

The War Has Just Begun

The Winter of Yuri



Big Serge
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♡ 376




"You should know, by and large, we haven't even started anything yet in earnest."

I have been attempting for several days to collect my thoughts on the Russo-Ukrainian War and condense them into another analysis piece, but my efforts were consistently frustrated by the war's stubborn refusal to sit still. After a slow, attritional grind for much of the summer, events have begun to accelerate, calling to mind a famous quip from Vladimir Lenin: "There are decades where nothing happens; and there are weeks where decades happen."

This has been one of those weeks. It began with the commencement of referenda in four former Ukrainian oblasts to determine whether or not to join the Russian Federation, accompanied by Putin's announcement that reservists would be called up to augment the force deployment in Ukraine. Further excitement bubbled up from the Baltic seabed with the mysterious destruction of the Nordstream pipelines. Nuclear rumors circulate, and all the while the war on the ground continues.

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In all, it is clear that we are currently in the transitional period towards a new phase of the war, with higher Russian force deployment, expanded rules of engagement, and greater intensity looming. Season 2 of the Special Military Operation looms, and with it the Winter of Yuri:

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Special Military Operation, Season 2: The Winter of Yuri



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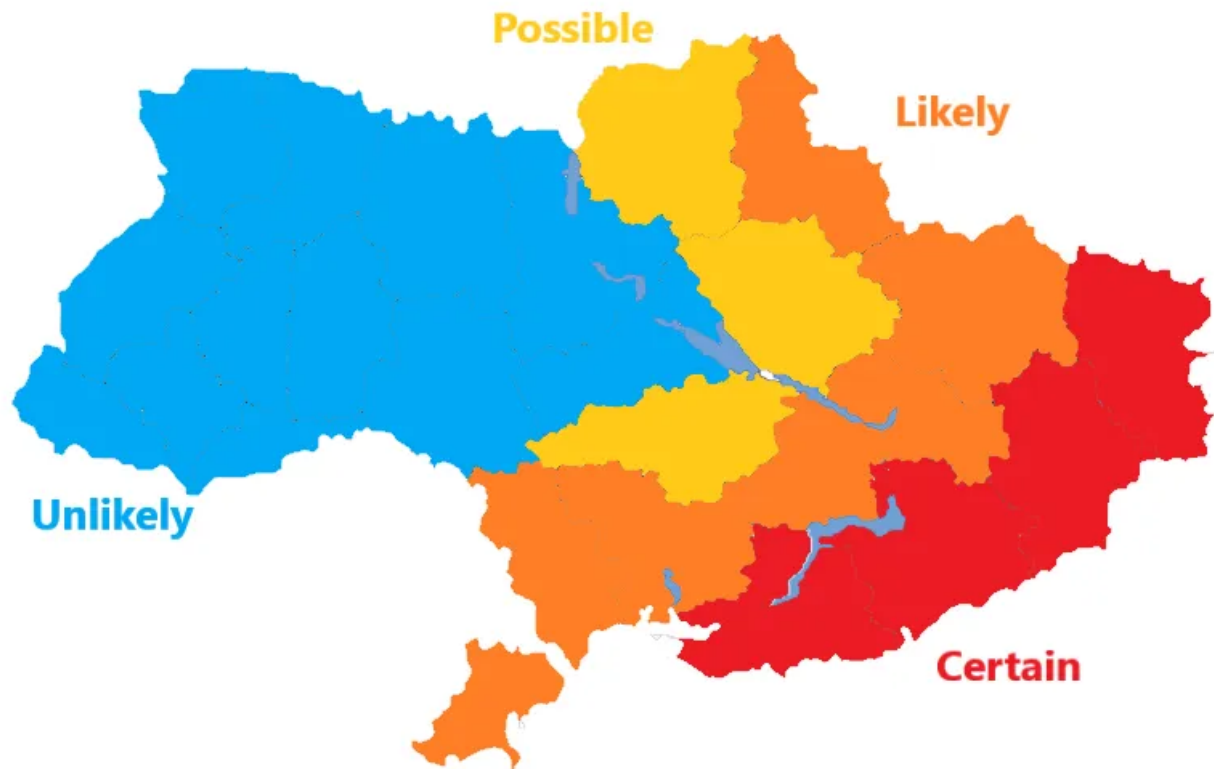
Let's try to process all the developments of the past few weeks and get a handle on the trajectory in Ukraine.

