

# Strategy for Weakening Russia under Current Conditions

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## Summary

The fastest way to end the war requires a strategy for breaking the Russian regime's ability to wage war at a high tempo, rather than waiting for its rapid collapse. The Russian Federation (RF) is no longer protected from military defeat in a conventional war by the very balance of forces that existed just a year ago. Russia could quite quickly lose the ability to sustain the tempo of combat operations, which would mean a shift to strategic defense. For the RF, this would mean endless attrition with no chance of achieving the so-called "goals of the Special Military Operation", that is, endless defeat. Moreover, the RF would not be able to change this prospect through the use of nuclear weapons.

The problem largely lies in the fact that, for Ukraine's partners, the defeat of the RF – which is becoming inevitable even without any disintegration of the RF – is still associated with the risk of nuclear escalation and the disintegration of the RF. Both of these remain taboo. Efforts are needed to ensure that the military defeat of the RF ceases to be associated with its disintegration. This would unblock collective steps that could bring Russia's military defeat closer, without which meaningful peace negotiations are impossible.

Why is this so? Because of a particular feature of Russian behavior in the face of the threat of defeat. In a critical situation, the Russian leadership seeks not peace, but a new, even more asymmetric escalation – one that is even less costly for the RF and even more costly for the world. As long as the Russian leadership is searching for, or believes it is searching for, such escalatory moves, the RF will try to continue the war. Therefore, blocking the very possibilities for the RF to take such steps makes it possible to connect "the realities on the battlefield" with the course of peace negotiations.

Russia's nuclear blackmail is increasingly failing to work as a practical instrument of coercion. Nuclear escalation does not give the Kremlin victory, does not solve its economic problems, and does not create allies. Defeat of the RF in a conventional war does not equal its disintegration. And in order to prevent nuclear escalation from appearing to the Kremlin as a cheap and effective way of avoiding defeat, it may be useful to draw a distinction: defeat of the RF in a conventional war is simply a defeat, but defeat of the RF following its use of nuclear weapons would destroy the international interest in the existence of Russia in its current aggressive configuration.

Thus, two working hypotheses run through this text. The first: defeat of the RF in a conventional war does not mean its disintegration; this is now a practically conceivable prospect for the start of peace negotiations, one that leaves no room for the sacralization of the idea of "saving face" for Moscow's rulers. The second: Russia is searching for an escalatory, asymmetric instrument of coercion with disproportionate payoff, one intended to offset the geopolitical debts of the war – human and material losses, the degradation of the war economy, the loss of markets, and dependence on China – which, for the sake of bringing peace closer, must be blocked by means no more costly than Russia's asymmetric threats themselves.

# Political Inflation of Russia

War has become the principal means of internal organization for the Russian authorities. It disciplines the elites, distributes budgetary flows, punishes the disloyal, creates new beneficiaries, and transforms participants in the war from “cannon fodder” into a personnel resource for the regime – a kind of “political meat”. Putin referred to this as “dvizh” (a colloquial term for “action” or “movement”). In more precise political terms, this is a simulacrum of development: a state that is incapable of offering a future instead produces a sense of movement through war, military investment, administrative career advancement, quasi-ideology, and a new external toughness.

Political inflation is the flip side of this mechanism of stability. Each major ritual of this simulacrum of development requires more security, protocol, and coercion, yet produces a weaker effect. On May 9, 2026, the parade took place, but without a ground column of military equipment. The Kremlin retained the reviewing stand, foreign guests, war participants, a Democratic People’s Republic of Korea detachment, and aviation, but removed tanks, armored vehicles, and missile systems from Red Square. The ritual did not disappear. It became more expensive to secure and poorer in symbolism, and therefore no longer functions as a cheap means of demonstrating strength.

