; in the European Parliament, political forces will form a pro-European coalition, allowing for the planning of an ambitious agenda for the next 5-year term. Ukraine and Moldova will initiate the technical process of negotiations for accession to the European Union. A new strategy for defence industry development will help strengthen the protection of EU members in the medium term. Regardless of the results of presidential elections, relations with the United States will remain strategic.

**LAGGARD EUROPE. ORBITALLY STABLE SYSTEM**

While the pro-European majority will remain in the European Parliament, the number of seats for far-right and populist forces will significantly increase. The official opening of negotiations with candidate countries and the formation of further steps to initiate negotiations will experience delays due to the stance of some EU member states. Support for Ukraine will remain while delay decisions can be expected. In the defence sector, the EU member states will remain highly dependent on military assistance from the United States and South Korea.

**EUROPEAN DECADENCE. UNSTABLE SYSTEM**

Mobilisation of protest voting poses the risk of questioning the formation of a stable pro-European coalition in the future parliament. The EU enlargement process risks getting stuck again due to the increase in populist and nationally oriented political forces in parliamentary and government coalitions in member states. The lack of significant battlefield success in the Russian-Ukrainian war will also increase the number of critical voices from European capitals regarding further support for Ukraine. There will be an increasing number of contentious issues and tensions between Brussels and Washington.



## 2.2. THE EU TRENDS 2024

### KEY INDICATORS

The European Union, as an international organisation, is entering another electoral cycle. The 2024 elections are intended to reset the EU institutions and establish a new long-term agenda for the Union for the next five years. The full-scale war of Russia against Ukraine has sharpened the question: how geopolitically powerful and independent is the Union in shaping its position on the international stage? The review of relations with Russia, China, and other authoritarian states around the world tests how independent and resilient the EU's economic and social systems can be under the influence of a series of crises.

Among the internal trends that will impact the European Union in the short and medium term, the following should be noted:

- The outcome of European elections and the possibility of maintaining a pro-European coalition in the next European Parliament. Current sociological surveys in EU member states indicate a rise in support for far-right and populist political forces, who can receive more seats in the European Parliament for the 2024-2029 term. Such a development is threatening, considering the fact that the political influence of the legislative body is constantly increasing, and in many cases, the European Parliament acts as a co-legislator of European directives and regulations.
- The activation of EU enlargement policy. Russia's aggression against Ukraine in 2022 has provided a new geopolitical impetus to restart the enlargement policy by adding the countries of Eastern Europe and the South Caucasus to the list of candidate states alongside the Western Balkan states. The political decision to initiate negotiations with Ukraine and Moldova, adopted during the European Council meeting, marks a significant development.
- Strengthening cooperation in the defence and security sphere within the EU. The Russian-Ukrainian war highlighted a very low level of joint initiatives in defence and security within the European Union. Despite a series of thematic instruments introduced between 2017 and 2021, the EU members did not show significant interest in joint defence procurement or substantial collective defence developments. It was only in the second year of the war that the EU managed to launch such programs as the Act in Support of Ammunition Production (ASAP) and European Defence Industry Reinforcement through Common Procurement Act (EDIRPA), aiming to provide incentives for collaborative approaches in the production and procurement of ammunition, as well as addressing other gaps in the defence sectors of the EU member-states. However, along with new opportunities, new obstacles have become evident on the path to a common defence alliance, both at the political and technological levels.
- The need for a coordinated common migration policy. Despite significant efforts by European institutions, the fight against illegal migration and its consequences have yet to find a resolution in the form of a common EU migration policy. Migration risks are heightened, considering the frequent attempts to use refugees as hybrid weapons by Russia and Belarus. The

issue requires comprehensive resolution at the EU level, but member states remain divided depending on their positions on specific aspects such as protecting European borders, refugee relocation within the EU, and common rules for dealing with illegal migrants.

- Searching for alternatives in energy and addressing climate change. In 2022, the EU countries faced an energy crisis due to dependence on Russia. Member states, supported by European institutions, are still compelled to find both temporary, quick solutions to reduce dependence on the aggressor state and establish long-term stability in energy policy. These steps must align with the principles of the European Green Deal, not disrupt the competitive foundations of the EU energy market, and avoid creating new dependencies on other authoritarian states rich in fossil fuel resources. Currently, national approaches in individual countries create conflicting situations in relations between national governments and the European Commission.
- Reforming the decision-making process in the EU. Since the full-scale invasion of Russia into Ukraine, the EU's decision-making in the realm of foreign and security policy has exposed its weaknesses. The EU Council's unanimity principle and a similar format for decision-making in the European Council made the EU a hostage to individual members who deliberately manipulate the decision-making process for their domestic political gain or, worst case, in favour of a third party. Member states are divided into camps of supporters and opponents of changing the voting rules in EU institutions. Success in overcoming these shortcomings will be decisive for the effectiveness of the Union on the international stage.

Among the external trends that will determine the international status, legitimacy, and effectiveness of the EU toolkit, the following can be highlighted:

- Maintaining transatlantic unity with the United States in confronting authoritarian and aggressive regimes that disrupt the international world order. Relying on transatlantic

solidarity, the EU aims to form a resilient, democratic coalition to address key issues on the international agenda. A joint Brussels-Washington position regarding aggressors or authoritarian states that challenge the EU's core values serves as a cornerstone for long-term political and economic deterrence.

- The dynamics of support for Ukraine on political-diplomatic, military, financial, and humanitarian levels. The European Union remains one of Ukraine's largest partners in aggregate indicators of financial and military support. However, depending on internal political factors and the battlefield dynamics, the EU's capacity may decrease. Such a decline would signify a reduction in the geopolitical agency of the EU and a loss of legitimacy in shaping the international agenda.
- The balance between values and interests in cooperation with authoritarian regimes. The full-scale war brought to the forefront the issue of the EU's strategic autonomy, manifested in reducing dependence on third parties in strategic areas such as energy, high technologies, critical natural resources, etc. Given that achieving full autonomy in these areas is impossible, the main challenge for the EU, as well as EU member states, will be determining the level of acceptability of cooperation with authoritarian states in diversification efforts and risk reduction. Expectations include divergences in positions among individual EU members in forming approaches to relations with Russia, China, and authoritarian regimes in the Global South.
- EU-NATO Relations. Nearly every conclusion from the European Council meetings includes references to the strategic autonomy of the EU, as well as the importance of cooperation between the EU and NATO. In March 2022, EU leaders endorsed the Strategic Compass as the long-term strategy for the European Union in the field of security and defence. The document outlines a series of steps the EU should implement in the medium term to enhance its resilience to security and defence challenges. The political will of the EU members in implementing the

Strategic Compass, as well as the establishment of synergistic mechanisms with NATO, will have a decisive impact on strengthening the EU's role in collective defence matters and transitioning towards the concept of the EU Defence Union.

## SCENARIOS

### STABLE SYSTEM. EUROPEAN RENAISSANCE

In 2024, the EU may successfully adopt a series of significant political decisions proposed at the beginning of the European Commission's term under the leadership of Ursula von der Leyen. In the external dimension, these cases include migration policy and the continuation of support for Ukraine. On the domestic front, leading up to the June 2024 elections, the EU Council and the European Parliament will likely bring legislative processes related to the regulation of natural resources and industrial production to a logical conclusion, with specific decisions within the framework of the European Green Deal.

The European elections will not bring significant surprises; in the European Parliament, political forces will form a pro-European coalition, allowing for the planning of an ambitious agenda for the next 5-year term. Ursula von der Leyen is likely to be re-elected as the President of the European Commission.

Despite significant political differences among EU members, Ukraine and Moldova will initiate the technical process of negotiations for accession to the European Union next year. Simultaneously, the Strategic Agenda will task to align decision-making processes with the realities of expansion. While the accession horizon for new EU members extends beyond the 5-year term of European institutions, the enlargement policy will remain an active and effective tool for communication with partners and a stimulus for implementing reforms.

A new strategy for defence industry development, built on the lessons learned from Russia's war against Ukraine, as well as an understanding of the deficit in defence capabilities, will help strengthen the protection of EU members in the medium term. Additionally, it will contribute to developing a corresponding institutional mechanism capable

of enhancing NATO and, if necessary, ensuring autonomous defence and security operations for the EU.

Regardless of the results of presidential elections, relations with the United States will maintain a strategic character. Cooperation with Washington will occur through various formats, including the Group of Seven, NATO, temporary coalitions (such as the Ramstein group), etc.

The European Union, while maintaining its position on cooperation with China, will seek to minimise dependence on Beijing in critical spheres.

### ORBITALLY STABLE SYSTEM. LAGGARD EUROPE

While the pro-European majority will remain in the European Parliament, the number of seats for far-right and populist forces will significantly increase. This may continue the trend of problematic decision-making during the term of the new parliament and amplify the influence of anti-European forces in the EU.

Despite political support for the enlargement process, the official opening of negotiations with candidate countries and the formation of further steps to initiate negotiations will experience delays due to the stance of some EU member states.

Support for Ukraine will remain a priority for the European Union. However, the imperfect decision-making process at the level of the European institutions may lead to attempts to block and delay decisions. This could complicate the planning of assistance to Ukraine and create temporary crises. The EU's ability to influence member states openly adhering to anti-European policies will remain significantly limited. Substantial internal differentiation among EU members regarding the rule of law will persist. The issue of compliance with common European rules by the EU capitals will also be on the agenda of European institutions more frequently.

In the defence sector, the EU member states will remain highly dependent on military assistance from the United States and South Korea. This dependence will reduce the potential for joint defence initiatives, which are currently actively implemented under the auspices of the European Defence Agency.



The construction of elements of resilience for EU member states in the economic and energy sectors will rely on national approaches. These approaches will define their own formulas for resource exploration, limitations on dependencies, and diversification of sources for critical resources. In this context, protectionism will persist, accompanied by frequent misunderstandings regarding adherence to EU rules.

## UNSTABLE SYSTEM. EUROPEAN DECADENCE

The worsening socio-economic situation in EU countries may lead to an increase in negative sentiments among the population of EU member states, which, in turn, can significantly influence voting behaviour. Mobilisation of protest voting poses the risk of questioning the formation of a stable pro-European coalition in the future parliament. Such a development could have a destructive impact on the subsequent legislative process, which will depend on the search for situational coalitions in the European Parliament.

The EU enlargement process risks getting stuck again due to the increase in populist and nationally oriented political forces in parliamentary and government coalitions in member states.

The lack of significant battlefield success in the Russian-Ukrainian war will also increase the number of critical voices from European capitals regarding further support for Ukraine. Some tracks of support may shift from the European level to the level of bilateral projects between Kyiv and individual EU member states. At the same time, the number of voices supporting Viktor Orban's current approach, emphasising the need for a ceasefire and refraining from supplying military aid to Ukraine, may increase.

