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THE RUSSIAN CHALLENGE

A Polish-German expert paper for a new Russia policy

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Cover image: Polish-Russian border in Dabrowka, Poland, on November 30, 2024
Photo: Imago/NurPhoto

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Each section was prepared jointly by a Polish and a German or Austrian author.

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WHY THIS PAPER?

Can German-Polish cooperation become the driving force behind a new European Russia strategy? Obviously, a strong tandem with Warsaw and Berlin would make the West much more resilient and capable of action, but their policies have so far failed to come together. In view of all the historical and political ups and downs in German-Polish relations, their policy towards the Kremlin was and is one of the key issues that traditionally divides Warsaw and Berlin.

It is not despite these differences that the inevitability for a coordinated Russia strategy between Germany and Poland is essential, but precisely because of them. If these conflicting perspectives resulting from different historical experiences were to find common ground in their Russia policy, the foundations of the common European house would become significantly stronger. On the threshold of the fourth year of the full-scale invasion Ukraine is fighting for survival. If Kyiv is to have any chance of repelling the attack and ending the war on its own terms, a joint strategy by two major European supporters is essential.

4 “At a time when the future of Europe is at stake in the face of Russia’s aggression, it is even more important that Germany and Poland undertake a joint effort for a new European Russia policy”

While the gap between the way Germans and Poles view Russia has narrowed after the 2022 attack, significant differences and even estrangement remain: While Poland has consistently argued for decisive Western action to achieve a defeat of the Russian regime in Ukraine, German policy up to now remains much less determined. Unlike the Polish position, the German Chancellor has never made up his mind to promote a victory for Ukraine.

The “Zeitenwende” that Chancellor Scholz has been calling for immediately after the full Russian invasion in February 2022 remains stuck halfway. Because of this, governments in Central and Eastern Europe wonder: if they were attacked tomorrow, would Germany be willing and capable of providing effective assistance?

Poland’s geopolitical weight has grown and, thanks to its resolute approach to Russia, Warsaw is now able to forge new security partnerships in Europe’s Central and Northern dimension. It is building a ‘coalition of the willing’ with like-minded Scandinavian and Baltic states. Poland is waiting for the outcome of the parliamentary elections in Germany to see whether a joint approach to the Russian challenge could be feasible. The Polish EU presidency in the first half of 2025 can add to the Polish impetus at this crucial moment for Ukraine and Europe. At a time when the future of Europe is at stake in the face of Russia’s aggression, it is even more important that Germany and Poland undertake a joint effort for a new European Russia policy. Precisely because the Franco-German engine as the former key to Western European integration has lost traction and thus the potential to integrate the diverging interests in an enlarged Europe that includes Central Eastern Europe since 2004.

If Poland and Germany can find common ground on their policy towards Russia despite their entrenched differences, this will greatly facilitate a European accord. Their lingering antagonism makes a common Polish-German policy on Russia all the more compelling for the other member states. Finding common ground must not necessarily mean meeting half-way between different standpoints. A new start should arise from shared insight and interests, if there only is the political will to cooperate.

Our paper aims to contribute to this endeavor.

Introduction

WHAT IS AT STAKE

The outcome of the Russo-Ukrainian war will determine the future of the international order, in particular the future pathway for Europe, and thus define the conditions in which our societies will have to live perhaps for decades to come. It is therefore in Europe's vital interest that the outcome of the war will be favourable to Ukraine. This means that Ukraine: 1) must preserve its independence, i.e. the ability to determine its inner and outer destiny, in particular the right to join NATO and the EU; 2) should re-establish its control over the territories within its internationally recognized borders.

One may dismiss this as “maximalist goals” However, what is at stake is nothing less than the core principles of international law and the European peace order. In fact, these goals can only be achieved by supporting a military victory for Ukraine – or at least putting it in a position that enables Kyiv to negotiate with Russia from a position of military strength.

Russia's full-scale attack on Ukraine in February 2022 opened a new chapter in European and even world history. It was a culmination of the Russian Federation's revisionist policies, the aims of which had been clearly laid out in draft treaties presented by Russia to the US and NATO in December 2021. The West's acquiescence to these terms would create a new, Yalta-style insecurity order in Europe, based on the principle of spheres of influence, where Ukraine and other so-called post-Soviet states would be fully subordinated to the Kremlin. Central and eastern Europe would become buffer states in the shadow of Moscow's overwhelming military preponderance.

There should be no illusion that the Kremlin will accept some kind of a negotiated end of the war below a de-facto submission of Ukraine, as long as it believes that victory is within its grasp. And as long as the West will not demonstrate by deeds that it has the political will to defeat Russian revisionism, the Kremlin will have all the incentives to continue the war as long as it has sufficient human and material resources. The idea of a compromise agreement based on

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the principle of “peace for territory”, which is often discussed in the West, is based on a fundamental misunderstanding of the Kremlin's key war aims, namely to deprive Kyiv of its sovereignty by limiting its right to conduct foreign and security policy (neutralization and demilitarization) and to acquire a formal right to intervene in Ukraine's internal politics (“denazification”).

Putin and his entourage are determined to achieve its aims because it sees victory in this war as a necessary condition for their own political survival. They believe that control over Kyiv is absolutely essential both for ensuring the security of the regime and for rebuilding Russia's position as a great power. They believe – not without reason – that a stable and prosperous democracy in Ukraine will undermine their autocratic system.

Putin has repeatedly claimed that Russians and Ukrainians are essentially one people and questioned Ukraine's right to exist as an independent state. According to this imperial logic, the unrestricted brutality of Russia's warfare against Ukraine is punitive action against a breakaway colony and against all Ukrainians who refuse to be part of the “Russian world”.

Finally, taking into account the Kremlin's record of violating international agreements (among others the Budapest Memorandum of 1994, The Good Neighbourhood Treaty with Ukraine of 1997, the INF Treaty, The Chemical Weapons Convention), neither Kyiv nor Western capitals can be confident that Moscow will not violate any war-ending agreement as soon as it deems it convenient.

Therefore, the stakes in the Russo-Ukrainian war are extremely high. A Russian victory will have far-reaching consequences:

- It will mean the end of Ukrainian sovereignty and of Ukrainian democracy. It will also mean that millions of Ukrainian citizens living under Russian occupation will be subjected to state terror, forcible de-Ukrainization and Russification.
- Among Ukrainians, a Russian victory could trigger an anti-Western backlash. While many may remain committed to the idea of Ukrainian independence and democracy, other Ukrainians may conclude that the West betrayed them. Moscow is likely to exploit this anti-Western resentment for its own purposes
- An end to the war on Putin's terms will demoralize democratic actors in the entire region, who have worked hard to strengthen their countries' independence by engaging with the West. It will heighten their fear that Russia might use military coercion with impunity if they cross the Kremlin's red lines.
- In the wider region, a failure of the West will also be widely interpreted as a confirmation of the Kremlin's propaganda, claiming that liberal democratic systems are unable to compete with authoritarian regimes in providing security for their citizens and allies.
- The Kremlin will treat Kyiv's surrender as a victory over the West, and as proof that the latter is incapable of mobilizing and using its superior resources to defend itself and its allies. Moscow will be emboldened to provoke or confront the West with demands similar to those it presented in December 2021, which included a ban of NATO forces on the territory of eastern flank Alliance states. Moscow aims at a total revision of Europe's post-Cold War security arrangements.

- With any success of its aggression against Ukraine, the Kremlin will surely further intensify its hybrid warfare against the West. If the Kremlin comes to the conclusion that key NATO states (in particular the U.S., Germany, France) are unwilling to respond militarily to Article 5 contingencies in Central Europe and the Baltics, Russia might be tempted to stage a military invasion into Eastern flank states. Moscow might take such a risky step despite being militarily weaker than the West as long as it enjoys relative superiority on NATO's eastern flank. Such an attack would create a political dilemma for the West by forcing it to choose between either accepting a new status-quo where Article 5 guarantees can no longer be relied on, or to getting involved in a military conflict with Russia, in which the latter might resort to using tactical and intermediate nuclear weapons.
- More broadly, Moscow will seek a "multipolar" international order, where great powers would have a right to use force to "discipline" their neighbours, to change borders and to establish spheres of influence by imposing their will on other states and limiting their sovereignty.
- On the global stage, this would encourage Russia, China and other authoritarian powers like Iran to challenge the West on all fronts and aggressively pursue her hegemonic agenda. There is no question that the Chinese leadership will be encouraged to more forcefully assert its claims against Taiwan, Japan and the Philippines, perhaps even India. This, in turn, will create additional pressure on the U.S. to reduce their military commitments to Europe, which at this stage will be facing increased threat from Russia. In a worst-case scenario, an armed conflict involving China and the U.S. in East Asia will provide additional incentives for the Kremlin to resort to military force to impose its terms on Europeans.
- A Russian success in Ukraine is also likely to trigger nuclear proliferation, especially in Asia, where states like South Korea, Japan and perhaps others would seek to guarantee their security with nuclear weapons as the only reliable deterring factor, after their Western allies demonstrated a lack of determination and extreme risk-aversion when challenged by a major rival.

A Russian success in Ukraine will not secure peace in Europe but increase the danger of an even greater war.

A Russian success in Ukraine will not secure peace in Europe but increase the danger of an even greater war. With Ukraine defeated, the ratio of forces will be less advantageous for the West.

