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# War Analysis [i]

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17–22 minutes

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Today I want to provide a crucial update.

I have decided to risk a bloody nose 😊

In the past year, almost all well-known analysts have announced some kind of big arrow offensive(s) on the part of Russia. Some announced for the time around the end of 2022. Some for the beginning of 2023, and some are constantly announcing it to be starting “soon”. Whenever soon might be. All have been proven wrong.

If you review the Black Mountain Analysis articles, you will see that my assessment has been that there won't be big arrow offensives at all. At any particular point in time. On the contrary, I was always against it and I constantly described things in terms of the special military operation; the SMO.

Nevertheless, I also said that when the time comes and that the Ukrainian army is comprehensively defeated, Russia indeed will initiate a counteroffensive. A strategic counter-offensive. [You can re-read this article for an explanation of the Soviet “absorption” doctrine.](#) It culminates with a counteroffensive.

The reasons why in a SMO you wouldn't want to go into big arrow

offensives against a functioning, well equipped and trained army is that you would sustain big losses. See what the Ukrainians are currently experiencing. Russia doesn't need that.

[In my last article I have written about the potential upcoming Russian counter-offensive. It would make sense to re-read it because I won't repeat everything I already wrote there.](#)

Taking my analysis of the geopolitical and macroeconomic developments into account I personally would claim that both "The West" and "The Rest" are now ripe for the ending of Ukraine:

- All major players are on board with the BRICS and SCO projects to diminish the Western empire and hegemony. The creation of a multipolar world order.
- The West's downfall and disintegration is in full swing. Since the West managed to pillage the rest of the world for the last several centuries, they have managed to accumulate enough wealth and influence to slow their downfall.

Ukraine is also ripe for its end:

- Its last iteration of "professionally" trained soldiers is currently being destroyed on the battlefield. They should be worn down by the middle or end of August.
- Critical Western equipment is being destroyed as we talk, or is already gone. But what is critical Western equipment? Air defense assets and mine clearing vehicles. Nothing else. Western tanks and IFVs are burning exactly as Soviet and Russian equivalents do. Hence, I do not now and did not before consider them as critical. They are only expensive coffins, since Russia is hunting them with a priority as trophies and propaganda victories.

- The West can (mostly) compensate for the lost vehicles. No problem. But who is going to drive the replenished equipment? Many of the professionally-trained drivers are dead.
- Train new troops? Well, as I wrote months ago, the volunteers have run out. You can't exactly train a forcefully mobilized person to operate sophisticated equipment with high motivation. These troops have already sabotaged their own equipment before the current offensive, so as to not be able to drive into certain death. Remember the trophies? Russian KA-52 "Alligator" choppers like to eat Leopards, Marders (Martens), and other animals.
- The ground in Ukraine will provide the best opportunity for larger armored movements in August.
- I assume that the Ukrainian army will be defeated by August. Everything I see points to that conclusion. Somewhere by the middle or end of August.
- Russia accumulated all needed equipment for a counter-offensive in two strategic directions. East and North. The only thing about which I am not sure is the question about logistics auxiliary vehicles. Tankers, lorries, pipe layers etc. Russia has plenty of Soviet stuff and a lot has been destroyed in Phase 1.

The NATO doctrine is to target Russia's rear logistics with ambushes and deep strikes. It's one thing to churning out tanks. It's another thing to conduct power projection or deep penetration with them. Without the proper logistics equipment, you can only operate your tanks a few miles/kilometers away from the main front line. I'm not convinced yet that these vehicles are in place, or even that they exist.

- Under the confusion around the "Prigozhin coup" Russia began

to pour troops into Belarus and other northern and eastern Russian border regions. The Russian mobilized- and voluntary army units have been trained for a long time on a dozen large training grounds across Russia. There are indications that they are now being brought into place.

- Strategic reserves have been prepared and activated. To be blunt, they are there to plug holes that will eventually occur due to large Russian losses that are indeed possible and likely. Moreover, if any particular problems occur at a front section, they will be reinforcements.

- [In November last year, I wrote an analysis of the Russian missile strikes on Ukraine's infrastructure. I think it was accurate, but I also want to openly admit that I failed to predict that another purpose was to deplete Ukraine's air defense capabilities. I would like to encourage you to re-read this article.](#)

I will try to summarize it in one sentence: Russia was (November 2022) preparing Ukraine's infrastructure for the final blow before Russia's counter-offensive kicks off. Hence, bringing it down to such a level that a few well-aimed hits will bring the whole house of cards down. And during the process, discovering all the strengths, weaknesses, and counter-measures of the Ukrainian power grid and their providers.

Moreover, I was strongly against doing that during the Winter because it would cost tens of thousands of civilian lives. In summer things are slightly different. August is the perfect time.

