

Weekly Commentary 12

The start of WW3 - how far are we in it?

Are we already in WW3?

As the world stumbles haphazardly , like an injured man, into various conflicts, some of them civil , one has to wonder if we are already in WW3?

Here are some tell – tale signs that we are :

- 1) NATO have already articulated the possibility of intervening in the Ukraine war with European ground troops. While the Macron proposal has been met with derision by other NATO members, including the USA, as well as with a stern warning from Russia not to move in that direction, it should be remembered that all arms deliveries to Kyiv started with trial balloons but eventually got fulfilled, as Kyiv demanded. Germany started with only the desire to send sleeping bags and 5000 helmets to Ukraine. A year later, they sent Leopard 2 tanks and now Storm Shadow missiles.
- 2) There are already NATO mercenaries in Ukraine, and some hundreds have already been killed. Once this is true, it becomes an easy escalation.
- 3) The Israeli-Hamas conflict has not slowed in spite of ICJ intervention to prevent genocide. There are reports that over a hundred Gazans were massacred by the IDF as they queued up for relief in food and water a few days ago. This is no longer a counter insurgency operation; it is hotting up to become a regional war.
- 4) Besides the hot wars, there is a civil confrontation between Biden and Trump, on the vexing question of the southern border. This is the issue that will determine who will be president in November, and at the moment, it does not look good for the incumbent.

While it seems like NATO countries rejected the boots on the ground idea, there are still lingering war like tones:

Britain, the US and Germany have trashed Macron’s threat to put “boots on the ground” in Ukraine as Russia warns it would make war with NATO ‘inevitable’.

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- *Britain has ruled out plans to deploy troops on the ground in Ukraine*
- *France said that the West hadn't ruled out send its own troops in*
- *But the UK joined Germany and the US in rubbishing the claims*

By JAMES TAPSFIELD, POLITICAL EDITOR and PERKIN AMALARAJ

PUBLISHED: 22:30 GMT, 27 February 2024 **The Daily Mail**

Britain, the US and Germany have trashed Emmanuel Macron's threat to put 'boots on the ground' in Ukraine after [Russia](#) warned it would make war with [NATO](#) 'inevitable'.

[Downing Street](#) insisted there are no plans to deploy British troops to fight alongside Ukraine in the wake of the French president's claim that the prospect 'should not be ruled out'.

Joe Biden's administration said the President had been clear that American forces will not be sent to Ukraine.

Meanwhile, German issued a thinly-veiled rebuke about the speed at which Paris had been supplying weapons to Kyiv, saying that should be Mr Macron's focus.

Tories expressed concern at the 'completely unnecessary rattling of Putin', saying there are better ways to test his 'long-term commitment'.

The Kremlin seized on Mr Macron's words as it bids to divide the Western military alliance at a crucial point in the war - which has now been raging for two years.

Putin spokesman Dmitry Peskov said the possibility of NATO troops on the ground was an 'important new element'.

'In that case, we would need to talk not about the probability but the inevitability [of war],' he said.

Mr [Macron](#) said earlier this week that European nations have not ruled out putting boots on the ground.

He said that nothing should be excluded as the West looked for a strategy to counter Russia, which controls just under a fifth of territory recognised as Ukraine.

'We will do everything that we must so that Russia does not win,' Macron added.

Asked about the comments, a Downing Street spokesman said: 'Beyond the small number of personnel in-country supporting the armed forces, we do not have any plans to make large-scale deployments.'

Tobias Ellwood, the former chair of the Defence Committee in the House of Commons, told [the Telegraph](#): 'The idea that you put boots on the ground, which is so totemic and so symbolic, but is completely unnecessary rattling of [Putin](#) when there are other ways to test his long-term commitment to seeing this through.'

[Germany's](#) deputy Chancellor, Robert Haebbeck, said that France should focus on providing more weapons to Ukrainian troops.

He said: 'I'm pleased that France is thinking about how to increase its support for Ukraine, but if I could give it a word of advice – supply more weapons.'

The US also weighed in, denying that American troops would be deployed in Ukraine. National Security Council spokesperson Adrienne Watson told reporters that Joe Biden 'has been clear that the US will not send troops to fight in Ukraine.'

Her colleague Jack Kirby added that American troops were only in Ukraine for the accountability of weapons distributed to its troops.

Kirby denied that US troops could be sent for demining, arms production or cyber operations, as French Foreign Minister Stephane Sejourne had suggested Western troops could be.

He added that it would be a 'sovereign decision' for France or any other NATO country whether to send troops to Ukraine.

State Department spokesman Matthew Miller, asked whether the United States could send troops for other purposes such as training, said the Biden administration opposed any deployment to Ukraine.

'We're not sending boots on the ground in Ukraine. The president's been very clear,' Miller told reporters.

Both the White House and State Department said the priority was for Congress to approve new military aid to Ukraine.

'Fundamentally, we think that the path to victory for Ukraine right now is in the United States House of Representatives,' Miller said.

German Chancellor Olaf Sholz's deputy, Robert Habeck, made a swipe about France's provision of weapons lagging.

'I'm pleased that France is thinking about how to increase its support for Ukraine, but if I could give it a word of advice: supply more weapons,' Mr Habeck said. **That's sarcasm of course.**

As a matter of fact, the disagreements among the members of NATO need not have been. For too long, they have been disunited over the war on the borders of Russia. All these countries made a big deal about supporting democracy in Ukraine as though it was some inalienable principle. But when the crunch came, and it is obvious that Ukraine has lost the war, the immediate reaction is panic and an attempt to protect their own ass.

Nobody now wants to be caught unprepared for the dreaded Russian invasion which 1) they think will happen within the next five years; 2) it will cost them a lot of money to prepare their armies for it; and 3) they are concerned that Trump would not support them. All these sentiments have been reported in the western media recently. The so called democratic principles they have been giving lip service to are not for real. Kyiv has suspended democratic norms and the country is not holding elections. On the other hand, Russia is going ahead with its own elections in which Putin with an 80 percent approval (as rated by Western polling agencies) is running again.

Which is worse? The country that just bans opposition parties, or the feared dictator making a bid to be elected again. The real reason why NATO has been fighting the Russians is because they were acting to help the Americans maintain global hegemony. Fighting for democracy is just the noble sounding excuse.

1) Any war against the Russians will end in a nuclear holocaust in which Europeans will die. As I have written before, the Russians have plenty of space to hide from nuclear fallout, while in Europe, they are highly congested. There is no prospect of a good outcome.

2) If nukes are not used, given the demilitarised state of NATO armies, including the American one, war will mean that the second half of WW2 after Stalingrad and Kursk, will be repeated as the first phase of WW3. The Russian army will prevail, as they have in the last conflagration, WW2.

