

Weekly Commentary 6 – 2nd Commentary for Feb 2024

Upheaval in Kyiv – Or How to Lose a War...

The worst kept secret in Kyiv has finally been confirmed: the man who led Ukraine's armed forces for two years is out of his job.

Zelensky replaced General Valerii Zalushny on Thursday, after 10 days of rumour, and speculation – and months of a deteriorating relationship.

The sacking of the Ukrainian chief of armed forces, General Zalushny took than a week of procrastination, possibly brinksmanship, from both sides. This is a sign that Zelensky is not in total control of his subordinates or of the situation. Not that Zalushny will be missed. The fact that Zelensky let Zalushny messed things up for two years with nothing on the battlefield to show for it is a sign of utter paralysis of decision making in Kyiv. Either that or he is afraid of a revolt from his own army led by the man he fired. Whatever it is, it does not show him up to be the Winston Churchill that western propaganda has made him out to be. He is a weak and ineffective leader, not quite of the same calibre as his arch enemy, Vladimir Putin.

In any case, he has now appointed General Syrskiyi. It seems that this is like jumping from the frying pan into the fire. Syrskiyi is not necessarily the better choice. He, who is of Russian origin, has most of his family still living in Russia. Rumour has it that his parents are highly critical of the general, being in fact loyal to Putin, and his brother as well as his son are also not supportive of his role on the Ukrainian side. If so many of your immediate family are against you, it must put tremendous psychological pressure on the general in the performance of his military duties.

Worse still, Syrskiyi is not popular with his own troops. He is thought of as a commander who is callous about incurring casualties on his side and perhaps this is what Zelensky wants in a commander. I would say that if Ukraine has a professional army, imposing a fierce fighting spirit may be a good thing. But if it is a rag-tag conscript army, with many soldiers drafted from the rural regions of the country and briefly trained for a few days (urban people can easily buy their way out of service), then the forceful command and control that Syrskiyi is noted for will lead to low morale among the rank and file, and ultimately to defeat. Besides Zalushny, Syrskiyi, and Budanov, is there not someone else who can be a better choice for Kyiv to put in charge of the only thing that matters now – the war?

Well, it is not my war...

With these changes to the top military leadership, Zelensky hopes that a new team would be in place to reverse some of the battlefield advances made by Russia. The latest of these is in a town called Avdiivka, right in the center of the crescent shaped swathe of land captured from Ukraine.

Both the Ukrainians and Russians acknowledge Avdiivka as a key settlement necessary for Russia's larger objective of securing the entirety of the Donbas, as the town serves as a "gateway" to Donetsk city.

Mykola Bielieskov of the National Institute for Strategic Studies, a Kyiv-based think tank, assessed in late 2023 that the Russian capture of Avdiivka would not have a strategic impact on the overall war, but "would make the situation more tenable for occupied Donetsk as a major Russian logistics hub." The capture of Avdiivka would serve as a morale boost for Russian forces and deal a psychological blow to the Ukrainians, Bielieskov added.

Bielieskov believes the battle is driven by a Kremlin desire to strengthen the hand of Western sceptics calling for a cut in support for Kyiv, citing the limited impact of billions of dollars in military aid. In short, Kyiv cannot afford the optics of losing Avdiivka.

According to the Institute for the Study of War, several Russian bloggers proclaimed in early November 2023 that the ongoing battle was already an operational success because it reduced the intensity of Ukrainian shelling of Donetsk city

Avdiivka, which had a pre-war population of around 32,000 and is called Avdeyevka by Russians, was briefly occupied in 2014 by Moscow-backed separatists who seized a swathe of eastern Ukraine but was recaptured by Ukrainian troops who built fortifications.

Has Avdiivka actually fallen?

[According to a Reuters report, this is the latest situation:](#)

[KYIV/LONDON, Feb 8 \(Reuters\) - Russian forces are intensifying efforts to seize the small eastern Ukrainian city of Avdiivka as Moscow's war in Ukraine grinds on.](#)

The fighting is reminiscent of the battle for the eastern city of Bakhmut, which fell to Russia last May after months of grinding urban combat, 15 months into a full-scale invasion that Moscow calls a "special military operation".

Today, authorities say fewer than 1,000 residents remain, many sheltering in cellars and basements. Officials say not a single building remains intact, and Avdiivka's mayor says it is under attack from all directions.

Avdiivka sits in the industrial Donbas region, 15 km (nine miles) north of the Russian-occupied city of Donetsk. Before the war, its Soviet-era coke plant was one of Europe's top producers.

