

Conflict Update # 138

August 1st, 2022

Conflict Assessment

Key Assessments

Winter is coming – Ukraine’s winter stretches from December to February. Hence the Russian invasion of Ukraine launching in late-February this year.

Ukraine seeks to re-take Kherson Oblast, moving down from there to the Black Sea, bordering Crimea and Odessa.

They want to do so, or at the very least, largely succeed in doing so, pre-winter – four months away. According to informed intelligence sources, they are making significant inroads into achieving their objective.

To Russia, who captured the city of Kherson during the first month of the war with troops from Crimea, Kherson is a fundamental, strategic and prestige requirement. It has to maintain it’s occupation there in order to see any facet of success in the Donbas. It cannot afford to tell the Russian people that Ukraine has recovered such a significant area of control. Loss of the city and oblast will be a major setback for not only Russia, but for Putin personally.

This is why Putin and the Kremlin are now pouring troops and armor into the area in order to lock down Russian defenses and retain control of the region.

Short of both troops and reliable armor, Russia will be extremely hard-pressed to fight on a new front, and one of such vital significance. Ukraine is keenly aware of this, and is pushing ahead, now receiving added weaponry (see below under “Containment”), allowing them to strike enemy targets up to 200 miles behind Russian front lines.

This battle is of vital import to the passage of the war and events will be watched closely by all parties. It is no small wonder that the US, NATO and EU have delivered massive amounts of major armory to Ukraine in the last few weeks, armor that allows Ukraine to strike targets deep in enemy territory.

Armories delivered to Ukraine are smart weapons enabling very accurate targeting ability, allowing Ukraine to minimize wastage and increase effect, something Russia cannot replicate.

Expect to see Ukraine attacking strategic points, such as the rail connection between Kherson and Crimea, re-supply points and Russian administration centers over the next few weeks.

Also expect to see Russia increase its random bombardment of Ukrainian cities and civilian targets.

Of import here is that Russia, according to well-informed sources, is dangerously close to running out of munitions and heavy weaponry, some anticipating a rundown by the 4th quarter of this year.

They are already using anti-aircraft missiles and naval attack weapons against Ukrainian ground targets. Anti-aircraft missiles are relatively docile against ground targets, as they carry small warheads – sufficient solely to bring down an aircraft. This speaks to their desperation when it comes to munitions and available resources.

Russian losses - The General Staff of the Armed Forces of Ukraine reported that between February 24 and July 29, Russia had lost about 40,500 personnel killed, 3 times as many injured, 1,749 tanks, 3,987 armored combat vehicles, 900 artillery units, 258 multiple launch rocket systems, 117 air defense systems, 222 warplanes, 190 helicopters, 731 drones, 174 cruise missiles, 15 warships, 2,870 motor vehicles and fuel tankers, and 77 units of special equipment.

Ukraine says over 40 settlements retaken in key Kherson region - Ukrainian forces have recaptured more than 40 settlements in the key southern region of Kherson, as Kyiv looks to drive back Russian troops in a counter-offensive, the local governor said Monday.

Moscow seized almost all the territory of the economically and strategically important region bordering the annexed Crimea peninsula during the first days of its invasion which began on February 24.

But in recent weeks the Ukrainian army, bolstered by deliveries of Western-supplied long-range artillery, have sought to stage a counter-offensive in the area.



Kyiv's forces have been carrying out strikes on Russian military warehouses and positions behind the front line and hit bridges acting as crucial supply routes for Moscow's troops in the city of Kherson.

"Today, 46 settlements have already been de-occupied in the Kherson region," Dmytro Butriy, the head of the Ukrainian regional administration, told national TV.

Butriy added that the majority of the regained villages lie in the northern part of the region, while some others are located in its southern part, close to the Black Sea and the heavily bombarded Mykolaiv region.

The governor said that some of the recaptured villages "have been 90 percent destroyed and today are still under constant fire".

Ukraine says scores of Russians killed in Kherson fighting - The Ukrainian military said over the weekend it had killed scores of Russian soldiers and destroyed two ammunition dumps in fighting in the Kherson region, the focus of Kyiv's counter-offensive in the south and a key link in Moscow's supply lines.

Rail traffic to Kherson over the Dnipro River had been cut, the military's southern command said, potentially further isolating Russian forces west of the river from supplies in occupied Crimea and the east.

Ukraine has used Western-supplied long-range missile systems to badly damage three bridges across the Dnipro in recent weeks, cutting off Kherson city and – in the assessment of British defence officials – leaving Russia's 49th Army stationed on the west bank of the river highly vulnerable.

"As a result of fire establishing control over the main transport links in occupied territory, it has been established that traffic over the rail bridge crossing the Dnipro is not possible," Ukraine's southern command said in a statement.