Divergent views on security threats among EU members will prevent the formation of a self-sufficient defence industry and the establishment of the so-called European Defence Union, which would possess sufficient independent military capabilities for defending the EU territory and assisting partners.

There will remain a noticeable division among EU member countries on the issues of reforming decision-making in the EU. Abandoning the requirement for unanimous voting in matters of common foreign and

security policy will not gather a critical mass of support.

There will be an increasing number of contentious issues and tensions between Brussels and Washington regarding competition in external markets, the protection of business interests, and the regulation of critical technologies. Donald Trump's potential return to power in the US may only intensify the polarisation.



**DEMOGRAPHIC DECLINE AND UNCERTAIN ECONOMIC SITUATION**

China faces a dual challenge of demographic decline and economic uncertainty that will significantly shape its foreign policy. With an aging population and a shrinking workforce, Beijing will likely prioritize policies aimed at sustaining economic growth, such as enhancing technological innovation and global trade partnerships.



**US-CHINA COMPETITION**

The ongoing competition between the United States and China represents a defining factor in Chinese foreign policy. As the two superpowers navigate complex economic, technological, and geopolitical challenges, China's foreign policy will be characterized by a delicate balance of cooperation, competition and even alienation.



**CHINESE GLOBAL INITIATIVES**

China's global initiatives go beyond the Belt and Road Initiative (BRI). Facing international scrutiny and concerns about debt-trap diplomacy associated with the BRI, China may refine its strategies to address these issues. Beijing could focus on creating alternative frameworks.



**DEVELOPMENT OF AI AND NEW ENERGY VEHICLES**

As China continues to invest heavily in cutting-edge technologies like artificial intelligence (AI) and new energy vehicles (NEVs), these advancements will play a pivotal role in shaping the country's foreign policy.

**20**  
**24** **SCENARIOS**

**THE DRAGON LURKS.**  
STABLE SYSTEM

China prioritizes stability in its foreign policy by actively avoiding conflicts, particularly those involving nuclear weapons, and advocating for peaceful resolution through diplomatic means. The nation focuses on regulating the utilization of artificial intelligence, participating in international efforts to establish ethical standards and prevent malicious uses of AI. In the context of Sino-U.S. relations, China promotes proactive crisis prevention and management through robust communication and cooperation mechanisms. Additionally, China engages in overseas maritime security initiatives, collaborating with other nations to address common challenges and contributing to the maintenance of open sea lanes, reflecting a commitment to global stability and security.

**THE DRAGON DANCE.** ORBITALLY  
STABLE SYSTEM

In prioritizing the Global South, China directs its foreign policy towards supporting development efforts, offering assistance to nations in the region. Simultaneously, China aims to foster stability and cooperation in its relationship with the United States, emphasizing diplomatic channels and collaborative initiatives to mitigate potential conflicts. The phenomenon of urbanization becomes a key focus, with China likely engaging in global urban development projects. In the realm of peace-making, China plays an active role in resolving international conflicts, employing diplomatic strategies to promote stability.

**THE DRAGON UNFURLS ITS WINGS.**  
UNSTABLE SYSTEM

Escalating strategic tensions between China and regional powers such as Japan, South Korea, and India heighten instability in the Indo-Pacific region. The mounting risk of a Taiwan conflict becomes a prominent concern. The decline in demand for Chinese exports in the West prompts a reassessment of economic strategies. The strengthening alliance between China and Russia becomes a pivotal feature, potentially altering the global balance of power. Increased military maneuvers and the emergence of an AI and semiconductor trade war leads to further escalations in international relations.



## 2.3. CHINA TRENDS 2024

### KEY INDICATORS

The key indicators that will have an impact on the Chinese foreign and domestic policies as well as on the Chinese positioning in the global international system will be:

- The demographic situation in China: the demographic decline is an ongoing trend despite the rejection of the "one-child policy". This trend may influence the economic situation, although the direct results of the respective impact will not be significant in the short-term period and can be compensated by the robotization of production, focus on services and new technologies, and stipulation of the economics by state subsidies.
- Deploying artificial intelligence (AI) in various sectors, including digital trade, will raise the issue of the respective regulations in China and globally. The subsidies for developing and adopting New Energy Vehicles to maintain Chinese dominance in lithium-ion battery production and addressing potential risks related to battery technology, such as safety and environmental concerns, will also remain a key priority.
- Development of Chinese global and regional initiatives. The Belt and Road Initiative (BRI) will remain among the Chinese priorities. However, China may refocus its financial flows on less global and regionally tailored initiatives, e.g. the Global Security Initiative and the Global Development Initiatives. Although judging from the names of both initiatives, they still contain a global element, their efficiency is mostly tested on the regional level (particularly in South East Asia). Instead of global projects worth hundreds of billions of dollars, the Chinese government rather tests smaller projects labelled as "small and beautiful". Besides, China switches its "modus operandi" from state and private loans to grants usually managed by the MFA. However, the BRI won't be neglected. Instead, the flow of capital may decrease. The initiative will still attract the attention of certain states due to the lack of alternatives and quite underdeveloped US-European Build Back Better World (B3W) Initiative and the Global Gateway Initiative.
- Competition in the high-technology domain will also remain trending. It will be one of the key drivers of competition between China, the United States and the West in general. The existing tensions, supplemented with the ideological discrepancy, may have spillover effects and result in the growth of tensions. Therefore, the proactive crisis prevention and management issue will remain high on the agenda.
- Competition with the United States and the Washington's Chinese strategy, as well as the Chinese approach towards Taiwan, will be a critical trend-making factor for the further evolution of the Chinese policies, decisive for the next few years, and will pre-define the future of the international system.

## SCENARIOS

### STABLE SYSTEM. THE DRAGON LURKS

In the ever-evolving landscape of global politics, maintaining stability may remain crucial. For the international system to remain stable and to ensure further growth of the Chinese People's Republic, it is essential that Chinese policy aligns with critical global trends.

Though stillborn in its current form, the Global Security Initiative announced in 2022 may set an essential foundation for Chinese engagement. While not directly linked to the Global Development Initiative, the core principle that a nuclear war cannot be won and should not be initiated will continue to guide China's approach to global politics. This commitment to avoiding nuclear conflicts may foster stability and promote peaceful solutions.

Amidst growing tensions in the semiconductor industry, the red lines won't be crossed, and monopolies won't be established. China's commitment to competition without confrontation may ensure a vibrant and innovative semiconductor market.

China's Belt and Road Initiative, the Build Back Better World Initiative, and the Global Gateway Initiative will compete fairly while complementing each other. This cooperative approach encourages collaboration and fosters mutual benefits, enhancing stability and economic growth in regions involved in these initiatives.

Deploying AI in various sectors, including digital trade, will be subject to regulation. China will recognize the importance of using AI for competition rather than confrontation.

The United States and China will also recognize the importance of proactive crisis prevention and management. By continuously updating and improving their protocols, both nations can effectively address potential conflicts and avoid unexpected escalations. This commitment to clear communication and mutual understanding contributes to stability and minimises the risk of miscalculations.

In addition to the aforementioned areas of alignment, if China coordinates its efforts in overseas maritime security with other interested actors, such as the United Nations (UN), the European Union (EU), and the North Atlantic Treaty Organization (NATO), it can bring added value and enhance the security of

crucial regions like the Gulf of Guinea, the Horn of Africa, and Somalia.

By actively participating in multinational efforts to combat piracy and ensure maritime security, China may demonstrate its commitment to being a responsible global actor. Cooperation among nations in addressing piracy not only safeguards vital trade routes but also promotes stability and economic development in these regions. China's involvement can contribute resources, expertise, and naval assets to complement the existing efforts and enhance the effectiveness of joint operations.

China's engagement in overseas maritime security, in concert with other interested actors, may strengthen regional stability, protect vital shipping lanes, and mitigate the threat of piracy. This collective effort benefits China and enhances the security and prosperity of the entire international community.

By embracing this collaborative approach, China can position itself as a valuable contributor to global security, fostering goodwill among nations and reinforcing its commitment to a stable international system.

### ORBITALLY STABLE SYSTEM. THE DRAGON DANCE

China's Global Development Initiative and Global Security Initiative are likely to continue as essential components of Chinese foreign policy. While these initiatives may not be options for Asian states in terms of military or traditional security cooperation, they could serve as supplementary instruments in non-military and non-traditional areas such as law enforcement operations and nuclear non-proliferation. China may emphasise these areas of cooperation to foster stability and mutual understanding.

Rather than developing separately, China's Global Security Initiative and Global Development Initiative could be integrated into the implementation plan of the UN 2030 Agenda for Sustainable Development. This integration may involve focusing on the Global South, where China could assist and support sustainable development efforts. By aligning its initiatives with the UN agenda, China may contribute to global stability.

China will restrain and avoid any escalation on the Taiwan issue, regardless of the election outcomes in Taiwan. This approach aims to maintain regional stability and prevent



conflicts that could disrupt the overall international system. China's emphasis on peaceful resolution and dialogue regarding Taiwan will demonstrate its commitment to stability and a peaceful rise on the global stage, at least for a short period.

Bearing in mind the trend-setting factor of the US-China relations, both China and the United States are likely to avoid further escalations in their bilateral relations. China will showcase reliable self-restraint, focusing on crisis prevention and management protocols. By adopting a responsible and measured approach, China seeks to foster stability and maintain a cooperative relationship with the United States. This restraint is crucial for the orbital stability of the international system, as any major conflicts or tensions between these two global powers could have significant repercussions.

Relative normalisation in international relations can create a fruitful ground for economic growth. Improved diplomatic relations and reduced geopolitical tensions can foster increased trade, investment, and cooperation among nations. As a major global economic power, China can leverage this environment to further stimulate its economic growth.

As economic growth accelerates, urbanisation can gather pace as well. China has been undergoing rapid urbanisation, and this trend could be further amplified in a scenario of relative normalisation. China might focus on creating smart mega-cities to support sustainable and efficient urban development. These cities would utilise advanced technologies, data-driven infrastructure, and innovative solutions to enhance the quality of life for residents, promote environmental sustainability, and optimise resource management.

China will also dedicate significant efforts to resolving international issues, focusing on conflicts like the Israeli-Arab conflict and security challenges in Iraq, Libya, Sudan, and Yemen. Through diplomatic initiatives and active engagement in peacekeeping endeavours, China strives to establish itself as a responsible and constructive global actor, building a positive image on the world stage.

Meanwhile, China will actively pursue maritime dominance in the Southeast Asian region, employing a multifaceted strategy comprising military presence, strategic partnerships, and economic influence. Through the projection of maritime power, China ensures the

safeguarding of its overseas interests, notably securing vital trade routes.

Demonstrating unwavering commitment, the central government will continue to subsidise the development and adoption of New Energy Vehicles. Concurrently, China strives to maintain its dominance in lithium-ion battery production - an indispensable component of NEVs - by intensifying investments in research and development.