Russian-backed officials describe Avdiivka as a "fortress" with concrete bunkers. They say defenders are holed up in tower blocks that cannot be stormed head-on without huge losses, and are using the coking plant as a base and weapons depot.

FIERCE FIGHTING

Ukrainian and Western military analysts say Russia's offensive on Avdiivka is taking a huge human toll.

Last November, British military intelligence said the fighting had contributed to "some of the highest Russian casualty rates of the war so far".

"Every day there are new fresh forces, regardless of the weather, regardless of anything - of losses," one member of Ukraine's 47th Separate Mechanized Brigade told, opens new tab Radio Liberty.

Russian war bloggers, whom the Kremlin has brought under tight control, have acknowledged heavy Russian losses but alleged significant Ukrainian losses too.

They say Kyiv's forces could be encircled if Russian forces can cut their last main supply line to the west.

President Vladimir Putin on Jan. 31 underlined Avdiivka's significance and said a group of military veterans had recently advanced ahead of the army to seize 19 buildings - an assertion that, like other battlefield reports, Reuters cannot verify.

Russia has been carrying out air strikes with targeting assistance from special forces, and using artillery, drones, helicopters and tanks as well as infantry, according to spare but regular Russian defence ministry updates.

WHAT'S AT STAKE?

Both sides regard Avdiivka as key to Russia's aim of securing full control of the two eastern "Donbas" provinces - Donetsk and Luhansk. These are among the four Ukrainian regions Russia says it has annexed but does not have full control of.

Avdiivka is seen as a gateway to Donetsk city, whose residential areas Russian officials say have been shelled by Ukrainian forces, sometimes from Avdiivka.

Seizing it could boost Russian morale and demoralise Ukrainian forces, which have made only incremental gains in a broad counteroffensive since June. Ukrainian President Volodymyr Zelenskiy himself visited in December.

"If the Russian army takes control of the (supply) road, the Ukrainian armed forces will evidently be forced to withdraw from Avdiivka. That will be a great victory for the Russian army," Sergei Markov, a former Kremlin adviser, said on Feb. 5.

Reporting by Dan Peleschuk and Andrew Osborn;

General Syrskiy has vowed to Zelensky that he will not abandon Avdiivka. Let's see how long he will last in the face of superiority in Russian arms in every department – air power, air defence, tanks artillery and simply manpower. I would not bet against the Russian army.

Here is another assessment by a western media outlet, CNN:

The announcement comes at a critical moment in the war with Russia and is likely to herald a change in Ukrainian strategy. But it is also hazardous.

The removal of Zalushny from his position as commander-in-chief comes as Ukrainian units are on the backfoot in several parts of the long front line, especially in the eastern Donetsk and Kharkiv regions. They are desperately short of shells and other munitions and running short of experienced soldiers.

The Russian war machine is running at full tilt and has a much larger pool of men to draw from than Ukraine to replenish its ranks. Russia is skirting international sanctions and its oil revenues help fund plentiful war spending.

Zelensky said he and Zalushny had a "frank discussion about what needs to be changed in the army. Urgent changes." He added that "the feeling of stagnation in the southern areas and the difficulties in the fighting in Donetsk region have affected the public mood."

The public mood is indeed gloomier. According to a recent survey in Ukraine, those who believe that events are going in the wrong direction increased from 16% in May 2022 to 33% in December 2023.

It's unlikely that Zalushny's replacement, General Oleksandr Syrskyi, will offer a radical change of style but he is thought to be closer to Zelensky. (Arguably, that makes it worse since Zelensky is no general and his natural instinct seems to be to resist all calls for tactical redeployments.)

Syrskyi has been in command of land forces since the Russian invasion but was criticized for extending the defense of Bakhmut at great human cost. Subordinates have described him as lacking empathy and some soldiers took to calling him "General 200" (200 is the military code for killed-in-action.)

"Syrskyi is seen a consensus choice," says Matthew Schmidt, director of the International Affairs program at the University of New Haven in Connecticut.

"Some say he's too Soviet, meaning unimaginative but capable, some say he doesn't take uncomfortable truths well – something Zalushny did – and some say he's the best of the worst kind of general."

Schmidt says there are few options right now. "Maybe it's a phase in the war where a safe choice is the right move."

Syrskyi's most urgent task will be to stabilize the front lines. Also in his inbox: how to replenish the depleted ranks of some of Ukraine's best brigades and how to expedite the arrival of Western munitions at the front lines - and how to cope until that happens.