Beyond Europe, a “multipolar” great power order is bound to be extremely conflict-prone. Neither Russia, nor China, nor other non-Western powers are willing or capable of ensuring global stability. If Russia manages to vassalize Ukraine, this will become a sign for other powers that international law has been replaced by the rule of the fist. This example is likely to be followed by others. Secondly, the victorious alliance of authoritarian powers is bound to intensify its subversion of the democratic political systems of the West.

For all these reasons, it would be an error of historic proportions for the West to push Ukraine into an agreement on Russia’s terms.

The West at a historic crossroads

There are only two realistic scenarios for ending this war that would be desirable for the West. We would call them a “Germany November 1918” scenario and a “Russia February 1917” scenario. Under the November 1918 scenario, Ukrainian armed forces would inflict such defeats on the Russian army that its command realizes that the war is lost, even though Russian forces would still be in possession of Ukrainian territory. Under the February 1917 scenario, the economic and social strains of war would provoke a split in the ruling elite and a grassroots rebellion in the armed forces, followed by the collapse of the Putin regime. Both scenarios presuppose that Ukraine will be able to go on the military offensive and Russia’s hope for victory will be broken.

At the moment, we are very far from either scenario. Western support for Ukraine – particularly in Washington and Berlin – has been constrained by two fears: first, that Putin might resort to the use of nuclear weapons and expand the war to NATO territory when he is on the verge of defeat; and second, that the Russian regime might collapse, setting free chaos in a state with thousands of nuclear warheads.

However, appeasing the Putin regime at the expense of Ukraine and European security cannot be the answer to the fear of escalation.

This would only increase the risk of a direct clash between Russia and NATO later. Rather, the West must counter the Kremlin’s threats with a credible policy of deterrence that leaves no doubt about NATO’s readiness to defend itself and the rule based international order. Weakness emboldens Putin, strength deters him.

Regarding further developments in Russia, the West should fear to strengthen the Putin regime more than its failure. The current regime is not a factor of stability, either externally or internally, quite the opposite. The West should rather encourage those forces in Russia that see Putin’s wars as a threat to the country’s future. A change of power in Moscow will highly likely strengthen those Russian voices who do not support the aggressive foreign policy of the current regime and seek some kind of arrangement with the West.

The war is now approaching its decisive phase. Despite Ukraine’s resilience and impressive technological advances, its outcome is largely in the hands of the West. It is not yet too late to turn the tide in Ukraine’s favour. Clarity is urgently needed regarding our strategic goals about the outcome of the war. This applies all the more in view of Donald Trump’s comeback as US President. If there is a chance that America will continue to stand by Ukraine’s side, then only with decisive European action. And if Trump will scale back U.S. support for Ukraine, it will be all the more urgent for the European democracies to step up to the plate.

Even if the liberation of all Russian-occupied territories and millions of Ukrainians living there cannot be achieved in the short term, Ukraine’s full political sovereignty, including its right to integrate with the European Union and NATO, must not become bargaining chips in a diplomatic game with the Kremlin. This is the minimum that the West owes to Ukraine and to itself. Washington as well as European governments must not yield to the temptation of following an “easy” and “cheaper” path of accommodating Russia at the cost of Ukraine. In view of the stakes involved and the Kremlin’s long-term objectives, the full-fledged support for Ukraine is actually the best – and by the way also the least costly – option for the West.

Chapter 1

CAN WE FIND COMMON GROUND? POLISH AND GERMAN RUSSIA POLICIES THEN AND NOW

For many years, Germany organized its thinking about relations with Russia around the question how Moscow could be included in order to build a mutually beneficial European security system. The rationale was that deepening ties would lead to an alignment of interests. Germany's weight allowed it to largely shape the EU's stance, symbolized by the "Partnership for Modernization" first formulated by then Foreign Minister Frank-Walter Steinmeier in 2008.

Successive Polish governments have long warned against such a "Russia-first" approach. The Eastern Partnership, proposed by Poland and Sweden, was supposed to balance this by turning Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine from countries-in-between into common neighbours with agency. This balancing act worked only partially.

Warsaw has pointed to Moscow's failure to come to terms with its totalitarian past, to the resurgence of militarism and revanchism in Russia, and to systemic corruption and a slide toward an increasingly authoritarian system – that grew more aggressive externally and more repressive internally. Following the annexation of Crimea, Poland called for a thorough policy shift. However, what ensued was rhetorical revolution and a mere facelift of policy. A striking illustration of this was the signing of the agreement to construct Nord Stream 2 in 2015, just one year after Russia's aggression.

Four Erroneous Assumptions lead to Flawed Policies

The "Russia-first" camp based its policy over the last two decades on a set of erroneous assumptions that led to flawed choices. They need to be discarded and replaced.

1) The first flawed premise was that a stable security order is only possible with Russia, never without it, let alone against it. Thus, Russia was given special treatment and

attention. In fact, Western policy should be focused on building a sustainable security order without the self-imposed prerequisite of normalizing relations with Russia.

The invasion of Ukraine marks a fundamental change in the security environment. Russia will remain a threat for years to come, so the West should pursue a new security policy not just without it but against it. Obviously, this should include a long-term perspective for a negotiated end of Russia's war against Ukraine through strength and deterrence and in accordance with international law. For it is Russia that excluded itself from the community of law-abiding nations.

- 2) The second assumption was that Russia was essentially like the West and sought roughly the same things. But Russia is not like the West. It has a different vision of international relations and no desire to change this. Russian elites genuinely believe they are at war with the West. Russian society has been shaped by this idea for a long time. And this will not disappear with Putin. A quarter-century of his rule, superimposed on tsarist and Soviet legacies, has solidified the regime. Its democratization or de-imperialization is unlikely.¹
- 3) The third was that Russia had the right to a sphere of legitimate interests in its proximity, at the expense of international law. This approach, exemplified by NATO's refusal to give clear membership perspectives to Ukraine and Georgia after the 2008 Bucharest summit, the weak response to the subsequent Russia-Georgia war and in limited support for Ukraine since 2014, was interpreted by Moscow as a green light for pursuing revanchist ambitions. Accepting a sphere of privileged interests for Russia amounts to granting it the right to plunder its neighbours – an open invitation to future crises.

¹ See Chapter 5 for more on this.

Russia seeks security (of its regime) through corruption, coercion or co-optation in order to subjugate (as in Belarus) or, when that fails, to destabilize (as in Georgia and Moldova) or even eliminate (as in Ukraine) the countries in its orbit. Lasting instability among them has very often been a desirable situation for Russia. Not only does it open a range of opportunities for hostile interference, it also allows Russia to portray itself as a stabilizing force. Russia's irritation with NATO- and EU-enlargement does not stem from geopolitical fears but from 'security interests', specifically the survival of its kleptocratic regime. Integrating Ukraine (and other Eastern Neighbourhood countries) with the EU and NATO would remove an important bargaining chip for Moscow. One of the goals of containing Russia should be to foster stable political systems, well-functioning economies, capable armed forces and well-organized societies in neighbouring countries.

Accepting a sphere of privileged interests for Russia, granting it the right to plunder its neighbours – an open invitation to future crises.

- 4) The fourth assumption was that inadequate communication was the reason for tensions, and that more dialogue, trade and pipelines could mitigate that. This was exemplified in the Wandel durch Handel slogan, which suggests that interdependence leads to change. In reality, more ties brought more tensions. This approach was partially debunked after 24 February 2022, when summits, ministerial meetings and joint institutions were suspended. Dialogue for the sake of dialogue was proven futile.

The belief in the benign effects of interdependence must be abandoned, because for an authoritarian state with imperial ambitions, interdependence is a form of leverage, a "weapon", while for its democratic partners, it is a source of vulnerability. For years, Russia's key exports

to the EU have been deception, disinformation, corruption, uncertainty and now fear. These 'products' were supported by an infrastructure built on oil, gas, financial and personal connections. Today, those channels have weakened, but Russia no longer pretends to be kind – it is openly interfering in states' internal affairs. The West therefore needs to increase the cost of such hostile actions by expanding sanctions.

Wanted: A Profound Shift in Attitudes

A new comprehensive Russia policy poses a political challenge, because it requires a profound shift in attitudes deeply entrenched among leaders and the public in Germany.

Three developments will be crucial in the coming months. The first is the possible reduction of American support for Ukraine and NATO allies. The second are the efforts led by Poland and other NATO members to create a European structure that could partially fill the void. The third is which policies will Germany conduct after the February parliamentary elections.

Many expect that the new U.S. administration will not be prepared to continue spending money for the defence of Ukraine and Europe to the same extent as its predecessor. Yet, the size of the cuts is unknown. In the best case, reasonable support will remain – if the Europeans also increase their share. In the worst case, the US might remove its nuclear umbrella from Europe. In either case, European allies will have to fill the vacuum.

Poland is leading these efforts. There is broad consensus inside the country that the time for decisive all-European action is now and that simply muddling through is not an option. Warsaw will increase its defence budget from 4.3 per cent of GDP in 2024 to a staggering 4.7 per cent in 2025 and is trying to form a group of countries that might take the lead.

