

UKRAINE: SCENARIOS 2026

A national and subnational analysis of potential developments affecting humanitarian needs and operations in Ukraine through December 2026



MAP 1. CURRENT SITUATION NATIONWIDE AS OF 17 MARCH 2026



Source: ACAPS using data from ISW (accessed 30/03/2026)

EXECUTIVE SUMMARY

Now entering its fifth year, the Russian Federation's (hereafter referred to as Russia) full-scale invasion of Ukraine continues to deepen a protracted humanitarian crisis. Active ground fighting remains concentrated in frontline areas in eastern, northern, and southern oblasts, while air, missile, and drone strikes continue to threaten civilians and critical infrastructure nationwide. More than 3.7 million people remain internally displaced, more than 5.9 million are refugees abroad, and an estimated three to five million live under Russian occupation (IOM 19/01/2026; UNHCR accessed 30/03/2026; AP 20/02/2026). In this context, the 2026 Humanitarian Needs and Response Plan (HNRP) estimates that 10.8 million people in Ukraine will face humanitarian needs this year. The response aims to reach 4.1 million, of whom 3.6 million have been prioritised under tightened targeting criteria (OCHA 13/01/2026). This means that at least 6.7 million people risk going without humanitarian assistance, a gap driven by significantly reduced funding and the operational restructuring triggered by the US foreign aid freeze and subsequent closure of the United States Agency for International Development (USAID) in 2025.

In February 2026, ACAPS convened 46 context and humanitarian experts in two workshops in Kyiv to assess how the situation and humanitarian crisis could evolve over the course of the year. The three scenarios detailed in this report – along with their regional implications – reflect the outputs of those workshops, updated to account for recent developments including the regional escalation in the Middle East and its potential effects on Ukraine.

The 2026 scenarios closely mirror those developed for 2025, reflecting broadly similar contextual conditions: the war remains the primary driver of humanitarian needs and a full end to hostilities in 2026 remains unlikely. These scenarios are best understood as distinct future pathways shaped by different combinations of key drivers, including shifts in international support dynamics, the trajectory of peace negotiations, military capacity on both sides, and internal dynamics in Ukraine. Each scenario, presented in order of probability, carries a distinct humanitarian profile with different implications for needs, response capacity, and operational dynamics.

Scenario 1: Continued war without resolution

This scenario reflects the status quo: a continuation of current conflict dynamics and their cumulative humanitarian toll. Hostilities persist while diplomatic engagement continues but fails to produce results. Peace talks remain deadlocked over incompatible positions on territorial control and security guarantees, producing a continued war of attrition marked by occasional, limited territorial gains in eastern Ukraine. The stalemate is sustained by entrenched defensive fortifications on both sides and an overall balance of capabilities that prevents either party from achieving a decisive or strategic breakthrough.

Communities near the front lines face sustained and slow-burning pressure instead of sudden shocks, with household coping capacity degrading under prolonged attritional conflict conditions and continued displacement. Civilian infrastructure – particularly energy, transport, and logistics – remains at significant risk nationwide. Reduced humanitarian and military support, driven by donor fatigue, competing crises, and domestic political considerations among key allies, further compounds the situation. Under this scenario, the primary constraint on the humanitarian response is the growing mismatch between reduced funding commitments and chronic, compounding needs.

Scenario 2: Reduction of hostilities

This scenario describes a fragile de-escalation, not a durable peace. Ukraine and Russia reach an agreement resulting in a partial or localised reduction of hostilities through one or a combination of alternative pathways, such as a localised ceasefire, frozen front lines, or drawdown in aerial attacks, as a precursor to an eventual and more comprehensive peace agreement implemented in 2027 or later. This outcome is enabled by a convergence of pressures – battlefield exhaustion, intensified diplomatic pressure, and domestic constraints on both sides – not a resolution of underlying political disagreements. As such and as with previous agreements since 2014, de-escalation remains tenuous: violations under this scenario are frequent, with a persistent risk of periodic escalatory spikes pushing conditions toward Scenario 1 or Scenario 3. Both parties use the relative lull to intensify force generation and improve military positions.

Perceptions of resolution – combined with a shift toward recovery and development programming, allocation of resources to other crises, and overall donor fatigue – prompt donors to reduce humanitarian assistance to Ukraine. The Government of Ukraine (GoU), constrained by wartime deficit spending, declining external budget support, and reconstruction costs, is similarly unable to meet the scale of humanitarian and recovery needs. As a result, populations most exposed to the resulting assistance gap – particularly frontline communities, long-term IDPs, older people, and returnees to damaged areas – face not only reduced humanitarian assistance but also eroding social protections, deepening underlying needs. Critically, reduced hostilities do not translate into reduced humanitarian need in the short term: needs may remain high or even temporarily increase as damaged infrastructure, disrupted livelihoods, and displacement persist.

Scenario 3: Escalating war

This scenario is defined by a significant shift in conflict dynamics, driven by a convergence of factors: expanded Russian force generation and operational adaptation, the cumulative degradation of Ukrainian defensive capacity, and interruptions in external military support during a critical window. Together, these enable a strategic Russian breakthrough in Donetska oblast, most likely through the penetration of Ukrainian defensive lines, enabling rapid territorial advances and creating conditions for the encirclement of urban centres and the disruption of critical logistical corridors. Aerial strikes on Ukraine’s energy, transport, and logistics infrastructure intensify, including a shift toward more systematic targeting of smaller, distributed nodes, cascading into service disruptions affecting both military operations and civilian life. Ukraine responds by tightening martial law and accelerating its own force generation. EU and NATO allies increase military assistance to strengthen Ukraine’s defence capacity, though structural limitations in European defence production mean this support may scale too slowly to prevent significant deterioration in the early stages of escalation.

Despite rising civilian displacement (primarily internal, though with a heightened risk of cross-border movement toward neighbouring countries), forced evacuations, and infrastructure damage, humanitarian assistance stagnates amid access constraints and funding shortfalls. The most binding constraints

on the response emerge first in evacuation capacity and logistics, compounded by staffing shortfalls linked to intensified mobilisation. Beyond displacement, escalation also places systemic strain on service provision, widening gaps in assistance and basic services at precisely the moment needs are greatest.

Across all three scenarios, the war remains the primary driver of humanitarian needs, shaping safety and security conditions, access and ability to afford basic services (such as housing, utilities, and food), and continued vulnerability to disruptions in electricity and heating. In all scenarios, Russian-occupied territories remain largely inaccessible and highly politicised, severely limiting both physical access and the ability to gather timely, reliable information on conditions, needs, and risks among the estimated three to five million people living there. Constraints facing both the GoU and the humanitarian response compound needs further as the gap between needs and response capacity is likely to widen.

TABLE OF CONTENTS

About this report.....	5
Baseline assumptions	6
Overview of scenarios and regional implications	10
Scenario 1: Continued war without resolution (status quo).....	10
Scenario 2: Reduction of hostilities	14
Scenario 3: Escalating war	18
Compounding factors	22
Annex 1. Indicators for scenarios.....	25
Annex 2. Triggers for scenarios.....	26

ABOUT THIS REPORT

Methodology

The scenarios presented in this report describe three distinct yet plausible futures for Ukraine through the end of 2026, focusing on how context changes could affect people's ability to meet basic needs and the operating environment for humanitarian responders.

These scenarios were developed between January–February 2026, drawing on input from national and international humanitarian and donor organisations, UN agencies, representatives from humanitarian clusters, working groups, and other coordination mechanisms, civil society organisations, and experts from academia, think tanks, and the GoU, who contributed through two in-person workshops, one in-person roundtable discussion, and key informant interviews. The collaborative process involved the following.

- An in-person roundtable in Dnipro that brought together 11 security, needs assessment, and humanitarian operational experts to identify the key variables shaping the context, ensuring that perspectives from organisations operating near the front lines were reflected in the baseline assumptions and nationwide scenarios.
- Eight targeted key informant interviews with context and sectoral experts (specifically with knowledge of Ukraine's conflict/security, economic, political, international relations, energy, and humanitarian dynamics) to deepen understanding of the identified drivers and their dynamics. These inputs, complemented by a review of secondary data, informed the development of the baseline assumptions and nationwide scenarios.
- Two in-person workshops in Kyiv totalling 46 participants. The first developed the scenarios and their subnational implications with experts in humanitarian analysis and assessments. The second tested and refined the scenarios with operational experts and explored the impacts of each scenario on people and humanitarian operations.

ACAPS uses the chain of plausibility approach to scenario-building, which involves a structured review of the full range of developments and factors that could shape the future situation, as detailed in our [guidance note](#). Key terms used throughout the process and this report are defined below.

- A **scenario** is a description of a plausible future state and its consequences for people and society based on a set of assumptions about how key variables will evolve.
- **Probability** refers to the likelihood of a given scenario materialising within the specified timeframe. Impact refers to the severity of the scenario's effects. Both are scored between 1 to 5, where 1 indicates rare likelihood or insignificant impact and 5 indicates near-certain likelihood or severe impact. A lower impact score does not necessarily indicate lower humanitarian need, however. Under the reduction of hostilities scenario, for example, the lower score reflects the impacts of reduced conflict intensity relative to the status quo instead of an improvement in the humanitarian situation, which remains serious across all scenarios.
- **Indicators** (Annex 1) and triggers (Annex 2) are tools to help humanitarian organisations monitor the context, identify which scenario is emerging, and adapt accordingly. Indicators are early signals pointing toward a given scenario; triggers are events or developments that accelerate or precipitate the scenario's materialisation and are unique to each scenario.
- **Drivers**, or variables, are the factors shaping how the future context may evolve.

Limitations

Scenarios are not forecasts or predictions; they are frameworks for exploring plausible futures and their potential effects on humanitarian needs and operations. The scenarios – including the factors and assumptions shaping them – account for key differences across the security, political, economic, social, and international relations dimensions of the Ukrainian context and consider how these differences may affect people's personal safety, needs, and coping strategies, as well as the operating environment for humanitarian responders. As such, the report does not aim to capture all conceivable futures, just those that are both plausible and most relevant to humanitarian decision-making. While the scenarios are presented as distinct futures, the context in December 2026 could reflect a combination of

elements from across them, and one scenario could evolve into another over time, underscoring the importance of monitoring the indicators and triggers detailed in the annexes.

Some factors – such as the death of a key government figure or a deliberate nuclear escalation – are so unpredictable that their humanitarian consequences, while potentially severe, cannot be meaningfully anticipated. These low-probability, high-impact developments fall outside the scope of this exercise and are not examined in this report; current forecasting tools are also limited in their ability to fully assess such implications.