- Russia spared its air assets because of the Ukrainian air-defense capabilities. An air-campaign would have cost the Russians dozens of planes, and more pilots. Which would be a gift

to NATO. The Ukrainian air defense is just shy of collapsing, or it has already collapsed and is now only operating in isolated, standalone cells. It is now possible to carefully increase the usage of planes over Ukraine. Especially at the front lines and perhaps a few miles behind the front lines.

- Everything I just mentioned could point to some kind of multi domain shock-and-awe kick-off day some time between now and the end of August.

To summarize: Since July 2022, Russia prepared simultaneously for two major activities:

- Fending of and destroying the Ukrainian military potential.
- Prepare an army for the strategic counter-offensive that should start right after the defeat of the Ukrainian army.

As far as I can tell, both events will converge to their conclusion by August 2023.

I want to admit that I could be entirely wrong. That's why I wrote initially that it is now my turn to get a bloody nose. 😊 At the end of August everyone can point at me and tell me that I was wrong. 😊 But I'm ready to take that risk since everything now points into that direction.

What negative consequences could be possible if Russia does not start the offensive and instead simply continues to grind down the Ukrainians another year?

- The war would be continued for at least another year.
- The ground will become less favorable for larger armored movements.

- The Ukrainians will get the time to continue mobilization, and form another iteration of an army. This even though I struggle to believe that Ukraine would be able to repeat the last trick. Building up two parallel armies. One, to be constantly fed into different meatgrinders to buy time. Another which would be trained abroad for “offensive” operations.

Since there are far fewer motivated people left in Ukraine, I doubt that an army that would be trained abroad could be built. You can't forcefully transport people to EU countries and train them under the threat of being shot in front of EU instructors.

- Another “Frankenstein” equipped army could be assembled. The question is whether enough people would be available and motivated to learn how to use the equipment without sabotaging it so as to not be driven into certain death.

- Another several thousand Russians would certainly need to be sacrificed in an additional year of fighting.

- Another generation of Ukrainians who are now becoming 16, 17, and 18 years old will be sacrificed. Which is extremely sad. Hopefully, most of them will have already been brought abroad. The probability is extremely high that many of them lost a father, brother, uncle or whatever. Their motivation could be given.

- The risk grows every day during the SMO that WW3 could be started by an incident, or by conspiracy of some non-governmental stakeholders of the West. Which would be the end of all of us.

What reasons exist which would Russia make wait another year?

- Geopolitical considerations. I'm only one guy who is doing these analyses in my free time. I work 8-14 hours a day. What I mean is

that I do not have the time and capacity to monitor everything. I only monitor a few sources that I trust, and that provide the most information compressed into the least possible time.

Which implicitly means that I could miss a whole lot of hints that would indicate that not all geopolitical players and chess pieces are in place to execute the final checkmate. That's definitely possible.

I want to present a totally fictional scenario: If the Russian intelligence agencies had reliable information that the United States could collapse due to internal problems before the election 2024, then it would be less bloody to wait until then and just keep on defending the Surovikin line. When the United States collapsed, every other imperial structure all around the world would follow, and the Ukrainian fascist Nazi state as well. Again, this is a fictional scenario for the sake of discussion.

- There could also be information available that Ukraine is physically unable to survive longer than this year in its current form. Further mobilizations could be impossible or insufficient. The training of the few mobilized on any kind of advanced equipment could be risky due to lack of motivation. You don't train people against their will and put them in multi-million-dollar machines.
- Maybe the continuation of the war and the depletion of the West's financial and military resources is by far more valuable for Russia than a quick end to the war. Depleting public/social spending and re-routing them into military spending could lead to a social implosion all across the West. Causing the West to collapse internally.

We mustn't forget the ongoing de-dollarization. This scenario could

be by far less bloody than the continuation of the war in Ukraine. Since it could eventually prevent a large global war, which eventually could lead to the end of the human race.

- I think you get my point. There could be higher goals that would prevent Russia from ending this war quickly. Feel free to comment if you have further ideas.

Since all indicators that I have been monitoring since the beginning of the SMO are now pointing to August (September would be the absolutely latest possible date for this iteration), I would value a probability of 70% that the offensive will start by then. Since I obviously don't have full information, and no access to Russia's "higher geopolitical goals", there is still the possibility that I could be completely wrong and nothing will happen at all. At least not this year. Thus this scenario has a probability of 30%. In this case I'm the next one in a long string of "The Russians are coming" callers that failed ha-ha. 😊 But that is entirely okay in such a sophisticated geopolitical and macro-economic environment.

Russia didn't mobilize further. I don't have exact numbers, and I doubt that any open-source analyst has. But I estimate that Russia has between 500 and 800 thousand troops assigned to the SMO. Which doesn't mean that all are frontline troops or are waiting to go on a strategic counteroffensive. Far from that. I assume that only between 150 and 300 thousand troops are specially trained and assigned for large-scale army-sized maneuver warfare and offensive operation, in coordination with other formations.