Annexation

The keystone event at the heart of recent escalation was the announcement of referenda in four regions (Donetsk, Lugansk, Zaporizhia, and Kherson) to determine the question of entry into the Russian Federation. The implication of course was that if the referenda succeeded (a question that was never in doubt), these regions would be annexed to Russia. While there were some rumors circulating that Russia would delay the annexation, this was never really plausible. To allow these regions to vote in favor of joining Russia only to leave them out in the cold would be monumentally unpopular and raise serious doubts about Russia's commitment to its people in Ukraine.

Formal annexation is a certainty, if not on September 30th as rumored, then within the next week.

All of this is rather predictable, and completes the first layer of annexations which I noted in previous analysis. The reasoning is not particularly complex: clearing the Donbas and securing Crimea were the absolute minimum Russian objectives for the war, and securing Crimea requires both a land bridge with road and rail connections (Zaporizhia oblast) and controlling Crimea's water sources (Kherson). These minimum objectives have now been formally designated, though of course Ukraine maintains some military activity on these territories and will have to be dislodged.



The Big Serge Annexation Map: Phase 1 Complete

I think, however, that people lost focus as to what the referenda and the ensuing annexation means. Western talking points focused on the illegitimacy of the votes and the illegality of any annexation, but this is really not very interesting or important. The legitimacy of annexation is derived from whether or not Russian administration can succeed in these regions. Legitimacy, as such, is merely a question of efficacy of state power. Can the state protect, extract, and adjudicate?

In any case, what is far more interesting than the technicalities of the referenda is what the decision to annex these regions says about Russian intentions. Once these regions become formally annexed, they will be viewed by the Russian state as sovereign Russian territory, subject to protection with the full range of Russian capabilities, including (in the most dire and unlikely scenario) nuclear weapons. When Medvedev pointed this out, it was bizarrely spun as a “nuclear threat”, but what he was actually trying to communicate is that these four oblasts will become part of Russia’s minimum definition of state integrity - non-negotiables, in other words.

I think the best way to formulate it is as such:

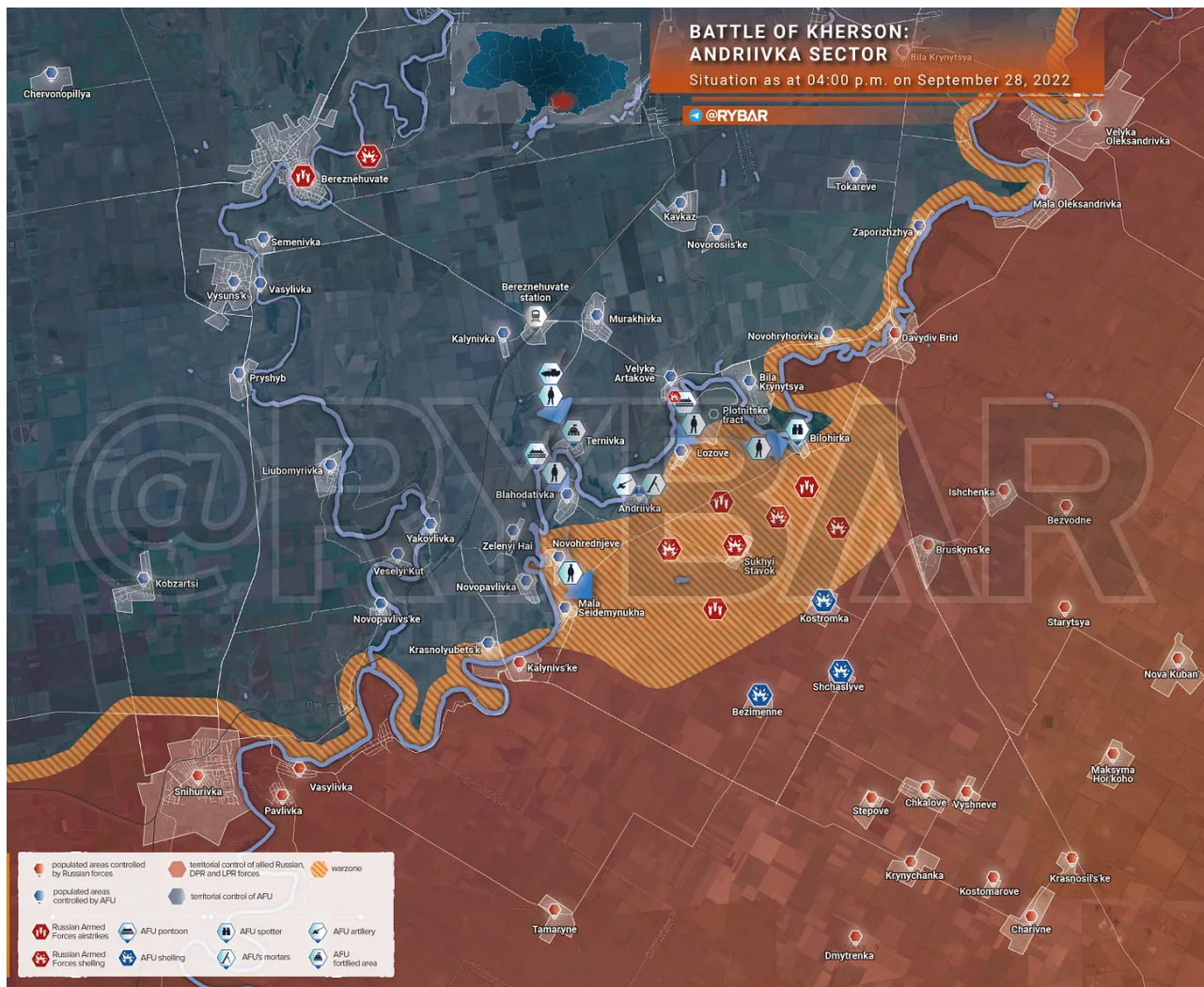
Annexation confers a formal designation that a territory has been deemed existentially important to the Russian state, and will be contested as if the integrity of the nation and state is at risk.

