

Policy Backgrounder: Ukraine Developments and Prospects Ahead of Winter

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Key Insights

As summer turns to fall, both Ukraine and Russia are fighting hard for military advantages before winter. Ukraine's recent battlefield struggles are also leading to pressure for negotiations, but Ukraine is responding with a "victory plan" focused on permitting military strikes deep inside Russia.

- Ukraine has maintained its hold in the Kursk area of Russia but is slowly losing ground along a broad front—though at an enormous cost to Russia in casualties.
- Ukraine's "victory plan"—which promotes long-range strikes in Russia and security guarantees—has not received the endorsement of the US, and NATO Allies are divided about how far to go in permitting long-range strikes in Russia using Western weapons.
- A Chinese-Brazilian peace plan, which would start negotiations with no preconditions for return of Ukrainian territory, will come into increased focus over the next month as Brazil prepares to host the [G-20 Summit](#) in Rio de Janeiro in November.

Military Developments

Strong and difficult fighting continues along a broad front in eastern Ukraine. While Ukraine has held on to Russian territory in Kursk it took over the summer, Russia has also been advancing slowly, steadily—and at great cost in casualties—elsewhere along the front. Most recently, Russia took [Vuhledar](#), a town in eastern Ukraine that had resisted since the beginning of the war and is [advancing](#) towards Toretsk in Luhansk oblast. Vuhledar occupies a strategic position near the junction of the eastern and southern fronts and high ground which Russia can use for further attacks. President Zelensky [said](#) in early October that Ukraine faces a "very, very difficult" situation at the front and that Ukraine's forces need to advance as far as possible over the autumn; there will be no letup in fighting.

Consistent with this, Russia is planning to [draft](#) an additional 133,000 troops starting this month. Meanwhile, defense spending will [account](#) for 40% of Russian government spending next year, according to a draft budget being considered by the Russian Duma. Some economists have termed this "military Keynesianism," and a Russian economic newsletter [noted](#) that "the economy has switched to a war footing, and, even if the war in Ukraine ends soon, channeling money to the army and a bloated defense sector will remain a top priority [.]". In addition, acting through local operators, Russia has also [engaged](#) in [sabotage](#) in some European countries as well as continuing its attacks on Ukraine's energy grid.

As the harvest season continues, Russia has also [resumed](#) attacks on shipping. A ballistic missile hit a St. Kitts and Nevis-flagged grain ship flagged in Pivdeny as well as a Palau-flagged cargo ship in Odesa harbor (Palau is independent but has a [Compact of Free Association](#) with the US).

Still, Ukraine is doing what it can to keep the pressure on Russia. Visiting the region from which Ukraine launched its attack on Kursk, Zelensky [stated](#) that "[i]t is crucial to understand that the Kursk operation is a really strategic thing, something that adds motivation to our partners, motivation to be with Ukraine, be

more decisive and put pressure on Russia”—pressure for Russia to give up seized Ukrainian territory to return the Kursk area to Russia. Zelensky also [noted](#) that the Kursk operation “greatly helped” efforts to obtain additional Western military aid, showing that Ukraine can attack rather than simply being on the defensive, while [vowing](#) “even greater pressure” to set better military conditions to “bring peace closer.”

Ukraine also [hit](#) a large oil depot in Crimea used to supply the Russian military and [another](#) in Voronezh near the border. Ukraine has also taken advantage of the war to modernize its own defense industry and accelerate production; the government claims to [produce half](#) of all its ammunition domestically and 4,000,000 [drones](#) per year. Ukraine also successfully [test-fired](#) its first domestically-produced ballistic missile. The Netherlands will [supply](#) more F-16s to Ukraine as part of its pledge of 24 planes and €10 billion military aid commitment (Russia [responded](#) by hitting a major air base near Kyiv), and the US [released](#) additional military aid.

Political Developments: Zelensky Visits the US and UN

In late September, President Zelensky made a trip to the US and to the UN to speak at the General Assembly meeting in New York. He began his visit to the US with a [visit](#) to a plant in Scranton, Pennsylvania that builds 155mm artillery shells, which have been crucial for Ukraine’s defense. President Biden, in his meeting with Zelensky, [said](#) “We cannot grow weary. We cannot look away. We will not let up our support for Ukraine. Not until Ukraine wins a just and durable peace.”

That support for aid, however, will depend on the disposition of the new President and the composition of the new Congress. And the statement was slightly less robust than earlier statements supporting Ukraine, perhaps recognizing a difficult political and military situation. During the visit, Zelensky met with Vice President Harris, who [expressed](#) her unwavering commitment to stand with Ukraine.”

Zelensky also met with former President Donald Trump in New York, at which Trump said the war would be “resolved very quickly” if Trump won, noting that he had a “very good relationship” with Zelensky, “and I also have a very good relationship, as you know, with President Putin.” Zelensky [described](#) the meeting as “very productive,” noting in somewhat anodyne terms that “[w]e share the common view that the war in Ukraine must be stopped. Putin cannot win. Ukrainians must prevail.” But Ukraine has clear concerns that Trump would cut off military aid to Ukraine—concerns reflected in the President’s decision to [order](#) the Defense Department to spend all money allocated for Ukraine by the end of his term in office, presumably both to provide money now for autumn fighting and to ensure it is spent.