A Coalition of the Willing

The core of such a "Coalition of the Willing" seems to be forming among Nordic and Baltic states, including Poland, but at this stage without Germany. The Joint Statement after the Nordic-Baltic summit in Harpsund in late November 2024 set the goal to "work together to constrain, contest and counter

If Germany teams up with Poland, the group's most populous nation joins the most determined.

Russia's aggressive and highly confrontational actions as well as to ensure its full international accountability for the crime of aggression."²

The countries on NATO's eastern flank are key to the continent's security. They are committed to significant investments in this effort and will not tolerate free riding by more complacent partners to the West. This is where Germany, with its economic potential, is expected to step in and to invest in a lasting and stable security environment instead of conducting ad-hoc telephone diplomacy.

Germany's aid to Ukraine has been large in absolute numbers, but much more modest when considering the size of its economy. According to the Kiel Institute for the World Economy's Ukraine Support Tracker, it ranks at 14 with 0.4 per cent of GDP, while Denmark and Estonia provide the biggest share with 1.9 per cent each.³ This might change though. After the February elections, the new government will have to decide whether it will join the leading group. While some in the Social Democratic Party still hope that peace with Russia is possible without much military spending, the Christian Democrats are more determined to strengthen the Bundeswehr and help Ukraine – and polls indicate that they might win. The Greens are also staunchly pro-Ukrainian.

To convince German voters to support pro-Ukrainian positions, two arguments are central:

- 1) Failure to ramp up defence and support for Ukraine might result in costs far beyond those of an adequate effort to contain Russia. One immediate effect of a Russian victory will be that the country's huge armament production will no longer be destroyed at the front but will accumulate and threaten European allies. In the worst case, a war-hardened Russian military will stand at the

eastern borders of Poland, Slovakia, Hungary and Romania. Defence against such a threat will cost multiple times more than present military expenditure, while future US engagement in NATO is uncertain. That might lead some European allies to jump ship by offering the US or Russia separate agreements. All this would be detrimental to Germany.

- 2) Even without the US and large allies like France and the UK, the most determined countries can face up to Russia: This potential group together has a GDP of 4.7 trillion euros, more than twice that of Russia (2.2 trillion). If Germany joined, that figure would increase to 8.8 trillion. Their total population would be 205.6 million, as compared to Russia's 143.8 million.

Weimar Triangle 2.0?

Of course, GDP and population do not automatically translate into military strength. To transform this potential into a deterrent requires will and time. Possibly more time than Russia will grant. Therefore, developing such a group is unthinkable without a minimum of help from the US. Without American nuclear guarantees, and without American boots on the ground at least for some further years, such efforts will fail. But that cannot be an excuse for not trying. The US will find Europe useful, if Europe gets stronger. In America's competition with China, partners might be welcome. But only if they are assets, not burdens.

If Germany chooses to team up with Poland, the group's most populous nation joins the most determined. Here, there is bad and good news: The bad is that traces of the old paternalistic attitude towards its eastern neighbours are still present in Germany. The good news is that the relationship can improve if an old-school Atlanticist, nursed on deterrence and containment, comes to power in February.

If Germany and Poland align, a domino effect might follow. France is unlikely to want a new centre of gravity without being part of it. This could motivate Paris to finally transform the Weimar Triangle from mere phrases into reality. If the UK also joins, such a future European club would include two nuclear powers.

2 Summit statement: <https://www.government.se/articles/2024/11/nordic-baltic-summit-and-new-partnership-with-poland/>

3 Ukraine Support Tracker: <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>

Chapter 2

DEFENCE: DEEP RETHINKING REQUIRED

The last two and a half years of Western military aid have barely allowed Ukraine to survive and maintain a defensive posture, but not to drive Russia back. The reasons for this are numerous – fear of escalation, budgetary and domestic constraints, wishful thinking – but the effects are clearly visible: After more than two years of short-feeding amid hopes the conflict might end in some sort of settlement, Ukraine has lost a tremendous amount of skilled and experienced military personnel. Its armed forces have degraded so far that rebuilding them so that they can apply offensive pressure on Moscow has become ever more difficult. And there is no indication that this can happen soon.

If Russia were to win the war in Ukraine, it would not only complete its genocidal policies of eradicating the Ukrainian nation and culture. Large swaths of its security apparatus (not only the armed forces, but also the FSB, National Guard and other police forces) will be deployed to occupied areas in order to impose russification. Settlers brought to occupied Ukraine by Russia will own their security, property and social rise to Putin's new empire, and hence try to preserve it at all cost. Any outcome other than a Russian strategic defeat is likely to strengthen the present revisionist and imperial regime in Moscow – including a “frozen” front with large parts of Ukraine under occupation.

Poland's position is that only Ukrainians can decide about themselves and that they are fighting not only for their independence, but also for the possibility of integration with Western institutions (NATO and EU). The role of the West should be to enable Ukraine not only to defend itself, but also to support its integration process. Only NATO accession can provide credible security guarantees and deterrence against another Russian invasion. At the same time, Warsaw perceives Russia as an existential threat, prompting it to begin the largest transformation and modernization of armed forces in post-Cold War Europe.

Poland's strategic goal is to develop armed forces capable of engaging in a full-scale conflict with Russia.

Unlike Western Europe, the Polish Armed Forces have not fully transitioned to out-of-area crisis response operations and maintain more armored, and mechanized brigades (12 in 2021) than their Western counterparts. On the downside, the majority of Poland's tanks, artillery systems, and all infantry fighting vehicles were outdated Soviet-era equipment, some dating back to the 1960s. Additionally, many of these units were understaffed. Russia's 2022 reinvasion of Ukraine spurred Poland to transfer almost all of this obsolete equipment to Ukraine and rapidly purchase a significant amount of modern weaponry, primarily from the United States and South Korea. In response to the conflict, the Polish General Staff devised a plan to transform the Armed Forces by 2035, which is now being updated with a target of 2039. The specifics of this plan remain classified.

Poland's strategic goal is to develop armed forces capable of engaging in a full-scale conflict with Russia, but this process is expected to take at least another decade and is subject to various vulnerabilities. For now, there is widespread agreement within Polish society and across the political spectrum to allocate more than four percent of GDP to defence in the coming years. However, it remains uncertain whether this consensus will hold in the long term, and whether Polish citizens will continue to be as enthusiastic about volunteering for military service. Volunteers (44,450 are expected in 2024) are crucial not only for boosting the active military but also for expanding the reserve forces. Another challenge is the relatively weak industrial base, which limits the country's capacity for ammunition production, equipment maintenance, and scalability. Overcoming these limitations will be both time-consuming and difficult.

Germany, like most countries in Western Europe, is driven by a “Germany first” policy that prioritizes the recreation of its armed forces and defence within NATO over Ukraine’s needs. On the former, there indeed would be potential room for deeper Polish-German cooperation in NATO to coordinate and strengthen defences in the Baltics and the Eastern Flank’s northern part. This would mainly concern the established joint commands Multi-national Corps Northeast (ground forces) and Commander Task Force Baltic (naval forces), plus subordinated Enhanced Forward Presence forces – Germany’s brigade in Lithuania. Joint exercises between both armed forces could further strengthen bilateral ties and improve defensive capabilities vis-à-vis Russia.

The Bundeswehr’s state, after 30 years of pivoting towards expeditionary warfare, leaves a lot to be desired (see below). The next German government will face the need to reorganize the Bundeswehr to meet NATO’s integrated force planning goals to deter Russia and enable allied operations in the Baltics. The plans are sound, but two major problems stand in the way of their implementation. One is financing – they would require a budget of roughly 80 billion euros per year. Second is personnel – the Bundeswehr has problems with recruiting more soldiers. A debate about reintroducing conscription has fizzled out in 2024, but may reappear after the Bundestag elections 2025.

For Germany to become the military hub and enabler for defensive operations on the Eastern Flank would require Berlin to be a trustworthy and reliable partner and ally in the eyes of Warsaw – which to a large extent depends on the country’s practical support towards Ukraine. And in this test, Germany has failed dramatically. Not only because the military support – although large in absolute terms – was small in comparison to the country’s industrial capacities. But also because of the political framing as “prudent” (besonnen according to Chancellor Scholz). Germany refused to commit its capable military land vehicle and machining sector to the war effort, because Scholz feared German tanks driving through Europe would undermine Germany’s “anti-militarist” traditions.⁴ Aside from the fact that Western Germany was a well-armed NATO member, this unconditional pacifism calls to question Germany’s commitment to European defence. If NATO were to be defended, German tanks would be all over the place as well.

Any agreement with Russia imposed on Kyiv – attempts made in Budapest and Minsk failed miserably – would evoke painful memories for Germany’s neighbours. For centuries, Berlin, often in collaboration with other powers, has disregarded its eastern neighbours’ sovereignty, treating them as pawns in the game of great-power politics, as seen in the partitions of Poland, the Treaty of Rapallo, and the Molotov-Ribbentrop Pact. To prevent repeating this history, Berlin should treat eastern flank countries, particularly Poland and Ukraine, as equal partners. This shift could open doors for constructive cooperation on military support for Ukraine and deterrence against Russia.

For centuries, Berlin has disregarded its eastern neighbours’ sovereignty, treating them as pawns in the game of great-power politics.

⁴ Bob Woodward, „Krieg“ Carl Hanser Verlag; 3. Edition (21.10.2024), p. 175ff;

What is needed?