Those fixating on the “legality” of the referenda (as if such a thing exists) and Medvedev’s supposed nuclear blackmail are missing this point. Russia is telling us where it currently draws the line for its absolute minimum peace conditions. It’s not walking away without at least these four oblasts, and it considers the full range of state capabilities to be in play to achieve that goal.

Force Generation

The move to hold referenda and eventually annex the southeastern rim was accompanied with Putin’s long-awaited announcement of a “partial mobilization”. Ostensibly, the initial order calls up just 300,000 men with previous military experience, but the door is left upon for further surges at the discretion of the president’s office. Implicitly, Putin can now ramp up the mobilization as he sees fit without needing to make further announcements or sign more paperwork. This is similar to American Lend-Lease or the “Authorization for Use of Military Force” in America, where the door is opened once and the President is then free to move at will without even informing the public.

It was increasingly clear that Russia needed to raise its force deployment. Ukraine’s successful drive to the Oskil River was made possible by Russian economy of force. The Russian army had completely hollowed out Kharkiv Oblast, leaving only a thin screening force of national guardsmen and LNR militia. In places where the Russian Army has chosen to deploy sizeable regular formations, the results have been disastrous for Ukraine - the infamous Kherson Counteroffensive turned into a shooting gallery for Russian artillery, with the Ukrainian Army haplessly funneling men into a hopeless bridgehead at Andriivka.



A Shooting Gallery

So far in this war, Ukraine has achieved two big successes retaking territory: first in the spring, around Kiev, and now the late summer recapture of Kharkov Oblast. In both cases, the Russians had preemptively hollowed out the sector. We have yet to see a successful Ukrainian offensive against the Russian Army in a defensive posture. The obvious solution, therefore, is to raise the force deployment so that it is no longer necessary to hollow out sections of the front.

The initial surge of 300,000 men is being a bit muddled. Not all of the men being called up will be sent to Ukraine. Many will remain in Russia on garrison duty so that existing ready formations can be rotated to Ukraine. Therefore, it is likely that we will see more Russian units arriving in theater much sooner than expected. Additionally, many of the units originally committed to Ukraine have been off the front for refitting and resting. The scale and pace of Russia's new force generation is likely to shock people. On the whole, the timing of Russia's manpower surge coincides with the depletion of Ukrainian capabilities.

Ukraine spent the summer sending its 2nd tier conscripts to the front in the Donbas as it lovingly collected NATO-donated weapons and trained units in the rear. With generous NATO help, Ukraine was able to accumulate forces for two full scale offensives - one in Kherson (which failed spectacularly) and one in Kharkov (which succeeded in pushing past the Russian screening force and reaching the Oskil). Much of that carefully accumulated fighting power is now gone or degraded. Rumors circulated of a third offensive towards Melitopol, but Ukraine does not seem to have the combat power to achieve this, and strong Russian forces are in the region behind prepared defensive lines.

