

Conflict Update # 191

September 23rd, 2022

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Conflict Assessment

Russian losses – 56,060 (+550) soldiers killed, 2,254 (+18) enemy tanks, 4,796 (+20) armored combat vehicles, 1,355 (+14) artillery systems, 318 (+0) MLRS systems, 170 (+1) air defense systems, 254 (+1) warplanes, 219 (+1) helicopters, 950 (+9) UAVs of the operational-tactical level, 240 (+0) cruise missiles, 15 (+0) warships/cutters, 3,659 (+29) trucks and tankers, 4 Iskander Missile Launchers (+0), 76 fuel bowsers (+0) and 125 (+0) units of specialized equipment.

Message of two wars

Russia has taken great pains to exclude its people from any news about the Ukrainian invasion, events and developments, passing legislation making it illegal to mention the word “war,” punishable by up to 15 years in prison.

It has gone to extraordinary lengths to couch any update in positive terms, shielding Russians from failures and anything contrary to their message and invasion.

Putin termed it “de-Nazification,” “purifying Ukraine,” and that “this nation and its people do not even exist.” That the “special military operation” would take a few days, a week at most. Ukraine would welcome the intrusion into their lives as they really wanted to be part of Mother Russia.

He located stand-in politicians to assume puppet control of the Ukrainian parliament and all offices, and dispatched Chechnyan assassination squads to eliminate Zelenskyy, his family and other office-holders.

So how does Putin now explain his message this week where he legislated mobilization of 300,000 soldiers, with internal Russian analyses and interpretations declaring it was really 1,200,000 soldiers, when reading the small print.

Suddenly, and out of the blue, and contrary to all Kremlin messaging and media control since February this year, the invasion cat and the “war” is “out of the bag.”

Russians previously had heard low-key rumblings and innuendo regarding failings and casualties, but the main areas of loss of fallen comrades centered primarily in the outer regions of the Russian Federation, leaving densely populated areas around Moscow relatively unaffected. Muscovites were “couch soldiers,” uninvolved in the daily combat and its consequent losses, deaths and injuries. This literally wasn’t their war, possessively speaking.

When Russia invaded Crimea in 2014, Russian people at large supported this as they were led to believe that Crimea had been illegally ceded to Ukraine in the 1950’s by Khrushchev. Now it was back, and they were happy.

Not so in Ukraine in 2022.

By unleashing this directive on an unsuspecting Russian populace, Putin has opened Pandora’s Box, the lid is off, permanently. Russians are now keenly and abruptly aware that a war is underway, despite being unable to refer to it as such, that it is going disastrously, and Putin and the Kremlin need more “cannon fodder” for the front lines.

“What?”

Now he has two wars underway, one against Ukraine and the other against the Russian people. History is again repeating itself, we all know what happened in 1917.

Putin and Kremlin desperation

This action speaks to utter desperation. Putin is absolutely aware of the internal danger of mobilizing – one of the primary reasons he has taken this long to activate it. Mobilization hasn't fully happened as yet, it has been legislated. He needs "an invasion of Russian soil" to legitimize and authenticate it.

NOW, the four Donbas oblasts started their referendums earlier today. He will rush the results and speedily announce that they have voted to become part of Russia. He has callously and brutally forced non-Russian supporters out of the oblasts by deporting them to furthest Russia, taking them out of any voting calculation, removing "no" votes and swaying the referendums in his favor.

Expect this to culminate very quickly, followed by a "Russian" message that any attack on these areas is an attack on Russia. Forget that the international community will not recognize these referendum results or any subsequent Russian declaration of a "New Russia."

It doesn't matter from the Kremlin's point of view, they now "legally" have what they need in order to mobilize, an invasion of "Russian soil," no matter how international opinion defines and refutes it.

Putin and Kremlin desperation II – just weeks ago – August 25th - Putin publicly ordered recruitment of an additional 137,000 troops.

This week he dramatically increases the number to 300,000 and reportedly closer to 1,2 million.

What happened?

Putin and the Kremlin have realised the folly of their estimations, the reality of their position, and have panicked.

Why?

Why? 1 – Russia is losing the tactical war - Ukraine has pushed Russia back in the Kharkiv oblast and gaining incrementally in the southwest, and reportedly in the southeast as well.

There is the very real – and strategic – reality that Ukraine has isolated a huge number of Russian troops between Kherson and the Dnipro River in the southwest of the country.

When sensing and understanding this danger, the Kremlin immediately extricated battalion leadership ranks by helicopter - some weeks ago - to the southern flank of the river, leaving battalions with relatively limited command.

Russian command structures are rigidly centrally-controlled with no command capability among lower ranks. These troops are basically leaderless.

Ukraine took out all bridges and supply routes into the area, tactically removing Russian resupply and evacuation possibilities. The remaining soldiers are trapped

Why? 2 - Ukraine is disrupting Russia back lines – Ukraine has deployed Special Forces behind enemy lines, linking with local partisans, wreaking havoc in Russian backfields, creating utter confusion for Russian command and ground troops, and reportedly outright panic.

The one constant from captured Russian soldiers is that they do not know where to shoot, they cannot locate the enemy, they get attacked and when retaliating find – "nothing, they are gone," "How are we supposed to fight

someone we cannot find?” “We keep getting hit, and we do not know from where,” “Our commanders have no idea and are not supporting us in any way.”

Why? 3 - Ukraine has weakened Russian supply chains - From the very start of the Russian invasion in February of this year, Ukraine has targeted, very specifically, army trucks, food and mobile kitchen trucks and petrol bowsers. They would strike the front and rear vehicles in Russian convoys, locking the rest of the train into a “killing zone.” Then they systematically took out other vehicles in a very methodical fashion. They deployed soldiers on electric cycles with shoulder-mounted missiles, drones to monitor Russian movement and recruited local “schoolboys” to track and report on Russian lines.

Russians helped this in no small manner through their preponderance for using cell phones to speak to one another and to call home. Ukrainians intelligence stations traced these calls with geolocating systems, listening in and precisely locking their positions into killing zones.

We can now see why;

1. Ukrainian forces knocked out bridges, supply routes, arms depots and command centers – constantly and without respite, specifically food and fuel supply chains.
2. They took out Russian anti-aircraft batteries with anti-radiation techniques from the US, forcing enemy fighter support craft out of range, removing Russian air cover and isolating Russian forward positions.
3. Forced Russia to locate arms, regular supply sites and fuel trucks out of range - more than 50 miles away.
4. Stretching crucial Russian supply lines, rendering them largely ineffective.
5. Russia found itself in the disastrous situation where
 - a. It cannot adequately feed its troops
 - b. Its vehicles run out of fuel
 - c. They now have to move munitions across hundreds of “dangerous” miles in order to reach front line positions, while under attack from “who knows where?”
 - d. They cannot maintain and replace mechanical equipment
 - e. And most importantly, they cannot cycle and swap troops without being attacked by “unseen” enemy.

