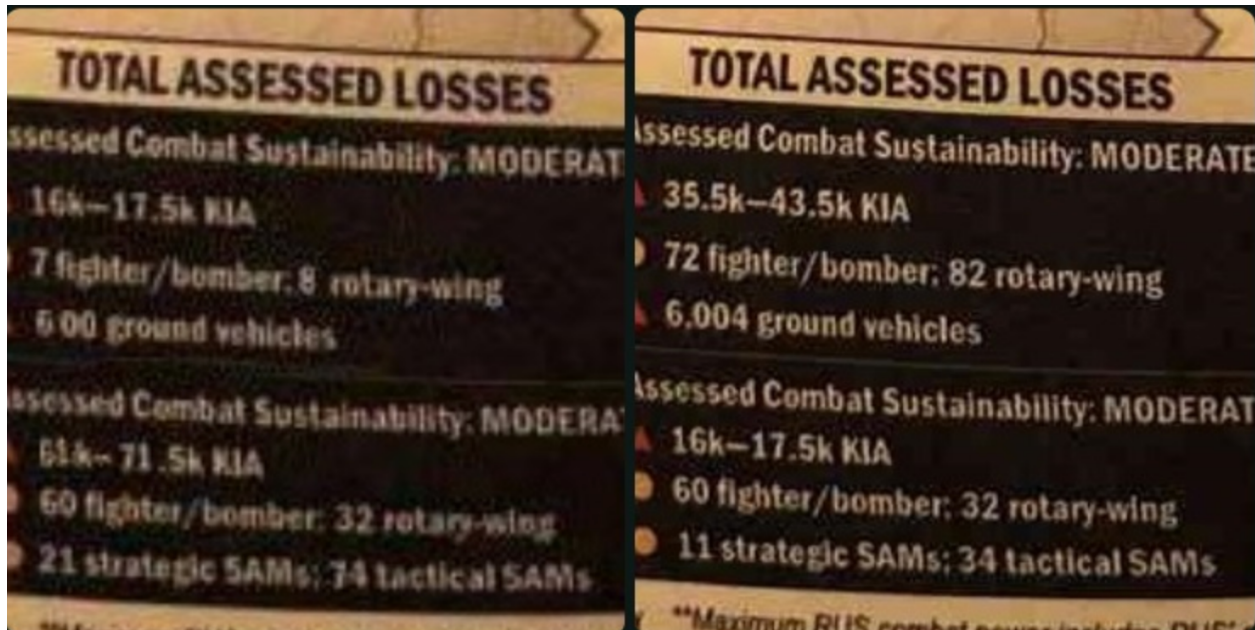


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It's been a while since I've done a Ukraine-specific thread, but given the feeding frenzy over the reported NATO leak, now is as good a time as any. The leak I will not post here, but you can find it on TG rusfleet. Caveat about the casualty box editing. More on this later. /1



Obviously, the immediate question concerns the validity of the leaks, and as of now even the NYT has come out and stated it appears to be authentic, apart from the edited casualty box. What this series of pages illustrates is the state of NATO's operational planning. /2

The documents are dated D+370, or the end of February, 1 year and 5 days since the start of the SMO. I'm going to list some of my observations. The most important part, obviously, concerns the upcoming Ukrainian offensive. /3

The nominal strength of the 9 brigades built up for this offensive is stated as 253 tanks, 381 IFVs, 480 APCs, and 147 artillery. However, much of this armor is listed "TBD" as in not yet arrived or repaired maybe. /4

By the end of April, they expect to have on hand 43 T-64, 38 T-72, 31 Twardy, 28 T-55S, 32 Leo 2A4, 14 Leo 2A6, 14 Challenger 2, 14 AMX-10. Another 53 listed TBD. First thing that jumps out is that Ukraine's prewar T-64s are almost all gone. /5

Ukraine also burned through the bulk of its armor deliveries last year, since they are now waiting on old new stock T-72s and PT-91 Twardys shipped from Poland. Many of the TBDs might be filled by Leo 1s, it's unclear. /6

As of the timing of this document, the beginning of March, however, these units were just beginning to be formed, with training rates of 0% (one brigade is 60% trained, and another 40%) and equipment rates of 30- 60%. /7

Training seems to be highly accelerated. For the Leopard 2s, training is about 6 weeks. They may hope to be getting better results transitioning existing tankers to new tanks, but it's unclear. Many old AFU tankers died with their tanks. /8