It said more than 100 Russian soldiers and seven tanks had been destroyed in fighting on Friday in the Kherson region, the first major town captured by the Russians following their invasion.

The first deputy head of the Kherson regional council, Yuri Sobolevsky, told residents to stay from away from Russian ammunition dumps.

"The Ukrainian army is pouring it on against the Russians and this is only the beginning," he wrote on Telegram.

The pro-Ukrainian governor of Kherson region, Dmytro Butriy, said Berislav district was particularly hard hit. Berislav is across the river northwest of the Kakhovka hydroelectric powerplant.

“In some villages, not a single home has been left intact, all infrastructure has been destroyed, people are living in cellars,” he wrote on the Telegram app.

Reuters was unable to independently verify the reports and officials from the Russian-appointed administration running the Kherson region earlier this week rejected Western and Ukrainian assessments of the situation.

Using nuclear reactors for cover, Russians lob rockets at Ukrainians - Russia has turned Europe’s largest nuclear power plant into a fortress, stymying Ukraine’s forces and unnerving locals who fear both shelling and a radiation leak. Ukraine — Along most of the front line in Russia’s war in Ukraine, when one side lets loose with an artillery attack, the other shoots back.

But not in Nikopol, a city deep in southern farm country where the Ukrainian military faces a new and vexing obstacle as it prepares for a major counteroffensive: a nuclear power station that the Russian Army has turned into a fortress.

Nikopol, controlled by the Ukrainians, lies on the west bank of the Dnipro River. On the opposite bank sits a gigantic nuclear power plant — Europe’s largest — that the Russian Army captured in March. The Russians have been firing from the cover of the Zaporizhzhia station since mid-July, Ukrainian military and civilian officials said, sending rockets over the river at Nikopol and other targets.

It is, in effect, a free shot. Ukraine cannot unleash volleys of shells in return using American-provided advanced rocket systems, which have silenced Russian guns elsewhere on the front line. Doing so would risk striking one of the six pressurized water reactors or highly radioactive waste in storage. And Russia knows it.

“They are hiding there so they cannot be hit,” said Oleksandr Sayuk, the mayor of Nikopol. “Why else would they be at the electrical station? To use such an object as a shield is very dangerous.”

Residents have been fleeing Nikopol because of the dangers of both shelling and of a potential radiation leak. And those who remain feel helpless, as if they are targets in a shooting gallery.

Expanding the zone of Ukrainian attack - Ukraine 'Preventive Strikes' Should Hit Moscow, Forces in Russia: Lawmaker. As fierce fighting between Ukrainian and Russian troops continues in the eastern region of Donetsk, with Moscow failing to make significant advances for weeks, former governor of Luhansk Oblast George Tuka said it's time Kyiv launches preventive airstrikes directly onto Russian territory.

In an interview with Ukrainian news site Obozrevatel, Tuka said Kyiv will not fight to the last Ukrainian, but "to the last Russian," saying Ukraine should not limit itself to hit enemy targets within its territory but strike on Russian territory too.

"I would very much like our American partners to stop tying us hand and foot with the demand not to shell the territory of Russia," he told Obozrevatel. "In my opinion, the task of preventive strikes on military facilities located on the territory of both Russia and Belarus is a matter of the security of our country, and not just some political scaremongering. For a long time, both Russia and Belarus deserve to receive certain actions in return."

Asked about the diplomatic risks of shelling Russian targets using weapons provided by NATO countries, Tuka said the difference between weapons provided by Western powers and Ukrainian weapons is "just a political gimmick."

"From the moment when any and whose weapons cross the state border of Ukraine, they become Ukrainian. From whom we bought it, how we got it—it does not matter at all. This is political manipulation and nothing more," he said.

Tuka said that he saw "no reason" why Ukraine should not strike Moscow. "I see no reason why we should stop, that we should be stopped from doing so," Tuka told Obozrevatel.

Drone bombs Russia's Black Sea fleet headquarters – As we reported in the past few days, Russia's Sevastopol Black Sea Fleet HQ was struck by a bomb-carrying kamikaze drone. Although denied by Ukraine, it is reported that this was in fact a Ukrainian bomb attack.

Sevastopol is around 200 miles from the Russian front line with Ukraine, showing the latter's ability to reach behind Russian lines. NATO and US-supplied drones cannot reach that distance so the likely scenario is that the attackers used a commercially available drone rigged with an explosive and flew it over Black Sea Fleet headquarters.