Ukraine is now seeking weapons and propellants to extend their artillery range up to 180 miles, pushing Russian forces literally back into Russia.

Why? 4 – Ukraine will shortly target Crimea - Putin reportedly views Crimea as the crown jewel in the Empire. It is very close to his heart. Kherson falling, opens a direct route into Crimea for Ukrainian forces.

It places Sevastopol military bases within range of Ukrainian artillery and mobile missile launchers, bringing Crimea into the front line. This must not happen from a Kremlin and Putin perspective. It will instigate disastrous dissent within Moscow and Russia.

Thousands of Russian citizens and armed force personnel are already streaming out of the peninsula back to Russia.

Ukraine is very well placed to succeed in Kherson Oblast, and pretty obviously, Putin believes he cannot stop it. He needs to react – and this is one way in which he believes he can stem the Ukrainian move south.

Why? 5 – OpSec – Operational Security – Ukraine does not announce its movements – look at how they misled Russia and tricked them into transferring battalions from Kharkiv to Kherson prior to mounting their counteroffensives.

Ukraine does not talk when engaged in operations. They maintain absolute tactical radio silence.

Putin and the Kremlin do not know what Ukraine is up to. Russia has limited satellite coverage, literally no smart intelligence apparatus, no partisan information and dated communication systems.

They doesn't know what to expect, when to expect it and where it will occur, adding to the panic in their command structure. Add to this, Ukrainian Special Force actions behind Russian front lines, and one can see why there is system-wide command and troop pandemonium.

Why? 6 – Russia is on the defensive, they follow Ukrainian moves in order to engage, no longer leading the conflict. They are guessing and guessing wrong.

They struggle to plug battle operational gaps, having lost thousands of troops and legions of equipment, but in reacting to Ukrainian feints and attacks, are moving troops to and fro, all over the countryside.

No sooner do they react to a firefight than it pops up elsewhere – through Ukrainian ground and special forces “shooting and scooting.”

Operationally and tactically inept.

Comment – In short, Ukraine has been patient, calm, methodical, strategic and tactically brilliant.

Nuclear option?

Will Russia and Putin launch tactical or full-on nuclear devices? That remains to be seen as they cannot afford to lose this war, surely doing anything to prevent a loss.

But just as surely, he will have been cautioned by the world at large and in particular the US, that any such nuclear deployment will see harsh reaction. Should he “drop nuclear bombs” on Ukraine, it is fully anticipated that China and India, perhaps South Africa and Brazil, will rapidly distance themselves, fully isolating Russia from international engagement and contact. Russia will lose momentum in BRICS and Shanghai Cooperation Organisation (SCO).

It stands to be excluded in toto.

The mobilization reaction - What a desperate military recruiting drive looks like: Russian officials are pulling badly needed men both young and old from the ranks of ordinary people traveling in planes, walking through train stations, and attending protests in countless cities and villages across the country—from Dagestan in the southwest, to Karbadino-Balkaria just north of Georgia; from Dalnerechensk in the Far East, all the way up to remote Arctic villages near Yakutsk. Some are so intoxicated by the experience that they're apparently falling asleep on patches of grass next to their airplane's runway.

At least five Russian airlines and ten different airports have been ordered to facilitate the movement of personnel into Moscow's military conveyor belt, according to Latvia-based independent news site Meduza, citing the Russian newspaper Kommersant. "A source close to Aeroflot Group suggested that mobilization would affect more than half of the company's staff, as well as Pobeda's and Rossiya's, which are part of the same group," Meduza writes.

Developing: The Russian-Georgian border has an automobile queue "several dozen kilometers long" with passengers allegedly fleeing Putin's mobilization. (Lines weren't observed to have been quite so long on Thursday.)

Developing - Using the last seven months of the invasion as a guide, analysts at the Institute for the Study of War expect Putin "to mobilize ethnically non-Russian and immigrant communities at a disproportionate rate," they wrote in their Thursday evening assessment. Meanwhile, "The Kremlin's heavy-handed approach to partial mobilization may successfully meet the Kremlin's internal quota of mobilized personnel—but is unlikely to generate effective soldiers and is prompting significant domestic backlash for little gain."

The message from Kyiv: "55,000 Russian soldiers died in this war in six months. Tens of thousands are wounded and maimed," Ukrainian President Zelenskyy said last night, "Want more? No? Then protest. Fight back. Run away. Or surrender to Ukrainian captivity. These are options for you to survive."

Mobilization in reality - Experts told Insider it would be weeks or months before the mobilized troops are trained, equipped, and deployed. They also said Putin's decision to take this step now showed how poorly the war was going for Russia and how desperate the Russian leader was to turn the tide.

"That Putin would do this shows how badly he feels the need right now to change the momentum, which has been all in Ukraine's favor," Daniel Treisman, a professor at the University of California, Los Angeles, whose work focuses on Russian politics and economics, told Insider.

'What's happening in Russia now is total fear' - In the centre of the Lithuanian capital Vilnius, a large banner is taped to a tall building, above a Ukrainian flag, that reads: "Putin, the Hague is waiting for you."

On city buses, electronic displays flick between announcing their destination and declaring "love" for Ukraine with little hearts.

This week Lithuania - together with Latvia, Estonia and Poland - banned all Russian tourists, arguing they should not be enjoying democracy and freedom in Europe while their government attacks those very values in Ukraine.

The move has raised concerns among Russian opposition activists already abroad.

"It's strange to ban people for being Russian, whether or not they support Putin's regime," argues Anastasia Shevchenko, an activist who spent two years under house arrest for protesting against the Russian president.

When Russia invaded its neighbour, she was serving a suspended sentence and one wrong move, even an anti-war comment, could have put her behind bars.

But Anastasia could not bear to be silenced, so she squeezed her family's life into a couple of cases, and they fled in the middle of the night for Lithuania.

"What is going on in Russia now is like total fear," Anastasia tells me, in Vilnius. "So many people are frightened because we know they can do anything. It's not only prison, or fines: you can be killed or poisoned. It's like a huge prison. All the country."

One mobilization question that remains difficult to answer – how is the Kremlin going to feed these added hundreds of thousands, if not million plus soldiers? – Russia is struggling to feed its current field armies, estimated at around 100,000 members. Ukraine has taken out vital resupply routes and channels.

How then is Putin planning to not only train, arms and deploy these folk, but how on Earth is he going to feed them?