Continued military support for Ukraine, development of the domestic arms industry and the simultaneous restoration of capabilities to wage full-scale war are essential. This is not just a matter of adding military items to a shopping list. It requires deep rethinking and reconceptualising defence as such. The pitfalls go beyond individual items – they concern the survivability, sustainability and scalability of the military as such:

- 1) **Survivability:** In a possible war with Russia, European armed forces would – regardless of high professional standards – sustain manoeuvre warfare for roughly a week. Then, Russian drones would have damaged and destroyed so many vehicles that manoeuvring would be impossible. Lack of electronic warfare (EW) systems, air-defence, and drones to defend against a veritable drone army, will cause crippling losses among soldiers and equipment. Moreover, our logistics heavily rest on a handful of civilian enterprises to maintain and repair the current fleets of vehicles and aircraft, all of which would be subject to missile and drone bombardments in the event of war.
- 2) **Sustainability:** The Bundeswehr not only lacks the ammunition reserves to sustain a war – current artillery ammunition would last a few days, and building up larger stockpiles is hampered by the lack of safe storage sites – it also lacks reserve capabilities of men and material. Ukraine thus far has lost 3,107 armoured fighting vehicles of all kinds in the war, and replenishing the losses becomes a problem for the West supporting Ukraine. But even if the materiel was there, Europe lacks the personnel reserves to replenish possible losses, in particular officers and specialists. While forced mobilisation could generate a lot of soldiers on paper, there would be insufficient officers to train them and lead them in combat.

The Bundeswehr not only lacks the ammunition reserves to sustain a war. It also lacks reserve capabilities of men and material.

- 3) **Scalability:** Constraints in personnel and materiel will also affect other western European armies' efforts to scale up their capabilities. At the beginning of the full-scale invasion, Ukraine's armed forces consisted of 29 manoeuvrable brigades (20 in the land forces, seven air mobile and two naval infantry brigades). 31 territorial defence brigades were just created on paper and had barely formed. Now, in the third year of the war, the Ukrainian armed forces have ballooned to over 150 brigades of all types. Despite all modern technology, force density, especially the availability of infantry to control territory, retains a key role: low density of Russian forces facilitated Ukraine's Kursk (2024) and Kharkiv (2022) offensives, while high Russian force density was pivotal in denying the Ukrainian summer offensive of 2023. If NATO as such would be attacked, the necessary space of operations would be even larger. Furthermore, the European rear and the critical infrastructure that needs protection by territorial defence forces are also larger.

Chapter 3

RUSSIA'S HYBRID WAR AGAINST THE WEST AND WHAT TO DO ABOUT IT

I. Russia's Hybrid War

For more than a decade, Russia has waged a hybrid war against the West. Putin's strategic aim is to build a new version of the Russian empire (or at least a Russian zone of influence), and to this end he is striving to weaken the West in every way possible. The goals and elements of this hybrid war are well-known – polarizing Western societies and undermining trust in democracy and its institutions, fostering the rise of populists, extremists and separatists, eroding support for Ukraine by playing up the fear of escalation and appealing to ingrained pacifist sentiments, bolstering the legitimacy of the Putin regime and allowing it to enjoy the benefits of access to Western markets. Fear of escalation is already working as can be seen in the withholding of military support, as described in Chapter 2. The essence of the Kremlin's hybrid tactics is – at the current stage – to stay below the attribution radar to avoid an open military confrontation with NATO which is feared by Putin's regime. This allows Moscow to test the West's resolve and cohesion and exploit its weak spots.

Russia's hybrid war has become even more aggressive since the large-scale invasion of Ukraine in 2022. Hybrid warfare has many facets, including a full-scale information war against our countries, massive interference in elections, such as in Romania, cyber-attacks against our politicians, public institutions and infrastructure. Spying has become ever more abundant. There is sabotage and attempts at elite capture. The list of attacks attributed to Russia is growing fast – ranging from arson and the destruction of equipment, cyber and physical attacks on railways and the armament industry, to assassination attempts. The regime has established dedicated structures for hybrid warfare – such as the General Staff Main Directorate for Deep Sea Research (GUGI) or media outfits like the Social Design Agency (SDA).

Moscow is becoming more reckless and brazen – there are credible reports that its sabotage attempts (see strong suspicions of recent targeting of Finnish water supplies and planting explosives on German cargo planes) are endangering the lives of many people in Europe. The latest case from November 2024 also points to growing evidence of Russia using Chinese help in suspected cases of cutting undersea cables between Sweden and Estonia and Germany and Finland. All those incidents come on top of a long-term series of cyber-attacks, GPS jamming and other forms of hybrid actions aimed at stoking fears and insecurity. The situation has become so serious that the Finnish government has publicly mentioned the possibility of invoking Art. 5 of the Washington Treaty (NATO's doctrine envisages such a possibility in response to foreign hybrid attacks).⁵

Poland and Germany are prime targets in Russia's anti-Western crusade. As heavyweights in the EU and NATO, they have a strong bearing on Western policies on issues crucial for Russia, such as sanctions and military support to Ukraine. Germany is the main logistics hub for NATO (e.g. it houses key military installations, US troops and US European command), while Poland plays such a role for the eastern flank and military assistance to Ukraine. Russia spares no effort to manipulate both Poland, and Germany, from within. There are common themes like the attempt to weaken the solidarity and support for Ukraine and the denigration of international institutions, especially NATO and the EU. There are also crucial differences such as the appeal to Germany's peace movement and deeply rooted anti-American sentiments in some social strata – both have no equivalent in Poland. Yet overall, for all our differences in the approach to Russia, the extent of Putin's hybrid war has been severely underestimated in both countries.

⁵ <https://www.politico.eu/article/finland-defense-minister-antti-hakkanen-nato-eu-critical-networks-undersea-cables-damage-russia-baltic-sea/>

To illustrate this observation: both states have been attacked during Operation Doppelgaenger which was investigated, inter alia by the FBI and the Counter Disinformation Network (CDN). This campaign was conducted by the SDA media company at the Kremlin's behest; according to the FBI its clear goal was to "escalate internal tensions ... in order to promote the interests of the Russian Federation," as well as "to influence real-life conflicts and artificially create conflict situations" via fake articles, influencers, as well as targeted posts and comments on social media.

Poland has been a key target of Russian disinformation and hybrid attacks for decades. Polish society is more resistant to Russian manipulation than countries further west due to better understanding of Russian history and policies. But even though pro-Russian sentiments are difficult to generate in Poland, the country is not immune to cyber-attacks and other forms of hybrid operations. And those have been escalated recently to such an extent in Poland that arson, reconnaissance, and disruption of key transport routes are openly attributed to Russia. In October 2024, the Polish Foreign Ministry ordered the closure of the Russian Consulate in Poznań, citing acts of sabotage.⁶ The last few years saw intensified weaponization of migration. Moscow has been working together with Minsk in an operation using illegal migrants to exert pressure on Poland's (and the EU's) eastern border – tellingly 90 per cent of those trying to cross illegally have a Russian visa.

The case of Pavel Rubtsov, a Russian agent masquerading as a Spanish journalist who was caught and jailed in Poland before being exchanged in the August 2024 prisoner swap, exposed the weaknesses of Poland's democratic openness and legislation, allowing Putin's regime to recruit some influencers and gather information of sensitive nature.

Due to the turbulent nature of Polish-Ukrainian history, Moscow is relentlessly trying to play up any divergences between Warsaw and Kyiv, aiming to undermine Polish resolve in helping Ukraine. The presence of a large Ukrainian refugee diaspora (often Russian-speaking and using Russian communication platforms) complicates the task

of identifying Russia's malign influence operations. Numerous Ukrainians living in Poland have for example been recruited by Moscow for a variety of disinformation and sabotage activities.

Chancellor Scholz' Zeitenwende has brought Germany closer to the Polish view on Russia. Germany scrapped the Nord Stream project and is now Ukraine's second biggest military supplier. But differences remain in the way that both countries look at Russia. Unlike in Poland, there are strong fears of escalation among Germans and many people, especially in eastern Germany, do not feel that Russia directly threatens their security. Many support opening negotiations for a peace deal and an end to Germany's military support to Kyiv. Although reports of Russian fake news, manipulated debates and sabotage attacks have become more frequent in recent months, German society is far from realizing that it has become a top European target in Russia's hybrid war.

Russia has been manipulating public debates in Germany for years and systematically fostered mistrust during the migration crisis, the COVID-pandemic and the war in Ukraine. Moscow has also actively promoted and supported anti-Western and pro-Russian parties like the AfD and Bündnis Sahra Wagenknecht and unleashed a formidable digital tsunami in social media. Russian secret services have murdered people in Berlin in broad daylight and are suspected to have plotted attacks against military facilities and the CEO of the Rheinmetall arms manufacturer. Yet despite Moscow's undisputable culpability in the war against Ukraine, surveys and election results show that pro-Russian convictions are on the rise in Germany.

German society is far from realizing that it has become a top European target in Russia's hybrid war.

⁶ <https://www.gov.pl/web/diplomacy/minister-of-foreign-affairs-decides-to-close-russian-consulate-in-poznan>

II. What is to be done?

We need to realize the full scope of Russia's hybrid war and impose a cost on the perpetrators. Russia is attacking the core of our democracy. It manipulates our opinions, our debates, our elections – and we still treat this as a side issue. This cannot go on. Hybrid warfare must be treated as a priority security issue.