Information gaps, particularly regarding Russian-occupied territories of Ukraine, constrain forward-looking analysis of conditions and developments in these areas. ACAPS was also unable to conduct interviews with key informants based in or with specific insights into Russia or occupied territories, and verified publicly available information on these areas remains limited.

Acknowledgements

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BASELINE ASSUMPTIONS

This report details three scenarios examining how the context in Ukraine – particularly the war and its impact on people – could evolve throughout 2026. As such, these scenarios are focused on developments relevant to humanitarian needs and operations.

The scenarios are built on several foundational assumptions spanning conflict developments, global political and international support dynamics, and Ukrainian domestic conditions. **These baseline assumptions form the analytical backbone of the scenarios** and were developed through key informant interviews with experts across a wide range of relevant expertise, a roundtable discussion with humanitarian operational experts, and a review of secondary data. These assumptions were subsequently presented and validated in two scenario workshops (see methodology).

Peace negotiations

Throughout 2025 and into early 2026, diplomatic efforts to broker a settlement between Ukraine and Russia continued without resolution, taking place across multiple tracks, including direct US-facilitated trilateral engagement between Kyiv, Moscow, and Washington as well as broader international mediation efforts involving European countries – though the latter have had limited formal involvement in negotiations. Such diplomatic efforts have not produced a halt in fighting, and limited confidence-building measures – including prisoner exchanges – have had little, if any, discernible impact on negotiations (BBC 05/02/2026).

While a localised or temporary reduction in hostilities cannot be ruled out in 2026 – and is reflected in the reduction of hostilities scenario – a comprehensive peace agreement is considerably less likely given the entrenched and incompatible positions on two central sticking points: territorial control and security guarantees. Russia continues to press for recognition of its control over occupied Ukrainian territories and for constraints on Ukraine's future security alignment with Western countries (such as membership in NATO), while Ukraine maintains its position on full territorial integrity and insists on credible, enforceable security guarantees from Western allies before making any concessions. As a result, it is unlikely that issues around territory and security guarantees will be resolved and fully implemented in 2026.

As such, the main obstacle is not procedural but structural: the gap between the two sides' core positions on territory and security guarantees is wide enough that bridging it would require one or both parties to make concessions that neither is currently willing to accept. Until that calculus changes – whether through battlefield shifts, economic pressure, or sustained third-party mediation – a durable settlement remains out of reach.

Throughout 2026, Ukraine and Russia are likely to continue leveraging military, economic, and political tools to strengthen their negotiating positions and resist concessions. This dynamic – whereby each side seeks to improve its position instead of compromise their positions – shapes the scenarios presented in this report: it underpins the continuation of hostilities in the status quo scenario, contributes to the fragility of any de-escalation in the reduction of hostilities scenario, and creates the conditions leading to the escalation scenario.

War trajectory and military dynamics

While the war is likely to continue throughout 2026, its trajectory depends on both sides' military capacity and political will, including production capacity, force generation, and international support. Both Ukraine and Russia face significant battlefield constraints – from attrition and personnel pressures to operational vulnerabilities – that limit the pace and scale of military efforts. **Within these constraints, technological and industrial adaptation, particularly weapons production and deep strike capabilities, is increasingly shaping the battlefield and will be a critical factor in how the war evolves in 2026.**

Throughout 2025, Russia intensified largescale aerial attacks on Ukraine, targeting energy, transport, and logistics infrastructure – including railways – in order to degrade Ukraine's resilience and civilian morale, particularly during the October 2025 to March 2026 cold season. This intensification was enabled in part by support from China and North Korea, as well as expanded domestic military industrial production, which has become a significant pillar of the Russian economy amid sanctions and is thus likely to at least sustain current levels in 2026. Russian strike packages progressively included an increased number of munitions throughout 2025 and into 2026, though there may be occasional lulls in such trends as Russia stockpiles munitions for future campaigns (ISW 31/12/2025).

Russia has also adapted its strategies to mitigate the impact of sanctions and maintain its economy (CEPA 05/02/2025; CSIS 11/04/2025). Should the regional escalation in the Middle East continue and the US extend its waiver of sanctions on Russian oil, this could provide additional economic relief for Moscow and bolster its capacity to sustain its war effort. **As such, Russia is unlikely to change course in 2026, even as the longer-term stability of its economy remains uncertain and its battlefield gains are slow.**

Ukraine also intensified strikes on Russian territory throughout 2025, targeting oil refineries, supply depots, and airfields to disrupt Russian logistics and signal deterrence (RFERL 26/02/2026; TKI 01/10/2025). Ukraine's growing military industrial base and demonstrated capacity to conduct deep strikes point to an expanding role for technological and industrial adaptation in shaping war dynamics. **While these capabilities may allow Ukraine to avoid a complete military collapse, its efforts will remain focused on sustained defence, not offensive efforts or a strategic breakthrough.**

Ukraine remains heavily dependent on external military support – primarily from the US and European allies – particularly for air defence systems, lethal weapons, ammunition, and intelligence-sharing. This support is critical to sustaining Ukraine's defence but is unlikely to enable major offensive operations. Ukraine's allies remain cautious about providing long-range munitions suitable for deep strikes on Russian territory, given concerns about escalation risks and the potential for direct confrontation with Russia, as well as supply chain constraints.

Ukraine also faces internal challenges around force generation and other operational capacity limitations. Force generation has emerged as one of Ukraine's most acute political, social, and economic problems and risks developing into a critical internal vulnerability for the country. Military personnel shortages (as well as casualties and desertion), resistance to mobilisation among the population, and the legal and political difficulties of expanding recruitment (such as lowering the conscription age) have all constrained Ukraine's ability to fully staff and replenish frontline units and sustain defensive lines and operational tempo (SCEEUS 19/12/2025; TKI 03/09/2025; Ukrainska Pravda 06/10/2025).



International support environment

Foreign assistance will remain a central pillar of Ukraine's resilience in 2026, but its availability is increasingly uncertain and fragmented. As Ukraine continues to direct almost all domestic revenues to defence and security, it operates on a growing deficit and a deepening dependence on external financial support. This dependence has been sharpened further by the closure of USAID in 2025, which had played a critical role in disbursing predictable and flexible financial aid to the GoU; the closure of USAID and the cessation of most US direct financial and budgetary support add significant pressure to Ukraine's longer-term economic stability (ACAPS 31/12/2025). While external financial aid remains essential to prevent economic collapse, planned and disbursed funding falls short of what is needed to enable meaningful economic expansion or a decisive increase in military spending.

External military support is also evolving following the end of new US direct military assistance to Ukraine. Under the Trump administration, there have been no additional aid commitments to Ukraine, though military aid appropriated under the Biden administration remains in the pipeline (CFR 23/02/2026). **Still, the US remains a critical, albeit less predictable, ally, with its support shifting away from direct weapons transfers toward indirect mechanisms**, such as NATO's Prioritised Ukraine Requirements List (PURL), which enables NATO member states to purchase and supply US-origin equipment for Ukraine (NATO 10/12/2025). This reflects a broader trend in which European countries have assumed a more prominent role in coordinating and delivering assistance. Despite increased European contributions, structural gaps persist: European defence industries currently lack the capacity to fully replace key US-supplied systems, particularly advanced air defence capabilities and high-end ammunition.

European support is further complicated by internal political and economic tensions. A proposed USD 105 billion (EUR 90 billion) EU support package for 2026–2027 signals continued commitment but also exposes underlying fragility, as unanimity requirements allow individual member states to delay or dilute assistance. The package was approved only in December 2025 after protracted debate over the use of immobilised Russian assets to fund financial assistance to Ukraine. Since then, Hungary and Slovakia have leveraged domestic political considerations and bilateral disputes — particularly over the Druzhba oil pipeline — to delay the EU loan package

(TKI 09/03/2026; Reuters 05/03/2026). **While these dynamics, along with upcoming elections in EU member states, could introduce further delays and uncertainty, they are unlikely to fundamentally derail collective European support given the region's broader strategic interest in Ukraine's stability.**

A consequential source of uncertainty is the US position on Ukraine, particularly given its outsized role as a critical security ally and primary diplomatic intermediary. The Trump administration's approach to Ukraine has been characterised by the absence of consistent foreign policy positioning, with sudden and significant shifts in stance that are difficult to anticipate and plan around. While the 2025 National Defense Authorization Act demonstrates efforts within the US Government to continue some support to Ukraine and put some safeguards in place on arms and intelligence provision, the US position on Ukraine and its continued support remain an open question.

Ukraine's internal stability

Despite four years of war and the absence of a credible political resolution, Ukraine is likely to maintain broad internal stability in 2026, underpinned by strong political cohesion and societal resilience. In a national (GoU-controlled territory) poll conducted between 26 November and 13 December 2025, a majority (63%) of Ukrainians said they are prepared to endure the war 'for as long as necessary', reflecting a durable social consensus around core war aims (KIIS 15/12/2025). That said, cumulative war fatigue and its political, economic, and social effects are likely to persist throughout the year.

Public trust in Ukrainian President Volodymyr Zelenskyy, while still substantial at 62%, has declined from 74% in mid-2025 (KIIS 18/03/2026). This erosion reflects, among other factors, concerns about high-level corruption — most visibly, the July 2025 protests that prompted the Government to reverse a law that would have curtailed Ukraine's anti-corruption bureaus — as well as the fallout from a corruption scandal in the energy sector during Ukraine's harshest winter in over a decade (AP 08/08/2025; TKI 11/11/2025). Broader dissatisfaction with government institutions also persists (KIIS 04/02/2026). Trust in the Ukrainian military and volunteers, by contrast, remains overwhelmingly high, even amid criticism of mobilisation efforts and the Government's difficulties with force generation (KIIS 13/01/2026).

These dynamics suggest a population that is broadly committed to wartime political stability while remaining alert to governance concerns that could, over time, affect public trust. Ukrainians overwhelmingly oppose holding elections during wartime – a sign of the system’s relative stability and the prioritisation of resolving the war on favourable terms (KIIS 18/03/2026). Under the Ukrainian constitution, elections cannot take place while martial law is in effect. As such, **martial law would first have to be lifted or the constitution amended in wartime, both of which are unlikely and face significant legislative and public opinion barriers, making elections unlikely in 2026.** Even in a scenario in which the Government pursued elections, logistical challenges would be considerable and unlikely to be resolved in 2026. With more than 11 million Ukrainians internally or externally displaced or living under occupation, and military personnel actively engaged in combat operations, resolving these challenges would be central to the feasibility and perceived credibility of any future elections.