Russia’s evident uncertainty surrounding May 9 may have had another explanation. For the regime, the parade is a display of the personal top leadership: who stands next to Putin, which security and military officials are visible, and which guests can be brought in. After it, the Kremlin added a compensatory measure: on May 12 it announced the testing of the “Sarmat”, and in the second half of May it held Russian-Belarusian nuclear exercises involving strategic forces. The shift from the fantasy of a swift seizure of Ukraine to increasingly narrow goals in Donbas works in the same way: the political outcome shrinks, while the noise surrounding it grows. Previously, a nuclear hint was often enough. Now a spectacle involving missiles, Belarus, and large figures from the Ministry of Defense of the RF is required. This is an attempt to find an additional intimidation effect where the old threat has already partly worn out.

Another important ritual of 2026 is the regular election of deputies to the State Duma of the ninth convocation, scheduled to take place on September 20, 2026, as part of a single voting day. According to reports from the Central Election Commission of the Russian Federation, voting is planned to be spread over three days – September 18-20. In parallel, direct elections of the heads of several constituent entities of the RF are to take place – according to current reports, eight – as well as the indirect election of heads in a number of other regions, elections of deputies to legislative bodies in 39 regions, and more than 2,200 campaigns at various levels, filling nearly 23,000 mandates and positions. Previously, such campaigns sustained the image of a country supposedly living according to a normal political calendar during the “special military operation”.

In 2026, this calendar is becoming less safe for the Kremlin. An artificial single-party majority in the Duma can ensure the necessary voting outcome, but it turns the parliament into yet another burden for the regime: it requires turnout, digital discipline, administrative orders, and ostentatious loyalty without any genuine political weight. If genuine political movement were allowed, the risk would arise for the system itself. If it is not allowed, the elections become a more expensive staging of normalcy. This is not disintegration, but a loss of the ability to cheaply confirm consent.

Russia’s digital self-blockade also intensifies political inflation. Russia is more digitized than might be expected for an archaic dictatorship: banking, taxation, public services, online marketplaces, delivery, electoral administration, and military communications all rely on services that the authorities themselves are now blocking or rendering unreliable. The embodiment of this state digitalization is

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Prime Minister Mikhail Mishustin, who came into top-level politics from the Federal Tax Service – a machine of accounting, data, and digital administration. The Russian authorities were not building a Chinese-style firewall, but a digital state of fiscal, administrative, and mobilization control. The war is forcing it to cut its own control channels.

# Kill Zone for Russian Military Force

The front – the kill zone of active combat operations – largely determines the extent to which the Russian authorities, elites, and population perceive the situation in Russia as positive or negative. The main Russian asymmetric escalatory instrument of coercion remains the military fact on the ground: an advance intended to force Ukraine and its partners to accept Russian terms. If Russian “advance” becomes “negative”, the question of the cost of the war arises. The cost of war is always greater if the war produces no movement.

The American Center for Strategic and International Studies (CSIS), in January 2026, estimated Russia’s cumulative losses from February 2022 to December 2025 at nearly 1.2 million people, including killed, wounded, and missing. CSIS estimated Ukraine’s cumulative losses at 500,000-600,000. According to this conservative international estimate, the ratio of overall losses is close to 2:1 in Ukraine’s favor; in terms of those killed, it may be closer to 2.5:1. CSIS also records the slowness of the Russian advance in key directions: from 15 to 70 meters per day in individual offensives.

Within the kill zone of the front, the current picture may be even starker. There, since 2023, Russia has been honing the tactic of human waves, in which individual Russian soldiers who survive a dismounted attack in small groups of up to 10 people take cover from Ukrainian drones and strike systems at new positions and build up in small groups for the next attack. Due to the extremely high level of losses, this Russian tactic was dubbed “meat assaults”. Since 2025, heavy losses have forced Russia to shift to infiltration tactics, in which the size of attacking groups is increasingly being reduced to pairs and trios.