3) As Putin admitted, there is no reason for the Russians to be interested in attacking anything west of Poland, or Poland itself, as the Warsaw Pact experience bankrupted the Soviet Union. For Russia to now want to repeat that historical mistake is to imagine that the Russian leadership are idiots. So all this posturing for Macron and his fellow heads of government in the last week, shows that they don't read history, and if they did, they don't learn anything from it.

4) Besides, Russia has a five-zero win loss track record in war versus the collective west over the last 200 years. If I were a betting man, I would say NATO has no chance.

If that is the case, why worry about it? Europe is finished anyway if the Russians want to fight.

While it seems like every European nation has rebuffed idiot-in-chief, Macron three days ago at the Elysee Palace meeting, on Friday, there are a few of the smaller NATO members including Estonia, Finland and Holland who said that the boots on the ground option should not be ruled out. If you ask me, these are smaller countries without a military capability or even a sizeable population, who are sacred shitless by Russia and would want NATO to invoke Article 5 for them. It is totally selfish and will dilute the strength of NATO should there be a fight.

Everybody in the world will die. But for us Asians who must reject this foolish step towards WW3, the only relief in this is that Europeans will probably die first .

For those readers who want an account on how Europe will be crushed by Russia in WW3, which started with no ill intentions on the part of Moscow (in fact they wanted to join NATO and were rebuffed), here is an account by a military historian on how the Russians have demilitarized the entire NATO through a war of attrition. In other words, the Europeans have only themselves to blame. The writer is based in San Francisco.

Russo-Ukrainian War: The Deluge **Z World Turns Two**

2024 March / 2

As the calendar barrels into another year and we tick away the days of February, notable anniversaries are marked off in sequence. It is now 2/22/2022 +2: two years since Putin's address on the historic status of the Donetsk and Lugansk regions, followed on 2/24/2022 by the commencement of the Special Military Operation and the spectacular resumption of history.

The nature of the war changed dramatically after a kinetic and mobile opening phase. With the collapse of the negotiation process (whether thanks to Boris Johnson or not), it became clear that the only way out of the conflict would be through the strategic defeat of one party by the other. Thanks to a pipeline of western support (in the form of material, financial aid, and ISR and targeting assistance) which allowed Ukraine to transcend its rapidly evaporating indigenous war economy, it became clear that this would be a war of industrial attrition, rather than rapid maneuver and annihilation. Russia began to mobilize resources for this sort of attritional war in the Autumn of 2022, and since then the war has attained its present quality - that of a firepower intensive but relatively static positional struggle.

The nature of this attritional-positional war lends itself to analytic ambiguity, because it denies the most attractive and obvious signs of victory and defeat in large territorial changes. Instead, a whole host of anecdotal, small scale positional analysis, and foggy data has to suffice, and this can be easily misconstrued or misunderstood. Ukraine's supporters point to nominally small scale advances to support their notion that Russia is suffering cataclysmic casualties to capture small villages. This suggests that Russia is winning meaningless, pyrrhic victories which will lead to its exhaustion, so long as Ukraine receives everything it asks for from the west. At the same time, the Z-sphere points to these same battles as evidence that Ukraine can no longer hold even its most heavily defended fortress cities.

What I intend to argue here is that **2024 will be highly decisive for the war, as the year in which Ukrainian strategic exhaustion begins to show out at the same time that Russia's strategic investments begin to pay off on the battlefield.** This is the way of such an attritional conflict, which burdens armies with cumulative and constant stressors in a test of their recuperative powers. Wear and tear and the raging of the waters will erode and burden the dike until it bursts. And then the deluge comes.

Avdiivka: Tactical Overmatch

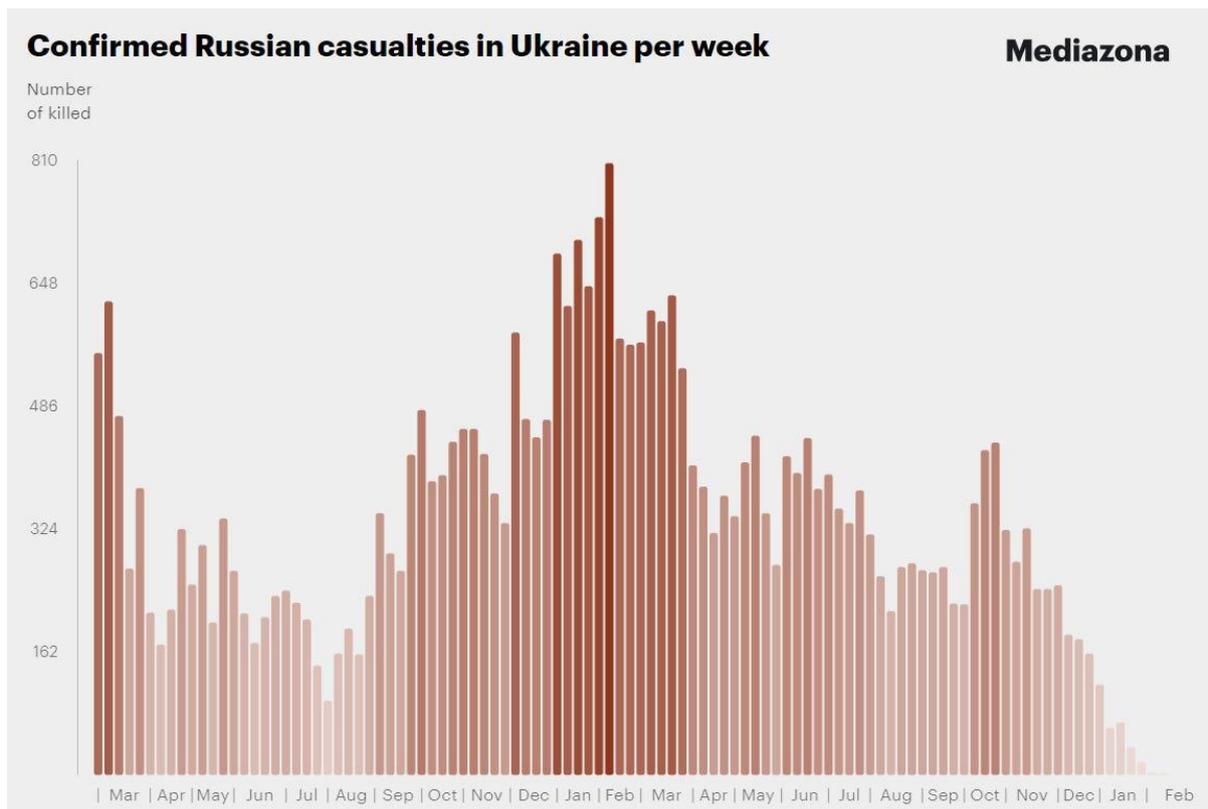
The signature operational development of 2024 is at this point clearly the complete Russian capture of Avdiivka. The strategic significance of Avdiivka has itself been subject to debate, with some dismissing it as little more than a dingy suburb of Donetsk, targeted to give Putin a symbolic victory on the eve of Russian elections.