On the whole, therefore, Ukraine's window for offensive operations has closed, and what remains is closing quickly. The last zone of intense Ukrainian operations is around Lyman, where aggressive Ukrainian attacks have so far failed to either storm or encircle the town. It is still possible that they take Lyman and consolidate control of Kupyansk, but this would likely represent the culmination of Ukrainian offensive capability. For now, the area around Lyman is a killing zone that exposes attacking Ukrainian troops to Russian air and ground fires.

The large scale view of force ratios is as follows:

Ukraine has spent much of the combat power that they accumulated with NATO help during the summer, and will have an urgent need to reduce combat intensity for refitting and rearming at precisely the same time that Russian combat power in the theater begins to surge.

Simultaneously, NATO's ability to arm Ukraine is on the verge of exhaustion. Let's look at this more closely.

Depleting NATO

One of the more fascinating aspects of the war in Ukraine is the extent to which Russia has contrived to attrit NATO military hardware without fighting a direct war with NATO forces. In a previous analysis I referred to Ukraine as a vampiric force which has reversed the logic of the proxy war; it's a black hole sucking in NATO gear for destruction.

There are now very limited stockpiles to draw from to continue to arm Ukraine.

Military Watch Magazine noted that NATO has drained the old Warsaw Pact tank

park, leaving them bereft of Soviet tanks to donate to Ukraine. Once these reservoirs are fully tapped, the only option will be giving Ukraine western tank models. This, however, is much harder than it sounds, because it would require not only extensive training of tank crews, but also an entirely different selection of ammunition, spare parts, and repair facilities.

Tanks are not the only problem, however. Ukraine is now staring down the barrel (heh heh) of a serious shortage of conventional tube artillery. Earlier in the summer, the United States donated 155mm howitzers, but with stockpiles of both guns and shells dwindling, they've recently been forced to turn to lower caliber towed trash. After the announcement of yet another aid tranche on September 28th, the USA has now put together five consecutive packages which do not contain any conventional 155mm shells. Shells for Ukraine's Soviet vintage artillery were running low as early as June.

In effect, the effort to keep Ukraine's artillery arm functioning has gone through a few phases. In the first phase, Warsaw Pact stockpiles of Soviet shells were drained to supply Ukraine's existing guns. In the second phase, Ukraine was given mid-level western capabilities, especially the 155mm howitzer. Now that 155mm shells are running low, Ukraine has to make do with 105mm guns which are badly outranged by Russian howitzers and will be, in a word, doomed in any kind of counterbattery action.

As a substitute for adequate tube artillery, the latest aid package does include 18 more of the internet's favorite meme weapon - the HIMARS Multiple Launch Rocket System. What is not explicitly mentioned in the press release is that the HIMARS systems don't exist in current US inventories and will have to be built, and are thus unlikely to arrive in Ukraine for several years.