Grain

A welcome milestone: Ukraine's first shipment of grain since the invasion started has finally departed the port city of Odesa on Monday, headed for Lebanon. The Sierra Leone-flagged ship, Razoni, is carrying an estimated 26,000 tons of corn as it heads to the Middle East at about 10 knots, with a planned arrival sometime Wednesday. But first, it must stop at Istanbul for inspection by the UN- and Turkey-brokered Joint Coordination Center, which is overseeing this new effort to get Ukraine's grain to the world's markets.

"Ukraine's government says 16 other grain ships with 600,000 tonnes of foodstuffs are waiting to leave ports in and around Odesa in the coming weeks," the BBC reports.

Russia appears to be sending forces to Ukraine's southern front, around Zaporizhzhia, after its officers identified that "as a vulnerable area in need of reinforcement," British military said Monday. In a wider analysis, "Russia is probably adjusting the operational design of its Donbas offensive after failing to make a decisive operational breakthrough under the plan it had been following since April," the Brits say. Some Russian elements have spent the last four days attacking around the northeastern Donetsk city of Bakhmut, but they've "only manag[ed] to make slow progress" so far, according to the Brits.

One perspective from inside Russia: "The borders of Russia never end!" reads a sign Steve Rosenberg of the BBC noticed recently just outside a military base in the city of Pskov, in Western Russia, which is about a dozen miles east of Estonia.

Rosenberg calls Pskov "a medieval fortress town," and particularly important right now, he argues, because "This is how the Kremlin portrays modern Russia: as a besieged fortress threatened by the West."

Belarus

Lukashenko 'Almost wholly dependent on Russia' as Belarus helps Putin: UK - Belarusian President Lukashenko has become "almost wholly dependent on Russia" as he backs Putin in the Russia-Ukraine war, according to British intelligence.

He has become a key ally for Putin, whose invasion of Ukraine has faced condemnation from many world leaders who have raised concerns about alleged war crimes committed by Russian troops, as well as concerns that Putin lacked a solid justification for the invasion, which was launched in late February.

In an intelligence report released on Sunday, the United Kingdom's Ministry of Defence said Lukashenko is becoming more authoritarian and has become increasingly dependent on Putin.

The report said Lukashenko "continues to follow Moscow's line on the Ukraine conflict." "His regime has become even more authoritarian, with the expansion of the death penalty for 'preparing terrorist acts,'" the report reads. "His

increasing and baseless accusations of Western designs on Belarus and Ukraine likely indicate that he has become almost wholly dependent on Russia."

The report follows news that Russia fired "at least 20 missiles into northern Ukraine" from Belarus, according to the ministry.

Impacts

Look inside Russian weapons systems (Jack Whatling) - Seen a few takes recently arguing that Russian weapons don't work well. Having spent time inside a number of Russian manufactured systems I thought I'd address why I think there is often a gap between Russian weapons on paper versus their performance in the field.

There are two primary problems with Russian weapons: integration and cognitive load. To begin with integration, a few years ago some Mi-24s allocated to ISAF were undergoing maintenance. It was found that some of the bolts holding the tail rotor in place had cracks in them.

This set off a panic among some US officers who went about trying to ground all aircraft of that type fearing that poor quality control in the supply chain represented a flight safety risk across the force. For NATO aircraft this would be a massive problem.

What the Mi-24 crews had to explain to their US colleagues was that this was normal. It was why the helicopter has 8 bolts in its tail rotor of which 4 would often crack. All 8 bolts are replaced after a specified number of flying hours irrespective of their condition.

So, on the one hand quality control in Soviet manufacturing was poor. On the other hand the design team just accepted this and built in redundancy to produce a very reliable and effective attack helicopter. Russian weapons involve lots of these kinds of workarounds.

This becomes a problem when you want to integrate new things onto the platform. When the Mi-24 was built it was intended for gun runs using rockets and machine guns. As MANPADS proliferated however the Russians recognised stand-off ATGMs were needed.

The Russians have built several very effective ATGMs some of which can be mounted from the Mi-35. They have impressive range and penetration. They are accurate weapons. However, the Mi-35 is built with the assumption that lots of its components will break while in use.

This firstly means that there is a lot of vibration in the platform and secondly that this vibration is inconsistent between platforms or between flights, as various sub-components fail. The result is that the mounted optics on this aircraft are very hard to use.

The last time I was in an Mi-35 we gave up searching for targets with the sensors in the nose and just used a big pair of field glasses out of the cockpit. The result was that while we had plenty of range with our ATGMs we couldn't actually accurately engage at that range.

You'll have noted in Ukraine the Russians keep teaming Ka-52s and Mi-35s together because the former was built around its sensor suite and so it works much more effectively. The design team made trade-off decisions that ensured the sensors worked.

So this is the first reason for a delta between capability and performance. Individually Russian weapons and platforms tend to do what they are designed for and do it reliably. When you start integrating things together however there are often problems deep in the design.