Putin's escalation gamble - Putin is placing two of his biggest-ever political and strategic bets in a single week.

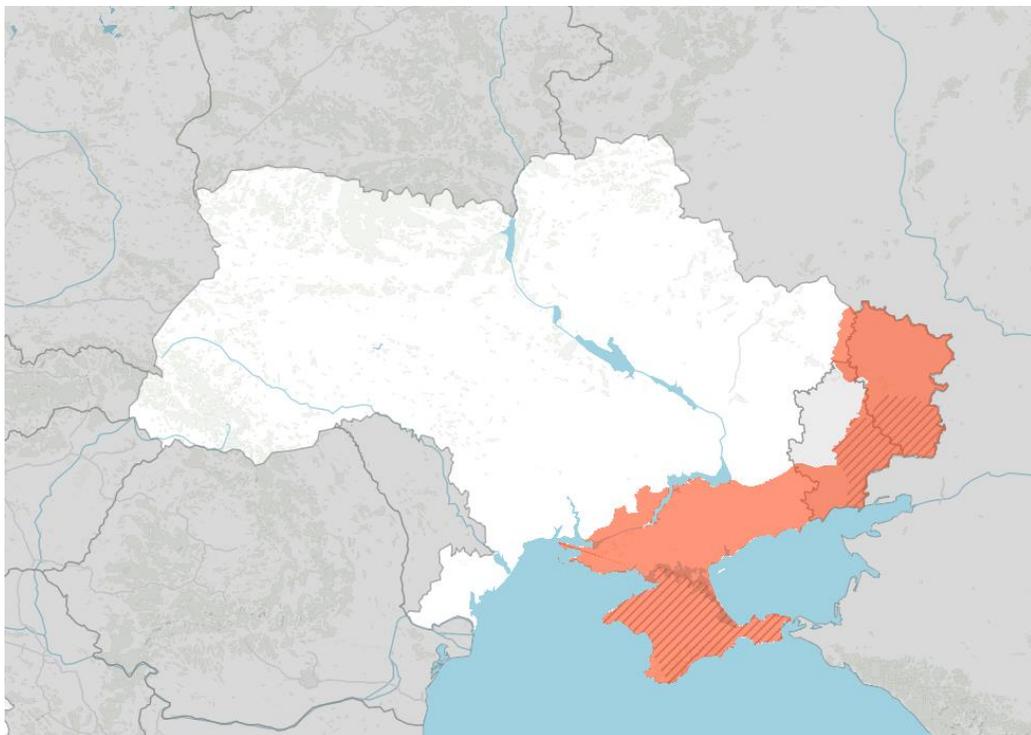
Why it matters: With his troops getting routed in northeastern Ukraine and their footholds elsewhere slipping, (see map below) Putin eschewed strategic retreat in favor of high-risk escalation. He's mobilizing an estimated 300,000 citizens and preparing to declare 15% of Ukraine as Russian soil — backed by a blatant nuclear threat.

Driving the news: Putin's mobilization announcement was followed by scenes of protests in dozens of cities, military-age men crowding into airports and border checkpoints to flee conscription, and long lines of soon-to-be soldiers being herded onto buses and planes — particularly in provinces far from Moscow.

Putin and Defense Minister Shoigu claimed that only about 1% of Russia's available reserves — roughly 300,000 military veterans with relevant expertise or combat experience — would be called up.

But as Sergey Radchenko of Johns Hopkins notes, Putin's actual decree is vague enough

that "just about anyone" could be enlisted, and the total number might be well beyond 300,000. Soldiers on short-term contracts will also be forced to remain on active duty.



There have been numerous anecdotal reports of men being conscripted regardless of their military experience and age. Those who resist face jail time and some anti-mobilization protesters have been immediately conscripted, according to the monitoring group OVID-Info.

The big picture: The specter of conscription will bring the war home to millions of Russians in a way nothing else has.

- Support for the war has remained static since it began, with roughly 45% of Russians solidly behind it, another 30% backing the war "with some reservations," and only a tiny fraction willing to pay the high price of protesting says Denis Volkov, director of the Levada Center, Russia's top independent pollster.
- Lately, more Russians say they have been tuning out the news, which Volkov attributes to fatigue or "psychological protection." Economic sentiment was improving, and many Russians wanted to move on.
- Now, says Tatiana Stanovaya of consultancy R. Politik, Russians are frantically searching the internet for news about mobilization and "getting much more than just information on who will be drafted."

Military analysts have also cast doubts on the Russian military's ability to integrate, train, and equip hundreds of thousands of soldiers, many of whom likely have no desire to fight this war.

"One thing we've seen from the Russian military throughout this war: it hasn't done most things well," says Rob Lee, a fellow at the Foreign Policy Research Institute and an expert on Russia's military. "So is mobilization going to be done that well? Are these units going to be well-trained and equipped when they deploy? Probably not."

"Russia can try to address the quantity aspect of the force, but they can't fix the quality," adds Michael Kofman, an analyst of Russia's military at CNA, noting, in particular, the dearth of experienced officers and advanced equipment.

Kofman believes the mobilization order is unlikely to change the trajectory of the war, which currently favors Ukraine, but thinks it could allow Russia to sustain the fight for longer.

So-called "referenda" in four regions of Ukraine under total (Luhansk), near-total (Kherson), or partial (Donestk, Zaporizhzhia) Russian control are slated to run from Friday to Tuesday.

- The White House expects declarations that huge majorities wish to join Russia, potentially followed by an announcement from Putin granting that "wish."
- Needless the say, those moves would lack international support or legitimacy.
- Furthermore, Ukraine is conducting a major counteroffensive in Kherson and a surprise push in Kharkiv which is threatening Russia's positions in the Donbas. Thus, Putin would effectively be announcing that the very ground he's in danger of losing is, in fact, Russia.

Breaking it down: Analysts believe this is part of an effort to recast the war as defensive in nature — a fight to free people and lands that are truly Russian — and to lock-in Russia's gains.

- Putin warned Wednesday that Russia would use "all means at our disposal" to protect its territory and could now bring the four Ukrainian regions under Russia's nuclear umbrella.
- The decision seems "almost like some kind of superstitious attempt to break free from a curse," because of the deeply held belief that Russia will always be victorious on its own soil, writes Alexander Baunov of the Carnegie Endowment.
- The message to the West, according to Stanovaya, is "either Ukraine retreats, or nuclear war."

The other side: Ukrainian and Western officials have been quick to insist that they won't let nuclear threats weaken their resolve. But some have also cautioned that Putin's warnings can't be dismissed.