In January 2026, Minister of Defense Mykhailo Fedorov described Ukraine’s strategic goal as driving Russian losses up to 50,000 per month. Interfax-Ukraine reported a similar formulation from Zelensky: such a level should exceed Russia’s ability to replenish its troops. This is a Ukrainian target figure, not an independently confirmed estimate of current losses. Its purpose is to deprive Russian forces of the ability to advance without mobilization or more expensive contract recruitment.

Ukrainian servicemen speak of loss ratios in certain sections of the combat zone of 1:6, or even 1:10 and higher, in Ukraine’s favor. This situation is characteristic of the Russian offensive. If Ukrainian forces shift to the offensive and Russian forces to the defensive, this ratio could change unfavorably for Ukraine, unless new offensive technologies are employed, in particular the use of robotic systems.

Ukraine is approaching the point where, in an increasing number of sections, it can halt the advance of Russian forces by driving the loss ratio to a level at which the Russian offensive machine breaks down. A shift by Ukraine to the offensive could be difficult due to the risk of increased human losses. But the very fact of a prolonged halt along the front, as in the final stages of the First World War and the Korean War, proves Russia’s strategic inability to make territorial advances and forecloses any hope for a military fact on the ground that could offset the costs of the war. This is not the disintegration of the RF. It is the loss of the main argument by which the Kremlin sells the war as a winning one.

In addition to the high degree of damage inflicted on Russian forces in the kill zone by tactical means, Ukraine has brought to a high level of readiness and combat application two other important methods of bringing Russia closer to strategic defeat. The first is the middle strike – striking targets in the operational depth of the front and beyond, up to several hundred kilometers, using economically affordable, remotely guided, and high-precision systems. The middle strike destroys Russian front-

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line logistics, contributing to its halt in the kill zone. In this way, Ukraine removes the expected payoff of the Russian offensive, without pitting mass against mass.

The deep strike, another economically affordable and high-precision Ukrainian instrument, strikes Russia's deep rear, including defense enterprises, transport logistics, oil infrastructure, and export terminals. This is a form of forceful sanctions that deprive Russia of the resources for war. In a certain sense, deep strikes give Ukraine an instrument of coercive diplomacy.

The distinctive feature of the middle strike and deep strike instruments is that they give Ukraine an offensive component of the war in a situation where its forces as a whole are in strategic defense. Russia also has these instruments, and it began using the deep strike from the very start of the full-scale invasion, having learned since 2023 to make it cheaper through the use of imported Iranian technologies. Russia developed the middle strike at roughly the same time as Ukraine. In this domain, the advantage lies with the side that has better air defense, communications, guidance, intelligence, and production capabilities.

The asymmetry in favor of Ukraine that has emerged in the effectiveness of the middle strike and deep strike depends to a significant extent on partner assistance with high-technology air defense and missile defense systems. The technologies and resources of partners are also important for the development of Ukraine's own middle strike and deep strike instruments. Such assistance can be regarded as a form of sanctions against Russia for waging an aggressive war.

# Cannibalization of Russian Economy

The Russian war economy looks resilient if one looks at the state's ability to pay for another year of war. But what matters is what each successive year means for the Russian economy.

In March 2026, the Stockholm International Peace Research Institute (SIPRI) estimated Russia's federal funding of the war and broader military expenditures in 2025 at approximately 16 trillion rubles, or 7.5% of GDP. In the 2026 budget, planned military expenditures have been reduced to 14.9 trillion rubles, or 6.3% of GDP, although SIPRI cautions that the budget may be amended during the year. This is not yet the demilitarization of Russia due to its inability to sustain the tempo of the war. But it is already a sign of financial maneuvering caused by budgetary fatigue.

The Bank of Finland Institute for Emerging Economies, in its forecast for 2026-2028, expects growth of around 1% for Russia in 2026. Re: Russia adds to this the first data for 2026: according to estimates by the Ministry of Economic Development of Russia, in the first quarter GDP declined by 0.3%, the index of core economic activities fell by 0.7%, and manufacturing also came in at approximately minus 0.7%. This is not yet a collapse, but it is becoming increasingly difficult for Russia to sustain another year of war without damaging the civilian economy, investment, and the profitability of enterprises.

