

2026

Fourth year of a war



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1. INTRODUCTION

This is an intelligence case study about what happened in the intelligence agencies milieu months **before the 2022 Ukraine invasion.**

The CIA and SIS (MI6) were very well positioned to gather inside information from Russia. Much better than any other organisation due to years of work, money invested in sources and technology to get exclusive information from within.

SIS and CIA counted on **sources which could provide with relevant information** regarding different environments which, although they were not the core of the power system, were able to convey information to unearth movements in Russia which were consistent with the preparation of an attack.

The CIA and other US agencies had **at their disposal SIGINT resources** which revealed troop movements and developments within military barracks and installations.

Putting it all together the picture was being shaped, and it could only mean that **a military operation was being prepared** and that the target was Ukraine.

Meanwhile, **in the West, intelligence agencies were not paying attention to developments in Russia.** Hybrid war and disinformation from Russia was the Russian threat they were struggling with. **Russia was too far away and the unthinkable was just that, unthinkable.** Migration waves, global terrorism and far right violent groupings were keeping them busy at home. Who could think of a real war in the heart of Europe?

Even Eastern countries, the Baltics or Poland, although weary of partial information they were able to get, it was hard for them to infer such a bold move for Russia.

And then, the US, after some diplomatic approaches to Putin decided it was time to make it public. But **they didn't count on the stubbornness and the anti-Americanism** they were about to face.

2. Strategic Context: The Intelligence Divide

The Russian invasion of Ukraine on February 24, 2022, represents the most significant rupture of the European security architecture since the Second World War. **The period from late 2021 to the outbreak of hostilities served as a high-stakes crucible for modern intelligence methodologies, exposing a profound divide between Anglo-American certainty and European scepticism.** While the CIA

and SIS moved toward a high-confidence prediction of a full-scale invasion, their assessments were met with persistent disbelief from European services and the Ukrainian leadership.

The pivot point for this divergence occurred in November 2021, when President Joe Biden dispatched CIA Director William Burns to Moscow. This mission was the critical juncture where raw signals intelligence met direct diplomatic warning; Burns delivered a clear message to the Kremlin that the U.S. was aware of the war plans and that the consequences of execution would be disastrous. Despite this, the intelligence community remained fractured. The primary tension was not a lack of data, but the conflict between high-fidelity technical collection and the "rational actor" bias—the belief that Vladimir Putin would not embark on a course of action that appeared strategically suicidal to Western eyes.

3. The Architecture of Prediction: SOCINT and Ideological Indicators

By late 2021, Western agencies realized that traditional military tracking—monitoring troop counts at the border—was **insufficient to confirm intent**. Analysts shifted their focus toward **Sociocultural and Behavioural Intelligence (SOCINT)** and sophisticated psychological profiling to decode Putin's personal state of mind. Sifting through evidence with the meticulousness of a forensic post-mortem, the CIA and SIS identified several primary predictive cues:

- **Leadership Isolation:** Putin's isolation during the COVID-19 pandemic significantly narrowed his circle of influence. He was reportedly "squirreled away" at his lavish residence on the Black Sea coast, where he had limited face time with his own subordinates. Intelligence indicated he was shunning contemporary diplomatic counsel in favour of devouring historical texts and pondering his personal legacy.
- **The Ideological Shift:** Putin's July 2021 essay on the "historical unity" of Russians and Ukrainians was analysed as a declaration of intent. The screed argued that Ukrainian sovereignty was only possible in partnership with Russia, signalling that the Kremlin no longer viewed Ukraine as a distinct political entity.
- **Political Consolidation:** Analysts observed Putin was being assertive through the poisoning of opposition leader Alexei Navalny and the violent suppression of

protests in Belarus. These moves were interpreted as pre-emptive strikes to secure the domestic and regional flank before a wider gambit.

This behavioural framework was validated by hard political data. Analysts pinpointed the first half of 2020 as the likely moment the invasion decision crystallized—the same period Putin pushed through constitutional amendments allowing him to remain in power beyond 2024. These indicators suggested a leader who was no longer managing a status quo but was actively preparing for a transformative historical intervention.

4. Methodological Breakthroughs: SIGINT, IMINT, and the Human Element

The Anglo-American assessment was built on a "detective-like" sifting of evidence that allowed agencies to pierce the Kremlin's inner sanctum.

Intelligence Source Analysis

Source Type	Key Evidence Collected	Strategic Utility
IMINT (Commercial Satellites)	High-resolution imagery of tens of thousands of troops at the Belarus border.	Provided undeniable physical proof of a massive buildup in positions that "made no sense" for training.
SIGINT (Intercepts)	Communications from the Main Operations Directorate (General Sergei Rudskoi).	Revealed war plans kept secret even from other top commanders, highlighting a small group drafting the invasion.
HUMINT (Human Assets)	Tangential evidence from inner circles and moles.	Corroborated intent; focused on corroborating collateral evidence rather than a single asset with an incredible access to critical information.

The "So What?" of this data layer was the extreme compartmentalization of the planning. SIGINT revealed that

while General Sergei Rudskoi's team was refining the invasion architecture, other senior military commanders were left in the dark. This established that the buildup was not a bluff intended for leverage; a bluff requires the participation of the rank-and-file to be credible, whereas this level of secrecy was only consistent with a genuine intent to strike.