Ukraine also faces mounting economic and demographic pressures. Inflation has eased since May 2025 but is likely to remain elevated by energy sector disruptions during the 2025–2026 cold season (NBU 11/02/2026). GDP growth is projected to slow, underscoring the limited capacity of the Ukrainian economy to expand under wartime conditions (CES 16/12/2025). These pressures are compounded by structural demographic shifts: labour shortages and livelihood vulnerabilities reflect the human capital consequences of sustained displacement, migration, and mobilisation. Unemployment remains significant – estimated at 22.8% in November 2025 compared to 9.8% in 2021 – characterised by a stark contrast between a surplus of job seekers in frontline regions and critical labour shortages in major hubs such as Kyiv and Lviv, where vacancies significantly outnumber available workers (KSE 14/05/2025; NISS 23/01/2026; WB accessed 25/03/2026).

Ukraine also faces longer-term fiscal risks stemming from high war expenditure and structural dependence on external support (see international support environment). Ukraine requires between USD 45–52 billion in financial assistance in 2026, and delays in EU disbursements – alongside the pace of reforms needed to unlock additional World Bank and IMF financing – mean the Government faces the risk of a fiscal shortfall by late spring (TKI 18/02/2026; Reuters 20/03/2026).

Should this fiscal pressure translate into cuts to social spending, including for pensions, social transfers, and public sector wages, it could begin to erode the broader societal resilience that has underpinned Ukraine’s internal stability. **This link between fiscal deterioration and social cohesion poses a slow-burning risk across all three scenarios, and these social, demographic, and economic challenges are likely to intensify, particularly after any cessation of hostilities.**

The situation in Russian-occupied territories of Ukraine adds a further, largely opaque dimension to any assessment of internal stability and humanitarian conditions. Populations living under occupation face a distinct set of pressures – including forced Russification,¹ restricted movement, limited access to Ukrainian social protections and services, and exposure to conflict dynamics – that are largely invisible to outside analysts because of severe information constraints. While these populations are not always captured in Ukrainian data or polling, their exclusion from the baseline picture should not imply stability; conditions there are likely to be among the most severe in the country across all scenarios. The scale and conditions of occupation – and their implications for humanitarian needs and access – are reflected across all three scenarios presented in this report.

Impacts of Middle East regional conflict

Competing geopolitical crises and their diplomatic, military, and economic impacts add further pressure on external support for Ukraine. The escalation of regional conflict in the Middle East since 28 February 2026 has redirected diplomatic attention; a fourth round of trilateral negotiations involving Kyiv, Moscow, and Washington, planned for 5 March in Abu Dhabi and aimed at paving the way for a meeting between Zelenskyy and Putin, has been postponed indefinitely (Reuters 26/02/2026). Key stakeholders – including the US, which is both a central mediator in the Ukraine war and directly engaged in war with Iran, and the United Arab Emirates, both party to the Middle East conflict and the intended host of Ukraine-Russia talks – are now preoccupied elsewhere.

¹ Russification refers to policies that enforce the Russian language and culture among non-Russians and has been pursued since the Russian Empire and Soviet Union. In the Ukraine context, since the annexation of Crimea, the subsequent outbreak of conflict in eastern Ukraine in 2014, and the full-scale invasion since 2022, these policies have focused on Ukrainian residents in Russian-occupied territories. Policies include the ‘re-education’ of Ukrainian children living under Russian occupation, requiring Ukrainian residents in these territories to take up Russian passports or face deportation and other restrictions, and the spreading of pro-Russia narratives and propaganda (Meduza 11/03/2024; UK MoD X 11/03/2024; BBC 13/04/2025).

The regional escalation in the Middle East also risks further straining global arms production capacity, aggravating supply-side constraints that may reduce the volume and consistency of military assistance reaching Ukraine, particularly air defence supplies (Bloomberg 03/03/2026). The macroeconomic effects of the regional conflict compound these challenges. Rising global energy prices, combined with the temporary easing of US sanctions on Russian oil, are likely increasing Russian state revenues – strengthening Moscow’s fiscal capacity to sustain the war at least in the short term – and simultaneously worsening economic and energy security pressures in Europe (Reuters 16/03/2026; Atlantic Council 17/03/2026). These pressures may reduce European willingness or ability to maintain current levels of financial and military support for Ukraine (Reuters 10/03/2026; FT 09/03/2026).

Taken together, these dynamics point to a key structural constraint: **while Ukraine is likely to continue receiving sufficient international assistance to sustain its defence capacity and basic state functions, that support is becoming less predictable and more uncertain as diplomatic efforts to end the war stall and attention is focused elsewhere.**

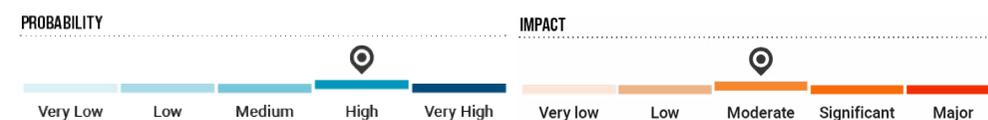
OVERVIEW OF SCENARIOS AND REGIONAL IMPLICATIONS

The scenario summaries below consider Ukraine’s overall context, followed by more specific regional developments and their impacts on humanitarian needs and operations, including displacement dynamics, basic needs, and operational access constraints. The scenarios are presented in order of likelihood, based on workshop consensus, with impact assessments reflecting ACAPS analysis.

For this report, three regions in Ukraine are considered based on OCHA’s inter-cluster coordination schematic in order to ensure alignment with Ukraine’s humanitarian operational and coordination environment: east, north-central-west, and south. The inter-cluster coordination page for Ukraine provides details on which oblasts are included in each region (OCHA accessed 23/03/2026).

Indicators (Annex 1) and triggers (Annex 2) for each scenario are included to support humanitarian organisations in regularly monitoring the context, identifying early shifts between scenarios, and adapting and planning accordingly.

Scenario 1: Continued war without resolution (status quo)



Despite peace talks between Ukraine and Russia, a ceasefire or comprehensive peace agreement remains out of reach. Incompatible positions on territory and security guarantees remain entrenched and neither party has the sufficient incentive to make the concessions a ceasefire or settlement would require, so both continue to prioritise battlefield gains over diplomatic progress. Each side fights a war of attrition, making incremental gains along the front lines without establishing significant footholds in newly gained territory, resulting in a slow-moving front without major breakthroughs in eastern and southern Ukraine. The stalemate and attritional warfare are sustained by a combination of deeply entrenched defensive fortifications on both sides and an overall balance of capabilities that prevent either party from generating the concentrated combat power needed to achieve and hold a decisive breakthrough. In this environment, neither side can translate tactical gains into strategic advantage, and the front lines shift only marginally over the course of 2026.

Ground conflict is most pronounced in areas of lower strategic value, where probing attacks, shaping operations, and opportunistic advances occur with greater frequency, not because these areas are priorities but because entrenched defensive positions in more strategic locations make advances there more costly. Even these limited tactical movements carry humanitarian consequences: localised displacement spikes can occur when advances affect urban peripheries or threaten transport corridors, and access disruptions along key routes complicate both civilian movement and humanitarian operations even when overall frontline shifts remain small.

Technological adaptation – particularly in drone warfare – continues on both sides and plays a growing role in shaping conflict dynamics without fundamentally altering the strategic balance. The most significant humanitarian implication of expanded drone activity under this scenario is the geographic spread of insecurity:

both intelligence, surveillance, and reconnaissance and strike drones push the effective threat zone well beyond the immediate contact line in Ukraine, meaning that communities, logistics and evacuation routes, and infrastructure previously considered relatively safe become exposed to surveillance and strike activity, including more frequent medium-range strikes.

Russia continues to target Ukraine's energy infrastructure – including power-generation facilities, transformer stations, and transmission networks – as well as transport and logistics nodes. These strikes are best understood not as strictly battlefield objectives but as deliberate pressure aimed at degrading civilian resilience, straining Ukraine's economy, and testing political will. Under this scenario, this campaign operates on a year-round baseline but intensifies seasonally, particularly during the cold season, when energy demand peaks and the humanitarian consequences of outages are most severe. This leads to both sustained service degradation throughout 2026 and periodic acute spikes in needs during periods of intensified targeting.

In response, Ukraine pursues further decentralisation – including distributed and off-grid generation at household, municipal, and facility levels – to reduce dependence on the centralised grid. Given the cost constraints and technical limitations of off-grid solutions, however, decentralisation remains an uneven and partial measure, and structural vulnerabilities in the grid persist. Service disruptions, including prolonged power outages and interruptions to heating and water, continue nationwide, with the most severe impacts concentrated in frontline and border oblasts and major urban centres.

Under this scenario, displacement is driven by the accumulative weight of insecurity, economic pressure, and service degradation, producing smaller but more persistent, harder-to-track flows than largescale displacement triggered by rapid frontline shifts. Largescale national displacement does not occur, but localised and cyclical displacement – whereby households move temporarily in response to strikes or seasonal and economic pressures before attempting return – continues, particularly in frontline communities and northern border areas, repeatedly disrupting livelihoods, schooling, and access to services. Around 90,000 individuals currently live within 5km of the active front lines, and 49% of the nearly 115,000 people living within 10km is over 59 years old, indicating significant constraints on evacuation feasibility and assistance modalities (IOM Ukraine Frontline Flow Monitoring and Population

Baseline 31/01/2026). Older populations face greater mobility limitations, higher rates of chronic health conditions requiring regular medication and care, and lower capacity to self-organise in response to sudden security deterioration, all of which require specialised approaches to evacuation planning and service delivery. Premature returns to high-risk areas – driven by economic pressure, savings depletion, and the pull of aid concentration in frontline zones – add further risks.

Broad social cohesion masks growing localised tensions, particularly around mobilisation, aid eligibility, and economic stress, which Russian disinformation campaigns may seek to exploit. Mobilisation continues or expands, placing increasing strain on the Ukrainian workforce as exemptions are reduced and more individuals are mobilised. Beyond its direct impact on military capacity, sustained mobilisation carries significant secondary economic consequences: the removal of working-age men from sectors such as agriculture, construction, and municipal service provision deepens already acute labour shortages, contributing to service delivery deterioration and livelihood pressures even in areas far from the front lines.