Re: Russia, an analytical project on Russian politics and economics, gives a name to the current economic model that has, for several years, allowed Russia to avoid economic collapse, but is now exhausting itself. This model is "military post-Keynesianism". In 2022-2024, the Russian state did indeed create a new industrial driver linked to the war: state investment through defense orders, the build-up of military logistics, the redirection of exports, import substitution, and new import schemes. Re: Russia estimates average investment growth in 2021-2024 at 8.4% per year, whereas over the preceding 15 years it had not reached 4%.

By October 2025, 70% of industrial sectors were already showing an annual decline, with growth remaining in only 20%. Military post-Keynesianism has moved from a phase of acceleration into a phase of cannibalization, in which the driver of previous growth has begun to consume the civilian base. The war is no longer driving the entire economy through state investment. Instead, it is drawing labor, credit, investment resources, and managerial attention away from civilian sectors.

The most vulnerable economic link has turned out to be not finance, but human resources. A record-low unemployment rate of around 2% is now not a sign of Russia's economic health. It is a sign that economic growth has been halted due to a shortage of labor.

The contract-based model allows the Kremlin to avoid open mobilization, but its cost is rising. Based on open data, Re: Russia estimates that at the end of 2025 and the beginning of 2026 the inflow of contract soldiers may have fallen by approximately one-fifth, with recruitment at the beginning of 2026 appearing to be below 30,000 per month. In the 24 regions with the highest payments, bonuses increased by approximately 40%. The Russian authorities are increasingly compensating for the shortage of people through administrative pressure, recruitment among vulnerable groups, and coercion into signing contracts. A new push would require even higher payments, mobilization, or a narrowing of the war's goals.

Sanctions restrictions, Ukrainian deep strikes, and the labor shortage are undermining Russia's ability to convert money into weapons, personnel, and the tempo of the war. The International Institute for Strategic Studies (IISS), the British think tank, frames this problem in terms of the limits of production

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capacity: rubles do not fight by themselves if enterprises are operating close to full capacity and there is a shortage of labor and technology. The IISS also warns that economic “collapse” is a rare scenario and should not be the test of Western policy toward Russia. Thus, the goal is not to wait for disintegration, but to ensure that Russia becomes increasingly less able to convert money into military quality. In April 2026, CSIS described Russia’s drone and artificial intelligence ecosystem as pragmatic, front-line-oriented, and dependent on a commercial component base.

# Sanctions and China Factor

Oil revenues remain the main external resource for the Russian war. Russia continues to sell oil but is incurring increasingly higher transaction costs due to international economic sanctions and Ukrainian forceful sanctions. For the Kremlin, high prices and the shadow fleet are meant to function as a move with disproportionate payoff: foreign trade offsets the domestic cost of the war. It is precisely this ratio that needs to be undermined.

At the beginning of 2026, it was expected that the combination of sanctions, discounts, and strikes on Russian oil infrastructure would gradually narrow the revenue base of the war. March changed the short-term picture: the Centre for Research on Energy and Clean Air, a Finnish research center, estimated Russia's revenues from fossil fuel exports in March 2026 at €713 million per day, the highest level in two years. The war around Iran and the resulting energy shock gave Russia unexpected hope. At the same time, the KSE Institute, the analytical unit of the Kyiv School of Economics, estimated that Ukrainian strikes on Baltic ports between March 23 and April 5, 2026 reduced Russian oil export revenues by approximately \$1.76 billion compared with a no-attack scenario.

The March increase in revenues caused by the Iranian shock does not negate this logic. Russia may temporarily benefit from high prices, but Ukrainian strikes and sanctions undermine its ability to safely monetize favorable market conditions: refineries, port capacities, shipping schedules, insurance, discounts, and buyer behavior. If the energy shock fades, high prices will no longer mask the losses caused by more expensive logistics and larger discounts. Over a prolonged period, forceful sanctions can produce a greater fiscal effect when combined with legal and diplomatic pressure on tankers, ports, insurance services, and buyers.