The mainstay of the mobile artillery is the M119, with some AS-90s, but most of the brigades here surprisingly use towed artillery. 155mm FH70 but also D-30. I do not think they have adequate supplies for the D-30 to offer much more than token fire. /9

Looking at each brigade's inventory, I do not believe them to be actual brigade sized formations. A US Stryker brigade typically has ~300 strykers alone, and that's before adding other vehicles, with a manpower complement of 4,500 men. /10

Here, each of these Ukrainian brigades has 90 IFV/APC and ~30 tanks. I'll be surprised if the manpower strength exceeds 2000. This whole grouping of 9 brigades is likely only to have 15-20k men. However, this isn't the entire force. /11

Ukraine is supposed to supply another 3 brigades internally, so if we are being optimistic, maybe another 10k. Pessimistic, 5k. Whole offensive force 20-30k. We don't have visibility into the composition of those internal brigades. /12

Lack of visibility into Ukrainian formations is actually something that plagues this report, and it corroborates something that some have suspected for a while - that old units are just being left to bleed out while new formations are generated. /13

Moreover, it appears that Ukraine's mobilization numbers, as I have stated consistently for months now, are bullshit. The numbers just don't bear that out. In Zaporozhye, Russian personnel are assessed at 23,250 and Kherson 15,650. Donetsk 23,050. /14

These surprisingly small numbers illustrate the difficulty, as I've been noting, of Russia's frontline force generation and how many troops are apparently being held in rotation or reserve. However, it gets interesting with Ukrainian numbers. /15

Donetsk: 10-20k, Zaporozhye 4-8k, Kherson 1250- 2500. There is a huge range of uncertainty of what the state of attrition in the current frontline brigades is. Moreover, there is no accounting, like with Russian side, of which Ukrainian brigades are combat capable. /16

It's like NATO builds these units, sets them loose on the front, and they disappear into a black box that is the Ukrainian General Staff and the SBU. They do not know what the combat capability of these units is so they must form new ones. /17

The combat losses, which have unfortunately been manipulated by Russian social media, are a good example of this black box effect. The original stated 35.5k-43.5k KIA on the Russian side and 16k-17.5k KIA on the Ukrainian side. /18

The Russian number of killed generally align with some of the more pessimistic estimates (within reason, including LDPR and Wagner losses), but the Ukrainian loss stats are just a copy paste from the Ukrainian General Staff. Nonsensical. /19

Just in the Mariupol-Volnovakha battles, a Ukrainian agglomeration of 15k+ disappeared to death and capture, not to say anything about the thousands who died in Severodonetsk or the fields of burned Ukrainian vehicles outside of Kherson. /20

The fact that Ukrainian brigades are now almost entirely dependent on foreign equipment and basically regiment-sized speaks to attrition over the course of a year of war. You don't send people out with a month of training (per this document) if one is avoiding losses. /21

The lack of internal intelligence points towards something I and others like @AniaKonic have been saying - that this is Zelensky's war, and Ukraine is in the driver's seat. The US wasn't making shit up when they say the Ukrainians don't tell them much. /22

@AniaKonic No greater example of this is the admission that the SBU's goons violate orders to launch terrorist attacks, like the bombing of the airbase in Belarus. In addition, some of the items in the document suggest they only find out these things after Russia reports it. /23

@AniaKonic It is Z-cope at this point to suggest that Kiev is irrelevant and that all the decisions are being made in Washington. It is meant to give Ukraine a way out for negotiations, but as I said from the start, Zelensky needs this war more than anyone. /24

@AniaKonic And they are psyopping the world to give them the money and weapons for their national baptism of blood. If NATO really believes this crap, despite already the visual evidence of multiple random graveyards with thousands of AFU graves, no wonder. /25

@AniaKonic Also, one last point. The docs give the total GMLRS expenditure as 9,612 and 155mm expenditure as 952,856. Over the last 7 days an average of 14 and 2,746, respectively. This rate of fire is anemic, and the west is not going to be able to scale up soon. /26

@AniaKoniec Which also leads to a point I have been saying over the last few months, that the biggest problem to solve is the one of war industry. Russia just needs to fully staff its production - more ammo, more drones, more bombs. VKS bombing with glide bombs is uncounterable. /27

@AniaKoniec If this war is going to be one of two drunk boxers swinging bananas at each other, the one with the bigger bananas will win. The battlefield math does not favor the side with the weaker industry here. The questions for Russian civil society are for another day. /28 END