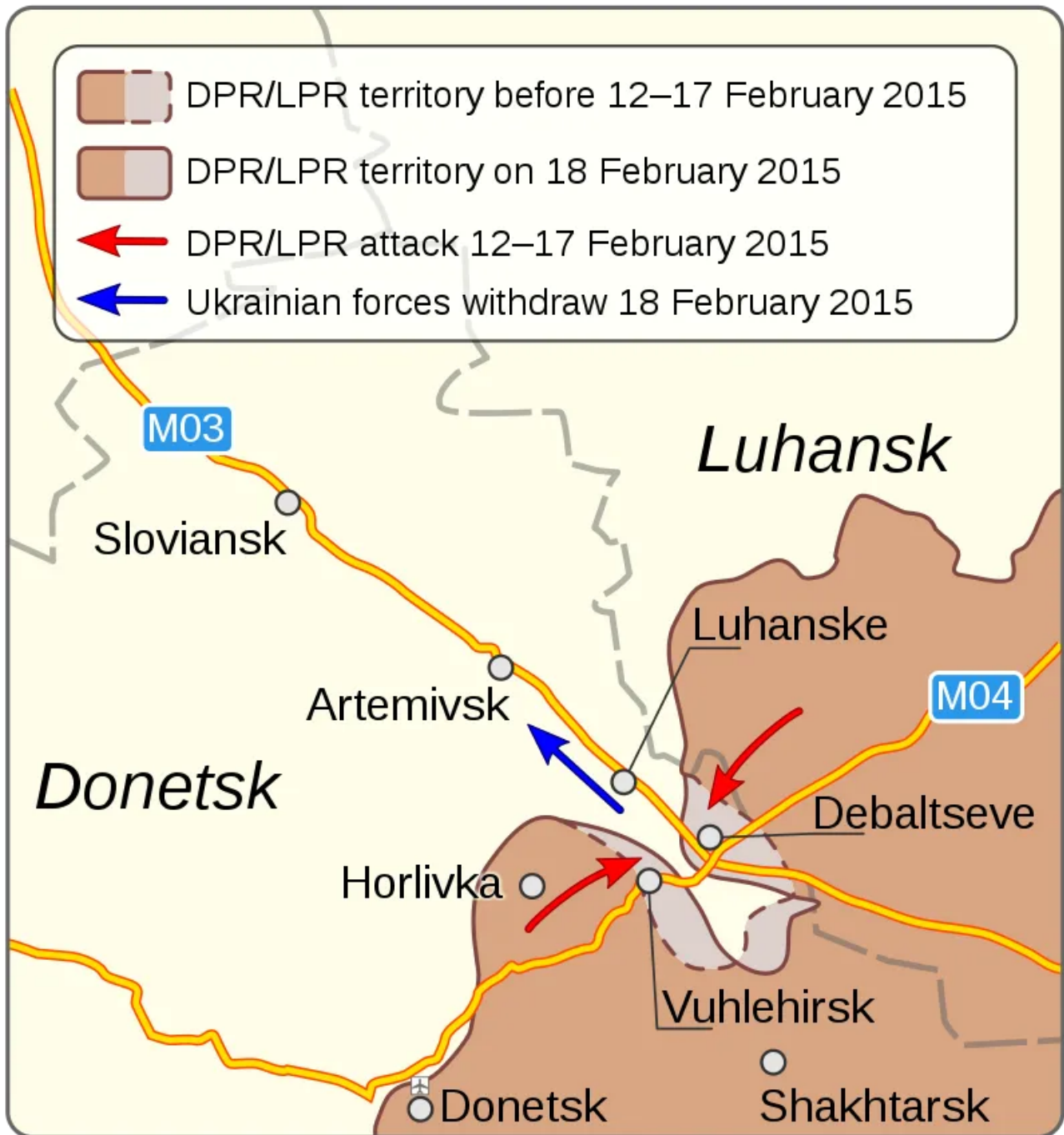
The increasing difficulties in arming Ukraine coincide with the rapid closing of Ukraine's window of operational opportunity. The forces accumulated over the summer are degraded and fought out, and every subsequent rebuild of the Ukrainian first tier forces will become harder as manpower is destroyed and NATO arsenals are depleted. This depletion comes precisely as Russian force generation is surging, foretelling the Winter of Yuri.

The Winter War

Anyone who expects the war to slow down during the winter is in for a surprise. Russia is going to launch a late autumn/winter offensive and achieve significant gains. The arc of force generation (both Russia's increasing force accumulation and Ukraine's degradation) coincide with the approach of cold weather.

Let's make a brief note about combat in the cold. Russia is perfectly capable of waging effective operations in the snow. Going back to World War Two, the Red Army was more than capable of offensive success during the winter, starting in 1941 with the general counteroffensive at Moscow, again in 1942 with the destruction of the German 6th Army at Stalingrad, and in 1943-44 with two successful large scale offensives beginning in the winter. Now, of course World War Two is not directly applicable in all ways, but we can establish that from a technical standpoint there is a clearly established capability to wage operations in cold weather.

We also have more recent examples. In 2015, during the first Donbas War, LNR and DNR forces launched a pincer operation which successfully encircled a Ukrainian battalion at the Battle of Debaltseve. And, of course, the Russo-Ukrainian War began in February, when much of northern Ukraine was below freezing temperatures.