In fact, Avdiivka is clearly a locale with great operational significance. A Ukrainian fortress since the beginning of the Donbass War in 2014, Avdiivka served as a keystone blocking position for the AFU on the doorstep of Donetsk, sitting on a major supply corridor. Its capture creates space for Russia to begin a multi-pronged advance on next-phase Ukrainian strongholds like Konstantinivka and Pokrovsk (more on that later) and pushes Ukrainian artillery away from Donetsk.

The subject that would seem to be of particular importance, however, was the manner in which Russia captured Avdiivka. The struggle amid the wreckage of an industrial city provided something of a Rorschach test for the war, with some seeing the battle as yet another application of Russian “meat assaults”, overwhelming the AFU defenders with mass amid horrific casualties.

This story does not hold up to scrutiny, as I would like to demonstrate from a variety of angles. First, we can try to gauge casualties. This is always difficult to do with a high degree of accuracy, but it would be useful to look for abnormalities or spikes in Russian loss patterns. The most widely accepted source for this would be the Mediazona casualty tracker (an explicitly anti-Putinist media project operated out of the west).

When one goes to examine the Mediazona counts, an interesting discrepancy manifests itself. The summary text notes that a four-month battle for Avdiivka has recently concluded, and Mediazona states: “*We are seeing significant growth of Russian casualties since mid-October.*” This is actually quite odd, because their data shows the literal opposite. Since October 10 (the day of the first major Russian mechanized assault on Avdiivka), Mediazona has counted an average of 48 Russian casualties per day, which is actually **significantly less than the burn rate earlier in the year**. In contrast, Mediazona counted 80 casualties per day on average from January 1 to October 9. This period, of course, includes heavy fighting in Bakhmut, so if one takes the period between the end of the Battle of Bakhmut and the beginning of the Battle of Avdiivka (May 20 to October 9) one finds an average of 60 Russian casualties per day. A time series of Mediazona’s weekly confirmed casualties also shows a downward trend, making one wonder how they can feel comfortable claiming that the action in Avdiivka has raised the burn rate.



Furthermore, Ukrainian sources on the ground emphasized that the Russian assault in Avdiivka was quite certainly not a mere function of mass, and noted effective Russian small unit tactics with a powerful fire support. One Ukrainian officer told Politico: “That’s how they work in Avdiivka — artillery levels everything to the ground, and then professional landing troops come in *small groups*.” Another officer described Russian small unit assaults (5 to 7 men) occurring at night. All of this is inconsistent with the trope about Russian “human wave” assaults - which, we should note, have never been caught on camera. Given the Ukrainian fondness for sharing combat footage, oughtn’t we expect to see some alleged evidence of these Russian waves being mowed down?

All this is to say, **the claim that Russia (yet again) suffered catastrophic losses in Avdiivka is simply not supported.** Like a previous analysis in which I showed that Russian armor losses were not rising or showing abnormal patterns, we yet again have a major Russian assault failing to cause a spike in the loss data. This is not to deny that Russia has suffered casualties. The operation at Avdiivka was a high intensity, four month battle. Men are killed and vehicles are destroyed in such affairs, but there is little evidence that this occurred at abnormal or alarming rates for the Russian Armed Forces.

Now, you’re certainly free to make your own judgements, and I have no doubt that the belief in massive Russian casualties and human wave assaults will endure. However, to believe this, you must make an epistemological leap of faith - believing that the wasteful human waves exist despite Ukrainian fighters testifying to the opposite, and that Russian casualties have risen in a way that is somehow invisible to trackers like Warspotting and Mediazona.

In contrast, Avdiivka stands out as the first major engagement of the war where Ukraine's growing material shortages have been acutely felt. After burning through much of their accumulated stock (including the large batch of shells purchased from South Korea by the United States), the AFU felt a glaring and painful artillery shortage in Avdiivka. Complaints about "shell hunger" were a motif of the coverage of the battle. Of course, we've heard about the growing shell shortage for months (and it is known that Ukraine simply does not have enough tubes to cover the entire front), but Avdiivka stands out as a keystone position, important enough for Ukraine to scramble premier assets to reinforce it, where they simply could not provide an adequate base of fire.



Avdiivka Feb 2024 ; Paris in WW3?

In the absence of adequate artillery, Ukraine has increasingly tried to lean on FPV drones as a substitute. There is a certain strategic logic to this, in that small drones can be manufactured in distributed facilities and do not require the capital intensive production centers (vulnerable to Russian strike systems) that artillery shells do.

However, drones are clearly not a panacea to Ukraine's problems. In the simple technical sense, the destructive power of an FPV drone (which usually carries the warhead of a rocket propelled grenade) pales in comparison to an artillery shell and is thus unsuitable for suppressive fire or the reduction of strongpoints. Drones are also subject to disruptions from weather and electronic warfare in ways that artillery is not. More importantly, however, Ukraine is simply losing the drone race. Ukraine's achievements ramping up drone production in wartime are genuinely impressive, but the country's industrial base is still far smaller and more vulnerable than Russia's,

and Russia's drone production is starting to widely outstrip Ukraine's. Ukraine's weakness in other arms prompted them to be the first party to lean heavily on FPVs, but that early lead has been lost.

So, drones clearly offer a lethal and important battlefield expedient, but they are neither a genuine replacement for artillery nor an arm of clear advantage for Ukraine. The result was a Ukrainian defense in Avdiivka that was substantially outgunned. The problem was compounded by the rapid proliferation of Russian air dropped glide bombs, alongside the degradation of Ukraine's air defense. This allowed the Russian air force to operate around Avdiivka with something approaching impunity, dropping hundreds of glide bombs with the power to - unlike artillery shells, let alone tiny FPV warheads - level the fortified concrete blocks that normally make Soviet vintage cities so durable in urban fighting.

Thus, Avdiivka unfolded along a pattern that is now becoming very familiar, and indicates the emerging Russian preference for assaulting cities, at least of this mid-sized fortress variety. Once again the operation focused in its preliminary phase on flaring out Russian control over the flanks, beginning with the large mechanized assault in early November which secured positions on the railway line to the north of the city. Again (as in the case of Bakhmut and Lysychansk-Severodonetsk) there was an expectation among some that Russia would attempt to encircle the city, but this still does not look feasible in the current operating environment under the nexus of fires and ISR. Instead, positions on the flank allowed the Russians to launch concentric attacks into the city, entering on multiple axes that compressed the Ukrainian defenders into a tight interior position, where Russian fire could be heavily concentrated.

The particular combination of concentric attack and overwhelming Russian fires led to a very rapid end to the battle once the Russian push into the city proper began. While the creep around the flanks occurred in a sequence of on and off pushes through the winter, the concentric crush on the city lasted scarcely more than a week. On February 7-8 the Russians achieved breakthroughs in both the northern and southern suburbs, and by February 14 the Ukrainians were in retreat. A few pockets of resistance would linger for only a few days.