Western support for Ukraine remains critical but below previous-year levels in both volume and predictability, particularly affecting humanitarian and financial aid. This is shaped by domestic political dynamics among key stakeholders, competing geopolitical crises, and donor fatigue, constraining Ukraine's ability to sustain its defence and meet growing civilian needs simultaneously. Ukraine's budget deficit persists as a key structural vulnerability, deepening dependence on external financing and forcing difficult trade-offs between military spending and civilian services. Russia continues orienting its economy around the war effort, sustaining its military campaign despite sanctions pressure and longer-term economic uncertainty.

Humanitarian organisations respond with significantly constrained resources, functioning increasingly through consortia and partnerships to maximise coverage. Community-level organisations – often the primary responders in rural and inaccessible areas – struggle to maintain operations amid declining funding, with direct implications for response continuity when they are the only responders present. Mobilisation also affects humanitarian staffing, as men face increasing difficulty obtaining or maintaining exemptions, constraining field operations. The defining operational challenge is the growing mismatch between chronic needs and available resources. Toward the end of 2026, early signals of potential further funding reductions may generate additional anxiety and corrections within the sector as organisations begin planning for 2027.

This scenario is defined by slow-burning deterioration not sudden shocks: the gradual erosion of household coping capacity, the incremental degradation of service delivery systems, and the widening gap between needs and available resources. This distinguishes Scenario 1 from the more acute displacement and service collapse expected under escalation in Scenario 3, as this scenario is characterised by chronic, compounding needs that require sustained programming instead of surge response. Rising food and utility costs accelerate the depletion of household savings, with IDPs, low-income families, and frontline communities worst affected. Labour shortages – shaped by mobilisation, demographic shifts, and business relocations – persist across the economy, particularly in agriculture, construction, and services.

Map 2. East region



Source: ACAPS using data from ISW (accessed 30/03/2026)

East

In this scenario, eastern Ukraine remains the primary theatre of active ground fighting. Russian forces continue to position substantial forces in and around unoccupied portions of Donetsk oblast, making slow progress largely in rural and less strategically significant areas that are harder to defend. Ukrainian forces maintain their defences along the critical Sloviansk–Kramatorsk route, where advances are consistently contested and pushbacks frequent. Russian forces also continue operations in Kharkivska oblast, primarily to secure their flanks in Donetsk oblast instead of achieve independent territorial gains. Expanded drone operations put logistical corridors under sustained threat and deepen the area of insecurity beyond the immediate contact line. Russian forces continue to target the Pokrovsk–Pavlohrad and Sloviansk–Kramatorsk road corridors, critical to both military supply chains and civilian and humanitarian movement. Humanitarian access continues to deteriorate as drone coverage expands over roads and transit routes.

Approximately 217,200 people still reside in Donetsk oblast, of whom around 120,000 remain in Kramatorsk and Sloviansk (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Without a decisive frontline breakthrough, steady but continuous displacement continues, testing transit centres and host communities in Dnipro, Lozova, and Zaporizhzhia. Mandatory evacuations for families with children continue. Sloviansk's health infrastructure experiences particular deterioration from staff shortages and facility closures following relocations, requiring targeted humanitarian health response. Kharkiv itself remains an economically viable destination for IDPs and evacuees despite persistent targeting by glide bombs and aerial strikes. Small-scale advances in the direction of Orikhiv cause minimal additional displacement toward Zaporizhzhia, which already hosts 154,000 IDPs, as the surrounding area is largely depopulated (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026).

Under this scenario, the humanitarian challenge in the east is more one of cumulative exhaustion than acute crisis: needs do not spike dramatically but deepen steadily as coping capacity erodes, infrastructure degrades, and resources shrink, requiring sustained programming. Humanitarian needs remain most severe in protection, shelter, and WASH, and the HNRP and coordination structures continue to prioritise these areas. Household coping capacity is already exhausted among those who have remained in frontline rural areas and urban centres, such as Izium, Kramatorsk,

and Sloviansk, leaving little buffer against additional shocks. Cash assistance remains an effective modality for rapid response, although potentially constrained by funding availability, while in-kind assistance addresses longer-term WASH, shelter, and health vulnerabilities. Russian-occupied territories remain an operational blind spot, with severe information gaps limiting understanding of conditions and needs and only limited cash assistance programming reaching these populations amid communications and access constraints.

South

With Russian forces primarily focused on consolidating control in Donetsk oblast, the southern region does not face largescale ground operations – a dynamic reinforced by the natural barrier of the Dnipro River. Continued drone activity and long-range strikes sustain high insecurity and significantly constrain humanitarian access, however, particularly in Khersonska oblast. Occasional small-scale infiltration attempts across the river are unlikely to result in a sustained foothold given the proliferation of drones on both sides.

The Dnipro River’s kill zones – shaped by dense drone coverage on both sides – have effectively expanded evacuation areas and increased civilian casualties in riverside districts, prompting additional evacuations in exposed communities. The 63,500 people currently residing in Kherson represent the most densely populated settlement within 5km of the front lines nationwide, facing critical levels of need across psychosocial support, protection, water, and shelter (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Unexploded ordnance and drone threats further degrade mobility and access to land, compounding already severe living conditions.

As a hub of agriculture and trade, the south faces continued pressure on economically important infrastructure, including ports, grain storage and processing facilities, and energy and water systems. Odeska oblast functions as a key logistics and trade hub, critical to maintaining the grain corridor; Russian strikes on ports and bridges disrupt exports and livelihoods. Cross-border trade with Moldova provides a partial economic buffer, but small businesses – particularly those displaced from Kherson – continue to require livelihood support.

Water scarcity persists in Mykolaiv and Kherson, where WASH programming and infrastructure rehabilitation – including provision of alternative energy sources for water pumping – remain critical. Demining continues to free up agricultural land but progresses slowly, requiring interim livelihoods support and cash injections to bridge the gap between demining progress and restored agricultural productivity. Reduced humanitarian capacity generally aggravates these challenges, leaving more civilians dependent on the government social support already under fiscal pressure.

North-Central-West

The north-central-west region continues to serve primarily as a hosting area for displaced populations, logistical and production base, and the main hub for many humanitarian and development responders. With the exception of Sumska and Chernihivska oblasts, these regions do not experience daily short- or medium-range strikes, and general insecurity levels remain comparatively low. Communities across the region do face cumulative strains from the war on livelihoods, services, and social cohesion, however. Even without major conflict activity, prolonged displacement pressure, rising living costs, and labour market strain could gradually erode the relative stability of this region over the course of 2026, generating new vulnerabilities that are significant but less visible than frontline needs.

Sumska and Chernihivska oblasts face significant border insecurity, with Russian forces continuing to target logistics hubs, transport infrastructure, and urban areas. Border communities in Sumska oblast experience daily drone strikes and ground assault attempts, generating consistent but manageable flows of IDPs through transit points in Sumy city and Romny. Northern border oblasts experience elevated severity of needs in energy, shelter, and cash support given continued strikes on civilian and service infrastructure, but do not face qualitatively new needs under this scenario. Checkpoint proliferation makes humanitarian access challenging, and accessibility to rural communities in northern and eastern border areas continues to deteriorate.

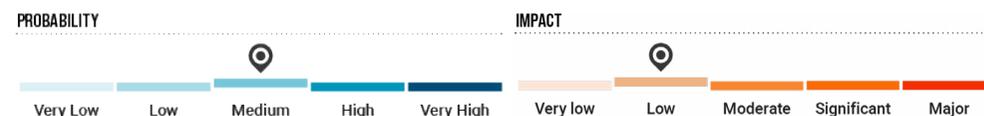
Gradual westward movement of IDPs continues, adding pressure on host communities and services in central and western oblasts. Reductions in financial assistance modalities affect longer-term IDPs, prompting some movement from urban to rural areas within the region, as well as minimal returns from the centre

and west toward the east. Rising living costs, service gaps, and reduced purchasing power – driven in part by demographic shifts and the sustained influx of displaced populations – continue to deplete contingency savings among both IDPs and host communities.

The west continues to function as a hub for recovery activities, though infrastructure investment is constrained by fiscal pressure and the risk of future damage, while the continued diversion of public resources to defence limits the GoU's ability to drive meaningful reconstruction or service improvement. Recovery activities in this region are likely to remain incremental and donor-dependent instead of transformative. Energy infrastructure in particular gradually degrades as repairs fail to keep pace with the scope and scale of damage, despite continued international support. Service disruptions increase in frequency and duration, affecting heating and water access. Kyiv continues to be targeted with symbolic strikes aimed at testing political will and civilian morale, and an attack on Kyiv's power plants and transmission grid – while not the most likely outcome – could trigger secondary displacement.

Humanitarian needs in the north-central-west region remain broadly stable under this scenario, but are increasingly underserved. As funding concentrates on frontline priorities, populations in central and western areas – including longer-term IDPs and host communities – face growing gaps in livelihoods support, legal assistance, and health services, particularly access to medications for chronic conditions. Community-level organisations, which are often better positioned than international responders to reach dispersed rural populations, face operational pressure from declining funding. In the west in particular, a gap is likely to emerge between the expectations of IDPs, returnees, and host communities – who may anticipate meaningful recovery now that the most acute phase of displacement has passed – and what is actually deliverable under wartime conditions, limited public investment, and declining humanitarian funding.

Scenario 2: Reduction of hostilities



Ukraine and Russia agree to a partial or localised ceasefire, frozen front lines, or drawdown in aerial attacks as a precursor to a more comprehensive peace settlement to be implemented in 2027 or beyond. This outcome is enabled not by a resolution of the underlying political disagreements but a convergence of pressures: battlefield exhaustion and the mounting costs of sustained attrition on both sides, intensified external diplomatic pressure particularly from the US and Europe, and domestic political constraints that make the continuation of full-scale hostilities increasingly difficult to sustain politically and economically. The agreement is preceded by a period of intensified fighting as each side attempts last-minute territorial gains to strengthen its negotiating position and improve its military posture in the event of re-escalation.

Frequent violations occur once the agreement is in place, as monitoring mechanisms face limitations related to observer mandates, restricted access, and security risks. Both parties use the relative lull to fortify defensive lines, conduct covert operations, and sustain mobilisation at high levels, signalling that the ceasefire is a tactical pause not a genuine step toward peace. The tenuous nature of the agreement means that de-escalation remains fragile throughout 2026, with the risk of renewed largescale hostilities a persistent undercurrent shaping both military and civilian decision-making. These dynamics mean that Scenario 2 carries an inherent instability: should violations escalate or one side perceive a strategic advantage in resumed hostilities, the situation could revert to the attritional dynamics of Scenario 1 or deteriorate further toward the conditions described in Scenario 3.