A transformational shift in the China-Russia dialogue sees the "no limits" narrative of the past fading away. Embracing a more nuanced approach, both nations foster constructive dialogue and reinforce cooperation. Though, China's adoption of a less confrontational "wolf-warrior" rhetoric will signal a preference for diplomacy and cooperation on the international stage.

As China's economy reaches a more stable plateau after rapid growth, a deliberate focus on sustainability and environmental responsibility may take precedence.

China's orbitally stable system development scenario revolves around a balanced and pragmatic approach to international affairs. Through concerted efforts in conflict resolution, technological advancements, maritime prowess, clean energy, and constructive diplomacy, China will seek to bolster its positive image and global influence while fostering economic stability and sustainable development at home.

## UNSTABLE SYSTEM. THE DRAGON UNFURLS ITS WINGS

Amid mounting geopolitical tensions, China may seize the opportunity to propose its Global Security Initiative (GSI) as an alternative to the US-led or US-dominated security mechanisms. The GSI gradually gains momentum, attracting support from other nations dissatisfied with the existing security arrangements. This shift leads to a fragmented and less effective international security landscape, with nations aligning with the GSI or traditional security mechanisms.

The Global Development Initiative undergoes transformation into an alternative to the American B3W Initiative and the European Global Gateway Initiative. China leverages the GDI to assert greater control over global industrial supply chains, directing investments and resources to strengthen its economic

influence. This move further intensifies economic competition and geopolitical rivalries among major powers.

In the aftermath of the January 2024 elections in Taiwan, where results do not align with Beijing's interests, tensions escalate. China perceives the outcome as a challenge to its territorial claims, leading to increased military manoeuvres and a semi-conductor trade war. The region becomes a focal point of instability, affecting global supply chains and economic interdependence.

Growing strategic tensions between China and regional powers like Japan, South Korea, and India exacerbate instability in the Indo-Pacific region. Military modernisation efforts in China and the US-Australia-Japan triangle fuel an arms race, heightening security concerns globally. This dangerous escalation strains diplomatic relations and heightens the risk of conflict.

China invests heavily in cultural expansion to consolidate its soft power and influence. Drawing on Russian know-how in information warfare, China constructs alternative reality patterns through sophisticated disinformation campaigns, influencing global narratives to its advantage.

As tensions rise and demand for Chinese exports declines in the West due to geopolitical uncertainties, China shifts its focus towards the Global South. This pivot involves increased economic cooperation, investments, and infrastructure projects to secure new markets and partners.

Amid the unstable international system, China and Russia's alliance strengthens further. The two nations coordinate media strategies to amplify their shared narratives and challenge the dominant information dissemination models in the West. This coordination enhances their geopolitical influence and seeks to reshape the global information landscape.

The critically unstable international system outlined in this scenario is characterised by growing geopolitical tensions, economic rivalries, and military build-ups. China's assertive moves, such as promoting the GSI and GDI, exacerbate divisions among nations, leading to a fragmented security and development landscape. The escalating situation in the Indo-Pacific region compounds the instability, setting the stage for a precarious global environment.





**CONSERVATION OF PUTIN'S REGIME**

Strengthening of the regime in Russia is expected to happen after the Prigozhin's coup



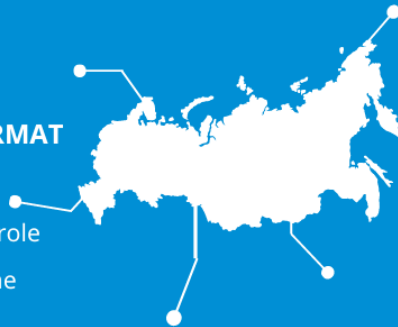
**MILITARIZATION OF POLITICAL DISCOURSE AND PREPARATION FOR A LONG-TERM WAR**

Russia will be showing readiness to wage a protracted war as a part of its geopolitical strategy



**CHANGES IN THE FORMAT OF FUNCTIONING OF POLITICAL ELITES**

Putin will move away from the role of referee in relations between groups of power, taking over the implementation of the most important decisions



**CREATION OF ADDITIONAL GLOBAL HOT SPOTS AND INCREASING INFLUENCE IN AFRICA**

Russia is expected to utilize elections in many African states and indirectly fuel conflicts all around the globe to create additional problems for the West



**EXACERBATION OF CONFLICT ON NATIONAL, RELIGIOUS, & ECONOMIC GROUNDS**

Demographic changes, an increase in the share of the Muslim population, and striking economic inequality will increase discontent among Russian citizens



**CONTINUATION OF THE GEOPOLITICAL TURN TO THE EAST**

Russian will be strengthening ties with its partners. At the same time, relations with China will retain features of disproportionality which may deepen as a result of Russia's inability to cope with the existing challenges

**20**  
**24** **SCENARIOS**

**AN OLD-NEW RUSSIA.**  
STABLE SYSTEM

Russia takes a more constructive position in the context of peaceful settlement of the Russo-Ukrainian War. The power structure is preserved from possible shocks but it leads to changes in the balance of power among the Russia elites which leads to the strengthening of the technocrats. They try to add flexibility to the regime in Moscow with the aim of converting Russia in an effective empire.

**A PUTIN'S RUSSIA.**  
UNSTABLE SYSTEM

Putin increases his influence in the state apparatus, contributing to the relative integrity and stability of the regime. Because of the war, Russia's economy enters a period of stagnation with possible risks of overheating. On the foreign policy field, Moscow uses the war against Ukraine in order to wedge into the US-China standoff and tries to preserve its influence in the countries that are considered to be a part of Russia's sphere of influence.

**AN UNPREDICTABLE RUSSIA.**  
UNSTABLE SYSTEM

Russia gains advantage in the war against the background of even greater erosion of the security system. In conditions of escalation, the Kremlin will move to manual control of the economy, undermining its growth capacity in the medium and long-term run. The escalation strategy accelerates the deepening of systematic problems within the Russian Federation which will have an even more negative impact on the economy, exacerbate social issues, and cause misunderstandings among political elites.



## 2.4.

# RUSSIAN FEDERATION TRENDS 2024

### KEY INDICATORS

2024 will be a year of relative strengthening of President Putin's regime. As a result, the Russian president will further move away from the role of referee in relations between influence groups within Russian political elites. At the same time, traditional internal competition between these elites will continue, but this process will not seriously impact shaking the political system of the Russian Federation. Despite a certain strengthening of Putin's regime, there will be an aggravation of conflicts and growing discontent on national, religious, and economic grounds, which may become a serious problem not only for the regional authorities but also for the federal government.

On the international stage, Moscow's attention will be focused on the war in Ukraine, which the Kremlin considers an opportunity to wedge into the confrontation between the United States and the People's Republic of China, the new contours of which are expected to be outlined after the formation of a new administration in Washington. Besides waging the war in Ukraine, to achieve this goal, Russia will intervene in the internal affairs of African states and support the emergence of new hot spots all over the globe. Such actions are expected to undermine the geopolitical strength of Western states and spark internal disagreements in the West. In parallel, the Russian Federation will try to defend its monopoly of influence in those states that are traditionally considered to be a part of Moscow's sphere of interests and intensify relations with Asian actors as a part of the geopolitical turn to the East.

Inside the state, the following variables are important:

- Conservation of V. Putin's regime. The personalist regime in Russia will remain, and the 2024 elections will be designed to legitimise the current president's rule. This process will take place in parallel with the introduction of changes to Putin's public image and manner of communication with citizens to dispel the greatest concern felt by the Russians - the age of the Russian president.
- Along with conserving the personalist regime, there will be certain changes in the format of functioning of political elites. Thus, V. Putin will move away from the role of referee in relations between those close to him, taking over implementing the most important decisions. These changes were provoked by the lack of reaction of the elites during the Prigozhin coup and the perception of the march as a threat to Putin himself. The death of the Wagner Group's leader allowed Putin to make sure that there has been no conspiracy behind him and to take control of most of the processes to prevent similar incidents in the future.
- Despite certain transformations in the context of Russian political elites' functioning, competition between groups of influence will continue in the future. V. Zolotov, the head of Rosgvargiya, will strengthen his positions in the law enforcement bloc since he has incorporated part of the Wagner Group under his authority. This will allow him to compete with Shoigu-Gerasimov tandem. Tensions between other law enforcement agencies are expected to continue, but the actions

of the entire group in the external field will be coordinated. Similar processes will take place in the group of technocrats where competition between financiers and persons connected to the political component or the energy sector will not cease to exist.

- Exacerbation of conflicts on national, religious, and economic grounds. The decrease in the share of the Slavic population and increase in the share of Muslims in the national structure of the Russian Federation provoked by different dynamics of the birth rate, migration, and subsequent naturalisation of natives from Central Asia will be a source of constant conflicts between residents of the Russian Federation, especially in large cities. In parallel, there will be growing discontent caused by striking economic inequality, which is a consequence of the exploitation of peripheral regions and also the challenges associated with the war in Ukraine.

In the foreign policy field, the following processes will take place:

- Militarisation of political discourse and preparation for long-term war. Ukrainian track will remain the main for the Russian Federation, and Moscow will not give up its efforts to draw Ukraine into its orbit of influence. Therefore, in order to mobilise citizens and state resources, Putin and the Russian government will promote the narrative of a "patriotic war" that is necessary to preserve sovereignty. In parallel, Russia will make significant investments in the defence industry, increase the production of weapons to fuel its military machine, and further develop a network of military-patriotic education organisations and structures to support the military.
- Creation of additional global hot spots and increasing influence in Africa. Given the fact that elections will be held in many African states next year, Russia can be expected to step up in this direction with its usual tools: corruption, interference in elections, and the use of mercenaries. At the same time, Moscow will try to indirectly fuel local conflicts around the globe in

order to create additional problems for the Western states.

- Attempts to maintain a monopoly in relations with states that the Kremlin considers a part of its sphere of influence. In relations with Central Asia, Moscow will try to maintain its position through a wide infrastructure of influence that extends to the political, economic, and cultural spheres. Also, the Kremlin will continue the integration process with Belarus within the framework of the so-called Union State, further undermining the sovereignty of the neighbouring state. Despite a mostly positive situation, Moscow will face several problems, particularly the distancing of Armenia, strengthening of Chinese influence in neighbouring countries, primarily in Kazakhstan, as well as the completion of the process of de-actualisation of certain structures, such as the CSTO.
- Continuation of the geopolitical turn to the East. Russia will be strengthening ties with its partners in military, economic, and political dimensions, which will make it possible to solve urgent issues, in particular in the context of waging war in Ukraine and circumventing sanctions, as well as contribute to the formation of a pool of partners whose interests are based on anti-American sentiments. At the same time, relations with China will retain features of disproportionality, which may deepen due to Russia's inability to cope with the existing challenges.