In his UN address, Zelensky said his goal is to force Russia to negotiate for a “just peace” that Zelensky also warned that Russia may be seeking to attack a Ukrainian nuclear power plant, noting “a day like that must never come . . . [t]hese are nuclear power plants, they must be safe.”

Chinese-Brazilian peace plan

On the margins of the UN General Assembly, China and Brazil presented a “[peace plan](#)” which the two countries had agreed in May. It is less detailed than an earlier Chinese peace plan and would require Ukraine not to expand the front (in essence, leaving Russia in possession of its territory) and to begin negotiations at an international peace conference with no preconditions that its territory would be returned but only “equal participation of all parties as well as fair discussion of all peace plans.” President Zelensky criticized the plan, [noting](#) that “half-hearted settlement plans, so called sets of principles” would help Russia continue the war. Secretary of State Antony Blinken also noted that Chinese arms were helping Russia continue the war. (Reports suggest that Russia’s new long-range attack drone [uses](#) Chinese engines.) Somewhat surprisingly, Switzerland—the host of the last Ukraine Peace Conference meeting—also “welcomed” the plan “despite an absence of reference to the UN Charter or an explicit mention of the territorial integrity of Ukraine” on the ground that “it calls for a ceasefire and a political solution to the conflict.”

The Chinese-Brazilian plan will come increasingly into focus as Brazil will host the meeting of the G-20 in Rio de Janeiro in November, at which Ukraine will surely be discussed. Ukraine's best diplomatic hope for pressure on Russia has been that the major countries of the developing world—such as India and Turkey, along with other countries such as Saudi Arabia—would support Ukraine's plan to preserve its territorial integrity. Any movement of initiative towards a plan without that explicit commitment weakens Ukraine's overall position and, in the absence of further military progress, may put Ukraine in a position where it must consider difficult territorial concessions.

In response, Zelensky prepared a “victory plan” which he presented to the President and also to former President Trump. Zelensky will [present](#) it to the coalition of countries supporting Ukraine, the “Ramstein Group” on October 12; President Biden was scheduled to attend that meeting but [withdrew](#) to address the impact Hurricane Milton. While the details of the plan are still secret, it clearly includes using Western weapons for strikes deep inside Russia and security guarantees for Ukraine (possibly including NATO membership).

Strikes Deep Inside Russia?

All this highlights a principal area of debate both in the “victory plan” and among NATO Allies: Should Ukraine be permitted to use Western weapons for long-range strikes inside Russia? Some allies, like the UK, strongly [support](#) this, with UK Foreign Secretary David Lammy calling this “a critical time of nerve and guts and patience and for fortitude on behalf of allies who stand with Ukraine.” But the US, despite the President [saying](#) on September 11 that “we’re working that [issue] out now,” remains [opposed](#) and deeply reluctant at best.

The Administration has deep concerns that long-range missile strikes into Russia would be crossing a red line, because these strikes would rely on active US targeting of the missiles rather than targeting simply being done by Ukraine, with US intelligence agencies [reportedly](#) citing a risk of escalation. Consistent with this view, Russia recently [revised](#) its nuclear doctrine to state that attacks by a non-nuclear state backed by a nuclear state would be considered a “joint attack” on Russia. Given the risks, the US may feel that any military advantage for Ukraine from the long-range strikes is not worth the chance of escalation and that Western-supplied weapons are better used in Russian-occupied territories in Ukraine, for instance in the [shooting down](#) of a Russian fighter jet in Donetsk, eastern Ukraine.

Leaving office, former NATO Secretary General Jens Stoltenberg [said](#) that “reckless Russian nuclear rhetoric” should not deter provision of greater military aid, nothing that “[e]very time we have stepped up our support with new types of weapons—battle tanks, long-range [missile] fires, or F-16s—the Russians have tried to prevent us [.]” This is certainly true, but the Administration—for now at least—remains convinced that this decision, requiring more active US participation in the war, is different.

Conclusion

The new NATO Secretary General, Mark Rutte, began his term by meeting President Zelensky. He will certainly [push](#) Allies to provide Ukraine with sufficient military and economic aid “so it can continue its fight for freedom.” The stakes certainly remain high, both for Ukraine and the world. As Zelensky [said](#), a victory in which Russia is permitted to retain conquered territory “would broadcast to the world the following implicit rule: I came, I conquered, now this is mine”—a clear threat to the rules-based international order at a time of increasing geopolitical tensions.

On his way to the US, President Zelensky [noted](#) that his goal remains “a shared victory for a truly just peace” and stated that “[t]his fall will determine the future of this war.” As Ukraine faces military challenges and an uncertain future level of support from the US, it is hard to disagree. Further military progress before winter sets in will be the best conditions for continued Western support, particularly if the

major nations of the developing world continue pressure for negotiations to end the war, even on unfavorable terms.

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