Long-range attacks targeting energy, transport, and logistics infrastructure decline, enabling partial but slow rehabilitation of these systems and gradual service restoration. Constraints such as damaged transmission networks, financing gaps, and workforce shortages limit the pace and scale of repairs. Ukraine also

pursues more substantial recovery efforts beyond emergency repairs and continues diversifying its energy infrastructure to reduce vulnerability to future strikes. Significant fiscal constraints prevent largescale modernisation of ageing systems, however, which remain exposed to Russian cyberattacks. Improved infrastructure stability is uneven, concentrated in areas further from the front lines where repair is feasible and investment confidence slowly returns, while frontline-adjacent communities see only marginal gains.

Persistent drone threats, sporadic ceasefire violations, and GoU restrictions on civilian movement near the contact line mean that areas within 5km of the front lines remain largely inaccessible, leaving approximately 92,030 people beyond the reach of NGOs (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Humanitarian access improves incrementally in areas 5–10km from the front lines, though conditions there remain far from safe. Civilian casualties decline compared to Scenarios 1 and 3, but a reduction in the frequency of attacks does not translate into meaningful safety improvements for communities closest to the contact line, where tensions remain high and incremental frontline movements continue.

Perceptions of reduced urgency – both internationally and domestically – trigger a shift in the funding and assistance landscape that outpaces actual improvements in humanitarian conditions. This shift is the result of a transition toward stabilisation/recovery funding, overall donor fatigue, and reallocation towards other global crises. Approved humanitarian funding remains broadly stable, but new allocations decrease as donors prioritise early recovery and development programming. Grant targets become increasingly tied to donor priorities, leaving gaps in non-aligned sectors. Traditional emergency response programming shifts toward early recovery, but this transition is premature in many areas where basic humanitarian needs persist. The responsibility for humanitarian assistance shifts progressively toward the GoU, which lacks the fiscal and institutional capacity to absorb it as a result of wartime budget deficits, gaps in external budget support, reconstruction costs, and capacity limitations, creating a widening gap in coverage, particularly in protection and other sectors not classified as lifesaving.

Displacement from eastern and southern regions slows, and limited returns occur, driven primarily by economic necessity and the exhaustion of contingency savings instead of genuine safety or service improvements. These movements are expected to remain small and localised, constrained by persistent insecurity, absent services,

and the exhaustion of household resources. Cyclical displacement patterns could emerge, however: households attempting return, finding conditions unliveable, and moving again – potentially multiple times – in ways that complicate humanitarian planning, strain transit and hosting capacity, and deepen vulnerabilities among already exhausted populations.

Where returnees encounter inadequate shelter, services, and assistance, small-scale secondary displacement follows – to either previous areas of displacement or other locations within the region. Moderate returns from abroad, concentrated largely in western urban centres, test the limits of housing and employment markets. The divergent experiences of those who stayed, those internally displaced, and those who left the country generate social tensions as different groups bring different expectations of what peace or reduced hostilities should mean for them, including competition over housing, access to reconstruction and other social assistance, employment opportunities, and political representation.

Regional and national social cohesion is further tested by intensifying public debate around war accountability, negotiations, military strategy, and the prospect of elections. New political stakeholders – many with military backgrounds – emerge and become increasingly vocal in their criticism of how the war and negotiations have been handled. Russia intensifies disinformation campaigns targeting these fault lines, seeking to deepen divisions within Ukrainian society. Western allies place growing pressure on the GoU to move toward elections, adding to an already complex domestic political environment. These dynamics risk fragmenting the broad societal consensus underpinning Ukraine's resilience.

Economically, urban centres in the centre and west rebound more quickly than frontline and border areas, where mine contamination, infrastructure damage, and persistent insecurity constrain recovery. Inflation and currency pressures increase, with the cost of goods rising beyond household purchasing power and the availability of work failing to meet demand. Along the contact line and in formerly occupied areas, shadow economies and smuggling networks could emerge in areas of reduced state presence and in response to the slow restoration of formal economic systems and cross-border economic incentives, discouraging legitimate business returns and complicating the transition toward economic normalisation. Veterans' reintegration – encompassing livelihoods, psychosocial support, and social protection – emerges as a growing and underserved need as demobilisation remains limited but rotation and return of some military personnel increases.

This scenario's defining humanitarian challenge is the mismatch in timing: the shift away from emergency response occurs before recovery systems – whether government or development-led – are sufficiently in place to fill the gap. The populations most at risk are those who fall between the two: no longer prioritised for emergency assistance but not yet reached by recovery programming, living in areas where basic services remain non-functional. As such, humanitarian needs may remain high or even temporarily increase during early stabilisation phases, as damaged infrastructure, disrupted livelihoods, and displacement patterns persist even while conflict intensity declines. The potential for regional disparities to emerge between frontline oblasts and the centre/west, particularly in terms of livelihoods, infrastructure recovery, and population return patterns, remains high.

East

The front lines, while frozen, see incremental tactical movements despite the ceasefire, shaping population movement, access, and recovery dynamics in frontline communities. Russian forces consolidate control over Pokrovsk and establish a major defensive position there, while Ukrainian forces focus on fortifying positions around key points including Kramatorsk, Pavlohrad, and Sloviansk. Both sides solidify their positions along the contact line, reinforcing the likelihood that any frozen line will be durable in the short term but structurally unstable over a longer horizon.

The tenuous calm attracts small-scale returns to larger urban centres –including Dnipro, Kharkiv, the Sloviansk–Kramatorsk area, and Zaporizhzhia – though many returnees conduct property checks and leave again upon finding insufficient services and damaged shelter. Kharkiv benefits disproportionately from the relative stabilisation, drawing increased economic activity, population returns, and investment as both a major urban centre and a symbol of resilience. IDP numbers in Dnipro and Zaporizhzhia increase as these cities become hubs for people seeking to move closer to home while remaining within reach of services. Travel to areas near the frozen front lines increases as people make temporary visits, but few return permanently. Service provision is virtually non-existent in many of these communities, and the emergence of black market and shadow economies alongside growing criminality could deter longer-term reestablishment. This uneven picture points to a risk of deepening and potentially durable disparities within the

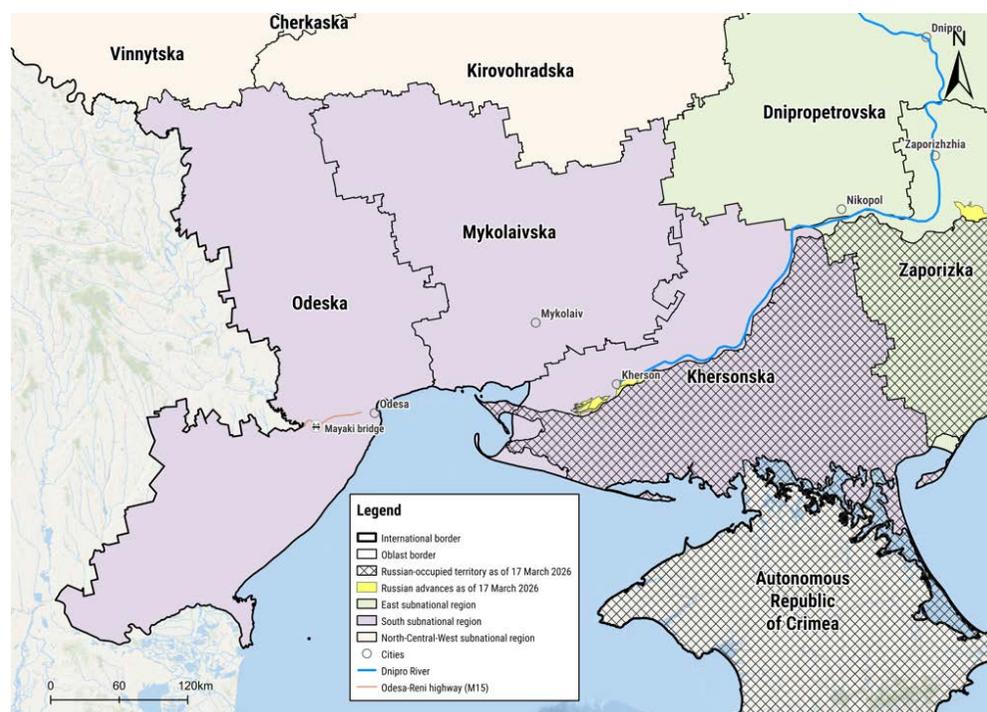
east itself, and between the east and the centre and west: while major urban hubs such as Kharkiv benefit from investment and population returns, smaller frontline communities risk being structurally left behind, with absent services, weaker livelihoods, and low return rates.

Improved security conditions and incremental humanitarian access gains beyond the 5km zone allow for better visibility of humanitarian conditions in previously inaccessible areas, revealing needs accumulated during the period of restricted access. Social tensions between long-term residents, IDPs, and returnees intensify as perceptions of unequal experiences of the war and access to assistance surface – a dynamic that Russian disinformation campaigns are likely to amplify.

Access to Russian-occupied territories remains highly restricted, with continued Russian efforts to consolidate administrative control. Under a partial ceasefire, there is speculation about whether reduced hostilities could open limited humanitarian corridors to occupied areas, but this remains unlikely in 2026 given the political sensitivities involved and the absence of a comprehensive agreement. Conditions for populations living under occupation are likely to worsen as Russification processes deepen and Ukrainian social protections become increasingly inaccessible.

Household needs remain highest in the east relative to other regions. With the collapse of many services and livelihoods in eastern frontline areas, shelter, WASH, protection, livelihoods, and psychosocial support are the most pressing needs for populations in the 5–20km zone that becomes more accessible. A significant proportion of this population is older, disabled, or has movement restrictions, requiring specialised services to address specific basic needs. WASH, shelter, and cash needs remain substantial given persistent service gaps and the risk that ceasefire violations create acute emergency needs.

Map 3. South region



Source: ACAPS using data from ISW (accessed 30/03/2026)

South

The relative pause in hostilities allows for marginal improvements in humanitarian access to rural populations in Khersonska oblast, though frontline zones remain insecure and the 5km zone largely inaccessible. Energy supply and trade route functionality improve moderately, but largescale reconstruction remains beyond reach in 2026 and agricultural recovery stays constrained throughout the year.

Demining efforts increase, particularly in Mykolaivska oblast, to open agricultural land and restore livelihood opportunities, though gains do not translate into immediate food security improvements given the time required to resume productive activity. Returns near frontline areas of Khersonska oblast remain limited, driven more by seasonal property checks than genuine resettlement, given persistent security risks

and the absence of meaningful economic incentives. Mykolaivska oblast sees slow returns and incremental business investment, particularly in warmer months when short-term agricultural livelihoods become available. Odeska oblast recovers more strongly, with port activity resuming at higher levels under less tense conditions and the grain corridor continuing to operate, providing an economic anchor for the region even as inland and rural communities lag significantly behind.