Other priorities include: what stress to place on longer-range strikes against Russian infrastructure such as fuel depots and military bases, integrating F-16 combat aircraft into battle plans, and the rapid development of the next generation of unmanned systems.

Shortages on the frontlines

Amid persistent Russian attacks around Avdiivka and Kupyansk, "the first priority is make sure you can hold the current line of contact," Schmidt says.

"Putin's tactical weakness doesn't mean he can't kill thousands of his soldiers in an attempt to take significant chunks of territory. Any new chief of staff has to respect that risk," he adds.

Frontline units in several vulnerable areas told CNN in recent weeks that they were often chronically short of ammunition, particularly Western 155mm artillery shells. At one gun position, troops were resupplied with smoke shells after exhausting their high-explosive ammunition, they said.

“It’s better than no shells,” one soldier said.

The head of Ukrainian Military Intelligence, Lt. Gen. Kyrylo Budanov, told CNN at the end of January that ammunition is “one of the most decisive factors” in the war.

With the Biden administration’s package of \$61 billion in military aid blocked in Congress, the US has been sending smaller packages for several months, and the slowdown has already begun affecting the Ukrainian military’s planning and operations, according to US officials.

Schmidt says “the immediate priority is to get enough artillery shells to the front to keep the Russians from exploiting the pause in US aid. Each artillery shell that’s available to fire equates to needing fewer infantry to hold the line.”

Unclogging the pipeline of US military aid and boosting European production of munitions are critical priorities if Ukraine is to move from hanging on to fighting back. The EU has acknowledged it will fall far short of its goal of producing one million artillery shells for Ukraine in the year to March, estimating the number will be roughly half of that.

This week, Ukrainian Foreign Minister Dmytro Kuleba said: “If you ask a soldier at the front what he needs most right now, he will say shells. This answer was the same yesterday, a month ago, six months ago and a year ago.”

“The main goal is to ensure that the shell shortage never turns into a shell famine,” he added.

Outnumbered

Russia's pool of manpower is at least three times greater than that of Ukraine. Budanov told CNN that Russian forces in and near Ukrainian territory "consist of 510,000 military personnel alone."

Ukraine's more professional units are exhausted by two years of non-stop combat, their ranks thinned by casualties. Ukraine does not publish figures, but US officials estimate that as many as 70,000 Ukrainian soldiers have been killed and nearly twice that number injured.

The scale and speed of additional mobilization in Ukraine is a thorny political question, and one source of the rift between Zelensky and Zalushny, who said the military needed another half-million soldiers and criticized "gaps in our legislation that allow citizens to evade their responsibilities."

In a column for CNN last week, Zalushny said: "We must acknowledge the significant advantage enjoyed by the enemy in mobilizing human resources and how that compares with the inability of state institutions in Ukraine to improve the manpower levels of our armed forces without the use of unpopular measures."

A bill passing through the Ukrainian parliament would lower the minimum age for the draft to 25 from 27 (a provision Zelensky did not sign last year) and introduce harsh punishments for people who flout mobilization rules. Citizens of military age would be obliged to carry military registration documents with them.

A more ambitious version of the bill was withdrawn amid public criticism, and it remains to be seen how effective the new measure is in addressing serious shortfalls. Zelensky is concerned about the government's ability to pay for a larger standing army (frontline pay is six times the average Ukrainian wage at \$3000 per month) and about the political risk.

"The population is still committed to the fight, we see that in opinion surveys, but they're exhausted," Schmidt says.

Unmanned systems

Zalushny has persistently argued that given Russia's higher pool of manpower and armor, Ukraine needs a step-change in its battlefield technology: more sophisticated

drones and other unmanned systems would provide real-time intelligence and accurate targeting information, for example.

In his recent essay Zalushny suggested that turbo-charging such investment, as well as embracing cyber technology, could produce results within five months.

Time is of the essence. The Russian military continues to make mistakes, but it is learning and adapting, especially in the exploitation of attack and reconnaissance drones and electronic warfare.

Budanov told CNN that the Russians had conducted “what you call ‘lessons learned’ and drew their own conclusions... The number of unmanned systems of all kinds, including ground-based systems and so on, has increased significantly.”

Ukrainian soldiers defending the skies around the capital, Kyiv, told CNN that the Russians were fielding new camouflage, deceptive flightpaths and engineering innovations to make their drones and missiles harder to take down.