- "We think it's just bluster," but that could change if Putin feels "backed into a corner," a senior European official told Axios on the sidelines of the UN General Assembly.
- The problem is that if Putin does come to feel that way, we might not know it, the official said.

The bottom line: "He's now staking his regime on this war," Kofman says.

Putin is beginning to face his worst enemy - reality

Putin and his Kremlin allies have finally begun to face their worst enemy – reality.

As reported above, he has dramatically changed his stance in the past month. In late-August he called up an additional 137,000 troops, only to triple this number earlier this week.

He is facing reality in that the former number is woefully insufficient to challenge the military status quo.

It is a harsh reality but a reality, nonetheless.

It is far worse than that. He will struggle to recruit, "Shanghai" or drive these number into reality, but he faces massive internal dissent, coordination challenges, military food ration pack shortages and a plethora of technical issues such as maintenance, weapons manufacture and technological advancement to meet western levels.

As we reported earlier this week, he is reportedly also taking control of the Russian Army command, something both Hitler and Czar Nicholas II tried without success. He was a KGB backroom operative in Eastern Germany for years, hardly the qualification for leadership and has no relevant or relative experience.

Even his oblast referendums will be a departure from reality, a further factor he has yet to confront.

Stages of engagement

In a previous War Update I spoke of the stages of engagement by western countries and NATO in initially believing Russia would not invade, then any invasion would be reduced to the Donbas region through to realization that it was a full-on Russian invasion of Ukraine.

It is apparent to me now that the US, EU, NATO, and other global states have realized that they can stand up to Russia, to me a further stage of engagement – the dilution of fear of the Russian power machine.

They have realized that Ukraine has the upper hand, Russia has run out of solutions and is poised to lose even more.

This has emboldened the pro-Ukrainian camp and will see massive arms uplifts and support mechanisms swing into gear.

Aside from a nuclear initiative, Russia is out of viable positions, but does still have the “Red Button.”

The US has stated that it takes Putin’s and Medvedev’s statements and Russian threats of nuclear attack seriously.

We need to gauge very carefully the mood swings within the Kremlin in order to track any movement in this regards. The US is monitoring Russian nuke positions and silo’s very closely from satellite platforms and reported earlier today that they have not noticed any shift in this (physical” area of attention.

There are historical examples of sound thinking Russian commanders refusing to launch missiles or taking action to avert international crisis moments. We need to hope such folk still manage nuclear stations around Russia.

But the fact remains that the pro-Ukrainian camp is emboldened and ready to stop Russian invasion and manufacturing of false border conflicts – once and for all.

Gradually and then suddenly you go bankrupt – (ret) General Ben Hodges on Russian failure

“How did you go bankrupt?” Bill asked.

“Two ways,” Mike said. “Gradually and then suddenly.”

The dialogue above is from Ernest Hemingway’s 1926 novel, *The Sun Also Rises*.

Gen. Hodges quoted the above from Hemingway in his assessment of the Russian failure over the past months and where it is headed.

Key takeaways

Russian Myth is gone – The Myth that Russia commands the second-most powerful military in the world and can project power to all corners of the globe – is gone.

It can no longer justifiably make such claims nor reinforce them through active engagement such as in Syria.

The world has noticed the poor performance and even poorer judgement of the Russian state and its military prowess.

More so will it be noticed in surrounding territories such as Turkey, Azerbaijan and Armenia, aside from member-states of the old Soviet Union and states close by and previously threatened by the Russian masters in Moscow.

Merely moving against Moscow could and in most cases did see robust action from the Russians.

Not anymore.

Yes, they still field the largest nuclear arsenal, and still command a huge amount of real estate, but those are different scenarios. Russia is not going to use a nuclear device against Kosovo or Turkey.

China, most of all, will watch with interest. It not only is positioning itself for the long term, but also still harbors resentment about swathes of (Chinese) land occupied by Russia. It is, as always, playing the waiting game.

On the other hand it needs Russia and India to combine with China in order to create and maintain a viable alternative global geopolitical power structure.

The emperor no longer has any clothes. Not for the first time in history.

Follow the numbers – At the top of the daily Update and as a header, I list Russian losses as reported by the Ukrainian government. Trending and following these numbers, one can generally see how the war is progressing.

During the counteroffensive's early days, the Ukrainians were relatively quiet about where they were and how they were faring. Most reports were a few days after events.

But tracking the trend one can see what is transpiring. As their offensive accelerated into Kharkiv Oblast, the number ticked up, continuing to do so as they progressed.

As invading forces started retreating and then moved en masse back into Russia, numbers rocketed and then subsided, showing fewer targets and battles, Ukraine careful not to engage on Russian soil. So the numbers drop off.

Then there was a lull, when Russian daily death reports dropped to the low hundreds. Now they have ticked up again as Ukraine increasingly engages in the Kherson Oblast.

There was also an extended period when Ukraine reportedly marginal downed Russian combat aircraft and helicopters.

Now they are ticking long quite regularly, indicative of Ukrainian deployment of advanced US missiles as now attached to their combat jets.

Ukrainian destruction of Russian anti-aircraft batteries dropped off for some weeks and then started picking up again – after the US supplied them with anti-radiation missiles particularly geared to tracking and destroying these sites.

Russia keeps stepping on rakes – Russia keeps making mistakes, misunderstands and exercises poor military and general judgement – it keeps stepping on rakes in its approach to strategy and assumptions regarding its ability to engage.

Russia loses 18 tanks, helicopter and fighter jet in a single day - Russia suffered significant losses of military equipment both in the air and on the ground over the last 24 hours, the Ukrainian Armed Forces have said in their latest update.

Ukraine's military said on Friday that over the previous day, Russia had lost 18 tanks, a helicopter and a fighter jet, as well as 14 artillery systems and eight Multiple Launch Rocket Systems (MLRS).

It said that Russia's biggest losses occurred towards Kramatorsky and Donetsk in the east of the country, adding that Ukrainian anti-aircraft missile units destroyed seven Russian targets, including four Iranian-made drones.

Oskil River crossings - Britain's Ministry of Defence said on Friday that over the last three days Ukraine had secured bridgeheads in the Kharkiv Oblast on the east bank of the Oskil River, which Russia had tried to integrate into a consolidated defensive line after its forces retreated earlier in September.

Defense officials said that Ukrainian troops were assaulting the town of Lyman, east of the Siverskyi Donets River, which Russia captured in May.

Putin's Ukraine war is falling apart: why Russia is making nuclear threats - Putin as well as Medvedev, the former president of Russia, keep making more and more nuclear threats. Why is Moscow raising the stakes so much with Kyiv? It seems that Putin realizes his war in Ukraine is in trouble and is looking for a way out and to get the West and NATO to back down: Vladimir Putin on Wednesday threatened to use nuclear weapons in a brazen escalation of his war in Ukraine.