Some international and national NGOs shift operational hubs from Odesa toward Mykolaiv or the outskirts of Kherson to be closer to at-risk populations in Khersonska and Mykolaivska oblasts. Programming transitions from humanitarian response to development and early recovery, with increased focus on agricultural rehabilitation, water system repair, and livelihoods. This transition carries risk: where it occurs before basic humanitarian needs are fully met, it may leave those most vulnerable to such needs – particularly those unable to benefit from recovery programming because of age, disability, or location – without adequate support.

Water and sanitation needs persist in Mykolaivska and Khersonska oblasts, where immediate infrastructure repairs are insufficient to resolve water access and drinking quality issues in the short term. In Khersonska Oblast, shelter repair remains a key need to enable returns and support livelihoods development. Demining progress is the single most important enabler of agricultural livelihoods recovery in the south, and its pace will largely determine the extent to which economic normalisation is possible in 2026.

North-Central-West

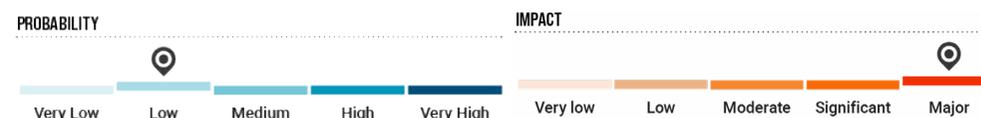
The north-central-west region transitions toward cautious stabilisation, serving as the primary zone for absorbing longer-term displacement and consolidating recovery activities. Decreased aerial attacks bring improved energy stability and gradual recovery of investment confidence, particularly in major cities such as Kyiv and Lviv. Improvements are uneven, however: central oblasts benefit more immediately from energy stabilisation and small and medium business returns, while northern border oblasts remain volatile and continue to experience ceasefire violations along the frozen contact line.

Sumy city continues to function as a base for services and humanitarian operations, though access to border communities within 5km of the front lines and border remains restricted. Previously occupied areas of Chernihivska, Kyivska, Sumska, and Zhytomyrska oblasts continue to require demining support before agricultural and economic recovery can meaningfully advance. IDPs who relocated to central and western oblasts largely choose to remain, contributing to structural demographic shifts in hosting communities. Moderate returns from abroad – concentrated in western urban centres – test the limits of housing and employment markets, and social tensions emerge between long-term residents, returning IDPs, and international returnees.

Western Ukraine continues to serve as a major hub for recovery and development activities, though some of these functions begin to shift toward central oblasts as conditions improve. University dormitories and other educational facilities serving as IDP accommodation may be returned to educational use as more in-person schooling resumes in western and central areas. Veteran reintegration programming – addressing livelihoods, domestic violence prevention, and psychosocial support – remains underfunded relative to the scale of need.

Humanitarian response capacity in the west and centre decreases faster than needs do, leaving large portions of the displaced population without dedicated support and more reliant on fiscally constrained government social programmes. In Sumska and Chernihivska oblasts, response options expand incrementally in rural communities beyond the 5km zone, requiring cash and in-kind basic needs assistance and transport support to markets and services. The reduction in humanitarian funding in these areas creates particular gaps in legal assistance for documentation, housing rights, and support with reconstruction grants, as the complexity of the recovery process generates new needs that emergency programming is not designed to meet.

Scenario 3: Escalating war



Russia generates a significant territorial breakthrough in eastern Ukraine, driven by the convergence of multiple factors: expanded Russian force generation and operational adaptation (such as improved logistics and drone integration), the cumulative degradation of Ukrainian defensive capacity in multiple areas, and interruptions or delays in external military support during a critical window. This allows Russia to sustain concentrated offensive pressure, especially through intensified long-range strikes designed to degrade Ukraine’s logistical and military support networks.

Russia, capitalising on these conditions, generates a significant territorial breakthrough in eastern Ukraine, likely taking the form of a collapse or penetration of a key defensive line in Donetsk oblast. This enables rapid territorial advances and creates the conditions for encircling urban centres, particularly Kramatorsk and Sloviansk, and the disruption of critical logistical corridors. Both sides rapidly escalate efforts in response: Russia seeks to press its advantage while Ukraine intensifies force generation, expands mobilisation measures, and tightens martial law, further restricting civilian movement.

Intensified long-range strikes target energy, transport, and logistics infrastructure across Ukraine – including in Dnipro, Kharkiv, Kyiv, and Odesa – deepening blackouts, disrupting mobility, and generating cascading public health and environmental risks. These attacks reflect a strategic shift in Russian targeting patterns away from large centralised nodes and increasingly towards small, distributed, and less protected infrastructure. This shift compounds the difficulty of repair – smaller and more dispersed infrastructure is harder to rapidly restore than large facilities – and reduces Ukraine’s ability to redistribute services from functioning areas to those affected, with significant implications for service resilience and repair timelines across all regions. Attacks on traditional transport routes prompt increased reliance on expensive alternatives, raising the cost of moving people and goods across the country.

NATO and EU military support increases – potentially substantially – in response to the deteriorating situation, while US military support remains politically contingent. The speed at which European support can realistically scale, however, is constrained by persistent challenges in defence production capacity and supply chains. In the early stages of escalation in particular, these structural limitations mean that additional support may arrive too late to prevent significant battlefield losses or humanitarian deterioration, potentially leaving Ukraine exposed during the most critical phase. Military spending surges, crowding out civilian expenditure and deepening fiscal stress, affecting social protection programmes – including pensions and subsidies – most immediately, as well as municipal services and infrastructure maintenance. GDP growth slows markedly, inflation and currency pressures spike, and the Government’s capacity to finance largescale infrastructure repairs is severely constrained. EU accession progress, governance reform, and electoral processes are effectively suspended as wartime imperatives dominate the political agenda.

Social cohesion strengthens temporarily as renewed wartime unity suppresses political polarisation in the short term, but this effect is likely to be transient. As the cumulative weight of escalation compounds years of prior attrition, chronic exhaustion among civilians, humanitarian workers, and the military is likely to become the dominant social dynamic over time, eroding the resilience underpinning Ukraine’s stability since 2022.

Evacuations surge, particularly in the east where the flat, open-steppe terrain, limited cover, and fewer natural fortifications enable largescale military movement. Displacement is driven primarily by damage to housing, mandatory evacuation orders, and the intensification of attacks but is not uniform: those with resources move quickly and further, potentially triggering cross-border movement to neighbouring countries, while older people, people with disabilities, and those with depleted savings are increasingly isolated in place, unable to leave but facing rapidly deteriorating conditions. Longer-range weapon usage prompts relocation within the current oblast or to a neighbouring oblast, suggesting that displacement flows will concentrate in transit and hosting areas already under strain instead of dispersing widely across the country.

In this scenario, the humanitarian system is fundamentally overstretched, immediately affecting evacuation capacity and logistics as transport infrastructure is targeted and access corridors narrow. Authorities issue mandatory evacuations and restrict NGO movement in newly contested areas, severing remaining civilians’ access to needed services, and remaining humanitarian responders operating in war-affected areas become increasingly reliant on armoured vehicles for aid delivery. Security incidents in key hubs – including Dnipro, Kharkiv, Kherson, Lozova, Mykolaiv, and Zaporizhzhia – force coordination hubs and operational bases to relocate, disrupting response continuity and increasing costs. Displacement and mobilisation also lead to staffing shortages, particularly disrupting operations requiring physical presence and service delivery.

Organisations are unprepared for the scale and pace of needs, and the response shifts almost entirely to emergency programming: evacuations, mass displacement support, transit centre and collective site operations, food security, WASH, and health. Funding does not scale proportionally with needs as defence financing absorbs an increasing share of available international resources, with humanitarian allocations stagnating or declining as the caseload grows. Organisations with strong partnerships and pre-positioned stocks are better placed to maintain response continuity; those reliant on centralised logistics and international supply chains face the greatest disruption. Coordination and information management capacities are strained by the pace of developments, increasing the risk of duplication and gaps in assistance.

The cumulative effects of escalation extend beyond the immediate humanitarian crisis. Long-term infrastructure degradation, economic contraction, and demographic decline in frontline regions, which could become semi-permanent if relocations become permanent and infrastructure recovery remains slow, risk deepening social and economic asymmetries between eastern and western Ukraine.

East

The east becomes the decisive theatre of escalation. Russian forces attempt to encircle or cut off Sloviansk and Kramatorsk while advancing through Synelnykivskiy raion in Dnipropetrovska oblast toward Pavlohrad, threatening the M-04 corridor that serves as a critical logistical and transit route for both military and humanitarian responders. The loss or sustained interdiction of this corridor would significantly disrupt east–west evacuation and supply routes, with cascading consequences for the entire response system. Regular drone and artillery strikes force displacement from eastern urban centres toward Kharkiv and Dnipro, placing intense pressure on both cities as transit and hosting hubs. Dnipro, previously a hub for early recovery support, shifts entirely to emergency response as IDP flows exceed its absorption capacity.

Approximately 217,200 people remain in Donetsk oblast, 138,000 in the 0–20km zone in Dnipropetrovska, and 46,000 in Zaporizka (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Mass displacement from these areas – potentially up to 180,000 people from northern Donetsk oblast alone – risks overwhelming transit centres and collective sites, requiring the rapid identification of new hosting locations (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). In Russian-occupied territories, the risk of forced displacement and deportation of civilians, particularly from areas near active fighting, may increase. Russian forces also seek to consolidate control of contested areas, deepening the information vacuum around conditions and needs in these areas.

Strikes on Zaporizhzhia and key bridges intensify instability for the 750,000 people living there, 154,000 of whom are IDPs with limited resources (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Regarding the Zaporizhzhia Nuclear Power Plant, the scenario anticipates two distinct but related risks: operational risks, including grid instability and potential disruptions to cooling systems linked to energy blackouts and infrastructure damage in the vicinity, and psychological effects, whereby perceived risk of a nuclear incident generates panic-driven displacement among nearby populations even in the absence of an actual emergency.

Expanded targeting of smaller energy nodes, bridges, and railways creates physical isolation and service and communications blackouts across the region. Health infrastructure in Donetsk oblast deteriorates further, with energy grid failures

compounding the inability to sustain medical services. Schools close or shift online with severe disruptions. Emergency cash assistance becomes increasingly important as households face sudden costs from displacement and strike damage.