## SCENARIOS

### STABLE SYSTEM. AN OLD-NEW RUSSIA

In the conditions of the aggravation of the economic crisis caused by aggression against Ukraine and the lack of gains on the battlefield, Russia will be forced to take a more constructive position in the context of a peaceful settlement of the Russo-Ukrainian war. The prospects of lifting part of the sanctions may be the factor that will incline the Russian leadership to seek such an exit strategy from the war that would allow them to save face.

Exit from the war on terms that can be presented as the achievement of the goals of the so-called Special Military Operation will make it possible to preserve the power structure from possible shocks, but it will somewhat change the balance of power among the Russian elites. Thus, greater influence will be gained by technocrats who will receive additional levers of influence on the foreign and defence policy. The strengthening of this group will not mean a fundamental change in approaches but a correction that will add flexibility to the regime in Moscow, making its policy more pragmatic in order to adapt its ideology to new realities and get out of the economic crisis. Simply put, this "Kremlin tower" will advocate the creation of an effective empire.

However, complete normalisation of relations with the West will not occur. Russia will continue its usual line of behaviour with neighbouring states, strengthening its influence, which may become compensation for failures in the Ukrainian direction.

## ORBITALLY STABLE SYSTEM. A PUTIN'S RUSSIA

The political system of the Russian Federation will maintain relative integrity and stability, which will be facilitated by strengthening V. Putin's positions. Preserving the regime and abandoning the referee role will be quite effective in the short term, but it will not answer the question of Russia's future without Putin. In parallel, the struggle between various groups of influence will continue, but it will not be of critical importance for shaking the system built by Putin.

Although the Russian economy will continue to show signs of recovery for some time, it will likely enter a period of stagnation and even overheating. This is due to a decrease in export volumes, a shortage of personnel, which will deepen because of the war, and an acceleration of inflation.

On the foreign policy track, Ukraine will remain key for the Kremlin, so the Russian Federation will continue to demonstrate its readiness to wage a protracted conflict. Thus, in 2024, defence spending will make up to 6% of GDP compared to 3.9% in 2023. The system of contract recruitment and covert mobilisation will maintain its effectiveness, ensuring a constant flow of personnel to the ranks of the Russian Armed Forces, and military-industrial complex enterprises will scale

up the production of equipment and ammunition. The Kremlin will make a key bet on reducing the amount of aid supplied to Ukraine by Western governments, as a result of what Moscow hopes to gain a better position before possible negotiations on the war settlement.

Russia will be using the war in Ukraine to wedge into the US-China standoff. Therefore, there will be no serious warming of relations between the Russian Federation and the West. However, the Kremlin will be looking for potential allies in the ranks of Western politicians, especially against the background of the presidential elections in the US.

At the same time, Russia will try to preserve its influence in the countries it traditionally considers to be a part of its sphere of interests. First, this concerns Central Asian states, which have become the main way of circumventing sanctions and obtaining sanctioned goods, as well as Belarus as the only formal ally of Moscow. However, in certain areas, the Kremlin will face difficulties due to China's growing influence, especially in Kazakhstan. Also, Russian influence will be decreasing in the Caucasus after Armenia abandoned the bet on Moscow as the sole security guarantor.

## UNSTABLE SYSTEM. AN UNPREDICTABLE RUSSIA

Russia is conducting a series of offensive operations and gaining an advantage in the war against the background of even greater erosion of the security system, increased military cooperation with Iran and China, escalating relations with the West, and the inability of the latter to provide all the necessary assistance to official Kyiv.

In the conditions of escalation, the Kremlin will move to manual control of the economy. Within this process, a law on contributions from the excess profits of large companies will be adopted. Small and medium-sized businesses may fall under additional tax burden as well. Additional tax obligations will be imposed on Russian citizens, making it possible to switch to a command system but at the same time, it will reduce the stability of the Russian economy and undermine its growth capacity in the medium and long-term run.

There will be a more serious purge of the media sphere with the expansion of blocking, including VPN services, reassessment of the use of messengers, especially Telegram, as well as

attempts to introduce a fully censored, state-approved network where the consumer will receive pre-filtered information.

At the same time, the escalation strategy will likely accelerate the deepening of systematic problems within the Russian Federation, which will have an even more negative impact on the economy, exacerbate social issues, and cause misunderstandings among political elites. In this case, the processes inside the country will be more difficult to control, which may lead to the emergence of unpredictable and dangerous situations for the Kremlin.



### NUMEROUS ELECTIONS AND ELECTION UNCERTAINTY

Latin America faces a series of elections, introducing uncertainty in the political landscape across the region.



### YOUTH POLICY - BETWEEN FAILURE AND NEW OPPORTUNITIES

Youth policy in Latin America is at a crossroads, presenting both challenges and opportunities for addressing the aspirations and concerns of the younger generation.



### CLIMATE CHANGE ISSUES

Climate change emerges as a pressing issue in Latin America, requiring concerted efforts for mitigation and adaptation.



### RISE OF CHINA AND UNCERTAINTY OF WEST

The growing influence of China and uncertainties in relations with the West shape the geopolitical landscape in Latin America, prompting a reconsideration of diplomatic and economic alliances.



## 20 24 SCENARIOS

### BUEN CLIMA. STABLE SYSTEM

A post-election period unfolds with a focus on maintaining political balance and preserving the status quo. Efforts are directed towards countering brain drain and empowering the youth agenda, recognizing the importance of nurturing and harnessing the potential of the younger demographic. The cooperative agenda of MERCOSUR takes center stage, fostering collaboration among member states for regional development and shared prosperity.

### LA NIÑA. ORBITALLY STABLE SYSTEM

The persistence of authoritarianism during an election year casts a shadow over democratic processes. China's growing competitiveness and active interference further shape the geopolitical landscape, influencing regional dynamics. Additionally, the prevalence of the climate agenda emerges as a significant focal point, with nations in the region addressing environmental challenges and fostering sustainable policies.

### EL NIÑO. UNSTABLE SYSTEM

In this scenario, there is a notable shift as China's economic influence transforms into political leverage within the region. The rise of non-governmental actors introduces new dynamics, potentially impacting traditional power structures. Concurrently, the negative repercussions of failed youth policies emerge as a critical concern, influencing socio-political landscapes.





## 2.5.

# LATIN-AMERICA AND THE CARIBBEAN TRENDS 2024

## KEY INDICATORS

Regional politics throughout Latin America and the Caribbean would be influenced by four main interconnected dimensions: electoral, socio-economic, environmental and a dimension of foreign interference.

- Countries in the region will hold several elections throughout 2024, which may demonstrate political balance and status quo preservation. While political continuity is important for implementing long-term projects and tackling strategic issues, it might also result in authoritarianism persistence, taking into account upcoming elections in El Salvador, which might violate the local rule of law and Maduro's reign in Venezuela.
- Youth issues have become one of the most popular among Latin American policymakers as there is no doubt that young people, due to demographic reasons, could make local economies, if not thrive, then at least succeed. Governments would likely concentrate on countering the brain drain and empowering youth agenda. While new policies to counter brain drain may prove effective, the current situation in the field of youth empowerment and youth well-being remains complicated: negative repercussions of failed youth policies can be quite destructive. For instance, the high number of poor and extremely poor young citizens is clearing the path for non-governmental actors' establishment. New terrorist and criminal groups and revitalisation of old left/right-wing insurgency movements could be just a matter of time if youth throughout the continent view illegal activities as the most simple and effective way of achieving their ambitions.
- Some actions to prevent the above scenario could be taken through the MERCOSUR cooperative agenda, especially when negotiating a free trade agreement with the European Union. Success in building closer economic ties within and beyond Latin America and the Caribbean may improve overall well-being and prevent the aforementioned negative repercussions.
- Environmental challenges could also affect the social and economic state of Latin America. That's why the prevalence of climate agenda can be observed. Local countries, especially those that heavily rely on agriculture, could benefit and lose assets due to unpredictable climatic phenomena in the Pacific.
- The Chinese factor. Will China take an aggressive or more relaxed stance towards its ambitions in Latin America? Chinese competitiveness and the possibility of turning economic ties into political influence could damage regional stability. A combination of authoritarian persistence and Chinese influence can severely undermine democracies across the continent. Key instruments to tackle this may be found in ensuring sustainable economic development and improvements in the social sphere, such as the aforementioned youth empowerment.

## SCENARIOS

### STABLE SYSTEM. BUEN CLIMA

Political balance and status quo after the elections. Latin America is heading into another busy and important election year, which will be notable for putting an end, at least temporarily, to the anti-incumbency wave that has swept through the region in recent years. Next year voters will go to the polls in Sint Maarten (January), El Salvador (February), the Dominican Republic (May), Panama (May), Mexico (June), Uruguay (October) and Venezuela (date to be determined). In a stable system scenario, the current government will prevail in four of at least five of the elections.

This will create a situation in which changes in the political discourse of countries with elections will be insignificant, respectively, and the planning horizon will remain constant and predictable.

Countering brain drain and empowering youth agenda. In recent decades, the Latin American region has had a stable tendency to rejuvenate the population and saturate economic and political life. However, in the last few years, there has been an outflow of young personnel - both qualified and not qualified, and therefore, this potential is not fully used. First of all, migration pathways lead to the United States of America. Still, the latter returns the tendency to more rigid control of borders, which increases social tension and does not contribute to the long-term resolution of the situation.

The stable development scenario predicts that individual countries (first and foremost, economic leaders such as Argentina, Brazil and Mexico) will implement a number of employment reforms and direct state budgets for the creation of additional jobs.

MERCOSUR cooperative agenda. Against the background of active political processes in the countries of the region, Mercosur, as an economic block of countries in the region, has every opportunity to act as a unifying and stabilizing factor for the development of the region. Despite certain tendencies of decentralisation (expressed, for example, in the position of new President Argentina Javier Milei), the prospects for continuing negotiations with the European Union regarding the free trade zone and the potential of positive economic influence of association for the stable

development of relations can play a positive role in the majority countries of the region.

With a stable scenario, the development of the regional system within Mercosur will continue to move towards rapprochement with the European Union. For the region, such a development of events will also become a stabilising factor in their relationship.

### ORBITALLY-STABLE SYSTEM. LA NIÑA

Authoritarian persistence. The countries that will have elections during 2024 mostly expect victory of current political forces. But it is not a fact that it will bring predicted stability. The trend of democratic erosion persists under authoritarian leadership. Anticipating the upcoming presidential elections, El Salvador is poised to witness voters granting Nayib Bukele another term, notwithstanding the constitutional prohibition on re-election. Mr. Bukele is expected to secure a resounding victory, buoyed by voter approval for his authoritarian yet effective anti-crime measures.

Contrastingly, Venezuela faces a grim prospect of achieving a free and fair vote, even with recent sanctions relief from the US intended to level the electoral playing field. However, this relief is likely to be short-lived as Nicolás Maduro, Venezuela's authoritarian leader, deviates from crucial aspects of the agreement. The leading opposition candidate remains disqualified from holding public office, a ban the Maduro regime is unwilling to lift. Despite the overall positive democratic landscape in much of Latin America, in 2024, the elections in Venezuela and El Salvador stand as cautionary narratives of democratic regression fuelled by voter disillusionment with traditional parties and politics in the region.