The Russian military has also exploited glide technology to deliver aerial bombs more accurately, one reason that the Ukrainian offensive in the south faltered last summer.

Put simply, Ukraine needs to widen the technological gap, as Zelensky acknowledged in his address announcing the leadership shake-up. Its rapidly expanding domestic drone industry will be critical in that effort and is already showing results.

First person, or ‘FPV’ drones deployed in the Avdiivka area have had a devastating effect on Russian attempts to encircle the town, inflicting heavy losses on tanks and munitions vehicles. Lt. Gen. Serhii Naiev, Commander of Ukraine’s Joint Forces, says they are a “much cheaper but no less effective means of destroying enemy equipment and manpower than anti-tank missile systems and artillery ammunition.”

The introduction of F-16s, expected at the earliest this spring, should erode the Russians’ edge in the skies, but Zalushny’s stated goal of achieving absolute air superiority to enable Ukraine to go on the offensive seems a distant prospect. Meshing the new combat planes into an overall battle strategy will be a critical task for Syrskiyi.

One area where the Ukrainians have been successful in recent months is in extending their attacks against Russian military infrastructure, transport links and refineries, as far away as St Petersburg and the Russian Far East.

The recent drone or UAV (unmanned aerial vehicle) strike on a refinery in Volgograd was the latest win in a series of targeted strikes.

More significant still, and despite having virtually no navy of its own, the special operations run by Budanov and the Security Service (SBU) have “allowed Ukraine to bottle up the Russian Black Sea Fleet in port...while also destroying multiple air-defense and ammunition sites in Crimea,” according to the US Naval Institute.

Ukraine has pioneered the development of maritime drones to take out several of the Black Sea Fleet’s warships. Aerial drones, missiles and sabotage operations have at least disrupted Russian logistics.

“They need to interdict Russia supply lines in Ukraine and make the Russian public feel the war in their daily lives. If Putin has to move resources to protect his rear, that means less to go on the attack with,” in Schmidt’s view.

Big shoes to fill

Over the past year, a sense of optimism among Ukraine’s allies and frontline commanders alike has given way to a darker mood, as Zelensky has acknowledged. Zalushny’s gloomy assessment in December was that “There will most likely be no deep and beautiful breakthrough,” a comment that did not endear him to the presidency.

Exhaustion at home, squabbles among allies (the EU versus Hungary) and the paralysis in Congress have added to what is a bleak outlook. Meanwhile, Russian President Vladimir Putin has been buoyed by the possibility of Donald Trump returning to the White House.

Filling Zalushny’s shoes won’t be easy. (And Zalushny was not even successful in deterring the Russians.)

Mick Ryan, a retired Australian general who has visited Ukraine and met with senior officials, describes him as a “charismatic and popular military leader who anticipated and prepared in the weeks before the Russian large-scale invasion.”

“He is a heroic figure – devaluing his achievements is impossible,” one soldier fighting in Zaporizhzhia told CNN.

Syrskiy has his own achievements, especially the defense of Kyiv in the early days and the lightning offensive that recovered swathes of Kharkiv in September 2022.

But the conflict has changed vastly since then.

In the immediate future, the Ukrainian leadership must show unity after what has been a messy changeover. Myhailo Podolyak, an adviser to the office of the President, said that “during a war, political competition, especially at the level of the army, generals, and politicians, doesn’t look so good.”

Instilling a new sense of purpose is all the more important as Ukraine faces a window of vulnerability.

As Matthew Schmidt puts it, Putin “can throw bodies at the enemy, using Russian quantity to overcome Ukrainian quality. It’s a very Stalinist approach to the battlefield, and it’s built into Russian strategic culture.”

Given that CNN is probably the most propagandistic of western media on behalf of Ukraine, I would discount half of what has been reported above. In short, I would not bet that Syrskiy would be able to turn things around.

Kyiv is completely dependent on the Democrats to provide money to sustain their efforts. But the Democrats have a problem in that their most enthusiastic cheerleader, President Biden, is now being viewed to be too senile to be war president.

Here is the latest report by the Financial Times on this issue of “too old to be president”:

Thursday ought to have been a good day for Joe Biden.

America's Supreme Court heard arguments that Donald Trump was unfit to hold office because he fuelled an insurrection; the former Fox anchor Tucker Carlson released an interview with Vladimir Putin making the case better than anyone else could that Trumpians adulate Russia's autocrat; and news broke that the Biden special counsel Robert Hur would not charge him for having retained classified documents.