The rest is there to simply continue doing what it is doing. Defending the assigned front-section. Providing all kind of logistics

and service work, such as baking bread and distributing it to the troops.

If we estimate that roughly some 250,000 troops are ready for large deep-penetration offensives and maneuver warfare in the open, then it can mean only one thing. The objective is not to capture one town after another. There are far too few troops for that. Additional mobilization waves would be needed and that would take another year. Possible? No. The objective is to provide a strategic checkmate and a consequent collapse of Ukraine.

I would consider Nikolayev and Odessa as impossible due to logistical problems to get the equipment and replenishment in place to sustain such an operation quickly. Whatever happens, it will most likely be shock-and-awe. Hence, everything will need to be done within a few days/weeks. You can't do that across a large river. That is impossible. And you don't want to blow Odessa up. All Odessa "defenders" should instead come to their slaughter where the Russians want them.

[If you re-read this article then you will learn that my proposed chess move would be an encirclement of Kiev. That would make sense. The most strategic reserves, equipment, infrastructure, and decision makers are concentrated there.](#)

[Here you can find the larger strategic picture.](#)

Here is what I think:

- Either Russia will try to checkmate Ukraine by encircling but NOT taking Kiev. Thereby containing most of Ukraine's remaining military potential. This time not with 40,000 troops and against an enemy in full strength. No. This time with perhaps up to 300,000 troops against a totally defeated enemy. This could lead to

negotiations of the kind that the German Admiral Doenitz had to conduct with the Soviets to sign the unconditional surrender of the German Wehrmacht. History could repeat itself with its Nazis regimes. At least one of the Nazi regimes that are around today...

- Or, Russia would satisfy itself this year by putting a checkmate on Donbass, Kharkov, Dnepropetrovsk and Zaporizhia, coming from Sumy and Zaporizhia. That would guarantee to the Russians a bridgehead over the Dnieper and put the local Nuclear Power Plant (ZNPP) out of harms way. Thereby laying the groundwork for whatever would be planned next year across the Dnieper.

This scenario could materialize if a collapse can not be triggered in one step, but in two. I think it is unlikely because it implies very bloody battles in MANY Russian cities and it allows time for the West to escalate. Remember, Kiev IS a Russian city. But only one. In the aforementioned oblasts you have dozens of large Russian cities.

IF a Russian counteroffensive is to come, I consider the Kiev scenario most likely because Belarus is nearby, and is the place where all the Russian offensive equipment is being assembled. Moreover, ever more Russian troops are pouring into Belarus. Some say the former Wagner formations are deployed there. Possible. Others say that under the guise of the Wagner “relocation deal”, large Russian regular formations will be moved to Belarus. Perhaps spearheaded by experienced Wagner assault detachments.

The bottom line is: As always, I think the goal is a Ukrainian collapse and not the total annihilation of every building and every able-bodied male in Ukraine. By triggering the collapse, Russia will

be able to preserve a lot of infrastructure and of course people as well.

If a collapse is impossible, even with an encirclement of Kiev, THEN another few mobilization rounds could start in Russia to go to the Polish border. Not for large-scale maneuver warfare. At this point there won't be much left in Ukraine to counter that. No, it will be to secure the rear, provide logistics, and conduct police missions in the cities. I explained that in former articles. Remember the cats on the trees? Meow.

I want to issue a personal note here. Even though the events are catastrophic, they never should have happened in the first place, I am now excited to see what happens, but definitely not in a positive way. I hate this war, which is a Russian civil war. I/we Serbs went through this already.

But everything I have been analyzing is now in place or will be in place by August. In theory the war could be ended then. Yes, Russia could decide to wait another year. But the potential to bring the war to an end will be in place. Don't get me wrong. The start of an offensive in August would not mean that the war would end in August. That is obviously BS. But it would mean that the process of ending Ukraine would start and could be concluded within a reasonable time.

To be honest, I hope that this will happen now. I want to see this war ended. I truly do not enjoy it and I hope it will quickly end. Moreover, the events distract me from writing about economics and geopolitics which I like the most.

IF Russia decides for geopolitical reasons to continue the war for another year then I will not appreciate that. To put it mildly.

Everything is in place to end it and that should be used.

Nevertheless, I will ALSO state that I DO UNDERTSAND IT if Russia would continue it. Since it would be for a higher good. For example, freeing the world from the Western empire and colonialization. Here you have the rational Aleks, who understands it and the human Aleks (Which I AM) who wants this shit to be over ASAP because I know the suffering, and it needs to end.

That of course is short-sighted because if the Western hegemony survives in any way, that would mean further decades of suffering and dying for millions of people in imperial wars and “divide and conquer” staged “civil wars” in countries all around the globe.

Hence, if Russia decides to continue the war I will most likely stop writing about it and pivot to what I initially wanted to do. Writing about “Economics and Empires”. That is why I started Black Mountain Analysis. And not to write about or to analyze war.

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