China competitiveness. Even though that, according to the experts surveyed, the Latin American region still retains the overwhelming commitment to the Western position, the increased influence of Chinese capital and the promotion of cultural diplomacy could not but reflect on the position of the region's leaders. The presidency of Lula Da Silva, which began with increased attention to Beijing's positions and the beginning of negotiations regarding the expansion of cooperation (in general - accelerating the flow of Chinese investments in the country), illustrates this trend. As shown in Southeast Asia and Africa, China's cheap lending policy and broad investment inevitably lead to the intensification of pro-Chinese

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# **THROUGH THE PRISM OF UKRAINIAN INTERESTS**

**ESTABLISHING A POST-  
RUSSIAN INTERNATIONAL  
SYSTEM**

## 3.1.

# ESTABLISHING A POST-RUSSIAN INTERNATIONAL SYSTEM

## MAIN VARIABLES

The Ukrainian track will remain a priority for the Russian Federation as Moscow perceives the war against Ukraine as an opportunity to wedge into the confrontation between the United States and the People's Republic of China. Consequently, the Russian-Ukrainian war is likely to be one of the centres of gravity for further developments related to the transformation of the existing world order and Russia's place in it.

Meanwhile, the development of global trends and positions of the main global actors could directly or indirectly influence Moscow's ability to reach its geopolitical objectives or undermine its efforts to find a new place in times of transformation.

Proceeding from the stated above, the following key factors can be highlighted:

- **China's stance towards Taiwan and willingness/unwillingness to escalate relations with the US** can potentially accelerate the restructuring of the existing world order and trigger the emergence of new hot spots or become a stabilising factor for the future.
- **Beijing's relations with the Russian Federation** may not only bring China and Russia closer (including military and information realms) but also deepen global fracture lines.
- **The 2024 elections in the US and the effectiveness of Washington in the international arena**, including military and financial support of Ukraine, as

well as the ability to fulfil its and preserve the existing share of responsibility.

- **The European Parliament elections and the EU's ability to maintain transatlantic unity with the United States** are two important factors that could prove crucial for deterring Russia's and China's attempts to disrupt the international world order.

## SCENARIOS

### POSITIVE SCENARIO

China will avoid confrontation with the United States and **look for a coexistence framework with Washington**. Both states will recognise the importance of crisis mitigation. By regularly discussing issues and maintaining clear communication in bilateral relations, China and the US can effectively contribute to the stabilisation of the global order and avoid unexpected escalations.

At the same time, election competition in the United States **will not have a negative impact on Washington's ability to preserve the current share of responsibility and provide assistance to Ukraine**, even if on a smaller scale. Donald Trump will be either banned from participation in the elections or receive a technical defeat. Such developments may open a window of opportunity for Russian information influence, but in general, Moscow's attempts to destabilise American society will not be successful, and internal stability will be preserved.

**The situation in the EU will not deteriorate as well.** The European elections will result in the

creation of a pro-European coalition in the European Parliament and the re-election of Ursula von der Leyen as the President of the European Commission. If Hungary remains a main European troublemaker, a way of circumventing Budapest's veto power **will be found**.

Under conditions where the stability of the global order is preserved, there is much less possibility that the Kremlin's attempts to intimidate Western decision-makers with a narrative of a protracted war will lead to serious consideration of this issue. As a result, **Moscow's ambitions to return to the league of the global powers will not be satisfied**. It would also be worth paying tribute to Beijing, whose constructive role in maintaining global stability is likely to be driven by the unwillingness to let Russia transform into a more powerful state that could threaten China's position on the geopolitical map.

It does not mean that Moscow's destructive influences in Ukraine, Africa, or elsewhere will be prevented. However, **the Kremlin will lack resources, and Russia will not have much room for manoeuvre**.

## NEUTRAL SCENARIO

**China will avoid a direct escalation with the United States**, considering all the potential risks that come along with it. Beijing will also restrain from any aggression against Taiwan, no matter what the election results are. This will not only minimise the possibility of a conflict outbreak in the South China Sea but also contribute to the relative stability of the current world order. The absence of a conflict between two global powers is a major factor in preserving the status quo.

In conditions when there is no need to wage war on Taiwan, **Ukraine will remain on Washington's foreign policy agenda**. However, there is a risk that due to the upcoming presidential elections, American political elites will be preoccupied with internal disputes and competition, making the Ukrainian issue a subject of political speculation. Moscow will likely attempt to gain leverage on this ground, using traditional tools to influence US public opinion and utilise the existing strain in US society. **Another risk is related to the possible victory of Donald Trump**, whose presidency could amplify the voices of isolationists. Washington's unwillingness to preserve the current share of responsibility will likely open a window of

opportunities for authoritarian regimes, including the one in the Russian Federation. Moscow could cherish the hope that due to changes in the White House, US support of Ukraine will further decrease, making Kyiv's position more vulnerable.

In this regard, **developments in the EU are of significant importance**. A rise in support for populist forces in the EU member states is spotted, which means such politicians could gain more seats in the European Parliament. This will likely affect the decision-making process and lead to complications in assisting Ukraine. Hungary will remain the main European troublemaker, regularly blocking initiatives aimed at providing support to Ukraine. Such a stance towards the Russia-Ukraine War will serve Moscow's interests and undermine Kyiv's defence capabilities. There is also a risk that after the presidential elections in Slovakia, Fico's "Direction – Social Democracy" party will strengthen its positions, converting the state into another European troublemaker.

All of these developments mean that **Russia will not be expelled from global processes or seriously isolated**. On the contrary, the Kremlin will be rather active in its contacts with both the so-called Global South countries and the Western states. Concerning the relations with the latest, all the information campaigns and messages transferred to European and American politicians potentially should incline Western decision-makers to some sort of negotiations with the Kremlin concerning a peaceful settlement of the war. To be more convincing, Russians will use two main narratives: **a protracted military conflict narrative and a narrative of possible dangers related to a growing dependence on China**.

Moscow has been demonstrating its readiness to wage a prolonged war, increasing military production, allocating more funds for military needs, and maintaining a high level of payments for personnel. It does not mean that Russia is incapable of waging war for three or four more years. However, by playing on one of the biggest fears of the Western political establishment, the Kremlin may try to reach the redistribution of zones of geopolitical influence. This would create the prerequisites for getting closer to the status of the third global power, even being technologically and economically weaker.

At the same time, **Moscow could impose the narrative about the dangers that come along with China's growing influence**. The goal will be to persuade US decision-makers that a

scenario when Beijing fills the geopolitical vacuum that may emerge after the weakening of Russia is against Washington's interests.

Yet, there is a **low probability** that in 2024, Russia's attempts to reach an agreement over the head of the official Kyiv **will turn out to be a success**. It is more likely that the military confrontation will maintain its current intensity throughout the year. Although Beijing will remain Russia's most important partner, in the conditions of the relative stability of the global order, Moscow's strengthening does not fit into China's vision of the status quo preservation.

As a result, the overall situation may slightly worsen for Ukraine, but these changes would not be critical, at least in the short term. Even if there is a probability that Russia may improve its position, it **would not help Moscow become the third global centre of gravity**.

## NEGATIVE SCENARIO

China considers election results in Taiwan to be a challenge to its territorial integrity and policy. This leads to **increased instability accompanied by military manoeuvres and trade wars**. Relations with regional powers like Japan also exacerbate, converting the region into a source of global turbulence.

In such conditions, **Washington's attention shifts to the Chinese issue even more, leaving Ukraine on the periphery of the US geopolitical priorities**. Destructive developments in the international arena may potentially lead to an isolationist policy after the 2024 elections.

Tensions in Southeast Asia **spark new economic challenges for the EU countries**, leading to the rise of populist forces. This will likely significantly influence the European Parliament elections, reducing the chances to form a pro-European coalition.

This creates **additional opportunities for Russia and China**. Using sophisticated information attacks and disinformation campaigns, both states can influence discourse in the West and worldwide to their advantage. In the case of Moscow, it means a **good moment for the escalation** on the Ukrainian front to gain further ground and weaken the Ukrainian state even more before starting negotiations on the settlement of the military conflict and shaping a framework for future

redistribution of geopolitical zones of influence.

Tensions in relations between China and the US will **pave the way for the outbreak of several regional conflicts**, shacking an unstable global order even further. Although most of Moscow's resources are concentrated in Ukraine, the Kremlin will manage to fuel the flames of war directly or indirectly in newly emerged hot spots, **using them to strengthen its geopolitical influence**. This does not mean that Russia will immediately become one of the global powers, but it **may indicate a change** in Moscow's stance globally.



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# **THROUGH THE PRISM OF UKRAINIAN INTERESTS**

**NEW SCENARIOS FOR THE  
GLOBAL SECURITY ORDER**

## 3.2.

# NEW SCENARIOS FOR THE GLOBAL SECURITY ORDER

## MAIN VARIABLES

The 2024 scenarios for the global security order will be shaped by a significant number of variables driven both by domestic developments in the key actors and their foreign policy choices. Considering the increase of volatility of the international system at the end of 2023 and the appearance of the new hot spots of instability, the combination of variables and their weight during 2024 can differ and change accordingly. While the big security actors will still play the main role in formulating and shaping the security agenda, the role of the smaller ignitions should not be overlooked or undermined.

The main variables to which special attention should be paid in 2024 are:

**Chinese willingness for global involvement.** For 2022-2023, there has been an impression that China hesitated to be more involved in the security domain, partially due to their position regarding the Russian-Ukrainian war and the Red Sea destabilisation. Nevertheless, China continued to develop their global and regional initiatives, such as The Belt and Road Initiative (BRI) and Global Security Initiative (GSI), cooperation with Latin American and African states and did not fully de-escalate tensions with the US. So, for 2024, we can expect that these spheres will remain among the Chinese priorities, however, it may refocus and reshape its involvement towards more tailored and regional involvement.

Chinese policies will remain competitive and even provocative against the United States, especially in the question of Taiwan. China will most probably promote its security initiatives and be involved in a closed-door consultation

on minimising risks and decreasing tensions in countries and regions where they have economic interests.

Chinese choices regarding Russia will also influence the developments, as the time of balancing between the political willingness to support Russia vs the USA and the necessity to care about the economic consequences of such cooperation (due to the possible EU and US sanctions) is finishing, that will make Beijing search for the new configurations.