Despite statements alleging that they had conducted an "orderly withdrawal", there is abundant evidence that the Ukrainians were taken aback by the tempo of the Russian assault, and the evacuation was hastily organized and only partially completed. A large number of personnel were unable to escape and are now POWs, and it is clear that Ukraine did not have time or energies to evacuate the wounded, instead ordering that they simply be left behind. The general picture is of a chaotic and ad-hoc retreat from the city, not an orderly and pre-planned withdrawal.

The issue for Ukraine now goes beyond the loss of Avdiivka and the opportunities that this will create for Russia. **Ukraine now has proof of failure on both the attack and the defense in operations where they concentrated significant forces. Their counteroffensive on Russia's Zaporhzia Line was a catastrophic failure, wasting much of the AFU's carefully husbanded mechanized package, and now they have a failed defense on their hands in Avdiivka, despite fighting out of a well prepared fortress and scrambling reserves into the sector to reinforce the defense.**

The question now becomes fairly simple: if Ukraine failed to attack successfully over the summer, if they could not defend Bakhmut, and if they cannot defend in Avdiivka, is there anywhere that they can find a battlefield success? The dam is leaking. Can Ukraine plug it before it collapses?

Russia's Full Court Press

Ukraine's force structure is always notoriously difficult to parse out, due to their propensity for ad-hoc battlegroups and their practice of piecemeal allocation of forces to resident brigade commands (turning brigade headquarters into the cups in a shell game). Truth be told, Ukrainian ORBAT and force allocation is in a class all its own - to try and get a handle on it, you can do no better than Matt Davies' excellent work over on X dot com. This generally makes the AFU's organization and force generation more opaque and more difficult to parse out than Russia's, for example. While Russia employs conventional army level groupings, Ukraine does not, and indeed lacks any organic commands above the brigade level.

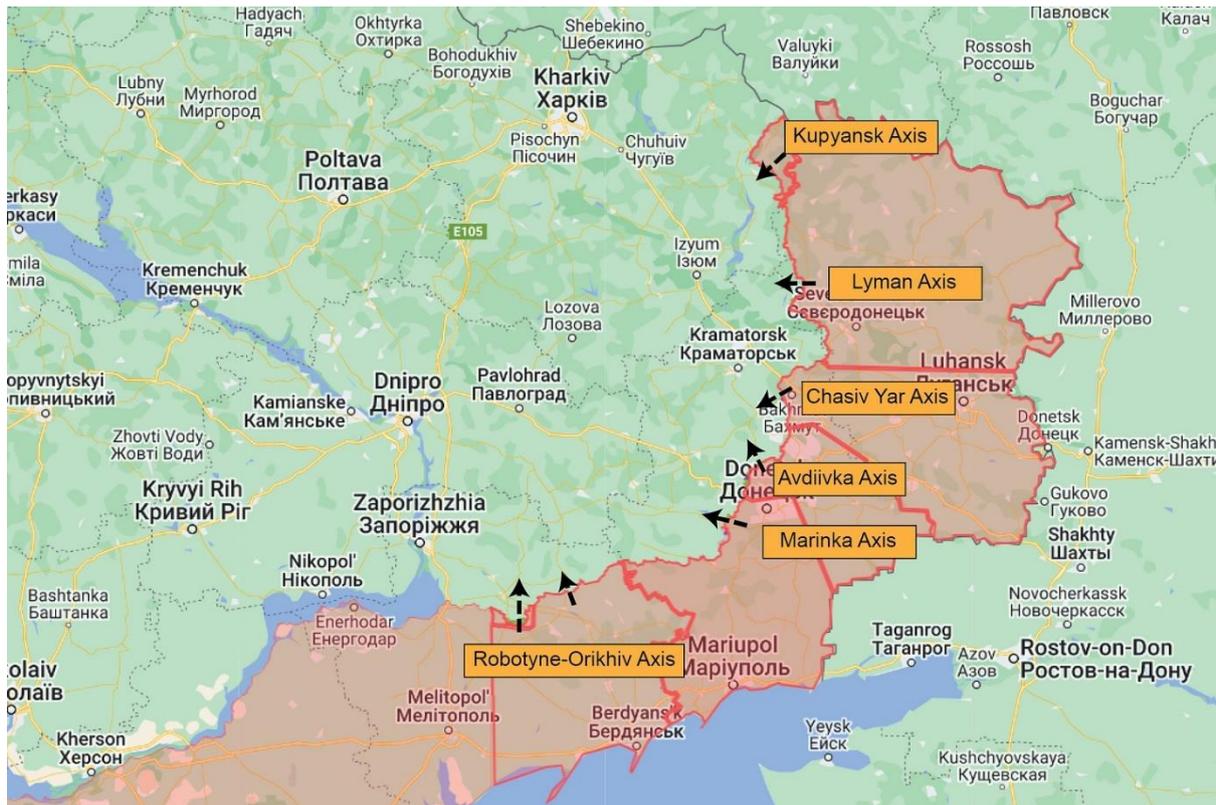
That being said, the basic picture is one of three Ukrainian "Operational Strategic Groupings", which are vaguely akin to army groups. These are, from north to south, Operation Strategic Groupings (OSGs) Khortytsia, Tavriya, and Odessa. Against these are arrayed four Russian Army Groups - from north to south, these are Army Groups West, Center, East, and Dnieper. Assessing the total line strength is always difficult, largely because we do not always have good insight into the actual combat rating of these units. However, we can make estimates of paper strength. Based on deployment information from the Project Owl Ukraine Control Map and the Militaryland Deployment Map, we can estimate that the nominal strength in the theater right now is some 33 Division Equivalents for Ukraine against perhaps 50 DEs for Russia - a significant, but not utterly overwhelming Russian advantage. We get a picture something like this (Ukrainian Army level formations are absent because they do not exist):



Ukrainian Theater Army and Group Level Commands (Base Control Map provided by Kalibrated Maps)

At the moment, Russia is grinding slowly forward on almost every axis in the theater. This has both strategic/attritional implications, in that the Ukrainians are forced to continually burn reserves while being denied the ability to rotate and reconstitute units, but there is also a clear operational formulation occurring.

The Russian maneuver scheme must be held in reference to their minimum end state objectives - namely, the capture of the remaining Donbas urban agglomerations around Sloviansk and Kramatorsk (though we should not assume that the war or Russian ambitions end there). At the moment, there are several major axes of advance, which I am labelling as follows:



Russian Axes of Attack (Base Control Map provided by Kalibrated Maps)

The intention of these thrusts is fairly obvious. In the center of the front, Russian advances on the Avdiivka and Chasiv Yar axes converge on the critical Ukrainian hub of Konstyantinivka, the capture of which is one of the absolute prerequisites for any serious attempt to move on the Kramatorsk agglomeration. Russian bases of control around Avdiivka and Bakhmut provide the necessary space to begin a two-pronged operation towards Konstyantinivka, bypassing and enveloping the strongly held Ukrainian fortress of Toretsk. (See the map below, which I made in December before the capture of Avdiivka).