But the Russian president's audacious warning is less a show of legitimate strength, and more a sign that Russia's military is faltering, according to experts.

Amid mounting military losses, deteriorating troop morale, and shifting public sentiment, it makes sense why Putin would turn to his warheads, said Simon Miles, an assistant professor at Duke University's Sanford School of Public Policy and a historian of the Soviet Union and US-Soviet relations.

"The poor performance of Russia's military on the battlefield in Ukraine has been an important reminder that any claim to great power status Russia may have is predicated almost entirely on its arsenal of nuclear weapons," Miles said.

Putin's message, Miles posited, is also directed at Ukraine's global supporters.

"Putin has tried and failed many a time to break the resolve of Ukraine's supporters, and his latest threats are no different." "It is clear that he is growing more aware of how limited his actual military options are in this war."

Ukraine earlier this month amassed one of its biggest victories yet, launching two concurrent offensives in the northeast and south in an effective effort to reclaim occupied territory. Reports from the front lines indicated that Russian troops fled as the country's military buckled under Ukraine's powerful performance.

"The Russians are dispirited, disorganized, and unmotivated, just trying to stay alive," Robert English, a professor at the University of Southern California who studies Russia, the Soviet Union, and Eastern Europe, told Insider. "The Ukrainian fighting spirit and the American arms industry have teamed up to thwart [Putin's] plans in a big way."

Russian prospects remain grim, especially given the West's ongoing military support to Ukraine. The country's most recent offensive, while executed by Ukrainian forces, was made possible thanks to US and UK intelligence, strategy, and weapons.

"As long as the west is supplying more and better weapons — and we are supplying more and better weapons — the pressure on Russian forces is only going to grow," English said.

Impacts

Russia can't protect its allies anymore - A tentative cease-fire between Armenia and Azerbaijan has held for the past week, following one of the deadliest-ever outbreaks of fighting between the two frequent belligerents on Sept. 12-14. But it is unlikely to hold; Azerbaijani forces who marched into Armenia continue to occupy part of its territory, in particular heights around the town of Jermuk. Rumors swirl of further offensives.

A key destabilizing factor is a power vacuum in the region, which has emboldened Azerbaijan to press its advantages.

Its military supremacy over Armenia was conclusively displayed by their previous conflict, the 2020 war over Nagorno-Karabakh, a mountainous ethnic Armenian enclave within the de jure borders of Azerbaijan.

Azerbaijan's 2020 offensive—with key support from Turkey and Israel—was settled only by an uneasy cease-fire mediated by Russia, which has a close relationship with Armenia. While the circumstances remain disputed, it appears that Russia threatened to intervene more forcefully if Baku did not agree. This marked an expansion of the Russian military's presence into the South Caucasus region on a scale unprecedented since the Soviet collapse.

The deal provoked mass opposition within Armenia. But Prime Minister Nikol Pashinyan, who had initially come to power three years prior on the back of an anti-kleptocratic liberalizing revolution, had no one to turn to but Moscow, as Washington and Europe were entirely absent from diplomatic efforts to end the 2020 fighting. Pashinyan ultimately allowed Russia to expand its military presence within Armenia, building new bases in the country proper in addition to its expanded role in Nagorno-Karabakh.

Russia is now incapable of sustaining that presence—and Armenia is now suffering the consequences. The question is whether the West will now recognize the opportunity to expand its own influence in the South Caucasus region.

What the Russian-brokered deal did not do was solve any underlying problems in the region. Instead, it opened more territorial disputes without solving the Nagorno-Karabakh one. Subsequent diplomacy proved unable to address both sides' concern. Meanwhile, the Kremlin—long the major arms supplier of both sides—also continued to offer Azerbaijan more heavy weaponry. At the end of this August, Azerbaijan presented Armenia with a fait accompli, sending its forces to take the town of Lachin (known as Berdzor in Armenian) itself, revealing Russia's impotence.

Calling Moldova – Russia has approximately 1,500 combat soldiers stationed in Moldova, to the west of Ukraine, ostensibly there to protect Russian-speaking folk in the Moldovan province of Transnistria. How long before, it at all, does the Kremlin call these into action?

Where is Belarus? – Belarus, with President Lukashenko as its leader, has essentially been “missing in action” over the past few months.

Russia has reportedly stationed nuclear weapons in the country and fitted its aircraft with the capability to launch such weapons, but nothing much else has transpired from this country to Ukraine's north.

As previously reported in the Update, Lukashenko has a fragile grip on power in the country and is wholly dependent upon the military for his continued stay in power. Sending them into Ukraine will signal to Belarusian opposition groups that the time may have arrived for an uprising.

It is also more than probable that not only Ukraine, but also Poland and other EU states have made clear to Lukashenko that it will be dangerous for him and Belarus to enter the conflict.

Whilst traveling through Minsk and Brest on business some years ago, it was loudly made clear to my companions and I that there was very limited respect for Lukashenko throughout the country. So much so, while there, he ordered gas stations to reduce the price of gas by 50%. They all shut their stations down, chained the pumps and went home, challenging him to force them otherwise.

People flee Russia after Putin's reservist callup - Putin's mobilization of hundreds of thousands of reserve troops to fight in Ukraine has sparked outrage across his country. Some tried to flee Russia.

Russia plans to draft 1.2 million people into its army as part of the mobilization.

Source: Meduza, quoting a source close to one of the Russian federal ministries

Details: The source noted that it was recommended to keep recruitment from regional centres "to a minimum", adding, "They're going to rural areas where there's no media, no opposition, and more support [for the war - ed]."

At the same time, Medusa's source close to the Kremlin leadership reported that there are plans to mobilize up to 16,000 people in Moscow. This information was confirmed by a source close to one of the Russian federal ministries.

An estimated 3,200 people are to be called up in St Petersburg, according to a source close to the authorized representative of the North-Western Federal District.

However, Putin's press secretary Dmitry Peskov told the Kremlin-sponsored news outlet TASS that the claim that 1.2 million Russians are to be drafted in the partial mobilization is a lie. He also said previous statements that the Kremlin plans to draft up to 1 million people as part of the mobilization were untrue.

Background:

On the morning of 21 September, Vladimir Putin announced partial mobilization.

Later it turned out that the decree on mobilization contains a secret paragraph which allows the Russian Ministry of Defence to draft up to a million people for the war.

Protests were held in Russian cities on 21 September after partial mobilisation was announced. Law enforcement agencies report that police arrested at least 1,176 people.

Detained protesters were issued with mobilization notices in Moscow and Voronezh.