**The US elections.** Within this variable, both the process of the elections and the possible outcome are important. The active, conflicting campaign may not only prevent the US from greater involvement in global affairs but also undermine its image as a reliable partner and a model of democracy. This may also cause some politicians to be willing to manipulate international support and the US involvement in different conflicts, depending on how it satisfies the political needs and rating of the candidate rather than the national interests of the state. The results of the elections will mean either continuation of the existing course (Biden), a rapid turnover with unpredictable configurations (Trump), or a change of policy with a strong position over Russia and China but less involvement as a global policeman (Haley). Two months of turbulences after the November 2024 elections are the time to be considered for security uncertainty.

**The outcome of European elections.** The preliminary polls demonstrate a greater interest in the European elections compared to previous electoral cycles, so the ability to get their votes on a voting day can impact the final results and configuration of European politics for the next several years. The main question on the table is a possibility of maintaining a pro-European coalition in the next term of the European Parliament. With the recent rise in support for far-right and populist political forces, there are high chances for them to get

higher support and thus bring a more Euro-sceptic approach to the European institutions. Hungary's Presidency in the EU in the second half of 2024 is also part of this issue as it coincides with the time of the European Commission leadership appointment and can provide Hungary's Prime Minister Orban with additional leverage and power.

The process and the results of both the US and European elections will impact **Transatlantic unity**. Isolationism from the one side and the rise of nationalism on the other, including greater attention to the idea of European Autonomy with less attention to NATO, can influence the stability of the current European security architecture, as well as the will and capacity to implement a sanctions regime against Russia. This will affect not only Russia's position in the global system and its ability to conduct active warfare but also the willingness of other states to act in a more disruptive way.

**Domestic situation in Russia.** Suppose the Presidential election results in March 2024 are mostly predictable, there are other public and covert factors that may impact the Russian policy and capabilities to continue the war against Ukraine and intervene in other conflicts. Economic and, first of all, financial stability will be one of the main factors, together with the internal rivalry among the security agencies and individuals from Putin's inner circle. Even if mass opposition or protests are not expected, the ethnic protests in the periphery regions or those of the marginalised groups due to the unresolved social issues in parallel with the significant military spending – can have a destabilising effect, undermining the Russian leadership image. Competition between influence groups, as well as the growing information bubble around the Russian President, will continue in the future.

This, among others, will also influence the capacity of the Kremlin to intervene in the domestic affairs of the third states, including the African and Latin American states, to promote its agenda and hybrid warfare in the so-called Global South. Given that elections will be held in many African states next year, Russia can be expected to advance in this direction.

## SCENARIOS

### POSITIVE SCENARIO

The following developments will shape this scenario:

1. **Crises and threats of 2023**, including the Gaza war, the Red Sea crisis due to the Houthi provocations, and Russian-North Korean rapprochement, will slow down. The Arab-Israel or Iran-Israel full-fledged war will not start, but the negotiations on the future of Palestine will be initiated.
2. **Russia's ability to intervene in third countries**, especially in Latin America and Africa, will be decreased due to the economic situation and concentration on the domestic disturbances.
3. **The US elections** will concentrate on the domestic agenda without manipulating the issues of the economic and military support for Ukraine. In this scenario, the final competition should occur between N. Haley and J. Biden. This will also mean continuing the current US approach of being a security provider for other regions.
4. This scenario may also envisage the **greater involvement of China in global affairs**, which within the Global Security Initiative promotes the idea that a nuclear war cannot be won and should not be initiated. This may lead to Beijing's non-public initiatives to decrease North Korean and Russian nuclear ambitions and rhetoric.
5. **The absence of new crises in Latin America, Africa, and the Middle East** will allow the regional powers to continue paying greater attention to sustainable development and economy, thus establishing a basis for a resilient and de-conflicting political environment.
6. **The win of the pro-European political parties** will allow the quick formation of the European Commission leadership and a continuation of the current strong support of Ukraine. This will also mean continuing the defence cooperation within the EU and a persuading policy of global involvement.
7. Such a scenario, first of all, assumes the decrease of conflict potential in other parts of the world, which will allow the focus to be back on Ukraine.

## NEUTRAL SCENARIO

Within this scenario, the current security crises in different regions will have different dynamics and levels of probability to move to the next stage. In this case, a greater involvement of the main security actors in one crisis may not mean the destabilisation of the whole security system or an immediate effect on Ukraine.

The following developments will shape this scenario:

1. **North Korea may continue provocations** but without increased support from Russia. Russia will also not receive stable support from Pyongyang due to the necessity of the latter to preserve the balance of capabilities with the Republic of Korea.
2. **Gaza war active phase will finish**, but the negotiations will be un-easy, and the high alert state will continue. Depending on the progress of negotiations, the attention of the Middle East countries and the main security actors may be divided between European affairs and the Middle East.
3. **China will continue the covert support of the Russian Federation** but will not allow Moscow to prevail or take serious advantage. Regarding other regions, China's economy will turn politics with greater involvement in Latin American and African affairs, where they feel a vacuum. This may lead to the gradually expanded confrontation between China and the United States, flowing beyond the purely ideological differences. The confrontation along the line of economic influence is transfused into the political sphere. While trend-setting for global affairs, for Ukraine, it will not have a significant impact in the security sphere, however, it can decrease Russia-China cooperation due to the change of priorities.
4. Within this scenario, one can expect **smooth and not scandalous European Parliament elections** that will allow the new European Commission to launch quickly, avoiding a scenario of Viktor Orbán's presidency over the European Council. Still, a higher rate of populist parties and far-right politicians may be present in a new parliament's composition.
5. **The turbulent US elections** will not allow a positive shift in US policies. Even if

Ukraine and its military support do not become a hostage of the election confrontation, the attention of the key players in US politics will be diffused, and for several months, Ukraine will disappear from the US agenda.

## NEGATIVE SCENARIO

The increased number of security challenges and new crisis zones are usually considered the most negative scenario. Such developments can have an impact on Ukraine as well, as will take away a significant number of the attention and resources. However, the worst-case scenario for Ukraine is an isolationist ideology and disengagement of the main security actors and ad-hoc mediators.

The following developments will shape this scenario:

1. **China will increase the level of provocations in the South-China Sea** as well as against Taiwan, thus prioritising its interests in the immediate neighbourhood and neglecting other regions. It will also mean the concentration of the Asian states on countering China's threats and partial disengagement from the global challenges, many of which have been provoked by Russian aggression.
2. **The US electoral campaign to be hot and scandalous.** Support for Ukraine would be a hostage of the domestic rivalry when Donald Trump increases rhetoric on the peace negotiations with Russia, hence decreasing military support for Ukraine. This can also negatively influence the developments in the Middle East and allow greater Russian hybrid involvement in the US and many countries of the Global South.
3. **Populist and far-right political parties may get a significant increase in seats** in the newly elected European Parliament, leading to a less coherent position towards support of Ukraine. This can also lead to the disengagement of the EU as a security actor beyond the European continent.
4. **Russia will increase appeasement rhetoric**, promoting the idea of peace negotiations with Ukraine and undermining the necessity to provide Ukraine with military support. This will allow the European and US politicians to insist on shortening support of Ukraine,

pushing it to the disadvantageous negotiations, and stepping back from the idea that their countries have already been considered a party to the conflict.

5. **Saudi Arabia, Qatar, and maybe UAE will concentrate on the regional confrontations** and mediation, siding with Russia on energy issues and losing interest in the Peace Formula or cooperation with the US and EU. Turkey can also side with them.

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# **THROUGH THE PRISM OF UKRAINIAN INTERESTS**

**EXISTING ALLIANCES ON THE  
GLOBAL GEOPOLITICAL MAP**



### 3.3.

## EXISTING ALLIANCES ON THE GLOBAL GEOPOLITICAL MAP

### MAIN VARIABLES

The trajectory of global alliances hinges significantly on US politics. Whether taking the lead or acting as the primary force driving these alliances, the United States plays a pivotal role in shaping international relations. The influence exerted by the US extends to alliances strategically formed by antagonist nations, such as China and Russia, aimed at countering American dominance. Regional alliances emerge as pragmatic alternatives in response, presenting a nuanced perspective beyond the dichotomy of US-led or antagonist-driven alliances.

The recent history of the United States has been characterised by **active engagement in resolving international conflicts**, addressing the aftermath of crises, supporting allies, and fostering partnership formats of cooperation. The USA has extensively utilised foreign diplomacy as a tool to tackle global challenges. As a result, alliances involving the US often derive substantial benefits from their membership, with many seeking US leadership. This holds true for both institutionalised alliances, such as NATO, AUKUS, or the Trans-Pacific Partnership, and more flexible, semi-structured alliances, as well as ad-hoc coalitions. The multifaceted nature of these alliances reflects a strategic approach to leveraging collective strength in addressing global issues and reinforcing diplomatic ties.

Nonetheless, recent discussions surrounding US foreign policy, particularly heightened during the presidency of Donald Trump, have generated anxiety among US allies. **Within the**

**European Union (EU), the emergence of a neo-isolationist trend** has sparked debates on the concept of strategic autonomy. While the notion lacks clear substance and faces both proponents and opponents, the mere existence of such discussions underscores the potential for transformations in Transatlantic unity. The ongoing discourse reflects a re-evaluation of partnerships, signalling a need for adaptability in the face of evolving geopolitical dynamics. For some European countries, the ongoing expansion of regional and transregional cooperation formats within the Indo-Pacific region, exemplified by initiatives like AUKUS, the Trans-Pacific Partnership, and bilateral alliances with regional states, has taken on significance. These efforts are seen as instrumental in extending American influence and acting as a deterrent against the growing strength of China. The perception is that these developments indicate a continued Trans-Pacific pivot by the United States, raising concerns about the potential diversion of attention from the European theatre. Consequently, there is a growing recognition of the need for tailored solutions to address the evolving dynamics and ensure continued focus on European interests amid shifting geopolitical priorities.

Divergent perspectives on **European strategic autonomy** have motivated certain EU and NATO countries to contemplate the formation of informal groupings within existing alliances. A notable example is the Bucharest Nine, comprising Eastern Flank NATO countries. By fostering collaboration within NATO, these informal clusters provide member states a platform to address shared concerns and priorities. The evolution of such ad-hoc arrangements underscores the adaptability of

alliances in response to the changing dynamics of global politics.

Simultaneously, **antagonist countries have seized the opportunity to enhance their initiatives and alliances, exemplified by the recent expansion of BRICS.** Originally established as a club of developing democracies without a defence alliance mandate, BRICS has undergone a narrative shift. The emphasis has evolved, positioning the member countries as an alternative to the West and Western-led alliances and blocs. This strategic repositioning highlights a deliberate effort to establish a distinct identity apart from traditional Western alliances, marking a noteworthy development in the global geopolitical landscape.

Amid these dynamics, non-aligned countries and those adopting balancing strategies between the **US and China actively pursue a delicate equilibrium.** These nations are increasingly invested in robust economic ties with China while simultaneously cultivating closer defence and security relationships with the United States. This nuanced approach reflects a pragmatic effort to navigate the evolving global landscape, leveraging economic opportunities from China while maintaining security and strategic interests through partnerships with the US.