Meanwhile, continued Russian pressure on the northern front (via a slow squeeze on the city of Kupyansk, at the top of the Oskil line as well as operations towards Lyman on the Zherebets axis) provide a base of progress towards the other operational prerequisite for Kramatorsk, which is the Russian recapture of the north bank of the Donets River, up to the confluence of the Oskil at Izyum.

Meanwhile, on the more southerly axes, Russia continues to expand its zone of control after the capture of Marinka, likely with the aim of developing momentum towards Kurakhove, which would put the Ukrainian fortress of Ugledar in a more severe salient. Ugledar remains a thorn in Russia's side, in that it lies uncomfortably close to Russian rail lines into the land bridge. Russia is also attacking the Ukrainian held Robotyne salient (the sparse fruits of Ukraine's counteroffensive). While these attacks have, as we have mentioned, attritional benefits by way of pinning Ukrainian forces in the line, it seems likely that Russia would aim to recapture the Robotyne salient to preempt any Ukrainian designs of using it as a springboard for a future attempt to restart operations towards Tokmak. Thus, these southern operations have

both attritive effects and offer the potential of preventatively neutralizing useful Ukrainian staging points.

Overall, the broad operational situation suggests that Russia is developing offensive momentum across the entire theater. This will have deleterious effects on Ukrainian combat power by preventing rotation, reconstitution, and lateral troop redeployment, while sucking in the dwindling Ukrainian reserves. Shoigu recently made an uncharacteristically bold statement that the AFU was committing much of its remaining reserves:

“After the collapse of the counteroffensive, the Ukrainian army command has been trying to stabilize the situation at the expense of the remaining reserves and prevent the collapse of the frontline.”

This is, if not totally verifiable, at least notable given his general reticence to make sweeping statements about the state of the war.

In the near term (meaning the spring and summer months) we should expect Russia to progress towards the following intermediate operational goals:

- Developing a concentric offensive towards the Ukrainian agglomerations around Chasiv Yar, Toretsk, and Kontyantinivka
- An offensive along the Zherebets-Oskil line towards Lyman, to capture or screen the Donets River line as a prerequisite for an operation against Kramatorsk
- Continued assaults towards Kurakhove in preparation for the liquidation of the Ugledar salient
- Preventative attacks towards the Orakhiv axis to prevent future Ukrainian attempts to exploit the Robotyne salient

Farewell Zaluzhny

Against the backdrop of Ukraine's defeat at Avidiivka, President Zelensky began a long expected command overhaul when he fired Commander in Chief Valery Zaluzhny and replaced him the the commander of the ground forces, Oleksandr Syrski.

There a variety of amusing ethnic and political subplots to this, particularly the longstanding tensions between Zelensky and Zaluzhny, the many ridiculous rumors that Zaluzhny had become a political rival to Zelensky and might be the lead figure in a military takeover of the government, and the rather ironic fact that the new top man, Syrski, is a Russian born less than fifty miles outside of Moscow, who ended up in Ukrainian service simply because his unit was posted near Kharkov when the Soviet Union fell, and he opted not to resign his command.

This is all very interesting, of course, and perhaps might help demonstrate that the relationship between these countries is far more convoluted and nuanced than most westerners assume. What matters for our purposes, however, is the military implications.

Farewell, Sweet Prince

What we should say about Zaluzhny is that, while he was not really Ukraine's biggest problem, he did not have the answers. Zaluzhny displayed a bizarre timidity, particularly throughout the Battle of Bakhmut and the Ukrainian Counteroffensive. We constantly heard about Zaluzhny's reservations and opposition to Ukrainian plans - he was against the costly defense of Bakhmut, skeptical of the attack out of Orikhiv, and so forth. There was even a rumor that Zaluzhny told Zelensky that the counteroffensive had failed already in the opening weeks of the operation.

The problem with all of this is simple: Zaluzhny cannot have it both ways. He seemed to be positioning himself as a voice of caution and reason, distancing himself from operations on the ground, *while allowing those operations to go forward anyway*. Over the summer, supposedly at the same time that Zaluzhny had concluded that the counteroffensive was failing, he continued to push Ukrainian mechanized forces into the Russian defenses in small, company sized battlegroups.

Ultimately, Zaluzhny strikes one as a non-entity: skeptical of Ukrainian battle plans, but willing to implement them anyway without offering alternatives of his own. In particular, his hesitation led the Ukrainian counteroffensive to devolve into a sequence of wasteful probing attacks which lacked the mass to achieve a decisive result and inevitably spiraled into a slow motion trainwreck. A commander who complains about battleplans while implementing them anyway is begging an obvious question: what is it that you do around here, anyway?

In contrast, Syrski is a man who clearly exerts some will on the battlefield, for good or ill. His preference for commitment and combat has resulted in several of Ukraine's ugliest defeats - he is, after all, the architect of the Bakhmut defense and the firebag at Lysychansk. But he's also the showrunner for Ukraine's signature military success to this point, in the 2022 Kharkov Counteroffensive, where he successfully exploited a badly hollowed out section of Russian front and recaptured important positions over the Oskil.

Syrski may very well lead Ukraine to disaster. He has shown a tolerance for casualties that could easily break the AFU's back, and a preference for generating horrible, grinding positional defense. But Syrski at least has a propensity to look for decision points, unlike Zaluzhny, who seemed content to slowly wither away in positional battle against a superior foe. Aggression could easily cause disaster for Ukraine, but time had clearly run out on Zaluzhny's way of war.

(That disaster has happened. It has been discovered that Syrski is not a good commander of men. He has taken to criticizing his subordinate commanders about their doing a bad job on social media.. How can he do that? If they were really bad, they should be sacked. But for him to comment on their performance on Facebook is cowardly. In other words, the leadership of Ukraine's military is still as disorganized as ever. Even on this factor of poor leadership alone, Kyiv will lose the war.)

Outgunned: Ukraine and the Arms Race

The Russo-Ukrainian War is one of industrial attrition. Despite a variety of theories about this or that game changing weapon, clever maneuver scheme, or superior western training, the reality of this war for the last 18 months has been one of grinding and laborious industrial war, battering through fixed defenses in a maelstrom of concrete, steel, and high explosives. The central problem for Ukraine is fairly simple: Russian force generation is reaching the liftoff point, which will interminably shift combat power in Russia's favor.

As artillery shells have become the totem item in this war, a commentary on the state of the artillery race is certainly warranted. Ukraine managed to build a large inventory of shells in preparation for its 2023 summer offensive, partially through careful husbanding of resources and partially through the United States tapping a few remaining reservoirs, like South Korea. After expending much of that stockpile in high intensity operations through the summer, the artillery advantage has once again swung heavily in favor of Russia, and "shell hunger" has become a ubiquitous complaint for Kiev.