Rural recruitment – as reported previously and above, the Kremlin recruits mainly from the furthest regions and zones of Russia, so as to minimize Russian awareness of events.

Video widely shared on social media shows men saying tearful goodbyes in a small town in the Sakha Republic, which is in the far east of Russia, before being loaded onto a bus to be taken off for military training.

Residents of Russia's Dagestan barricade federal highway while protesting against mobilisation - Residents of the Babayurt district in Russia's Dagestan have taken to the streets to protest the partial mobilisation declared in Russia, Ask Rasul Telegram channel reports.

Russian government buildings on fire – There are unconfirmed but increasing reports of Russian government buildings in major cities on fire in protests against the Putin mobilization announcement.

The Kremlin wants everyone to know there's absolutely no panic in Russia a day after Putin called up hundreds of thousands to go fight in Ukraine—just ignore the burning military recruitment offices, protests shutting down highways, and college students being snatched from their classes to go kill or be killed.

Russians protesting a mile from Kremlin: 'Send Putin to the trenches' - Russian citizens assembled in the streets of Moscow to protest Putin's mobilization.

Journalist Francis Scarr posted a video on Twitter of a nighttime crowd gathered on Moscow's main pedestrian street shouting, "Send Putin to the trenches!" Arbat Street is located only about a mile from the Kremlin, Putin's official residence.

The gathering followed Putin's announcement on Wednesday in response to a Ukrainian counteroffensive in regions like the Donbas. Part of the mobilization includes a transfer of forces in Izyum and Balakliya for what Russian officials refer to as the continued liberation of the Donetsk People's Republic.

Panic recruiting - In Buryatia, reports emerged of local schools literally being turned into mobilization centers and of men being rounded up by the dozens in villages.

"A draft notice came for my father this evening. He never served, he has no military education, no military ticket, and he falls into the category [of health exceptions]," read one plea for help shared by the advocacy group Free Buryatia Foundation.

"Leave for Mongolia, everyone who can. If you don't have an international passport—hide! People are being taken away by buses," the group warned.

In Ulan-Ude, several college students were pulled straight out of their classrooms and sent off, accompanied by police officers, to begin their service, The Village reported.

Russian Website petition - One Russian-language petition against conscription, titled 'Against partial and total mobilization,' was created on change.org and has been signed over 140,000 times.

"We, the citizens of Russia, women and men, oppose general and partial mobilization," the petition states. "President Vladimir Putin has no legal grounds, weighted and well-reasoned reasons for announcing it, and cannot have any. In the current state of uncertainty we are not prepared to expose our men - brothers, sons, husbands, fathers and grandfathers - to any moral, ethical or physical danger."

India says Ukraine conflict trajectory, outlook very concerning - India told the U.N. Security Council on Thursday that the trajectory of the Ukraine conflict was very concerning and that the outlook was more so, as New Delhi sharpened its calls for peace.

"The trajectory of the Ukraine conflict is a matter of profound concern for the entire international community," India's foreign minister, S. Jaishankar, said in New York. "The future outlook appears even more disturbing. The nuclear issue is of particular anxiety."

'A cornered Putin' isn't done with economic retaliation and could cut oil exports to Europe before embargo kicks in - Putin can still lash out against Europe's economy with a surprise cut in oil exports, according to Helima Croft, RBC Capital Markets' head of global commodity strategy.

"A cornered Putin is a very dangerous Putin, and we should prepare for very destabilizing, escalatory moves from this regime," Croft told CNBC Wednesday, though she noted that traders seem more concerned about the Federal Reserve than Russia this week.

Putin may move to cut oil exports ahead of the December 5 start-date for Europe's partial embargo on Russian crude, she warned.

War in Ukraine has created a fertilizer 'crunch': The global food crisis won't get solved until it's fixed - As the world's leaders gathered in New York this week for the annual United Nations General Assembly meetings, it was one of the more unlikely buzzwords: **fertilizer**.

It may not be top of mind for most heads of state, but in the midst of a global food crisis, concerns about the supply of this humble commodity — critical to the work of all farmers and food producers — have exercised the minds of food experts and policymakers alike. So much so that it rated a mention in the United Nations Secretary-General António Guterres' opening remarks to the global meeting. "To ease the global food crisis, we now must urgently address the global fertilizer market crunch," Guterres said, warning that inaction now could lead to a "global food shortage."

The cause of the "crunch?" Russia's war in Ukraine, which has affected global supplies of not just food but also the fertilizers that are needed to grow crops around the world.

Another war-related problem has added to the pressure: a drop-off in Russian natural gas supplies to Europe has led to a steep reduction in European fertilizer stocks. Natural gas isn't just a source of power; it's a key base ingredient in fertilizer production. As of late August, around two-thirds of the continent's production of fertilizer had been halted.

There are only a handful of major global suppliers of fertilizer, but demand is truly global. A shortage of fertilizer translates into big problems for farmers in many corners of the world. It means that countries are competing for limited fertilizer stocks, ahead of the next crop planting season. The chief worry among farmers, experts and policymakers

alike: Continued pressures in the fertilizer market could drive down the amount of farmland that can be cultivated in coming months. The impact would be felt during the next harvests, reducing the amount of food there is to go around.

Russia partners like China and India expressing concerns over Ukraine may have forced Putin's hand and driven him to try and end the war quickly, Russia scholar says - Putin escalated his unprovoked war on Ukraine this week, just days after some of his supposed partners publicly expressed doubt over it — and the events may well be related.

Since invading Ukraine in February, Russia has been shunned by much of the world and faced crippling sanctions from the West. But as Russia grew more isolated, some nations have either stood by Putin or avoided directly condemning him.

Both China and India have been powerful partners of Russia throughout the war, declining to institute sanctions and continuing to purchase the country's energy products. However, leaders of both countries recently took the rare step of speaking against the war.

During a meeting with Chinese President Xi Jinping in Uzbekistan on September 15, Putin acknowledged Xi had "questions and concerns" regarding the war. The following day, Indian Prime Minister Narendra Modi criticized the war during a face-to-face meeting with Putin.

Sanctions

Russia offering 'enormous discounts' on oil to China, India - A planned Western price cap on Russian oil is already making a difference, U.S. Treasury Secretary Janet Yellen said on Thursday, noting that Russia was now offering China and India "enormous discounts" while looking for other outlets for its oil.

In December, Europe would halt the bulk of its purchases of 3 million barrels per day, putting additional pressure on Russia to find new buyers for its oil, Yellen told a conference hosted by The Atlantic magazine.