## SCENARIOS

### POSITIVE SCENARIO

In a positive scenario for Ukraine, **the United States would remain a dominant power** and linchpin of security alliances. Alliances such as NATO could potentially extend security guarantees beyond their borders and entertain the prospect of admitting new member states. European allies, while intensifying efforts to bolster their security capabilities, would see these endeavours as a supplement rather than an alternative to US contributions.

**Coordinated policies regarding third parties would be a hallmark of Alliance members,** allowing smaller groups within NATO to advocate for their specific needs on the agenda. Russia-driven initiatives may face further decline, while Beijing-led efforts to position China as a responsible global player would likely be constrained to the Global South or Southeast Asia, avoiding direct confrontation with the West.

**Non-aligned countries like those in ASEAN might persist in their strategy of balancing** and maintaining economic ties with China within global projects such as the Belt and Road Initiative (BRI) and the Global Development Initiative (GDI). However, they may refrain from unequivocal support for China's Global Security Initiative (GSI). This multifaceted geopolitical landscape points towards a delicate balance, with various actors strategically positioning themselves in response to evolving global dynamics.

### NEUTRAL SCENARIO

In a neutral scenario characterised by a **potential weakening of the US commitments** and a continued Trans-Pacific pivot, the focus on ad hoc coalitions could erode Transatlantic unity. Informal cooperation formats like the Rammstein format might persist but with reduced formalisation, leading to decreased efficiency. European NATO allies may grapple with the challenge of rapidly enhancing their security capabilities, potentially impacting the New Strategy for Defence Industries and giving rise to intra-EU divisions.

**The issue of funding for the defence industry** could have adverse social consequences, potentially leading to social unrest and providing opportunities for populist parties to gain traction. In this context, Central and Eastern European (CEE) and Baltic States may be particularly vulnerable, seeking to preserve ties with the US while forging their own cooperation efforts, albeit with potentially limited effectiveness.

In such circumstances, **Russia might seize the opportunity to bolster its security ambitions,** developing alternative security frameworks and alliances, especially among Western antagonists like North Korea and Iran. While not aligning directly with these countries, China could use the chance to position itself as an alternative responsible peacekeeper, particularly in the Middle East, and aim to maintain dominance in Southern and Eastern Asia. This geopolitical landscape may witness **non-aligned countries in ASEAN maintaining a strategy of balancing economic ties** with China through initiatives like the BR) and the GDI. However, they might refrain from unequivocal support for China's Global Security Initiative.

**Beijing's growing assertiveness may prompt a latent arms race** in the region, especially as it strengthens its frontiers to distance itself from

traditional US allies. The escalating strategic tensions between China and key regional powers, including Japan, South Korea, and India, contribute to heightened instability in the Indo-Pacific region. As these nations navigate complex geopolitical dynamics, territorial disputes, and economic competition, the potential for regional instability increases. These tensions can manifest in various forms, such as military posturing, diplomatic friction, and economic competition, creating a challenging environment with broader implications for the geopolitical balance in the Indo-Pacific. This complex scenario underscores the importance of strategic decisions and potential ripple effects in a world where geopolitical shifts can have cascading consequences.

## NEGATIVE SCENARIO

In a negative scenario marked by **US neo-isolationism, the emphasis on ad hoc coalitions may erode Transatlantic unity**, potentially challenging the validity of the North Atlantic Treaty. Countries that traditionally relied on the US security guarantees in both Europe and globally may find themselves searching for alternative formats of security cooperation. However, this quest for new alliances could be impeded by challenges and threats from US antagonists seeking to exploit the weakened state of NATO and American indifference to regain their influence.

**European NATO allies, facing a security vacuum in Europe, the Middle East, and Asia, might be tempted to fill the void.** Central and Eastern European and Baltic States, particularly, could be vulnerable to Russian assertiveness, while South and East Asia might contend with increased security pressures from Beijing. The American withdrawal from global affairs may also create opportunities for Chinese actions, potentially manifesting in hybrid attacks on Taiwan.

In such circumstances, **Russia and China might find a common cause**, forming a club of anti-Western powers. China's Global Development Initiative and Global Security Initiative may be imposed on non-aligned countries, such as those in ASEAN, as part of a broader strategy to reshape global influence dynamics in favour of China and its allies.

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# **THROUGH THE PRISM OF UKRAINIAN INTERESTS**

**THE PLACE OF UKRAINE ON  
THE GLOBAL SOUTH  
AGENDA**

## 3.4.

# THE PLACE OF UKRAINE ON GLOBAL SOUTH AGENDA

### MAIN VARIABLES

Currently, Ukraine is interested in the comprehensive involvement of the countries of the Global South in the implementation of its Peace Formula, which would be able to guarantee a fair victory and recovery of Ukraine after the conflict and increase the chances of Russian aggression not repeating itself in the future. Due to strengthening diplomatic activity (primarily in Africa and Latin America), Ukrainian diplomacy finds its place in the Global South's extremely active political and informational agenda.

The question of how much the Ukrainian factor fits into regional trends and corresponds to the key global narratives that have an impact on the Global South remains open.

The main variables for the region are as follows:

- **A significant number of elections in the region** simultaneously make the direction of individual countries difficult to predict and introduce an element of instability into any scenario;
- The growing urgency of overcoming the devastating **effects of climate change**;
- The division of the Global South between two blocs of global influence, namely **relatively pro-Western and relatively pro-Chinese states**;
- The continued **instability of key economic players**, which comes with the growth of China's "economic bubble" and the overall slowdown in economic growth in the BRICS countries.

### SCENARIOS

#### POSITIVE SCENARIO

During 2024, 38 elections will be held in the countries of the Global South. Even though some of them (such as in Venezuela or El Salvador) will leave de facto dictatorial governments in power, some of the election campaigns have a chance to lead pro-Western and pro-democratic candidates to power in their states (for example, in Senegal), thereby increasing predictability in relations with these countries can be expected. While it is simply not possible to predict the foreign policy of each new government in all the mentioned elections, within the framework of a positive scenario for Ukraine, it is expected that **the election processes in the countries of the Global South will not cause an aggravation of the political and social situation** and, regardless of the results of each particular election, will play a stabilising role for the region.

The fight against the devastating impacts of climate change has always been at the forefront of the political agenda of the Global South. All the countries of the region experience its consequences, and although some of them may have potential short-term economic benefits, from a strategic perspective, they carry a threat of apocalyptic scale. On a global scale, the climatic disasters of the Global South have a catastrophic effect – for example, the El Niño effect increases the number of climatic disasters in the Caribbean, and on the coast of the United States, deforestation in the Amazon or desertification in Africa have serious consequences.

In a positive scenario, **the countries of the Global South will become a driving force in**

**resisting climate change.** They may themselves create the necessary projects and political infrastructure to attract global players and resources to combat the consequences of climate change. Under these conditions, the risk of politicisation of this issue will be minimal due to the initiatives and the internal direction of the projects of the countries of the Global South.

Despite objections from US diplomacy, **the new Cold War with the PRC is still taking its contours**, and both camps are actively luring neutral states to their side. In some places, these processes acquire a sufficiently aggressive manifestation – such as China's aggressive loan-diplomacy in Africa or the information and investment competition of Washington and Beijing for Latin America. However, within the framework of supporting a stable scenario, it was predicted that the United States would adopt a course to return to "leadership by example" and, accordingly, restore an active global role as a champion of liberal values and a pro-Western world order. Thus, within the framework of Ukraine's positive scenario of international development, the leadership of the US and the West will be confirmed, and, accordingly, the position of the states of the Global South regarding Ukraine and the Ukrainian Peace Formula will be directly correlated with this improvement.

**Russia finds itself more dependent on the BRICS alliance than the BRICS members depend on Russia.** This conclusion becomes evident when comparing the projected 2024 GDP growth of the founding and new BRICS members. Similar concerns arise in China, where, for the first time since the People's Bank of China started providing data in the early 2000s, Chinese banks exhibit a year-over-year net decline in lending to the property sector. If China channels significant funds into its manufacturing industry, it will require markets to absorb the resulting surplus of goods. Given the subdued levels of domestic consumption, China will inevitably turn its gaze back to the Western markets. However, a considerable increase in Chinese exports will likely face resistance from the United States and the EU, especially in an election year. Initiating an EU anti-dumping investigation is only the initial step, and 2024 is poised to witness new trade conflicts. Additionally, during the last quarter of 2023, a sharp decline in Global South countries' interest in joining BRICS was noted (the most illustrious example being Argentina).

To that extent, within the positive scenario unfolding, such economic barriers will restrain the capabilities of Russian and Chinese malign activities within the context of the Global South and wider on the international stage.

## NEUTRAL SCENARIO

In a neutral scenario, **the electoral unpredictability currently present in many countries of the Global South will be balanced.** Although, in many cases, the results of the elections will lead to temporary instability and/or political realignment of specific states, such changes will not have a decisive impact on the region's stability. Thus, the elections will lead to a change of political leadership in some countries, cementing the position of the ruling circles in others, but will not have a decisive impact on the stability of the regional system of international relations itself or Ukraine's national interests regarding the development of relations with the countries of the region. Thus, in terms of the election issue, a neutral scenario means that Ukraine would have to reconsider its stance on specific countries on an individual base if the political leadership is changed as a result of the elections.

In terms of disaster management and radical climate change, the neutral scenario will see a certain status quo of current activities and policies. Accordingly, **climate change will continue to play an important role in the activities of international organisations**, regional and interregional associations, but it will fade into the background in the policies of governments in the Global South (especially new governments that will come to power as a result of elections) due to existing security and political challenges.

In addition, the competing state of the aid and support system for countries and regions affected by natural disasters plays an important role in maintaining the status quo.

In the neutral scenario, the **status quo will remain in the issues of division between the two major geopolitical blocs**, similar to the issue of elections. In the absence of significant changes in the balance of power in international politics (which will be responsible for the orbital-stable scenario in most regions), the current course of the Global South states to maintain contacts with Washington or Beijing will also continue. This factor also correlates with the issue of elections and the transition of power, which will not have a



decisive impact on the regional system in this scenario.

**The economic crisis that much of the Global South is currently struggling with will begin to slow down in 2024** under the neutral scenario. According to the World Bank's general forecasts, the growth rates of the region's largest economies will not meet the successful "ceiling" of 2023 and will fall by an average of 1-1.5% compared to the forecasts made in the last quarter of the previous year. However, given the market activity and the gradual recovery of supply chains and trade flows after the COVID-19 economic crisis of 2019-2022, such a crisis will not be protracted.