In particular, Zelensky has recently begun to complain of what he calls an "artificial shortage", blaming the Republican opposition in the US Congress for Ukraine's supply difficulties. Zelensky is wrong. The shortage is real, and not easily fixed.

After burning through excess stocks, Ukraine's long-term supply has increasingly come to hinge on attempts to expand production in Europe and the United States. However, this plan is foundering on three separate rocks: 1) industry has been much slower to ramp up than expected; 2) even the expanded production targets are too low to win the war for Ukraine; and 3) even if adequate ammunition could be procured, Ukraine would quickly run into problems with barrel availability.

Thus far, the United States has been much more successful ramping up production than has Europe. While American targets have been revised several times, it now looks like the United States will produce something like 500,000 shells in 2024, which is a good number given the state of the American industrial plant and issues with labor shortages. The European Union initially hoped to deliver 1 million shells on an annualized basis, but they appear to be far short of this number. Europe faces a variety of problems, like labor shortages, exorbitant energy costs, and a consensus driven decision making culture that is slow to allocate significant resources. The European practice of small orders placed by individual member states also leaves manufacturers hesitant to make large investments in new production lines. Or, as one Belgian general put it: "We're in deep shit."

Let's say that the USA and Europe both fulfill their current targeted deliveries to Ukraine in their entirety. What would that amount to? A recent study from two German analysts at the European Council on Foreign Relations estimated that, in the optimist scenario, the USA and Europe can supply Ukraine with approximately 1.3 million rounds of ammunition on an annualized basis. That would give Ukraine a budget of about 3,600 shells per day - enough to sustain moderate intensity, but far below what they need.

Last year, Ukrainian Minister of Defense Reznikov said that Ukraine would require nearly 12,000 shells per day to “successfully execute battlefield tasks”, particularly offensive actions. That works out to more than 350,000 shells per month - more than three times what the NATO bloc is hoping to produce. Obviously that large number is unrealistic, but a recent study from the Estonian Ministry of Defense estimated that at minimum Ukraine will need 200,000 shells per month (Roughly 6,600 per day). At the estimated long-run availability of 3,600 per day, Ukraine can have some basic functionality, but they will find it difficult to accumulate a stockpile to allow higher intensity offensive operations.

This runs into an additional, follow on problem, which is that simply pumping shells into Ukraine is not enough. Solving the shell shortage will exacerbate the barrel shortage. Artillery barrels, needless to say, wear out from extended use. Using a rule of thumb number which says that a howitzer barrel has a lifespan of about 2,500 shots, this means that Ukraine would be wearing out somewhere between 125-150 guns per month, assuming they could actually shoot as much as Reznikov wants. This would create yet another sustainment bottleneck, complicated by the fact that Ukraine has at least 17 different platforms in use.

Meanwhile, what of the Russians? It’s clear that Russia’s pool of shells has been vastly underestimated. First we have the news that North Korean deliveries have been far larger than initially expected; instead of 1 million, it’s something more like 3 million with deliveries ongoing. This number is dampened by the fact that some of the North Korean shells are defective (from long stays in depots and cannibalization), but the sheer size of the delivery can’t be ignored. Meanwhile, indigenous Russian production has skyrocketed, with the Estonians estimating some 3.5 million shells produced in 2023 for the Russians, with a figure of 4.5 million expected in 2024. Including North Korean shells, it seems highly likely that Russian can easily sustain a firing rate of up to 12,000 shells per day, with surge capacity in reserve.

The upshot of all this is essentially that, even if the European production surge occurs on schedule, **there’s at least a 3-1 advantage (potentially 5-1) in Russian artillery fire** that’s baked into the calculus of this war, occurring alongside a substantial *western acknowledged* ramp up in Russian production of strike systems like cruise missiles, Geran drones, Lancets, and glide bombs of both greater power and greater range. A recent publication from the Royal United Services Institute noted that Russia can deliver 1,500 tanks (both new build and retrofitted depot stocks) and 3,000 armored vehicles per year - the report also notes that Russian stocks of Iskander and Kalibr missiles have grown significantly over the last year.

The standard argument - the sort of “Theory of Ukrainian Victory” - rests on the idea of disproportionate, catastrophic Russian casualties, and both sides love to throw around that cherished word “loss ratios.” However, this rather tends to obfuscate the issue. The most important question is simple whether an army’s relative combat power is growing or shrinking over time - that is, whether its ability to generate forces is greater than its rate of burn - can it reconstitute attrited units in a timely manner, generate replacements, recover, repair, and replace broken equipment, and so forth. The prototypical example of this is of course the Nazi-Soviet War. Despite the fact that the Germans enjoyed favorable “loss ratios” throughout most of the war, the ratio of combat power consistently grew in the USSR’s favor due to their vastly

superior force generation powers. Tellingly, Hitler even made a quip during the Battle of Kursk that the loss ratios should predict an imminent German victory. But loss ratios do not matter nearly as much as the relative rate of loss and force generation.

Given that Russian casualties are obviously far below the phantasmagorical hundreds of thousands suggested by western Media and Ukrainian propagandists, it has become clear that Russia is generating more force over time. Estonian intelligence estimated that Russia can properly train, equip, and deploy roughly 130,000 additional troops every six months, which is more than adequate to overcome current loss rates. As if to emphasize the point, RUSI notes that the Russian grouping of forces in Ukraine (that is, only those forces deployed in theater at the moment) rose from 360,000 to 470,000 over the last year.

So, Russian force generation is growing over time, and not simply regenerating losses. Meanwhile, Ukrainian forces are increasingly undermanned, with understrength brigades asked to perform increasingly heavy lift. We know that Ukrainian reserves are running low. This was clearly demonstrated in Avdiivka, when the AFU scrambled brigades from other fronts (like the 47th Mechanized) that had been fighting all summer, indicating that there was a lack of adequate strategic reserves, and then throwing in the elite 3rd Assault Brigade in the closing days of the battle to try and stem the bleeding. Meanwhile, formations like the 110th Mechanized, which had been fighting in Avdiivka for months, were essentially burned off entirely because they could not be rotated out. Russia conducts regular troop rotations, while Ukrainian forces remain on the line due to the lack of replacements.

So, here we are. **The current *Theory of Ukrainian Victory* is exhausted**, intending as it did to leverage western ISR, training, and surplus equipment to deliver disproportionate casualties on Russia. 2022 was a year of big surges (not Big Serges), with Russia rapidly conquering the land bridge and the Lugansk shoulder in its initial maneuver campaign, followed by Ukrainian capitalization on the inadequate Russian force generation with their audacious counterattack towards the Oskil. But 2023 was different - Ukraine had a significant window of opportunity, flush with western equipment, training, and planning assistance while Russia's mobilization ground into gear. That strategic window yielded nothing. Instead, Ukraine burned off valuable resources defending Bakhmut and then bashed uselessly against a well shaped and well defended Russian line in the south. Now the window is closed, and Russian force generation is inexorably rising, threatening Ukraine with the deluge of total strategic overmatch.