Russia's shadow fleet – a fleet of tankers operating within international maritime trade in significant violation of established norms – is part of Russia's war infrastructure. Ukraine can attack this infrastructure primarily through maritime-legal, sanctions-based, and diplomatic means; the question of forceful action requires a separate legal assessment depending on the vessel, cargo, route, and connection to the financing of the war. In its 20th sanctions package of April 23, 2026, the European Commission added 46 vessels, bringing the list to 632, introduced new rules on the sale of tankers, imposed bans on the ports of Murmansk and Tuapse and the Karimun terminal in Indonesia, and introduced service restrictions for Russian LNG (liquefied natural gas) tankers and icebreakers.

Ukraine can conduct its own foreign policy campaign against the shadow fleet in parallel with Western sanctions. Its targets should be three groups. The first is flag states, port administrations, and maritime regulators, which can impose legal and technical restrictions on problematic vessels. The second is insurance, financial, and service companies, without which old tankers cannot safely operate in international trade. The third is countries and business groups through which the chartering, transshipment, purchase, or servicing of Russian oil takes place.

Separate work is needed with Mediterranean shipping centers, Northern European states with port, insurance, and environmental expertise, as well as Turkey, the Gulf states, and India as important hubs of trade and transshipment. For each vessel, Ukraine needs a brief evidentiary dossier: who controls the vessel, under what flag it operates, what routes it uses, whether it has called at Russian ports, who insures it, what environmental risk it poses, and how its operation is linked to the financing of the war.

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In addition to oil, Russia has other significant export revenues that fuel the war: LNG, nuclear fuel and enriched uranium, coal, metals, fertilizers, grain, diamonds, and transportation services. Fertilizers require caution due to food security concerns, but certain enterprises and the logistics of fertilizer production in Russia have a direct link to the war economy, in particular to explosives production. Therefore, certain nodes of this industry may fall within the logic of sanctions pressure or deep strikes, if their connection to military production is proven.

Regarding Russian grain exports, Ukraine can exert significant influence through the fact that Russia mixes its own product with grain stolen from the temporarily occupied territories of Ukraine and attempts to legalize such exports through various schemes. The grain story has an evidentiary basis, and it is politically sensitive. A buyer may not want a sanctions war with Russia, but it also does not want to be complicit in purchasing goods from occupied territory. A port may not want a conflict with Russia, but it does not want a vessel carrying legally questionable cargo.

Foreign policy work around grain should extend beyond the sanctions coalition. Ukraine needs to work with transit states in the Black Sea and Mediterranean basins, major buyers in the Middle East and North Africa, as well as with the commercial and regulatory infrastructure of the grain trade: ports, traders, insurance and financial institutions, laboratories, customs authorities, and ship registries.

The argumentation should be legal in nature: the origin of the goods, the route, certificates, laboratory samples, and the liability of the trader, the bank, the insurer, and the buyer. The more links in the chain perceive the risk of goods from occupied territory, the more costly it becomes for Russia to legalize stolen grain under the guise of ordinary exports.

In its war against Ukraine, Russia relies on China, which NATO, in its 2024 Washington Summit Declaration, called a “decisive enabler” – a factor that allows Russia to continue the war through an unrestricted partnership and large-scale support for the Russian defense industry. Ukrainian policy cannot be built on the fantasy of a rapid rupture between China and Russia. China does indeed save Russia from complete technological, commercial, and financial isolation, but it does so on terms that increase Russia’s dependence. For the Kremlin, China may appear as an external reserve capable of offsetting the losses caused by the West. For Ukraine, it is important to demonstrate something different: this support does not eliminate Russia’s war debts but converts them into long-term dependency.