## NEGATIVE SCENARIO

In the negative scenario, **the elections will mostly be a crisis point for the Global South.** Such a development could be particularly threatening in India and Pakistan, where society is already significantly polarised on political grounds. Similarly threatening scenarios can be observed in Africa, where the risk of growing authoritarianism and anti-democratic forces is growing. Russia and China will undoubtedly exploit such sentiments and potential outcomes, each within their spheres of influence and with a significant set of pressure tools. Thus, in this scenario, the elections will become a destabilising factor and deepen both the internal crises of individual countries and the division into geopolitical blocs of the Global South and its involvement in the Washington-Beijing confrontation.

As mentioned earlier, **the issue of rescuing the countries and peoples of the Global South from the effects of natural disasters sometimes becomes an arena for political confrontation between major players** from outside the region. The leaders of the region themselves are interested in using these problematic issues to attract investments in the development of specific sectors of the economy and expand direct financial support to overcome the consequences of natural disasters. In a negative scenario, we will see the politicisation of climate cooperation between African, Latin American, and Southeast Asian countries, with money and humanitarian support allocated to the affected regions becoming the subject of political bargaining and blackmail (examples of this approach were seen in the discussion of China's assistance to combat the effects of El Niño).

In the negative scenario, **the pro-Chinese camp in the Global South will grow** and gain a foothold. China's engagement with countries such as Iran, Venezuela, and Zimbabwe, despite international condemnation, underscores its ability to build ties with diverse states. By contrast, the West's emphasis on human rights and promotion of democracy has, at times, strained its ties with the Global South, leading to accusations of interference. On the other hand, China can engage states quickly enough through investment and loan diplomacy, complemented by infrastructure and technology projects. For Ukraine, such a scenario is risky, as it would tie more states to Beijing's position, which could be detrimental to the ability of Ukrainian diplomacy to work in the region, especially in the context of the initiative to engage the Global South in the Ukrainian Peace Formula.

Under the negative scenario for Ukraine, **the economic element of the system will become one of China's global achievements in 2024.** Despite the projected slowdown of the Chinese economy and the loss of a significant part of its growth potential in the first half of 2024, China has a chance to restore its potential by concluding new trade, credit and investment agreements within the Global South. Some of these agreements will be possible within the expansion of the pro-Chinese camp in the region, which is also present in this scenario. Thus, as the most powerful economic partner of the aggressor state, China will be able to continue creating conditions for Russia to conduct international trade, circumvent sanctions and obtain markets for Russian raw materials.

**20**  
**24** **GLOBAL**  
**TRENDS**

# **THROUGH THE PRISM OF UKRAINIAN INTERESTS**

**UKRAINE'S TOOLKIT TO  
INFLUENCE GLOBAL  
PROCESSES**

# 3.5. UKRAINE'S TOOLKIT TO INFLUENCE GLOBAL PROCESSES

## MAIN VARIABLES

The possibility of Ukraine being involved or even influencing global processes will depend on the number of variables. In this category, it is difficult to clearly state which will have greater influence: those dependent on the internal developments in Ukraine or those that characterise the international system itself and the actions of the third actors.

1. **Competition in the high-technology domain.** This variable for 2024 comprises both innovation development and access to hi-tech, including microchips and rare materials for their production. The main development will depend on the readiness of the United States and China to recognise the importance of proactive crisis prevention and management in this sphere, sanctions regimes, and possible crises in countries with rare materials.
2. **Ability to refocus attention of the Global South.** For the last two years, Ukraine's authorities have been proclaiming their focus on Asia, Africa, and Latin America. However, this policy still lacks a coherent and comprehensive approach, with limited diplomatic presence and not always the ability to attract the attention of these regions and explain why they should care about Ukraine. Participation of the Global South states in the Peace Formula, voting in the UN, number of bilateral interactions, and opening of the new embassies of Ukraine are among the factors to follow.
3. **New crises in Asia, the Middle East or Africa.** Ukraine's ability to influence the global process will also depend on the

necessity to balance between the conflicting parties in other parts of the world (e.g. Israel-Arab countries, China-Taiwan, etc.). The appearance of new crises or the escalation of those developed in 2023 (e.g. Gaza, Red Sea, Venezuela-Guyana, Iran, Sudan, Mali, Ethiopia) may distract attention from the Ukrainian agenda.

4. **EU elections and deepening of the integration process.** Integration of Ukraine into the EU has increased the interest of many countries around the globe in possible cooperation with Ukraine. The successful integration process without disruption will make this tendency more stable and can allow Ukraine to join the EU global initiatives. EU election results in 2024 are important in this sense as they will determine a more nationalist isolationist approach or the greater global involvement of the EU as a single actor. Joining PESCO and other defence industry initiatives of the EU may also become an important factor that will have not only a European effect but may allow the promotion of Ukrainian technologies to the global market.
5. **Russia's ability to conduct active foreign policy.** Russia is not only a counterpart in the Russian-Ukrainian war but also a competitor in the grain and weapons market. It also provides active information policy and hybrid warfare in different countries around the globe and within international institutions. In such context, as the previous experience demonstrated, it will aim to undermine Ukrainian positions abroad. Internal destabilisation, the efficiency of sanctions regime implementation (minimising grey supplies and sanction bypass), economic decrease, anti-war sentiments – all this may lead to greater concentration on domestic politics

rather than international, remaining fewer resources for conducting special operations abroad and project influence. The domestic weakness of the political system, first of all, the current regime, may also lead to a different balance in Moscow-Beijing relations.

In addition to the external factors, the following **internal variables** should be named:

1. **The ability of Ukraine to conduct an asymmetric warfare.** The success of Ukraine on the battlefield has a significant impact not only on the security of the state but also on its perception around the globe. However, not only a counter-offence or de-occupation of the territories influence such perceptions. Use of the new technologies and marine drones, change of the balance of power in the Black Sea due to their use, ability to counter cyber-attacks and to build an integrated command and control system, successful counter-disinformation campaigns and gaining the support of the big players – all this allow Ukraine entering spheres that previously were not in its portfolio, to begin with maritime security, additional military industry sectors and future of warfare, strategic planning, etc.
2. **The pace of the EU and NATO approximation reforms.** This variable contributes both to Ukraine's ability to join the EU and NATO's global projects and demonstrates to the third countries its ability to economic and democratic development during the war and opening of new markets.
3. **International presence.** Though this variable aims at the external dimension, nevertheless, it mostly originates from Ukraine's internal capacity and capabilities to be active and comprehensive in conducting its foreign policy and guarantee global presence. To be involved in the global processes, Ukraine should be ready to react to other regions' agenda, be present at top international events and voice its position in the international discourse. For this, it should be a complete deck of actors involved – the President, Ministry of Foreign Affairs, its diplomatic missions abroad, and other ministries involved, all parties representatives of the Parliament, and civil society.

## SCENARIOS

Considering the above mentioned, we can conclude that there are a limited number of spheres where Ukraine can have a global involvement. Still, there is a possibility to be an initiator of certain discussions or an example for lessons learned. Three basic scenarios are simple in this case:

**A positive scenario** will mean the ability of Ukraine and its actors to impact the global agenda and to be included in the global process, for which we will need a lower level of crisis development around the globe, with deeper EU and NATO integration, plus success in the war against Russia.

**A neutral scenario** de facto envisages securing the current status quo of an ambiguous situation. Alternating currents of attention towards Ukraine due to the sporadic new conflict spots appearance but without serious regional conflict's developments that will include major powers, uncertain situation at the front-line, and unstable position of many countries at the Global South regarding support of Ukraine or Russia, participation in Peace Formula meetings, in parallel with continued European integration of Ukraine, smooth elections to the European Parliament and US elections – are the main indicators that will characterise this scenario.

**A negative scenario** will mean inability of Ukraine to attract attention of the Global South, losing positions in priority spheres, which among others identified in the Peace Formula (e.g. nuclear and food security, rules-based order, etc.), losing support within the international institutions that can be driven both by the internal developments in Ukraine (lower pace of reforms, economic difficulties, loses at the battlefield, political conflicts) and external factors of increased conflict potential around the world, rose of populist sentiments and pro-Russian politicians, EU crises, etc.

## FIVE SPHERES TO BE INVOLVED IN GLOBAL AFFAIRS

Within all these scenarios, the following five spheres will be the most preferable and realistic for Ukraine to be involved in the global process in 2024.

1. **Maritime security.** This will include both military and transport aspects of the maritime domain. From the protection of the seaports and freedom of navigation to the use of marine drones and asymmetric warfare on sea – these spheres “tested” in the Black Sea have a significant potential for lessons learned and initiation of the global or regional forums for sharing experience and norms clarification.
2. **Food security.** The issue of food security will continue to be among the top security priorities for many countries around the globe, with the situation aggravating due to the new crises and long-term effects of the Russian war against Ukraine. The food security issue through Ukraine’s lens can attract the attention of other countries as it can be packed together with transport security, maritime domain, hunger and sustainable agriculture development, customs and populist border blockades, humanitarian aid, sanctions, and the role of the international humanitarian institutions.
3. **Nuclear security.** If, for decades, the issue of nuclear security has been seen predominantly through the lens of nuclear non-proliferation and arms control, so Ukraine has a chance to add the issues of nuclear safety, nuclear terrorism and threats of using civilian nuclear infrastructure as blackmail and an instrument of war. This may also lead to the question of empowerment for the respective international organisations, including the IAEA.
4. **Reform of the UN.** The long over-ripped issue is gaining new momentum. First, there is a question of the Security Council reform and efficiency of the UN institutions, manipulation of the UN procedures, and the inability of proper crisis reaction and humanitarian aid provision. Russian-Ukraine war amplified these problems, so Ukraine may not only be involved in the reform discourse but also be a promoter of certain proposals.
5. **Hybrid warfare, including asymmetric warfare and cyber domain.** This sphere will continue to be among the top of those interesting to the international community in terms of Ukraine’s experience. This experience gives Ukraine access and moral authority. While many of the issues within these spheres will be less public and of concern to the respective agencies and experts, nevertheless, this may allow building bridges and authority that will allow Ukraine to enter sensitive domains of interstate cooperation. The most important will be to project this experience to other countries’ and regions’ expectations, and generalise the knowledge that will not be purely Russia-focused.

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# SCENARIOS AND TRENDS 2024



In a short- and middle-term perspective innovation development and access to hi-tech, including microchips and rare materials for their production and the development of AI will be trend-setting factors for the development of the international system. The trajectory of the respective trends will pre-define the future of global security including the dynamics of relations between the US and China.



Ukraine's ability to influence the global process will also depend on the necessity to balance between the conflicting parties in other parts of the world (e.g. Israel-Arab countries, China-Taiwan, etc.). The appearance of new crises or the escalation of those developed in 2023 (e.g. Gaza, Red Sea, Venezuela-Guyana, Iran, Sudan, Mali, Ethiopia) may distract attention from the Ukrainian agenda.



Realistically, in the coming year Ukraine may reach noticeable progress in the spheres of maritime security, food security, nuclear security and further promote the idea of the reform of the UN as well as share best practices in combatting Russian hybrid warfare, including asymmetric warfare and cyber threats.