Ukraine is facing strategic defeat, and the only way out is to go all in - not only for Ukraine, in the form of a more radical and totalizing mobilization plan, but for its partners too, who will have to adopt a quasi-war economy and devote radically more resources to arming and training the AFU.

There are signs that Ukraine might be ready to take that plunge, from Zelensky's claim that the army is asking for 500,000 more men, to the ongoing deliberation over an expanded draft, to comments about the need for "total mobilization" and laws against capital flight (to prevent men from fleeing the country with their money). This is only natural; due to Russia's vastly superior resource base, Ukraine

can only hope to match them with a totalizing and far more extractive mobilization policy.

That leaves the NATO partners. Even if Ukraine adopts a radical mobilization policy, it lacks the indigenous capacity to train them, let alone arm them. Without the NATO training pipeline and robust material support, a Ukrainian total mobilization (even if it were possible with Ukraine's limited state capacity) would serve only to inflate casualties and burn off what is left of the nation's demographic base. With even a stable level of Ukraine aid struggling to get through an American congress that is suffering from Ukraine fatigue and a host of domestic crises, it seems unlikely that any by the Baltic States are in the mood to double down and begin sending daily trains full of material to Kiev.

And so, we once again return to the motif of strategic exhaustion. 2022 was the year of wild swings as the front stabilized into a conveniently shaped and easily supplied Russian position, and 2023 was the year of Ukraine's strategic window of opportunity, frittered away at Bakhmut and Robotyne. 2024 is the year that Russia's swelling force generation reaches a climax and the war turns in an obvious and irreversible way against Ukraine.

The great German soldier and author Ernst Jünger had the following comment on the prospect of war with Russia:

When Spengler warned against any invasion of Russia for reasons of space, he was, as we have since seen, right. Even more questionable become each of these invasions for metaphysical reasons, insofar as one approaches one of the great sufferers, a titan, a genius of suffering power. In its aura, in its sphere of influence, one will become acquainted with pain in a way that far exceeds any imagination.

Much is always made of Russia's propensity for "suffering", with interpretations ranging from a romantic Russian-patriotic notion of sacrifice for the motherland to an anti-Russian criticism of the Russian tolerance for casualties. Perhaps it means both: the individual Russian soldier is more willing to sit in a freezing trench and trade shells than his adversary, and the Russian state and people are able to lose more and last longer in the aggregate.

I rather think, however, that Jünger's metaphysical "titan of suffering" is not so metaphysical at all. It rather refers to a mundane power of the Russian state, namely its excellence and willingness across the centuries to mobilize huge numbers of men and material for war, at the expense of other social goals. War with Russia sucks. It means mass casualties, cold trenches, scarred earth, and long nights of shelling. The Ukrainians have coped with this as well as anyone (because they are themselves quasi-Russian, however much they deny it), but it is an awful thing to trade shells for years on end. The Russian power of suffering is to willingly fight wars that devolve into bat fights, knowing they have a bigger bat.

The window of strategic opportunity has closed for Ukraine, and now opens wide for Russia. The earth opens wide for the dead.

The war between the IDF and Hamas is also getting worse. Yet another tragedy shows anarchy is not ending any time soon in Gaza. Here is the story from the Economist:

A shooting and stampede kill 112 and injure hundreds

Feb 29th 2024

Early on February 29th death descended on a coastal road in Gaza. As many as 112 people were killed and hundreds more were injured, according to the Hamas-run health ministry, when catastrophe befell an aid convoy of 30 lorries carrying desperately needed food. As with many events in the war between Israel and Hamas, the facts are destined to remain fiercely contested. Nonetheless **this tragedy's importance will go far beyond the immediate loss of life. The images of hungry people jostling for food illustrate the dearth of aid reaching Gaza.** The anarchic circumstances surrounding so many deaths highlight a power vacuum there that no one, least of all Israel, knows how to fill. And another civilian calamity will test America's appetite for letting the war rumble on.

The incident was in northern Gaza, where the Israeli Defence Forces (idf) has dominated for months. All agree the deaths occurred after the food convoy had passed an Israeli checkpoint and was surrounded by thousands of hungry civilians. Accounts differ over what happened next. Palestinian eye-witnesses say idf soldiers fired on the crowd, killing some and sparking a stampede that claimed more lives. Mahmoud Abbas, the Palestinian president, called it an "ugly massacre conducted by the Israeli occupation army".

Contradicting this, the idf says the stampede began as people surrounded the vehicles. Aerial video footage purporting to be of the incident shows many people running around and between trucks. The Israelis say that people were killed and crushed during this stampede, the first stage of the incident. In the second stage "several hundred metres away" from the first, they say, a crowd began moving towards the checkpoint that the convoy had already passed. An Israeli military spokesperson said idf soldiers there "identified a threat" and after firing warning shots used only "limited fire". **(This is genocide pure and simple.)**

Further investigations may reveal more details, and perhaps make it easier to establish an objective picture of what took place. Nonetheless, three things are already obvious. One is that the lack of food and other aid is causing mayhem in Gaza. **Israeli security officials have been highly critical of the policy of the government of Binyamin Netanyahu, which has dragged its feet on allowing more humanitarian aid into Gaza from Israeli territory.** Mr Netanyahu has tried to block cabinet discussions on alternative authorities which could organise food distribution into Gaza. The World Food Programme has warned that "if nothing changes, a famine is imminent in northern Gaza."

The second consequence is another blow to the idea that local organisations unconnected to Hamas could quickly take de facto administrative control of Gaza. It is striking that the incident took place in northern Gaza, where Israel has largely

ejected Hamas. The truck convoy was organised by private Palestinian firms. Yet the picture that emerges is not of an emerging new hierarchy, but of fear and chaos. Israel is unwilling to enforce public order and unwilling to exit, and no one else is able or prepared to step in. That matters because Mr Netanyahu's plan for the "day after" in Gaza, a one-page document which was released to the cabinet on February 22nd, envisions administrative control by local groups "who are not affiliated with terrorist countries or groups and are not financially supported by them" who will rise from the rubble. Rule by mafias and mobs appears more likely.

The final knock-on effect relates to America. It has been pushing for a temporary ceasefire and hostage-release by Ramadan, which it sees as a way of catalysing a reset in the conflict, as well as creating a path to talks over a two-state solution. Mr Netanyahu said on February 29th that Israel was interested in a temporary ceasefire agreement but that "Hamas' demands are delusional." He is wary of a ceasefire, which could cause his fragile coalition to collapse. Whoever is to blame for the latest tragedy, it piles on the pressure on all sides to find a way to pause the fighting. One Israeli official said that "we have had a much longer window of legitimacy from the Americans than we expected but it's about to close."