5. The Strategic Utility of Declassification

In late 2021, the U.S. and UK pioneered the "Strategic Disclosure" doctrine, intentionally **downgrading sensitive intelligence to build international consensus** and pre-empt Russian "false flag" operations. This strategy carried massive stakes for **source protection**. Director of National Intelligence Avril Haines famously emphasized the gravity of this move: "These are sources and methods that we put our blood and sweat and tears into obtaining, and they can put people's lives at risk if lost."

The strategic deployment of this intelligence involved:

1. **Consensus Building:** Sharing granular detail within the "Five Eyes" and with sceptical partners like France and Germany to prove the threat was not another "Iraq-style" exaggeration.
2. **Source Protection:** The implementation of a rigorous "weigh-in" system where agencies reviewed data before disclosure to ensure that no specific asset or technical method was exposed.
3. **The New York Times Effect:** Rapidly transitioning classified findings to the public domain to raise the alarm and strip Putin of the element of surprise.

Despite this transparency, the strategy struggled to move the Ukrainian leadership. **President Volodymyr Zelenskyy famously downplayed the warnings**, making comments about "grilling meat on barbecues" to prevent economic panic. Zelenskyy's frustration stemmed from what he called the "word for it" problem; he told Western officials he needed "better weapons" and tangible support rather than repetitive warnings that were causing his economy to haemorrhage capital.

6. The Scepticism Matrix: Why Intelligence Often Fails

The failure of European services to accept the Anglo-American assessment was rooted in a profound trust deficit.

The "legacy of Iraq" (2003) loomed large over the discussions. European diplomats and members of intelligence agencies had at their back of their minds the bold lies disseminated by the U.S. in different stages, big and small meetings at all levels.

Furthermore, allies fell into the "Rational Actor" trap. European analysts believed Putin would not embark on a plan destined to fail, correctly noting that the force Russia had amassed was insufficient to occupy a country of 44 million people. They overlooked the Russian internal estimate, compiled by Western sources, which incorrectly predicted only 10% of Ukrainians would resist the invasion.

Historically, the intelligence community must admit a legacy of high-profile failures, including but not limited to:

- The fall of the Berlin Wall.
- The Arab Spring.
- The fall of Muammar Gaddafi in Libya.

These failures underscored three critical reasons for the 2022 divergence: the dismissal of "irrational" scenarios, historical bias (Iraq, Berlin Wall or Libya), and the difficulty of persuasion without exposing high-level sources. Ironically, even the "successful" agencies suffered an assessment failure; while the CIA and SIS got the *intent* right, they were wrong on the *outcome*. Both agencies assumed a "swift Russian takeover" was a foregone conclusion, significantly underestimating Ukrainian resilience and the systemic rot within the Russian military.

7. Lessons for the Unpredictable Era

The 2022 war anticipation stands as a spectacular success in intelligence collection but a sobering failure in persuasion. The divide between those who analysed the raw data and those who relied on the logic of the rational actor reveals that **persuasion is now a core intelligence function**. In an era where disinformation is rampant and the "Iraq legacy" persists, knowing the truth is only half the battle; communicating it convincingly to a sceptical alliance is the other.

The primary takeaway for strategic policy consultants is the danger of dismissing scenarios simply because **they appear to be outside the realm of rational possibility**. In a fragmenting world, "it makes no sense" is no longer a valid analytical defence. **Strategic foresight requires not only the collection of hard data but the analytical courage to**

accept that irrational actors will frequently pursue irrational ends to satisfy ideological obsessions. Persuasion in intelligence is the final, essential bridge between warning and action.

8. CONCLUSIONS

Russia remains a paramount threat to Europe, particularly as it shifts to full war-economy mode. Beyond the ongoing war in Ukraine, Russia is expected to escalate its hybrid warfare campaign across Europe to exploit transatlantic divisions. This includes cyberattacks on critical infrastructure, sabotage of energy and transport systems, GPS jamming, and unauthorized drone overflights to probe NATO defences and sow domestic anxiety.

Meanwhile, Ukraine faces immense pressure; while European nations are attempting to fill the gap left by halted US aid, the country requires over \$500 billion for reconstruction amidst severe demographic decline and an uncertain long-term economic outlook.

It should not be forgotten that Europe includes Eastern European countries which were part of the USSR sphere of influence. It should not be forgotten that Belarus is intended eventually to be part of Russia again (Treaty on the Establishment of the Union State). The agreements between both leaders go in that direction and actions are being taken.

Putin is clearly behind Belarus and Ukraine. But why not Moldova? What about Georgia? The Baltic states, the Suwałki gap, Lithuania?



Western and Eastern Europe are flanked by irrational actors on both sides: Putin in the East and Trump in the West. It is an explosive situation. It raises the risk of an unexpected and unlikely-until-now confrontation.

This is a time to expect the unexpected. Therefore, intelligence agencies are forced to be more adventurous in their analysis and **take seriously bold data without shaping them with too much rationality,** especially if information about the actor's mindset is not profound.