Our governments need to devote far more attention and resources to this challenge. We need to develop a broad toolbox of defensive and offensive measures that mirror the weapons of the aggressor. We also need effective mechanisms that enable us to adopt the best possible countermeasures nationally and internationally.

Attribution needs to be used more frequently and with less hesitation. There should be proactive publicizing of specific cases where there is compelling evidence of Russian culpability – something the US and more recently, Romania, have started doing. Failure to name Russia as a hostile and criminal state, fear of escalation, the lack of a full understanding of the Kremlin's gangsters' logic and reluctance to push back will only aggravate the Kremlin's feeling of impunity and invite further acts of hybrid aggression.

Short-term actions should include a strategy to increase digital platforms' responsibility to take down Russian information manipulation. This calls for enforcing national and European law, active debunking and pre-bunking of disinformation and propaganda. At the same time, a more robust protection of critical infrastructure (energy, IT, defence industry establishments), including counter-drone security, and a more direct signalling to Russia on red lines (e.g. threatening retaliation against Russian assets in case of cyberattacks) are necessary. Governments may be well advised to reuse some of the public campaigns from the past, raising awareness of the real and current threats of Russian hybrid operations (e.g. using posters, TV and video ads etc.). Government, intelligence and the police should actively communicate the risks of manipulation and interference in upcoming elections.

We need a broad toolbox of defensive and offensive measures that mirror the weapons of the aggressor.

A new approach should focus directly on the weaknesses of the Putin regime by exposing regime members' corruption (what Alexei Navalny used to do), tightening or creating counter-espionage laws, tightening sanctions against individuals and companies, by publicizing Russian state failures (rising criminality and social deprivation due to the war against Ukraine), increasing pressure on reluctant partners of Russia by openly explaining the costs of aligning with the Kremlin and by strengthening efforts to reach out to Russian society, e.g. via the European Endowment for Democracy and support for independent Russian media.

Long-term work must involve structural projects and political initiatives, such as building up resilience through e.g. legislation tackling elite capture (anti-corruption, creation of a foreign-influence transparency register, developing and policing implementation of regulation on enforcing counter-disinformation culture of digital platforms), projects promoting media literacy, investing in civil society and promoting cooperation with businesses to defend against hybrid activities.

Poland and Germany should establish a joint group to analyze the conduct of Russia's hybrid war and propose concrete measures to counter it. They should carefully study Russia's actions today (such as sabotage and manipulation in the digital sphere including artificial intelligence) and draw applicable lessons from the Cold War, especially those which successfully addressed Soviet patterns of hostile activities, now continued in a modernised format by the Putin regime (push-back against propaganda, degrading of Moscow's ability to infiltrate Western institutions etc.). Proposals should include measures strengthening counterintelligence and counter-hybrid

capabilities against Russia. Both countries should also take a lead in building a European consensus for meaningful restrictions placed on movements of Russian officials within the Schengen zone. In view of advanced forms of economic interdependence between Poland and Germany there is both a need and a scope for conducting joint resilience exercises, involving representatives of the private sector (a good model is offered by the Nordics and Czechia).

The Weimar Triangle framework could be used to develop and promote 2-3 initiatives where there is clear agreement between three capitals (e.g. early warning and response system on information manipulation, pooling resources on countering cyber-attacks, exposing sabotage networks used by Russia against France, Germany and Poland). Bearing in mind the extensive use of the Telegram platform for planning, recruitment and conduct of hybrid operations, the case opened against its founder Pavel Durov in Paris might lend itself to trilateral cooperation. Other themes include developing policies for AI and democracy in the EU, promoting education on media literacy.

If possible, Berlin and Warsaw should jointly lobby for a logical international division of labour in terms of responses – NATO/EU/G7 to lead with developing more robust policies, standards and agree on response measures, then implement those which fall within their purview (e.g. NATO looking after physical security, while the EU works on legislation and provides funding for resilience projects), while individual states pick up implementation which is within their mandate (Telegram case).

III. The Cost of Non-Action

Past experience and expertise points to a strong correlation between weak (or absent) responses to Russian hybrid operations and Moscow's intent to intensify such attacks. If the problem is assigned low priority and generates only verbal, pro-forma responses, it will not go away – on the contrary, it will get worse. Good analysis helps, but is not enough at this stage. In some domains – e.g. security of military installations (NATO bases) – the Kremlin is still focused on the reconnaissance phase. When it comes to elements of critical infrastructure (undersea cables), it has already moved to actual sabotage. We cannot allow it to believe that it can move to even more brazen forms of attacks. With political will we have the means and capabilities to deter it. Germany and Poland should take the lead in this task.

When it comes to critical infrastructure (undersea cables), the Kremlin has already moved to actual sabotage.

Chapter 4

WHAT SANCTIONS CAN DO

Western sanctions and the escalating costs of war are destabilizing the Russian economy. The imposed measures were intended to work through several channels, each with its own timeline for impact. Financial sanctions, such as those (partially) cutting off Russia from international finance, often have immediate and potentially significant effects in the short run, as was witnessed in initially strong reactions to the rouble exchange rate. Trade sanctions, on the other hand, especially targeting technological investment goods or other inventory-dependent items, take longer to manifest economically beyond their direct impact on imports and exports.

Given that Russia is a relatively large economy, studies suggest that even the most extreme hypothetical scenario of a total global embargo would yield a cost on the Russian economy in the range of a 20 per cent fall in GDP in the medium term. Countries like Iran or North Korea demonstrate that even under harsh sanctions economies do not collapse – and even Ukraine’s economy – where the war is actually taking place – has not collapsed. Thus, the expectation of a rapid collapse of the Russian economy due to sanctions alone was unrealistic from the outset and in fact never their aim.

Instead, the sanctions are intended to weaken **Russia’s ability to finance the war**. Hence, we should not ask if the Russian economy has collapsed, but rather what would the situation be today without sanctions? By this metric, the sanctions have indeed increased the costs of waging war for the Kremlin, albeit with some limitations.

Status Quo Analysis: What Works and What Doesn’t

While Russia’s macroeconomic numbers suggest growth – GDP was up 3.6 per cent in 2023, and a similar rate is projected for 2024 – it is crucial to look beneath these figures. Reported GDP growth is largely driven by public spending related to the war effort, which has barely had a positive effect on the welfare of ordinary Russian citizens. Increased armaments production does not translate into an improved quality of life – no Russian is better off because of a newly manufactured rocket destined for the front lines. Hence, GDP growth figures reveal little about the true condition of the economy and living standards in Russia. Even with this big caveat, not all figures look rosy: Rosstat reported annual inflation at around 8.5 per cent in early November 2024 and the Central Bank interest rate is 21 per cent.⁷

In 2024, total war-related spendings, including on national defence and internal security – the National Guard and the Federal Security Service among others – are expected to consume around 40 per cent of the budget, equivalent to 10 per cent of GDP. A further increase is planned in 2025. As a result, the Kremlin’s prioritization of war efforts is absorbing the country’s financial, productive, and human resources, weakening the civilian sector. In the sectors that seem to show growth, state-owned companies produce, and the state procures, at arbitrary prices, which are likely to contain substantial hidden inflation. Thus, it is inaccurate to call it real growth – exactly as was the case in Soviet times – when hidden inflation was later assessed at 3 per cent of GDP each year.

⁷ Other research, e.g. from the Romir Institute, suggests that the actual increase in the prices of goods and services during that period was more than 20 per cent.

Technological regression, combined with Russia's demographic crisis, is already a major factor hampering economic activity.

As a result, the civilian sector, heavily impacted by sanctions and financially drained by the state, is unable to meet growing domestic demand. Following the withdrawal of many Western investors, the Russian market is now filled with expensive, often lower-quality imported goods. Additionally, Russia encourages the bypassing of sanctions by so-called parallel importing through neighbouring countries like Belarus, Turkey and Kazakhstan. This practice, sometimes dubbed the „Eurasian Roundabout,“ involves rerouting sanctioned goods through intermediaries before they reach Russia. While this does allow some necessary imports to continue, these goods are far more expensive – often up to 40 per cent above pre-sanction prices. Additionally, the overall quantities imported are far less than pre-sanctions imports directly from Western countries, and the higher costs add significant strain to the economy. Overall, China has become Russia's main supplier, accounting for about 40 per cent of Russian imports in the first half of 2024. However, China primarily provides finished goods rather than components needed for domestic production. Russian raw material exporters, cut off from Western markets, are also facing significant challenges. The mining industry, critical to Russia's economy, has been in decline since 2023. Although many exporters have found new buyers outside the West, their profitability has sharply decreased due to higher costs of logistics, cross-border financial operations, and lower prices because of a weakened bargaining position.

The negative impact of cutting off Russia from Western technology through trade restrictions will intensify in the long term. For the past 30 years, Western countries – especially EU member states – have been the primary source of high-tech goods for Russia. Currently, countries that have not joined the sanctions either lack the technologies Russia needs or are unwilling to share them, viewing Russia as a competitor or fearing secondary Western sanctions, with China being a prime example. The loss of Western technology suppliers poses a particular threat to the development of new, often hard-to-reach, Russian oil reserves, and to maintaining the high production levels necessary to finance the war. Growing pressure from the U.S.

is also increasingly hindering the development of Russia's LNG sector. With Gazprom facing challenges in pipeline gas exports, liquefied natural gas was supposed to provide flexibility to the sector and help rebuild Russia's position in the global market.