South

The south faces structural destabilisation across services, livelihoods, and humanitarian operations, without the largescale ground offensives characterising the east. Kherson – home to 63,500 civilians – continues to be targeted by drones and other weapon systems, creating persistent insecurity and widening the gap in key services, including health, as fewer workers are willing to remain (IOM Ukraine Frontline Flow Monitoring and Population Baseline 31/01/2026). Displacement from the city remains limited despite deteriorating conditions, reflecting the immobility of a predominantly older population with depleted resources. Humanitarian operations continue but increasingly operate from nearby areas to maintain staff safety, reducing the timeliness and increasing the cost of deliveries.

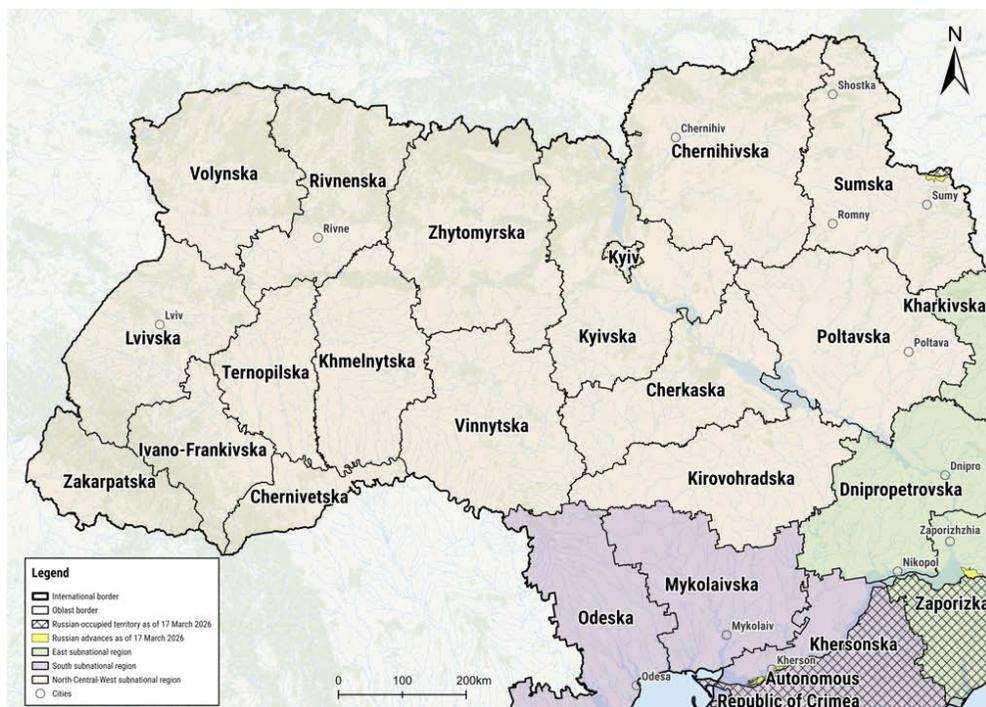
Odeska oblast sees intensified strikes on port and maritime infrastructure, disrupting and delaying grain exports. Strikes on energy, water, and sanitation infrastructure deepen public health and ecological risks. The targeting of key bridges threatens logistical routes to Moldova and risks isolating southern portions of the oblast, with potential for small-scale sabotage operations through Moldova’s Transnistria region adding further instability. The oblast becomes increasingly reliant on energy transfers from neighbouring oblasts, with logistical, livelihood, and business continuity implications.

Mykolaivska oblast experiences increased long-range strikes disrupting maritime routes and worsening logistics through bridge and transport node targeting. Persistent sanitation challenges in Mykolaiv intensify with repeated infrastructure strikes, generating compounding public health risks. Mykolaiv serves as a first point of call for households displaced from Khersonska oblast, but overstretched response capacity pushes IDPs further west toward areas with more stable services.

Humanitarian needs across the south are elevated, with larger segments of the population more severely affected by electricity, water, and service outages of increasing frequency and duration. In-kind support becomes more operationally challenging as bridges and transport routes are targeted, forcing civilians to travel

longer distances to access markets and services. NGO access is further constrained by government-managed security and access protocols, increasing operational costs and reducing coverage.

Map 4. North-Central-West region



Source: ACAPS using data from ISW (accessed 30/03/2026)

North-Central-West

Previously stable regions in the north-central-west absorb secondary stress at levels not seen since the early months of the war, as east-generated displacement, elevated infrastructure targeting, and economic shocks ripple westward. The region transitions from a zone of relative safety and recovery to a stressed hosting and transit environment, with both collective centres and rental markets facing strain.

Northern border oblasts – particularly Sumska and Chernihivska – face sustained shelling and infrastructure damage, forcing civilian evacuations from settlements near Sumy and Shostka. Health infrastructure weakens in Sumy, leaving residents in the city and surrounding areas with limited options for medical care. Border economies deteriorate, businesses and markets cease to function, and logistics services halt operations. Transportation hubs such as Romny see sharply increased activity as displacement flows intensify. Checkpoints tighten and humanitarian access deteriorates.

Central population centres – including Kyiv and Poltava – face increased targeting of energy and other infrastructure, degrading service functionality and prompting relocations outside urban areas. Dams in Rivne and other western areas are targeted to induce service outages and ecological damage, and rental prices surge as hosting and transit capacity in the west becomes overwhelmed.

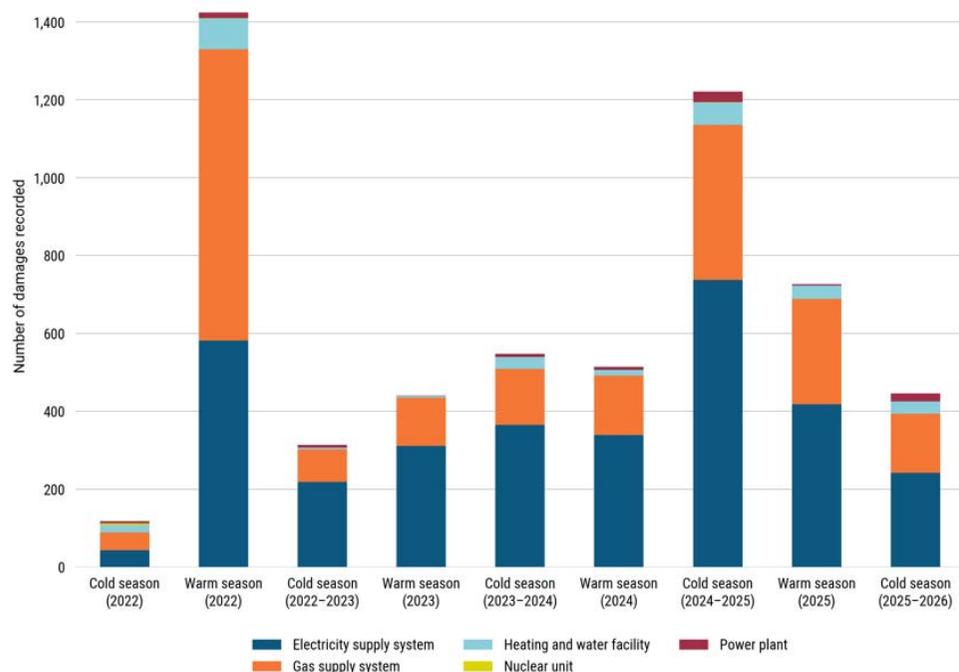
The west, previously Ukraine's most stable region, transitions into a stressed hosting zone. The perception of nationwide deterioration prompts surging but limited migration to Europe. The humanitarian response in the west and centre refocuses on emergency assistance for border regions, but struggles to scale up given previous reductions in coverage. New displacement requires collective centre, transit, and livelihoods capacity that the response system – already operating below pre-2025 resource levels – cannot adequately provide.

COMPOUNDING FACTORS

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

Attacks on Ukraine's critical infrastructure

Figure 1. Aggregated seasonal damage incidents to energy infrastructure in Ukraine since the start of the full-scale invasion through 25 March 2026



Ukraine experienced its coldest winter in a decade, with an average temperature of -5.8°C in January 2026 compared to 2.3°C in January 2025 and -1.9°C in January 2022 (TKI 11/02/2026). Severely cold temperatures persisted throughout February 2026, compounded by significant energy service disruptions and infrastructure damage. Russian military shifted strategy from previous campaigns, moving from

strikes aimed at degrading the national grid and creating widespread disruptions to targeting power generation, transmission, and distribution facilities aimed at triggering regional outages, as well as gas infrastructure (Al Jazeera 21/01/2025). In some cases, power outages lasted 20–40 hours in a single event, with Dnipropetrovska, Donetsk, Kharkivska, and Zaporizka oblasts most severely affected, alongside the Kyiv region and capital city, by power and heating losses (TCH 11/01/2026). In response to prolonged power and heating loss, Ukrainian authorities introduced mitigation measures including scheduled and emergency power cuts and industrial restrictions on electricity usage (Ukrainska Pravda 10/02/2026).

Attacks on energy infrastructure occur year-round but intensify during the cold season (typically October–March), when Russia applies maximum pressure on civilian resilience and the two-way dependency between Ukraine's electricity and gas supply systems (ACAPS 28/08/2025). Decentralisation efforts – including solar panel and generator installation – have been pursued at various levels, improving energy resilience for some. Access to these solutions, however, is uneven and decentralisation measures remain partial and complementary, not a systemic solution, given the significant costs of off-grid generation, operational constraints, and the overall degradation of the national grid (TKI 23/07/2024).

The cumulative effect of infrastructure damage and sustained outages has deepened energy insecurity across the country, with the burden falling disproportionately on communities with the least capacity to cope. Frontline areas most frequently report a lack of alternative power sources, with 70% of households reporting such challenges (REACH 30/10/2025). High utility costs further constrain coping capacity; for example, median monthly heating expenditure is higher in Donetsk (UAH 2,600) and Kharkivska (UAH 2,300) oblasts than in other frontline oblasts (UAH 2,000) (REACH 30/10/2025).

Prolonged outages also affect locations outside frontline areas, and people in urban and rural areas face distinct challenges in managing outages: urban households dependent on district heating or electric heaters have few alternatives when power fails, while rural households – though more likely to have access to solid fuel stoves – face rising fuel costs, supply chain disruptions, and affordability constraints that limit their ability to rely on these alternatives during extended cold periods (ACAPS 28/08/2025).