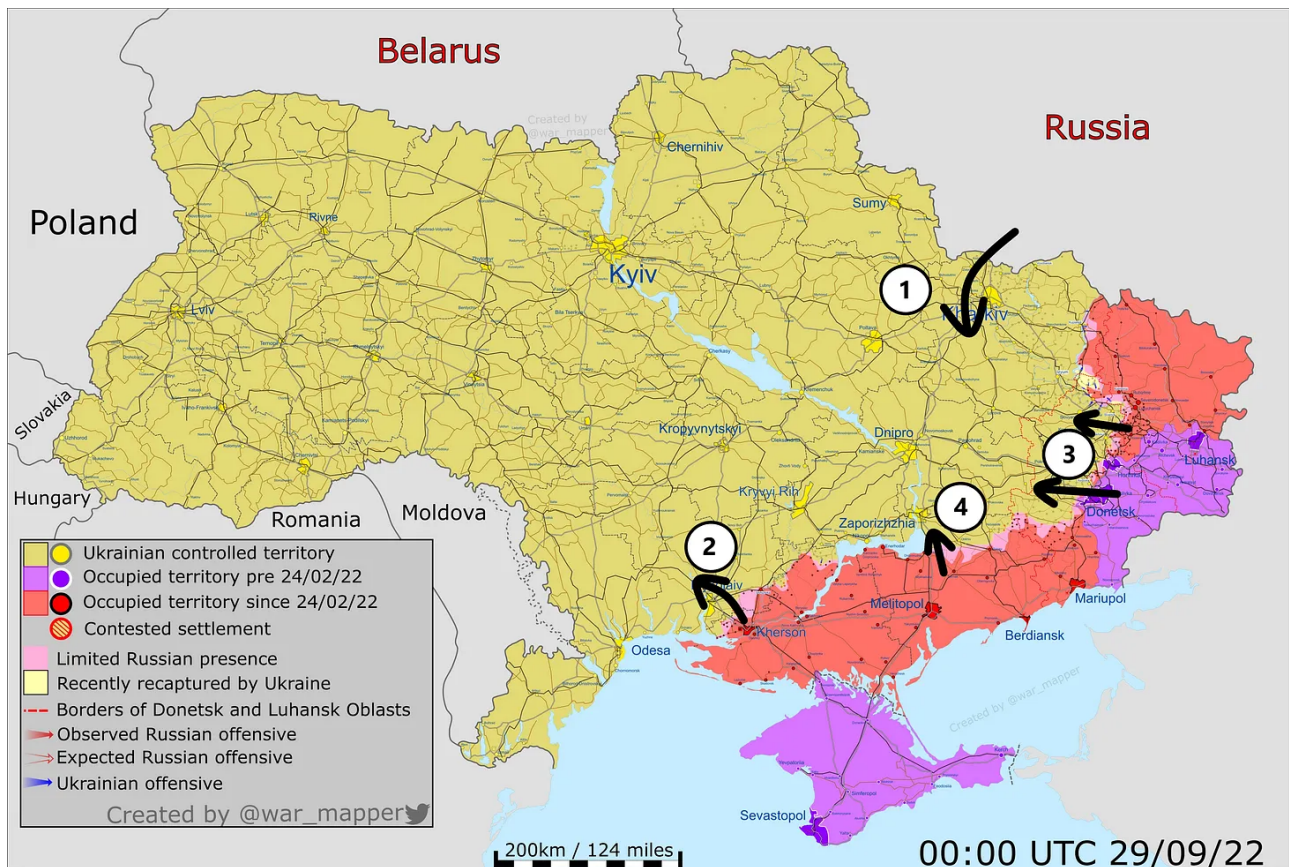
Nice Move

Winter weather actually favors a Russian offensive for multiple reasons. One of the paradoxes of military operations is that freezing weather actually enhances mobility - vehicles can get stuck in mud, but not on frozen ground. From 1941-43, German troops celebrated the arrival of spring, because the thaw promised to bog the Red Army down in mud and slow their momentum. The winter death of foliage also reduces the cover available to troops in a defensive posture. And, of course, cold weather favors the side with more reliable access to energy.

As for where Russia will choose to commit its newly generated forces, there are four realistic possibilities, which I will enumerate in no particular order:

1. Reopening the Northern Front with an operation around Kharkov. The attractiveness of this option is clear. A Russian move in force towards Kharkov would immediately collapse all of Ukraine's gains towards the Oskil by compromising their rear areas.
2. An offensive on Nikolayev out of the Kherson region. This would move further towards the goal of a landlocked Ukraine, and would take advantage of the fact that Ukrainian forces in this region are badly chewed up after their own failed offensive.
3. Massive commitment to the Donbas to finish the liberation of DNR territory by capturing Slovyansk and Kramatorsk. This is less likely, as Russia has demonstrated comfort with the slow tempo of operations on this front.
4. A push north from the Melitopol area towards Zaparozhia. This would safeguard the nuclear powerplant and end any credible threats to the land bridge to Crimea.