Increasing investment in the Russian economy, which is growing at around 10 per cent year-on-year in 2024, is largely allocated to the arms sector and the replacement of Western production tools. This technological regression, combined with Russia's demographic crisis, is already a major factor hampering economic activity. As a result, production costs will rise, and economic growth will slow down, a trend already seen since the second quarter of 2024. By 2025, GDP growth is projected to drop to below 1.5 per cent. Given these production limitations, substantial budget expenditure will mostly fuel inflation rather than stimulate growth.

Financial restrictions have also proven to be relatively effective. Since 2014, Russia has been unable to raise international capital. Their implementation and enforcement are easier compared to trade sanctions, partly due to compliance requirements for banks like the „know your client“ rule. The effectiveness of these sanctions is further enhanced by fear among banks in China, Turkey, and the Gulf states of being cut off from the U.S. financial market through secondary sanctions if they cooperate with Russian clients. As a result, in the first half of 2024, Russian entities have faced increasing difficulties with international payments and access to foreign currencies, which in turn hampers their ability to import goods. In the second half of the year, problems with export payments intensified. Thus, limited currency inflows to Russia are weakening the rouble and further exacerbating inflationary pressures.

“Russia’s reserves could run out in late 2025”

With shrinking government reserves, the cost of the war is increasingly being felt by businesses and the public. Russia’s liquid reserves in its national wealth fund had shrunk to 56 billion dollars or 2.8 per cent of GDP in November 2024, and Russia has a steady budget deficit of 2 per cent of GDP that needs financing. Thus, Russia’s reserves could run out in late 2025 and the Kremlin is not likely to raise much more in tax revenues, forcing it to cut public expenditures more severely. Vladimir Putin is counting on the West’s willingness to support Ukraine running out faster than his money to fund the war. However, we should not let him do that.

Weakness of sanctions

At present, a steady source of funding for the war comes from revenues generated by export of energy resources. Russia continues to earn from exporting oil to the European Union (due to exemptions from sanctions) and gas (due to the absence of restrictions). Moreover, since mid-2023, Russian oil has been exported at prices exceeding the price cap of 60 dollars per barrel, often with the support of Western entities. Estimates suggest that by mid-2024, about 35 per cent of seaborne oil exports were transported by tankers owned or insured by countries inside the price cap coalition, while the rest was carried by the so-called shadow fleet. This fleet poses a significant threat to maritime safety and the environment, as many of its tankers are outdated and sail with inexperienced crews.

The effectiveness of the trade sanctions is severely undermined by their circumvention through third countries. This is particularly damaging in the case of goods and technologies essential to the arms sector. In 2023, alongside a decline in EU exports to Russia, there was a marked increase in exports to countries neighbouring the Russian Federation, especially Belarus, Turkey, Kazakhstan, and Kyrgyzstan. At the same time, there was a noticeable uptick in deliveries from these so-called connector countries to Russia, suggesting they were being used to bypass sanctions. These trends were particularly visible in Germany’s and Poland’s foreign trade.

Strengthening sanctions

The current effectiveness of sanctions can be strengthened along four clear lines.

- 1) While financial sanctions have proven to be highly effective, stringency across countries could strengthen their impact. The United States is the leader in their use, but the European Union should also actively expand and enforce them, as well as apply secondary sanctions against third-country actors who engage in sanctions’ evasion. Further tightening of financial sanctions by Brussels – including cutting off more Russian institutions (including Gazprombank) from the EU financial market, forcing European banks to withdraw from Russia and threatening third countries with secondary sanctions for supporting Russia – will adversely affect Russia’s financial stability. Poland and Germany could lobby to hit payments for Russian energy exports, which would be particularly damaging to Russia’s budget.
- 2) Trade restrictions can be tightened. Historically, Europe has been Russia’s primary trading partner – in exports (oil and gas), but also in imports, ranging from high tech industrial goods to consumer products. This also means that Europe’s rigorous policies are responsible for the vast majority of the impact of the imposed trade restrictions.⁸ Other Western countries, including the U.S., have had very little trade exposure with Russia before, and thus play only a minor role in leveraging this form of economic power. Specifically, authorities should enhance detection mechanisms for unusual trade patterns. Shipments to countries adjacent to Russia

⁸ As these economic dependencies are often bi-directional, sanctioning was economically and by extension politically costly as well. A case in point was Germany, being much more dependent on Russian oil and gas than other European countries, which made it politically more difficult to disengage.

with different pre-war trade patterns should be systematically flagged, especially for dual-use goods. Coordinating these efforts at the EU level would ensure that loopholes are harder to exploit.⁹

Furthermore, fully ending imports of Russian oil and gas should be a priority. By leveraging intra-European burden-sharing, the economic impact of ceasing Russian energy imports can be mitigated, while significantly reducing Kremlin revenues that fund the war effort. Additionally, it is in the common Polish-German interest to reduce shadow fleet activity in the Baltic Sea – which has, at least partially, become the target of the latest EU sanctions package in December 2024. Both countries could also lobby for an embargo on uranium imports from Russia and a ban on cooperation with Rosatom. Russia's state nuclear energy corporation plays an important role in foreign policy mainly towards countries of the Global South and also provides budget revenue.

- 3) The responsibility of European companies to comply with EU sanctions by their subsidiaries in third countries must be strengthened. The “best efforts” obligation (enshrined in the 14th sanctions package) is not sufficient. The EU Commission's guidance clarifying the ‘best efforts’ principle is not legally binding, and each member state may take different positions on these measures' scope and application.

- 4) With a view towards achieving their ultimate aim of contributing to an end of the war, European policymakers should provide clarity on conditions for lifting sanctions. In light of the Kremlin's actions, the Western coalition should, of course, for now focus on expanding sanctions and decoupling itself from the Russian economy. However, to be effective, the Western coalition must clearly communicate conditions for removing the measures: For example, any lifting of financial sanctions should be conditional upon the restoration of Ukraine's territorial integrity, and all trade sanctions could only be lifted once reparations are paid. This clarity serves as both a deterrent and an incentive for Russia, providing specific steps it must take to normalize relations and have economic isolation reduced. Conversely, the West should not agree to weaken the sanctions regime in exchange for Russia merely halting its military action against Ukraine, as the Russian side has repeatedly demanded. This would allow the Kremlin to rebuild its economic and military potential, likely leading to an intensification of its aggressive policy towards its Western neighbours in the future.

Fully ending imports of Russian oil and gas should be a priority.

⁹ Efforts to combat this practice (in the first half of 2024, Poland imposed financial penalties on over 20 companies, and German Economy Minister Robert Habeck announced increased efforts to enforce sanctions compliance by German firms) should be continuously intensified and coordinated among all member states. Although Russian companies are likely to find new channels to access the goods they need, prices and delivery times will increase.

Chapter 5

WHY LASTING PEACE IN EUROPE IS ONLY POSSIBLE WITH POLITICAL CHANGE IN RUSSIA

There is an intrinsic connection between the Russian regime's character and its revanchist foreign policy. As long as the authoritarian, kleptocratic and over-centralised regime remains in power in Moscow, no innovative political, social and economic development seems possible. Any substantial modernisation would require political liberalisation, which the Kremlin perceives as an existential threat. Retaining lifelong political power is the ruling elite's overarching goal because it secures material wealth and personal safety.

During Putin's seemingly stable rule, Russia was governed in a permanent „special operation“ mode. The Kremlin used military conflicts (from Chechnya to Ukraine) and economic crises to change the language of communication between government and society and to shift the boundaries of what is acceptable in domestic and foreign policy. The anti-Putin protests of 2011/12 have strengthened the Kremlin's resolve to crack down on any pro-democracy movement, both in Russia's neighborhood and within its borders. The systematic suppression of civil society, freedom of expression and any kind of democratic opposition was a prerequisite for Russia's full-scale invasion of Ukraine and the rapid suppression of any significant anti-war protests. The regime is using the war to expand its neo-totalitarian practice of unprecedented interference in the private lives of citizens, mass censorship, indoctrination of children and youth and digital surveillance. The brutal war against Ukraine, with its destructive consequences also for the Russian population, is only possible in an atomized society without political agency.

In more than three decades of post-Soviet statehood, Russia has been unable to develop a post-imperial national identity. This would have required a serious confrontation with its totalitarian past – something that is intrinsically inconsistent with the regime's domestic goals. To legitimize its growingly oppressive rule, the regime promotes a revanchist imperial idea, which draws on the imperial traditions of Russia and the Soviet Union. Driven by an inferiority complex and resentment of the West due to Russia's defeat in the Cold War, it is glorifying Soviet history and appealing to the pre-Soviet imperial past.

This narrative portrays the country as a thousand-year-old civilization facing an eternal threat from the West. Russia is presented as a last bastion defending „traditional values“ against “destructive” and “decadent” liberal democracy. To restore Russia's great power status, the leadership reclaims a geographical cordon sanitaire. Its role is to keep the West at distance and to prevent democratic ideas from contaminating Russian society.