The thing about the Middle East is that everybody knows that this is a trip wire to global instability. Now right there is no prospect of peace, which means that we are in a WW3 scenario, as the violence veers towards the unstoppable. It seems likely that the Israelis will not heed the ICJ's demands that it not commit further plausible genocide. And even though Germany has reversed its position on supporting Israel 100 percent (Germany has also been sued for complicity in genocide at the ICJ), the fact that the United States has succumbed and abrogated its moral responsibilities in an election year to the Israeli lobby to continue to let Netanyahu to kill as many Palestinians as he possibly can, means that Israel will not stop. The American war with Iran is still desired by the US and should that happen, we will have the equivalent of WW3 in the Middle East. All these likely combatants are nuclear armed. So we are no better than NATO and Russia punching each other out.

It is looking like the Israeli Hamas war is taking on a racist and religious fundamentalist nature. In previous decades, the Israeli Defence Forces were honourable, but since two decades ago, Americans who have interacted with the IDF find that there have been profound changes there, since Israel took on a lot of the Jews who emigrated after the fall of the Soviet Union. These people are extremely intolerant, and many of them believe that Arabs in Gaza are no better than animals. Because of this, the Israelis are incapable of compromise and are totally intolerant of religious differences. They kill wantonly. And the Americans who back Netanyahu are victims of massive institutional corruption, when the Israeli lobby provides funding for both the Democrats (as well as the Republicans) to keep them in their political posts.

In my humble opinion, this problem is intractable. It is far more difficult for this war to end than for a Russian defeat of NATO in Ukraine or in Eastern Europe. But if the ICJ cannot stop the IDF and the Americans are too corrupt to do what is morally correct, then we are in WW3 in the Middle East.

The final sign that we are now in WW3 is the civil war in the US between the Democrats and the Republicans. This is hotting up as the leaders of both camps went to the southern border to make political news that would enhance their prospects.

Biden, Trump Clash in Texas With Dueling Trips to Border

By [Josh Wingrove](#), [Thomas Black](#), and [Gregory Korte](#) Bloomberg

March 1, 2024

Swing-State Voters in 2024

A monthly poll by Bloomberg News and Morning Consult on the issues at stake in the US presidential election.

President Joe Biden and his political rival Donald Trump undertook dueling visits to the US southern border on Thursday, highlighting an issue that stands to feature prominently in an expected November rematch of their bitterly contested 2020 contest.

With Biden in Brownsville and Trump 300 miles away in Eagle Pass, the president and his predecessor competed for attention, each seeking to demonstrate his ability to respond to a migrant surge that voters say is one of their top concerns ahead of November's election.

Balance of Power: Biden Returns from the Border (Podcast)

Biden toured border areas with his Homeland Security Secretary Alejandro Mayorkas, US Border Patrol Chief Jason Owens and local officials, while Trump received his own briefing from the state's Republican governor, Greg Abbott.

Trump and Abbott greeted members of the Texas National Guard, Border Patrol and Texas Department of Public Safety troopers at Shelby Park, a hot spot for migrants seeking to enter the US. They walked past shipping containers topped with razor wire placed there to discourage migrants.

'Biden Invasion'

"This is a Joe Biden invasion," Trump said as he delivered remarks outdoors against a dusty backdrop, flanked by the governor and other officials. "The United States is being overrun by Biden migrant crime."

Trump ticked off a list of violent crime allegedly committed by migrants, including the recent killing of a Georgia nursing student. "Joe Biden will never say Laken Riley's name," Trump said, adding that he had spoken to her parents.

The former president praised Texas officials' efforts to stop the flow of migrants, contrasting their approach with Democratic governors in other states, including California's Gavin Newsom, a prominent Biden surrogate whom he mocked with a new nickname: "Newscum."

"We have languages coming into our country — nobody that even speaks those languages," Trump said. "They're pouring into our country, and they're bringing with them tremendous problems, including medical problems."

Across the Rio Grande in Mexico, a small crowd gathered to watch the spectacle, standing on a retaining wall decorated with a colorful mural. Trump at one point waved and pumped his fist at the people on the other side of the border.

"Today is a day of extraordinary contrast," Abbott said. The governor has assailed the Biden administration over its response and fought it in court over how much local officials can do to secure the border. And he's sent busses of migrants to cities in other states.

As Trump spoke, Biden was being briefed at a border patrol station by US Customs and Border Protection, US Citizenship and Immigration Services and Immigration and Customs Enforcement officials.

Biden began speaking just moments after Trump wrapped up, urged the former president to join him in securing passage of a bipartisan border deal, which Republicans had rejected under pressure from the GOP frontrunner.

"Instead of playing politics on this issue, instead of telling members of Congress to block this legislation: join me, or I'll join you in telling the Congress to pass this bipartisan border security bill," Biden said.

"We can do it together, you know and I know it's the toughest, most efficient, most effective border security bill this country has ever seen," he added.

Rejected Deal

Biden has sought to reverse criticism of the administration's handling of the crisis by highlighting Republicans' decision, at Trump's behest, to kill the painstakingly negotiated bipartisan deal. That agreement would have given the president powers to effectively close the border if crossings reached certain levels. Biden has said his rival would rather "weaponize" the issue of immigration than address it.

The president pushed Congress to act, saying lawmakers needed to approve more funding for Border Patrol agents and for additional immigration judges to deal with a backlog in cases.

“It’s long past time to act,” Biden said. “We can’t wait any longer.”

Biden earlier met with Border Patrol agents as he toured a section of the Rio Grande with a boat patrolling the calm waters behind them. There were no migrants visible. Pro-Trump protesters waved flags along a nearby fence.

The border visits come at a critical moment for the presidential contenders.

Trump is closing in on the GOP nomination and increasingly solidifying his hold on the party. He’s vowed to carry out the largest deportation in US history and complete a wall along the entire Southern border if returned to office.

Texas holds its primaries on March 5, Super Tuesday, when voters in more than a dozen states head to the polls.

Blame Game

A February Bloomberg News/Morning Consult poll shows a majority of voters in seven swing states still hold Biden and congressional Democrats responsible for the migrant surge. But blame for congressional Republicans and the Trump administration each increased 5 percentage points compared to the previous month.

While Biden contends that Congress needs to act on immigration — he told governors visiting the White House last week that his lawyers have told him he has few options — Speaker Mike Johnson has said the president can take executive action to deal with the border, leaving the two sides at a stalemate.

The issue with the southern border will determine the outcome of the US elections in Nov. As it stands, Trump is slated to win by a landslide. If this indeed happens, a new bipolar world will emerge. How that world will deal with the global economy, China, Russia and the Global Majority (the new name for the Global South) will be left for us to see.

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