China is shifting Russia into a regime of long-term economic dependency: through price dictation in raw materials, the replacement of Western goods with Chinese ones, and control over critical transactions. “Power of Siberia 2” illustrates this asymmetry: Russia cannot impose its terms on China regarding price, financing, and the pace of construction. Therefore, leverage on China should be built around the mechanisms that support the RF: components, the financial servicing of deliveries, and transit through third countries. Chinese companies and banks need to perceive the risk of secondary sanctions, the loss of the European market, and the legal liability of their managers. In that case, China remains an important partner for Europe but ceases to be a free way out for Russia.

# Forcing Russia toward Peace

Different Russian vulnerabilities manifest themselves at different speeds. Political symbols can lose their persuasiveness within weeks; the tempo of the front and oil revenues change over a horizon of months; production, components, and the labor market produce their full effect over 12-24 months. Russia is searching for its next moves in the war that would produce a greater political effect than the cost of preparing them.

Forcing the RF toward peace means blocking its possibilities for such next steps, in the same way that Russian forces are blocked by the front-line kill zone and middle strike instruments, Russian air attacks are blocked by Ukrainian air defense, and Russian war resources are blocked by Ukrainian long-range strike capability.

To this end, it is necessary to remove from the system of international decision-making the artificial correlation between defeat and the disintegration of the RF, which is supposedly bound to automatically increase the risk of nuclear escalation. The RF can simply lose the war on land, in the air, and at sea, and this is a less risky prospect than prolonging the war for the sake of "saving face" for the leaders in Moscow.

In a scenario unfavorable to Ukraine, external conditions give Russia additional time. The situation in the Gulf keeps oil prices high; the U.S. government may open up licensing exceptions; partners restrict Ukrainian deep strikes; China, Turkey, the UAE, Kazakhstan, Kyrgyzstan, and other intermediary states maintain mechanisms for supporting Russian foreign trade. If, in parallel, Russia carries out a new mobilization or sharply increases contract recruitment, it could sustain military pressure for longer and postpone the moment when losses, labor shortages, technological constraints, and more expensive exports force it to reduce the tempo of the war. The worst addition to this would be a belief among partners that any Russian defeat automatically leads to disintegration and must therefore be softened even before negotiations begin.

In the inertial scenario of events, Ukraine blocks Russia's war potential, but partners restrict Ukrainian long-range strike capability, sanctions are added slowly, oil exemptions appear during price shocks, and China and intermediary states help Russia sustain foreign trade under sanctions. Russia then retains the ability to continue the war throughout 2026 and a significant part of 2027. Individual vulnerabilities accumulate, but do not add up to systemic pressure. The Kremlin continues to search for a new coercive move that would offset previous costs, and every unaddressed gap – an energy shock, a maritime workaround, Chinese components, or fear of nuclear escalation – prolongs this search.

In the scenario of intensified pressure, Ukraine and its partners systematically complicate the functioning of the mechanisms that sustain the Russian tempo of war. The middle strike and deep strike hit front-line logistics, equipment repair, weapons production, oil refining, and export infrastructure. The EU, the U.S. government, and the United Kingdom move from expanding sanctions lists toward pressure on circumvention infrastructure: maritime services, vessel registration, insurance, and port servicing. Separate pressure is needed on the mechanisms of Chinese and intermediary support for the RF. Such actions do not drive partners into a symmetric cost race but instead strip Russia's moves of their expected excess payoff.

In such a scenario, the first noticeable changes could appear by the end of 2026. The Russian advance becomes more costly, the oil margin becomes less reliable, the supply of components slows

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down, the election campaign requires cruder administrative pressure, and military production increasingly relies on the depletion of the civilian economy.

Forcing Russia toward peace does not require a bet on its disintegration. It requires the synchronized removal of the payoff Russia expects from asymmetric escalatory methods of continuing the war. The more costly each successive day of the war becomes for the Kremlin, and the fewer chances it gives Russian leaders for a new asymmetric gain, the closer the situation comes to one in which, for the RF, negotiations cease to be a pause before the next escalation and become a way out of the war.

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