Militarism and violence are seen as integral with Russian heritage. Military interventions in neighbouring states are presented as „preventive“ defence against the West.

The concept of Russia as the “besieged fortress” widely resonates among the Russian population. Deprived of civic autonomy and political agency, it seeks compensation in the imperial might of the state. The regime justifies the war against Ukraine and the “collective West” as a reincarnation of the Great Patriotic War against Nazi Germany – a powerful narrative that largely unites Russians and has become an effective way to mobilise patriotic support for the government and distract from repression and corruption. The world's fear of Russia's destructive power offers Russians a sense of national pride.

For decades, the West has legitimized Putin's increasingly repressive regime in the eyes of Russian society and the international community.

In addition to these narratives, generous transfers and privileges to select groups have created new beneficiaries of the war. They range from members of the defence sector, the repressive apparatus and from those who profit from creeping economic nationalisation and the seizure of Russian and foreign companies' assets to participants in the war and their families. The latter often come from poverty-stricken provinces and are now seeing unprecedented social and financial advancement. This boosts the Kremlin's narrative that war is not just normal but a profitable business and a path to prosperity.

What is needed?

As long as its current power structure persists, Russia will pursue an aggressive foreign policy and remain a major threat to the European security order.

That is why Western Russia policy should aim at (A) making Vladimir Putin's imperial project fail and (B) promoting fundamental political change in Russia.

While developed democracy is not a realistic prospect for Russia any day now, liberalisation, decentralization and pluralism are achievable – albeit not easily. The realistic minimum would be to allow for broader political competition within the ruling elite and between key influential groups. That would create some balance of power to prevent a narrow group of rulers from taking decisions crucial for the global security order, without any scrutiny from the broader elite and the public. The revocation of repressive laws, the release of political prisoners and the lifting of media censorship should be core elements of this process.

While only Russians can change their country, Western policy could shape circumstances conducive to more openness and pluralism. Policies pursuing these aims should focus on the following:

I. Discredit Putin's imperial project and delegitimize him in Russian society

The failure of Putin's neo-imperial project in Ukraine would demonstrate to the Russian political establishment (and to the broader population) that war is endangering Russia's future. Unless the idea of militarism and reviving the imperial past is fundamentally compromised, future governments will likely invoke it to hold onto power. This would stoke tensions and threats to European security for decades to come.

The current indecisive Western policy toward Moscow is counterproductive also in this regard. Negotiating with Putin, while he still believes in military victory due to the West's perceived weakness, is premature and only strengthens his domestic standing and allows him to mobilize more resources for war. Such negotiations would show other aggressive, revanchist states that international law is toothless, that might makes right, and that even genocidal crimes go unpunished. They would also accelerate the global decline of democracies and the rise of authoritarianism.

For decades, the West has legitimized Putin's increasingly repressive regime in the eyes of Russian society and the international community. Russia invested Western money in its military and security apparatus, its propaganda machine, and its subversive operations against Western democracies. At the same time, the regime paid little to no price for its massive human rights violations that were a prelude to the full-scale war.

Now it is in the West's strategic interest to delegitimize Putin's regime and promote his departure from power, which would be an opportunity for political change. Resolute military, political and economic assistance to enable Ukraine to end the war on its own terms combined with more effective sanctions could lead to internal tensions within the ruling elite and a possible change in political leadership, especially if military morale declines quickly. Attacks against military targets inside Russia, together with growing economic problems in Russians' everyday lives are likely to fuel doubts about the war's sense and about Putin's performance as the guarantor of security and stability.

Difficult as it is, the West should work to split Russia's nomenklatura. Members of the elites, who publicly condemn the war and credibly side with Kyiv should be offered safety in the West and be exempted from sanctions, provided they have not committed war crimes. Such cracks could break the perception that there is no other regime possible.

The West's goal should be to disrupt the normalisation of the war in the eyes of the Russian public. Debunking anti-Western narratives should be part of this strategy. Albeit support for the war and the regime remains high, the picture is not as rosy as the Kremlin likes to draw it. Propaganda fatigue is gradually growing, and Russians are increasingly aware of their country's economic grievances. Their attachment to the occupied territories of Ukraine is shallow and abstract but their biggest fear, actively stoked by state propaganda, is that a possible defeat in the war would mean the final decline of Russia.

II. Support pluralism and political alternatives among Russians

There are still millions of independent-minded people in Russia. With political opposition effectively illegal, many local activists, public opinion makers, regional journalists and artists work under increasingly difficult conditions to preserve spaces for critical discourse and civic spirit. These people deserve consistent support from the West, based on strategic, long-term planning. This is not just a humanitarian endeavour but a political enterprise contributing to European security.

Two dimensions of activists' work are particularly important. First, some independent media are still able to reach Russians despite growing censorship. While those in exile can openly distribute anti-regime and anti-war content, those remaining in Russia must carefully navigate the highly repressive environment and tailor their content to specific audiences. Aesopian language and a focus on Russians' everyday hardships instead of "big politics" can often be effective channels of disseminating anti-war messages.

Propaganda fatigue is gradually growing, and Russians are increasingly aware of their country's economic grievances.

Second, overcoming social atomisation and building trust in local communities is a value in itself in an increasingly totalitarian state. Small steps, like formally apolitical initiatives by activists, can pay off in the future, should repressions be eased.

Since 2022, Russia has experienced the largest wave of political emigration in its modern history. Among the hundreds of thousands in exile, a relatively small but active group of civic activists, politicians, journalists and researchers is involved in civil society initiatives, independent media, and political activism.

Support for democratic groups in Russia and in exile needs to be based on clear political criteria: beneficiaries should act in line with anti-war, anti-authoritarian and anti-imperial agendas, even if they are forced to self-censor their public activities. Western donors should revisit some of the practices of the fight against Soviet oppression, including the dissemination of truth about war atrocities and state crimes against Russians.

Most activists are unlikely to play a decisive role in post-Putin politics. They may, however, play a big role in developing concepts and visions of political liberalisation and pluralism for their country's future. They can communicate with Russians about "life after Putin" and "life after the lost war" and the conditions for future rapprochement with the West.

Maintaining contact with potential agents of change in Russia and in exile helps to better understand the local political landscape and public mood and to tailor the Western approach accordingly. However, a broader space for their activities will only emerge if the regime is significantly weakened by military defeat and the adverse effects of sanctions.

III. Consider different scenarios and policies for a post-Putin Russia

In order to prepare appropriate, proportionate, and coordinated policies, the West needs a sober analysis of Russia's domestic strengths and weaknesses, as well as of the risks and opportunities of possible political change.

Turbulent change (like as a result of Moscow losing the war) is widely perceived in the West as a worst-case scenario, even though it could render Moscow less aggressive and less hostile to the rule-based international order. Regardless of who comes to power, a post-Putin leadership would have less domestic control, at least in the first years.

A common stereotype, upheld by Russian propaganda, is that Russia's vast and diverse territory can only be ruled with a heavy hand and that Russians are „organically“ incapable of democracy. In addition, Putin is portrayed as the last line of defence against radical nationalists or criminal groups that might take power if he is overthrown.

In reality, he is Russia's leading nationalist and an internationally wanted war criminal. The damage which the continuation of the current regime does to the global security order is greatly underestimated. And it overlooks the fact that Putinism and the structural grievances it has created pose a significant risk of destabilizing Russia.

Once his personalist dictatorship is gone, the system can indeed become unstable and chaotic. However, competing rivals will mostly fight each other, not neighbouring states. There are also good reasons to believe that the new rulers will be no less interested in securing Russia's nuclear arsenal than the post-Soviet nomenklatura was in the 1990s – if nothing else, to gain international legitimacy.

Possible separatist movements are often cited in this context as potentially leading to a breakup of Russia. However, while anti-Moscow sentiments do exist in the regions, they have little to do with separatist sentiments. Moreover, Russia is much better equipped than the Soviet Union to deal with major turbulence. Russia's economic model is still largely market-based, the small and medium business sector has been flexible enough to survive despite corrupt state capitalism and the once relatively robust civil society is likely to revive when repression is eased.

Regardless of who comes to power after Putin, a normalization of relations should be conditional not only on Moscow abandoning its aggressive foreign policy and paying compensation to Ukraine, but also on a liberalization of domestic politics. A future leader will probably be weaker and more susceptible to pressure, at least until he or she has consolidated power. The Kremlin is likely to view the West as an important source of legitimacy. Western capitals should be prepared to adopt a zero-tolerance policy toward human rights abuses in order to assist democratic groups within Russia.

The damage from the continuation of Putin's regime to the global security order is greatly underestimated.

Prospects for coordinated Polish-German action

Although Russia's attack on Ukraine in 2022 has led to widespread disillusionment with Russia in Germany, fears that regime change could lead to instability with unpredictable consequences remain widespread.

By contrast, Poland experienced Kremlin-sponsored state terror and atrocities during the 20th-century Soviet occupation and the 19th-century Russian occupation. Most Poles' perception of Russia is shaped by the fact that their country regained sovereignty in 1918 and 1989 only because Moscow was too weak for foreign interventions. This historical memory significantly lowers Warsaw's concern about possible political turmoil in Russia.

Both Poland and Germany have a long history of promoting democratic values in Russia through cooperation with Russian civil society and the democratic opposition. This should help to design effective ways of supporting them under an increasingly totalitarian regime.