Other possibilities I regard as unlikely. A second advance on Kiev would make little operational sense, as it would not support any of the existing fronts. I would expect action around Kiev only if the new force generation is significantly larger than the headline number of 300,000. Otherwise, Russia's winter offensives are likely to be concentrated on mutually supporting fronts. I think some movement to reopen the northern is likely, as it would completely compromise Ukraine's gains in the Izyum-Kupyansk direction. There are rumors that forces are being moved into Belarus, but I actually think the Chernigov-Sumy axis would be more likely than a new Kiev operation, as it could be supportive of an offensive on Kharkov.



Potential Axes of Winter Advance (Base Map Credit: @War_Mapper)

On the broadest level, it is clear that Ukraine's window to conduct offensive operations is nearing its close, and the force generation ratios on the ground are going to swing decisively in Russia's favor through the winter.

Nordstream and Escalation

As we were pondering these developments on the ground, yet another plotline emerged underwater. The first hint that something was amiss was the news that pressure in the Nordstream 1 pipeline was dropping mysteriously. It was then revealed that the pipeline - along with the non-operational Nordstream 2 - had suffered serious damage. Swedish seismologists recorded explosions on the floor of the Baltic Sea, and it was revealed that the pipelines are heavily damaged.

Let's be frank about this. Russia did not blow up its own pipelines, and it is ludicrous to suggest that they did. The importance of the pipeline to Russia lay in the fact that it could be switched on and off, providing a mechanism for leverage and negotiation vis a vis Germany. In the classic carrot and stick formulation, one cannot move the donkey if the carrot is blown up. The **only** feasible scenario in which Russia might be responsible for the sabotage would be if some hardliner faction within the Russian government felt that Putin was moving too slowly, and wanted to force an escalation.

This would imply, however, that Putin is losing internal control, and there is no evidence whatsoever for such a theory.

And so, we return to elementary analysis, and ask: Cui bono? Who benefits? Well, considering Poland celebrated the opening of a new pipeline to Norway only a few days ago, and a certain former Polish MP cryptically thanked the United States on Twitter, it is fair to make a few guesses.



The first lesson of doing crimes is not to brag about it on twitter

Let us briefly meditate on the actual implications of Nordstream's demise.

1. Germany loses what little autonomy and flexibility it had, making it even more dependent on the United States.

2. Russia loses a point of leverage over Europe, reducing the inducements to negotiation.
3. Poland and Ukraine become even more critical transit hubs for gas.

Russia clearly perceives this as a bridge burning move of sabotage by NATO, designed to back them into a corner. The Russian government has decried it as an act of “international terrorism” and argued that the explosions occurred in areas “controlled by NATO” - the concatenation of these statements is that they blame NATO for an act of terrorism, without explicitly saying that. This precipitated another meeting of the Russian National Security Council.

Many western nations have advised their citizens to leave Russia immediately, suggesting they are worried about escalation (this coincides with Ukraine’s unhinged claim that Russia may be about to use nuclear weapons). For the time being, I expect Russian escalation to remain confined to Ukraine itself, likely coinciding with the deployment of additional Russian ground forces. If Russia feels compelled to undertake an out of theater escalation, targeting American satellites, digital infrastructure, or forces in Syria remain the most likely option.

On the Precipice

I am fully cognizant that my views will be spun as “coping” after Ukraine’s gains in Kharkov oblast, but time will tell out. Ukraine is on its last legs - they drained everything usable out of NATO stockpiles to build up a first tier force over the summer, and that force has been mauled and degraded beyond repair just as Russia’s force generation is set to massively increase. Winter will bring not only the eclipse of the Ukrainian army, the destruction of vital infrastructure, and the loss of new territory and population centers, but also a severe economic crisis in Europe. In the end, the United States will be left to rule over a deindustrialized and degraded Europe, and a rump Ukrainian trashcanistan sequestered west of the Dnieper.

For now, though, we are in the interregnum as the last flames of Ukraine’s fighting power flickers out. Then there will be an operational pause, and then a Russian winter offensive. There will be several weeks where nothing happens, and then everything will happen.

During that operational pause, you may be tempted to ask - “is it done, Yuri?”

No, Comrade Premiere. It has only begun.

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