How Western sanctions are quietly undermining Russia's fighting power - Despite what the Kremlin claims,



Western sanctions against Russia are working. Perhaps most important is the embargo on electronic component exports, which prevents the Russian army from rebuilding tanks and missiles severely depleted in the war.

Sanctions were never aimed at weakening the Russian economy, which is largely impossible given the country's agricultural resources and well-known resilience. Instead, the blockades are meant to paralyze Moscow's war effort and weaken its key civilian industries — ultimately to make it clear victory is impossible and encourage the Russians to withdraw from Ukraine.

Now the evidence that the sanctions are working is even coming openly from Russia. Due to a lack of imported electronic components, especially semiconductors, Moscow admitted on Tuesday that it was 15 years behind the rest of the world in this area. Several military-industrial facilities have had to cut back on production or even shut down, such as the Ulyanovsk anti-aircraft missile factory, the Vypel air-to-air missiles factory and the Uralvagonzavod tank manufacturer, the country's largest production complex.

The Kremlin reportedly recycles microprocessors from... refrigerators and washing machines.

And reports now say Moscow is probably unable to rebuild its 3,000 cruise missiles' stock, crucial for their precision and power, 75% of which have already been used. An investigation by the Royal United Service Institute (RUSI), a British defense and security think tank, reviewed 27 types of captured Russian weapons, which shows that they all contained crucial components from 70 Western firms. Each cruise missile has dozens of components that are not made in Russia.

It is true that Russia can obtain critical components on the black market, but it is more expensive, less reliable and more time consuming. Some very specific components, especially German ones, cannot be found anywhere on the Chinese market.

Moscow now uses mostly so-called "dumb" shells and bombs, not computer guided, dating back from its 1970s-1980s stocks. It recently revealed it had to buy North Korean shells and Iranian drones. Finally, due to a depletion of public revenues because of the Western embargo on the purchase of gold, coal and metals, some troops are only receiving their pay occasionally. This contributes to refusals to fight, or even surrenders.

Lack of spare parts, brain drain

Another impact of the sanctions is unemployment, swollen by the departure of a thousand Western companies. In addition, inflation has reached 15% and recession is estimated to reach at least 6%.

Industries are virtually shutting down one after the other. For lack of spare parts, airliners have begun to "cannibalize" themselves, that is replacing worn-out parts with those of other grounded aircraft. In May and June, Russian car production was cut by 20%, while sales of computers fell by 25% and cell phones by 27%.

Some medicines are coming up short. The Kremlin claims that local industry will be able to replace imports, but this is questionable given both corruption and brain drain: 500,000 Russians have left the country this year.

In total, Russian imports were cut in half in the second quarter over the same period in 2021. Indeed, Chinese companies are reluctant to replace Western exporters, for fear of losing — in retaliation — the vast U.S. market, which is seven times bigger for them. All this puts into perspective the importance for Russia of "drowning in cash" thanks to petro-fuels, since it no longer can spend it.

Putin

The end is near for Putin's war against Ukraine - Wednesday in Moscow, Putin said he will call up reservists and hold political referenda in captured Ukrainian territory. And yet again, he threatened to use nuclear weapons if Russian territory is in danger.

Despite the scary language, Putin is not fooling anybody in NATO. Secretary General Jens Stoltenberg lost no time pointing out that Russia doesn't have enough weapons to equip more troops. White House National Security Council spokesman John Kirby immediately said the speech showed Putin was struggling. And at the UN, President Biden denounced Putin's war.

Putin's biggest problem is that Russia is losing, and Ukraine has seized the initiative (see picture of Ukrainian tank above). Ukraine has two counter-offensives underway, in the north and the south and scored a major victory by pushing Russian forces out of the town of Izyum two weeks ago, thus keeping control of a major highway and turning back territorial gains in the east. Russian forces broke and fled. The defeat around Izyum also showed that the battlefield performance of Russia's forces is getting worse, not better. Ukraine is learning and improving while Russia is on the run.



Wednesday's announcement sounded like Putin had to do something to rally his own beleaguered military forces and attempt to convince Russians he still has a plan. But here's why his words rang hollow.

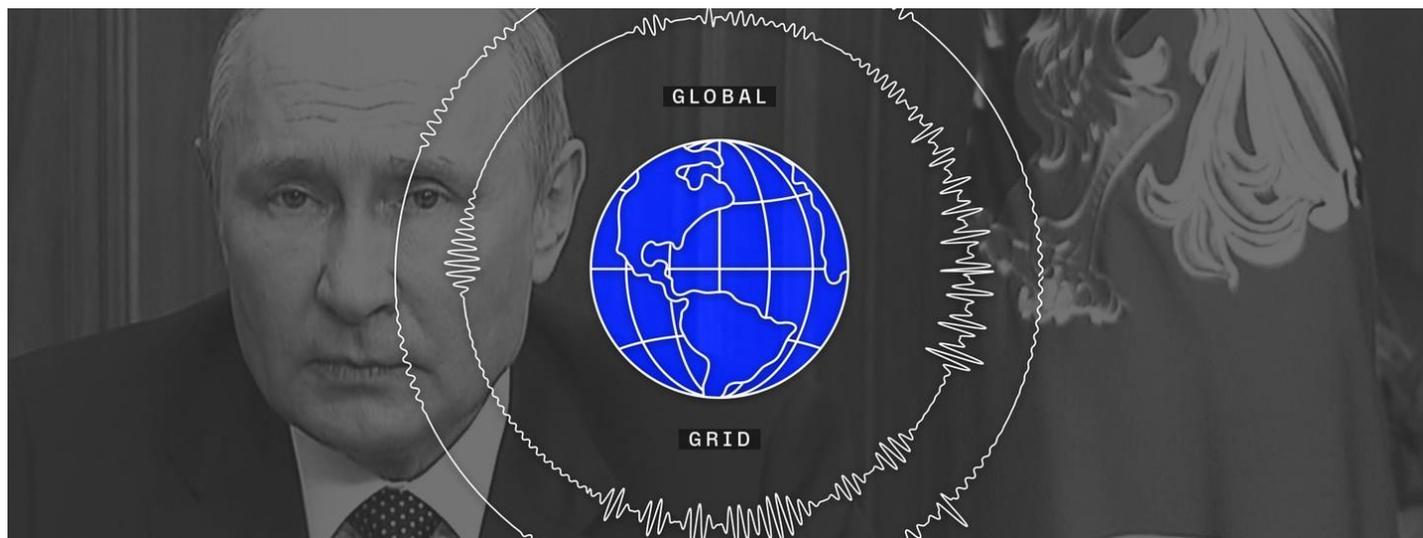
Putin announced a partial call-up of 300,000 Russian reserves, but this won't happen overnight, or even over the next few weeks. Simply transporting new troops to the front lines will be difficult for Russia as Ukraine uses long-range weapons to target roads and supply depots. Russia's military is losing this war despite their superior numbers; so calling for more troops tells you they don't have a clue how to cope with Ukraine's tactics and new weapons.