Then the White House saw Hur's Semtex-packed wording. Biden's "diminished faculties and faulty memory" meant that no jury would convict him, Hur wrote. The US president was a "well-meaning elderly man with a poor memory", who could not even recall which year his son, Beau, had died.

News of this legal counsel's version of a drive-by shooting instantly turned Thursday into the worst day of Biden's presidency.

His hurriedly scheduled appearance to rebut Hur's language suggested there will be more bad days in store.

Biden's reference to Egypt's leader Abdel Fatah al-Sisi as "president of Mexico" did not help his case. His four words, "my memory is fine", may not equate to Richard Nixon's "I'm not a crook" but they could enter US political lore just the same.

A measure of the climb facing Biden is that he broke news by saying that Israel's actions in Gaza were "over the top". But the assembled reporters had only one thing on their mind — Biden's declining powers.

It is all very well pointing out that Trump's recall also appears to be just as faulty. Trump recently confused the former Democratic Speaker Nancy Pelosi with his Republican opponent Nikki Haley.

He also described Hungary's President Viktor Orbán as "the leader of Turkey". It is also more than reasonable to underline that Biden has not been charged over the classified documents, while Trump faces 40 criminal charges on the same issue and another 51 alleged felonies on, among other things, trying to overturn a democratic election.

Nor is it wrong to point out that Hur was a Trump-appointed US attorney with an axe to grind. Having failed to unearth sufficient legal evidence to try Biden, Hur scattered some political ammunition as a gratuity. All of these rejoinders are true.

Yet the unavoidable truth is that most US voters, including a majority of Democrats, see Biden as too old to run again. Trump actually leads Biden by double digits on which of the two is more competent to govern.

In electoral terms, Biden's age will be front and centre. It is not going to get any better.

It has been clear for a long time that whichever of the Democrats or the Republicans drops their candidate would have a far better chance of winning in November. Trump owns the Republican party so his exit can be ruled out. Were Biden to do so, on the other hand, there would be a collective sigh of Democratic relief.

In public, Democrats have sustained tight-lipped support for Biden's candidacy. In private, they say things like "it's time to take the car keys from grandpa". In addition to Biden's deeply-held conviction that only he can beat Trump, the main argument against Biden pulling out is based on history.

The most salient example of a sitting president declining to run for a second term was Lyndon Baines Johnson in 1968. His vice-president, Hubert Humphrey, went on to lose the presidential election to Nixon. But that citation raises more questions than it answers.

LBJ pulled out on March 31 1968. He did his best to undermine his vice-president's candidacy by refusing to call a bombing halt of North Vietnam. This all but guaranteed that a conflicted Humphrey, who still felt loyal to LBJ but badly needed to distance himself from the Vietnam war, would face a lethally divided convention in Chicago. That riot-besieged gathering did not disappoint.

Biden, on the other hand, is not saddled by a faraway war that is taking thousands of young American lives. The US economy is humming along. The only real problem is his age. If Biden addressed the nation today with his prayerful decision not to run again, that would give his party six months to find a nominee before August.

As it happens, the 2024 convention is also in Chicago. The other case against Biden's retirement is that his vice-president, Kamala Harris, is even less popular than he is. That would put Biden in a dilemma. If he endorsed her, he could be handing the election to Trump.

If he did not endorse Harris, who is both the first woman and non-white person ever to become vice-president, he could divide the Democratic base. Instead of being split over a bloody war, Chicago this time could be racked by identity battles.

The choice is unenviable. Those close to Biden say that the only person who could persuade him to quit is the first lady, Jill Biden. She continually tries to limit her husband's public exposure. But scarcity is not a strategy.

In 2020, Biden was able to campaign on Zoom because of the pandemic. This time round he will need to get out there.

Literally no one else can make the case that Biden is not too old other than Biden himself. Mark Twain is said to have quipped: "Age is mind over matter. If you don't mind, it doesn't matter."

Unfortunately for Biden, US voters do seem to mind.

My own sense is that the Americans will be unable to get behind the effort to support Ukraine financially because people are tired of the war, the incompetence in Kyiv and the lack of a proper response to a domestic issue – the southern border. And the cheerleader is now thought to be too senile to challenge the alternative narrative – that of Trump who has said he would not waste US taxpayers' money in Ukraine and to take back the presidency from Biden.

By:

*Yeong, Wai-Cheong, CFA
Fintech Entrepreneur, Money Manager and Blogger
Un-Influencer in a World full of Hubris*