Alongside attacks on energy infrastructure, Russian forces also continue targeting logistics nodes such as railway lines, key highways, and supply hubs, posing risks to Ukrainian military supply lines and civilian transport (*The Guardian* 27/01/2026). Strikes on critical rail nodes have prompted precautionary service stoppages and the replacement of rail segments with bus services to protect civilians (*TKI* 07/10/2025). Continued attacks, particularly on transport infrastructure, risk further complicating civilian evacuation efforts.

Severe weather conditions

Civilians in Ukraine face compounding seasonal risks throughout the year: the acute cold-season threats detailed above and growing warm-weather hazards. Extreme weather exposure brings significant risks for affected populations, particularly in communities near the front lines, where housing damage, insecurity, and mobility constraints are most acute (*REACH* 07/11/2025; *WHO* 19/06/2025 and 01/12/2025).

The intersection of cold exposure and energy insecurity is particularly acute for people in damaged housing or temporary shelter, where heating is often unreliable, and those in urban areas where centralised heating systems are offline and power outages limit the use of alternative heating devices. People with pre-existing humanitarian vulnerabilities – including older people and those with chronic health conditions – face the greatest risks to extreme weather exposure. For example, among households surveyed in frontline areas, those managing chronic conditions requiring regular medication – accounting for 83% of households in Donetsk oblast, 65% in Dnipropetrovska, and 64% in Zaporizka – are particularly susceptible to the health consequences of prolonged cold exposure (*REACH* 30/10/2025). Unsafe coping measures, such as improvised heating, carry additional health risks including fire hazards and carbon monoxide poisoning (*ACAPS* 28/08/2025).

Beyond cold-season risks, warmer-than-average temperatures in 2026 could generate compounding risks across energy, health, and agricultural systems. Ukraine is increasingly vulnerable to hazards such as drought, extreme heat, heatwaves, heavy rainfall, mudflows, and floods (*WHO* 19/06/2025). Sustained temperatures above 30° C could drive increased power outages as demand for cooling rises and puts pressure on the energy grid. Disruptions to power systems may also cascade into affecting water and sanitation systems – potentially creating public health risks,

particularly in frontline areas where health and WASH systems are already under strain – as well as livelihood risks in rural areas dependent on cold chains for food and livestock farming. Heat exposure and water shortages may also affect livestock health, reducing productivity or, in extreme cases, increasing mortality (*RBC Ukraine* 20/07/2024).

Hotter summer weather and seasonal disruptions, including above-average rainfall, are likely to affect the agricultural outputs upon which Ukraine is heavily reliant, and which are already constrained by labour shortages, mine contamination, and insecurity. According to an FAO assessment of frontline oblasts in July 2025, 70% of households cited crop failures from severe summer drought, while 50% reported losses from spring frosts (*FAO* 17/12/2025). Ukraine is a major global grain exporter, and exposure to weather-related risks (as well as continued Russian attacks on infrastructure) has implications for export revenues, domestic food security, and global markets (*USDA* 04/02/2026).

Funding for humanitarian, development, and government sectors

Following the sudden shock of US reductions in foreign aid and the subsequent reorganisation of the humanitarian response in Ukraine, another abrupt funding decline in 2026 is unlikely. Overall confirmed funding for humanitarian and development assistance in 2026 is still likely to fall below 2025 levels, however, reflecting general funding trends for protracted humanitarian crises, new US funding priorities, key donors redirecting resources toward domestic and military spending, and other competing geopolitical crises (*ACAPS* 31/12/2025; *FPRI* 06/03/2026).

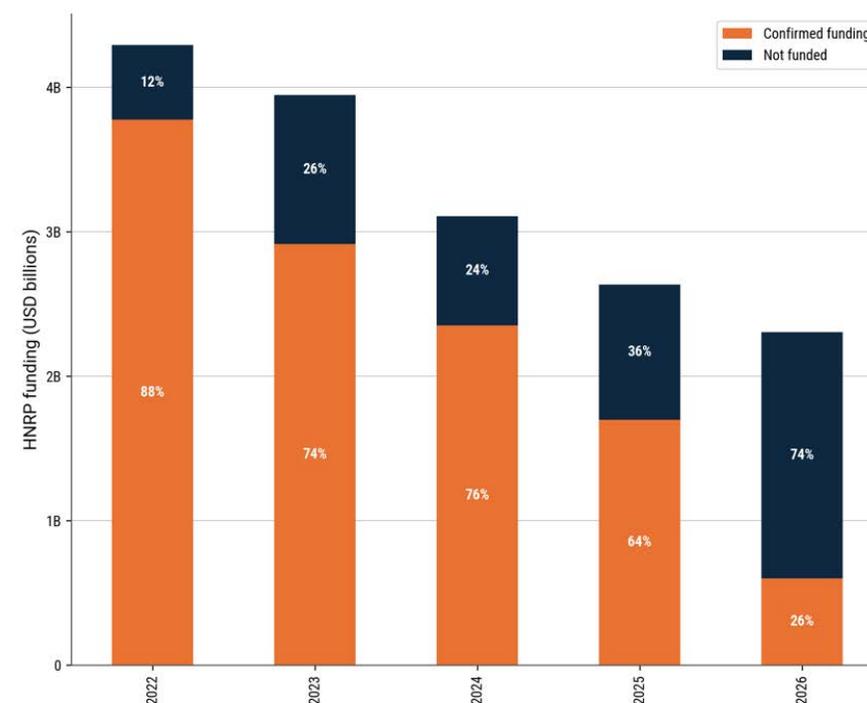
By 25 March, only 26% (USD 599 million) of the funding required under the 2026 Ukraine HNRP had been confirmed – well below the USD 2.1 billion needed to meet even the most hyper-prioritised needs (*OCHA* accessed 25/03/2026; *Humanitarian Action* accessed 25/03/2026). Although additional funding may be confirmed throughout the year, limited funding pools are expected to constrain the scale of further allocations.

The closure of USAID also disrupted financial support to key government systems and development programmes at a time when the GoU faces a budgetary crisis driven by war expenditure and delays in external financing to cover a USD 45–52 billion budget gap in 2026 (*ACAPS* 31/12/2025; *Reuters* 20/03/2026). From 2022, the US channelled more than USD 45 billion through six US government organisations,

including USAID, for development projects and government-run social programmes in Ukraine; USAID managed more than USD 30 billion in direct budget support to the GoU during that time (OIG 14/08/2025). While Ukraine has access to alternative mechanisms to ensure liquidity, such as EU-backed loans, disbursement delays and the lack of predictable funding pose a major risk for Ukraine's ability to maintain fiscal stability and non-military expenditures (see baseline assumptions).

Taken together, these factors constrain the ability of humanitarian and development responders and the GoU to respond to largescale needs, widening the gap between what is needed and what can be delivered. If current funding trends continue, this gap is likely to widen further as the year progresses, with the most acute impacts among populations in frontline and inaccessible areas, where needs are greatest and operational constraints are highest, as well as in areas deprioritised by the humanitarian response. How this funding trajectory intersects with conflict dynamics – and what it means for the humanitarian response under different conditions – is examined in each of the three scenarios detailed in this report.

Figure 2. HNRP required funding vs. confirmed funding per year as of 25 March 2026



Source: ACAPS using data from OCHA accessed 25/03/2026

ANNEX 1. INDICATORS FOR SCENARIOS

Indicators are early signals that suggest the situation is moving toward a given scenario. They should be monitored regularly by humanitarian organisations to anticipate shifts and adapt operations accordingly.

DESCRIPTION	SCENARIO 1	SCENARIO 2	SCENARIO 3
Failure of a significant Ukrainian or Russian offensive	X		
No significant change in the frequency or intensity of Russian missile, drone, and air strikes on major urban centres	X		
No major change in Russia's overall military strategy or operational posture	X		
Increased social or political tensions in Russia (e.g. rhetoric supporting a ceasefire from Russian military figures)		X	
Sharp increase in conflict activity accompanied by ceasefire negotiations as each side attempts to improve its negotiating position		X	
Western countries tighten sanctions against Russia, signalling increased pressure on Moscow		X	
Increased international diplomatic engagement in ceasefire negotiations or implementation mechanisms		X	
Increased public statements from Ukraine, Russia, or third parties indicating willingness to make concessions		X	
Increased pressure by the US or other parties on Ukraine to hold elections or make significant political concessions		X	
Rapidly worsening economic conditions in Russia, including rising inflation or increasing interest rates		X	
Significant deterioration in Ukrainian civilian morale or social cohesion, including increased protest activity or public dissatisfaction with war leadership		X	
Political and diplomatic tensions strain Ukraine's relationship with the US or key European countries			X
Ukraine reduces mobilisation age or pursues other emergency recruitment measures, indicating acute troop shortages			X
Sharp increase in Russian conscription, recruitment, or use of foreign military contractors, suggesting preparation for intensified offensive operations			X
Russia amasses troops and materiel near Donetsk, Kharkiv, Sumska, or Zaporizka oblasts			X
Accelerated Russian advances in Donetsk oblast or along key routes toward Kramatorsk, Pavlohrad, or Sloviansk			X
Russian advances accelerate in Kharkiv, Sumska, or Zaporizka oblasts			X
Rapid increase in the frequency and intensity of Russian missile, drone, and air strikes on urban centres nationwide			X
Western countries loosen or waive sanctions against Russia, providing economic relief to Moscow	X		X
Collapse of active negotiations between Ukraine, Russia, and key third-party mediators, with no prospect of resumption	X		X
Reduction in the volume or predictability of US and European military and financial aid to Ukraine	X		X

ANNEX 2. TRIGGERS FOR SCENARIOS

Triggers are specific events or developments that precipitate or significantly accelerate the materialisation of a given scenario. Unlike indicators, which are gradual signals, triggers represent discrete shifts that make a scenario substantially more likely or mark its onset.

DESCRIPTION	SCENARIO 1	SCENARIO 2	SCENARIO 3
No major developments or progress in negotiations to resolve the war	X		
Russian forces do not make significant breakthroughs in Donetsk, Kharkivska, or Zaporizka oblasts	X		
Ukraine and Russia agree to a localised truce, interim ceasefire, or cessation of long-range targeting of specific infrastructure types, including energy, transport, or logistics		X	
Failure to meet interim ceasefire agreements			X
Russian forces cut off a critical Ukrainian military supply or logistics corridor			X
Collapse of Ukrainian defensive positions in Donetsk, Kharkivska, Sumska, or Zaporizka oblasts, leading to rapid Russian advances			X
Major attack on or critical incident at a major energy or utilities facility in Ukraine, causing widespread service collapse			X