He may be trying to figure out how to sell his defeat. He'll hold rigged referenda where occupied territories "vote" to join Russia. That's part of his old plan, but it won't help if Russia keeps losing ground to Ukraine's forces.

The biggest sign of desperation was the renewed nuclear threat. All along, Putin's nuclear threats have been intended to scare NATO, the U.S. and allies into halting military assistance to Ukraine. He'd like nothing better than to have Washington and London and Berlin and Warsaw cower and cool it on the aid.

But the simple fact is that Russia's threats are not working. As of now, the U.S. military reports that Russian nuclear forces have not changed their posture, according to Kirby. That is a very significant point. It means that Russia is not unwrapping nuclear weapons and activating units and people to employ them. Of course, the U.S. military has been watching Russia's nuclear units closely since well before Feb. 24 and the Pentagon says the Russian posture had not changed over the last seven months. So, Putin says he's "not bluffing" but for now his nuclear threats are all just words.

Patience with Putin may be ebbing among friendlier countries - Signs that some countries willing to tolerate Russia's invasion of Ukraine are losing patience have emerged as Turkey, India and China responded coolly to the announcement that four Ukrainian regions occupied by Russia were planning referendums on joining the Russian Federation.



Turkey, which has been at the centre of mediation between the west and Russia, issued a sharp rebuke, saying in a statement that it was concerned by attempts to stage unilateral referendums.

“Such illegitimate fait accompli’s will not be recognised by the international community. On the contrary, they will complicate efforts to revitalize the diplomatic process and deepen instability,” the statement said.

“We renew our support to Ukraine’s territorial integrity, independence and sovereignty, which we have been emphasizing since the illegal annexation of Crimea in 2014 and reiterate our readiness to extend all necessary support to resolve the ongoing war ... through peaceful negotiations.”

In New York, the Turkish president, Erdoğan, said he had always supported the territorial integrity of Ukraine.

He appeared to have been blindsided by Vladimir Putin’s mobilisation of troops on Wednesday, given that he said in an interview with the US Public Broadcasting Service on Monday that he was under the impression that his Russian counterpart was in the mood to make concessions.

Reflecting on a recent discussion he had with Putin , he told PBS: “He is actually showing he is willing to end this as soon as possible. That was my impression because the way things are going is quite problematic.”

Erdoğan is not the first world leader to end a meeting with Putin with a misleading impression, but Turkey is also facing other pressures.

The country’s banks are under growing sanctions pressure from the US to decouple from Russia. Two private institutions, DenizBank and Isbank, suspended use of the Russian payment system Mir this week after Washington expanded its sanctions on Russia, including targeting the head of the entity that runs Mir. Turkey is never going to be cut off from Russia economically, but business as usual is over.

India’s prime minister, Narendra Modi, whom the French president, Emmanuel Macron, praised lavishly this week for telling Putin to his face that this was not a time for war, is being urged to follow his comments up with concrete action.

There has been a lot of impatience with India's refusal to take sides, or what Delhi likes to call juggling balls on a high wire. Jen Psaki, then the White House press secretary, urged the country in mid-March to reflect on "where you want to stand when history books are written at this moment in time."

India's external affairs minister, S Jaishankar only referred to Ukraine tangentially at a session at Columbia University this week but suggested his country had reappraised its attitude toward the US.

"For almost 50 years, for various reasons – I'm not saying we were at fault, or the US was at fault – but the fact was we regarded the US with suspicion, with a lot of wariness," he said. "It was a very substantive relationship, but the overall foreign policy assessment of the US was of deep caution, if not of deep suspicion."

"It has taken us a lot of effort to overcome the earlier assumptions in order to forge a different relationship with the US and one of the big differences which PM Modi has made ... he has not carried ideological baggage, he's not a person who is rooted in a certain worldview which makes you fundamentally distant from the US."

That has been reflected in India's approach to Ukraine, where it has taken small steps away from neutrality. It continually refers to honoring the UN charter, has condemned war crimes committed in Bucha and voted for the Ukrainian president, Volodymyr Zelenskiy, to be allowed to address the UN security council by video link.

China is a tougher nut to crack, and its often opaque statements are open to contradictory interpretations. It may still think its alliance with Russia is necessary to keep Washington in check, but the statements coming from the Chinese foreign ministry spokesperson have hardly endorsed Putin's gamble. **Comment** – Russian use of a nuclear weapon will drive China away from it, most likely something that they have communicated to Putin.

But China hasn't lent its full support to Russia, either. It hasn't sold weapons to them or explicitly violated sanctions to support its war effort. But at the same time, from the beginning, China has in some ways effectively supported Russia's stance by echoing statements Russia has made about NATO's expansion as a precursor to the war, putting blame on the West for that.

One former British foreign minister said Russia had retained deep links to countries around the world, with allies who were still willing to push back against the west and find reasons to excuse Moscow's actions.

Of the neutral camp, he said: "I think they will extra hedge against a Russian defeat, so they should be open to western engagement. It is clear now Russia can't win, but that is obviously not the same as losing."

Remarkable unity in agreement to end Russia Ukraine war - US Secretary of State Blinken yesterday noted that there has been a 'remarkable unity' among member states towards the narrative to 'end the (Russia-Ukraine) war' during United Nations Security Council (UNSC) briefing on the same. "What is striking is the remarkable unity among member states when it comes to the (Russia-Ukraine) war. Leaders from countries developing and developed, big and small, north and south have spoken in UNGA to end the war," he said.

Containment

Pressure mounts on Germany's Scholz to send tanks to Ukraine - The warning shots are getting closer and louder. Witheringly, opposition lawmaker Florian Hahn from the center-right Christian Social Union fumed that Germany was only "number 18 in the world" when comparing its military aid for Ukraine relative to the economic output. Hahn noted that Estonia was far ahead of Germany in supplying arms instead of keeping them for national defense, "even though they have a direct border with the Russian Federation."

In a heated parliamentary session on Thursday, German Chancellor Scholz received stark signals from his coalition partners that they expect him to ramp up weapons supplies to Ukraine at what is becoming an increasingly critical inflection point of the war.

While his government coalition bought him a little more time in the Bundestag debate and temporarily fended off a critical parliamentary motion expressing a lack of faith in his military support for Ukraine, it is now looking more and more likely Scholz will have to respond to the calls for Europe's biggest economy to pull its weight when it comes to arming Kyiv more decisively.