Germany traditionally had more extensive civil society relations with Russia than most other EU countries. Since 2022, the German government has undertaken a comprehensive review of its policy and now focuses on relations with independent Russian civil society.

Tailored instruments like scholarship programmes and humanitarian visas for individuals, as well as targeted financial support, have made Germany an important hub for Russian civil society, independent media and the democratic opposition in exile. The Foreign Ministry's Eastern Partnership Programme, which supports cooperation between German and Russian civil society, is also open to Polish NGOs.¹⁰

Poland, which has been much more affected by the war and has taken in two million Ukrainian refugees and migrants, has also continued assistance for Russian political exiles mainly with humanitarian visas and support for diaspora networks.

However, all activities to support the Russian democratic diaspora are hampered by the ongoing repression in Russia and the criminalization of many foreign organizations as 'undesirable'. In these circumstances, regular exchanges and coordination of agendas between the two governments, the Polish-German expert community and Russian NGOs and independent media, can contribute to more coherent Western policies towards Russian democratic groups and to a long-term strategy for the transformation of Russia.

Most Poles' perception of Russia is shaped by the fact that their country regained sovereignty in 1918 and 1989 only because Moscow was too weak for foreign interventions.

¹⁰ <https://www.auswaertiges-amt.de/en/aussenpolitik/europe/cooperation-with-civil-society-373732>

CONCLUSIONS AND RECOMMENDATIONS

This report demonstrates that German and Polish experts probably more than ever think alike, not only in terms of diagnosing the situation, but also – and this is crucial – in terms of recommendations for European policy towards Russia. Although the governments of Germany and Poland agree on many aspects of their policy towards the war, including the need for continued support and Ukraine’s undeniable need to preserve its sovereignty, they are significantly apart when it comes to their goals regarding the endgame of the war.

Different goals lead to obvious differences in the nature, speed and extent of military support for Ukraine. They also result in divergent preferences when it comes to specific policies (e.g. sanctions, the degree of isolation of Putin’s regime). Furthermore, up to now, Berlin and Warsaw differ in the response to the “Russian problem.” A rapprochement between the two neighbors therefore presupposes a profound strategic dialogue and a departure from the traditional German paternalistic view of Poland.

One of the gravest weaknesses in the West’s approach to Russia’s aggression against Ukraine and its hybrid war against the West has been the lack of a joint goal and of a coordinated strategy. At the same time, against the backdrop of Donald Trump’s return to the White House and the volatile political situation in Europe, the political complexity in the West seems to be more challenging than ever. In this critical situation, much greater alignment between Poland and Germany could substantially contribute to elaborate a European security consensus.

In view of the critical culmination of the war in Ukraine, it is even more urgent that Berlin and Warsaw (and the West at large) find a common approach to the desired outcome of the war and the steps necessary to achieve it. Even if the Bundestag elections on 23 February may bring the long-awaited change in its policy towards the war, this does not necessarily mean that the thinking in both capitals about the way to end the war will converge.

A military and diplomatic victory for Russia would not only have dire consequences for European security and the international order but would also provoke massive upheaval in the Western alliance.

Therefore we believe that Europe is facing five main tasks.

- 1) Realistically assess the stakes of the ongoing war. Russia is not only fighting with Ukraine, but also with us. Russia’s ultimate goal is not to grab more territory in Ukraine, but to control the entire country and fundamentally reshape the international, in particular the European, security order. We can easily conclude that we are at a turning point in European post-Cold War history. The shape and content of the next political period will depend on us.
- 2) Deprive Russia of the hope of victory. We must recognize that the Kremlin still hopes that it can win the war because of the West’s internal division, inconsistency, indecision and fear of escalation. The West’s weakness makes Russia stronger, gives the Kremlin additional options and thus prolongs the war. As shown in one of the chapters above, in parallel with increased arms deliveries, Europe still has the potential to tighten sanctions against Russia. Part of this should be using of frozen Russian assets – not only their proceeds – to support Ukraine.
- 3) Build up European military potential as quickly as possible so that Europe’s contribution to NATO’s defence capabilities matches its economic potential. If we want to secure continued US political and military engagement in Europe, we must demonstrate that we are willing to shoulder our fair share of the burden of defending the West. The situation is likely to worsen as the US is expected to shift its attention away from Europe to the Pacific. There is no reason why Europe – apart from political inertia – should be unable to provide for its own defence. Realistically, we must admit that this will take many years.

The West’s weakness makes Russia stronger.

But first steps should be taken immediately. Poland, investing more than 4% of its GDP in defence, supported by a cross-party and societal consensus, sets a remarkable model to follow.

- 4) Finally move towards a joint strategy for thwarting Russia's neo-imperial ambitions. This will require the abandonment of well-established routines and comfortable, but outdated habits. Pushing back without hesitation, with vigour, including by imposition of real costs, against Russia's ongoing hybrid warfare must be one of the priorities. This also includes the issue of extra defence spending on the national and EU level. Germany and Poland should make a joint effort to strengthen the European pillar of NATO and foster a common long-term strategy towards Russia. Germany still is an economic heavyweight and a key player within the EU, while Poland in recent years acquired significant political credibility due to its role in supporting Ukraine and its commitment to increasing its defence capabilities. To begin, Germany and Poland could use the existing "Weimar Triangle" format, bringing France into the process.

Another strategic option is the formation of a European "Coalition of the Willing" to support Ukraine and strengthen European defence. Such an initiative must reflect the increased role of the Central Eastern European, Baltic and Nordic states. The summit of the "Nordic-Baltic 8" in late November was a step in the right direction. This should be followed by the creation of an institutionalized mechanism for security policy coordination and construction of "interfaces" between key institutions of participating countries, dealing with various aspects of the Russian threat. Care should be taken that such initiatives strengthen the internal cohesion of EU and NATO.

- 5) Finally recognize that Russia's aggressive policy is deeply rooted in its political culture and governance system and be prepared for different scenarios and policies for a Post-Putin Russia. Any future integration of Russia into the international order will require a profound change of its current model of governance, which may take a long time and offers no guarantee of success. For the time being, Russia remains a major threat and challenge to European security. However, the West should be prepared for various scenarios of regime change. The fall of the Assad regime has again demonstrated how quickly a long-standing dictatorship can collapse. While developed democracy is not a realistic prospect for Russia any day now, political liberalisation, decentralization and pluralism are achievable – albeit not easy. While only Russians can change their country, Western policy could shape circumstances conducive to more openness and pluralism. This policy should aim to make Putin's imperial project fail, to split Russia's elites and support pluralism and political alternatives among Russians.

Germany and Poland
should make a joint
effort to strengthen the
European pillar of NATO
and foster a common
long-term strategy
towards Russia.

The endgame of the war in Ukraine: Some policy recommendations

1. Finding a common approach to negotiations with Russia

In our view, Europe and the West cannot negotiate:

- Ukraine's internal sovereignty – Russia has no right to interfere in Ukrainian domestic affairs, e.g. the constitution of the country and its government.
- Ukraine's external sovereignty regarding NATO and EU membership
- European security architecture – definitely there should be no negotiations about Russia's demands from December 2021
- The West should tie a gradual lifting of sanctions to binding agreements that go far beyond a mere freezing of the war. These should include European security issues, such as the withdrawal of Russian forces from Ukraine and Russian nuclear weapons from Belarus and Kaliningrad, the release of all Ukrainian prisoners and political detainees in Russia, as well as the legal accountability of those responsible for the war of aggression against Ukraine. Also on the agenda should be Russian financial compensations for the vast destruction in Ukraine.

2. Securing Ukraine in its de facto borders

A fundamental question in the context of any political settlement of the war is how to prevent Russia from attacking Ukraine again. We should be aware that Ukraine's integration with the EU requires robust, reliable security guarantees.

- In view of the uncertainty regarding the future commitment of the Trump administration, Europe needs to be ready to continuously strengthening Ukraine's self-defense.
- In order to stabilize the situation after a potential ceasefire, Germany and Poland should be prepared for the need of deploying robust European peacekeeping forces in Ukraine, preferably with a US-contribution.
- We suggest the establishment of an EU off-budgetary fund for financing military equipment to Ukraine, combined with efforts to strengthen military capabilities of EU member states in line with NATO priorities and capability gaps. Only an increased European input into NATO will be able to keep the US engaged in Europe.
- Although up to now – not least due to Germany's repeated resistance – no short-term NATO membership for Ukraine is on the table, the path to NATO should be open and an invitation should be agreed upon by the alliance.

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At a time when the future of Europe is at stake in the face of Russian aggression, it is all the more important that Germany and Poland undertake a joint effort for a new European Russia policy. Precisely because the Franco-German engine as the former key to Western European integration has lost traction and thus the potential to integrate the diverging interests in an enlarged Europe that includes Central Eastern Europe since 2004.

If Poland and Germany can find common ground on their policy towards Russia despite their entrenched differences, this will greatly facilitate a European accord. Their lingering antagonism makes a common Polish–German policy on Russia all the more compelling for the other member states. Finding common ground must not necessarily mean meeting half-way between different standpoints. A new start should arise from shared insight and interests, if there only is the political will to cooperate.

This paper aims to contribute to this endeavor.

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