Now for cognitive load. The Soviet military was a conscript military and the Russian military today has a similar structure. When you buy a Russian weapon system you usually get a nice cardboard flow chart showing you the buttons to press in what sequence to get a result.

If you get in a Buk for example there are a lot of buttons and each one tends to do one thing. Furthermore, each operator does one task. It is actually quite easy to teach someone to use it to a basic standard because using the controls doesn't require understanding the system.

However, to use the system to a high standard is really difficult because YOU are the integrator. The computer isn't doing much for you. If something is out of the ordinary you need to find the workaround and get the crew to do all the right things in the right order.

NATO systems tend to have far fewer controls and what the controls do is contextual. The system supports the user so they can focus on judgement. The result is a system with a much higher initial training burden but a much higher effectiveness for a newly trained crew.

If you have expert crews then Russian weapons systems are highly effective and can be more effective in some cases than NATO counterparts. If you watch old Finnish or Ukrainian Buk operators who have been at it a while it is impressive.

But if you have short term contract soldiers - especially if you lost a lot of your skilled personnel early - then Russians are left with crews whose basic proficiency is insufficient. You end up with less and less skilled people using the equipment.

That is how you end up with Russian air defence systems getting hit by UAVs. It isn't that a Buk can't see or engage it. The Ukrainians Bucs which are less capable platforms are detecting and engaging UAVs just fine.

So what is going on with Long Range Precision Strike. There have been some impressive misses. What is interesting is how often the misses are in the right distribution to have struck the target but are all displaced from it.

In a lot of misses with the newer Russian systems the problem is that they are either getting the wrong coordinates of the target or the launcher has the wrong coordinates for itself. This is likely a problem with EW fratricide.

In exercises the Russians had switched to digitised fire control. In Ukraine they've lost a lot of the operators who knew how to do that. They're coordinating on voice. And jamming navigation all over the place. Sequencing strikes and deconfliction is hard.

There are lots of other issues with the Russian targeting process, often 48 hours late striking a target because of how inefficient their kill chains are. In Chernobyl it was noted that their soldiers were using maps from before the disaster.

Well, some of the things they've struck that appear completely random or blatant misses make more sense when you look at the older maps. So in some cases their kill chain is 40 years out of date.

There are also older systems with relatively poor accuracy and some systems being used out of role (ACSMs for example) that are similarly less accurate. With the newer systems however it isn't that the weapons don't work or aren't precise.

In conclusion, the problem with Russian weapons isn't usually that they don't work but rather that when they are linked up and operated by under trained crews they become decidedly less than the sum of their parts.

Sanctions

Von Der Leyen says EU must prepare for 'worst' on Russian gas supplies - European Commission President Ursula von der Leyen has warned that Europe must prepare for the "worst situation" with regard to Russian gas supplies.

"Since Russia has already completely or partially cut off gas supplies to 12 [EU] member countries, we must all prepare for the worst situation," von der Leyen told El Mundo, a Spanish-language newspaper.

Russia has suspended gas deliveries to several EU countries for their refusal to pay for delivery in rubles, a demand that European countries have said is linked to Kremlin attempts to ease the impact of Western sanctions on Russia over its full-scale invasion of Ukraine.

Russia has also lowered deliveries of gas to Germany through the Nord Stream 1 pipeline over a maintenance issue that Germany has said has been manufactured by Russia as retaliation for Western sanctions.

Europe's natural gas crisis is going from 'bad' to 'ugly', according to Bank of America - The European natural gas crisis is getting even worse, according to Bank of America.

In a Monday research note, the investment bank highlighted Russia's actions to limit supply to the region, adding that winter stockpiles could run low.

"The European gas situation is quickly moving from our 'bad' to our 'ugly' scenario in the past month," the bank said.

Russia has shaken energy markets since it invaded Ukraine and more recently jolted Europe after cutting supply of natural gas to the region. In July, Russia's state-run energy giant Gazprom slashed flows to just 20% along the Nord Stream pipeline, a week after it cut flows completely for a 10-day maintenance period.

The First Seized Superyacht To Go To Auction - Designer superyacht Axioma is going to be the first seized Russian vessel to go to auction. It has a slightly unusual past though. Here's how it used to look before it got put under lock and key (as well as a video showing the little-known side of super yachting you've probably never thought about).

News broke on Wednesday that Axioma, a \$75 million superyacht, will be the first seized Russian schooner to go to auction – in a single day, and without reserve.

Axioma was delivered in 2013 and owned by billionaire Dmitry Pumpyansky, who made his fortune in the gas and steel industries. According to Boat International, Axioma will be flogged off on August the 23rd, 2022. Axioma was seized by authorities in Gibraltar in March on the basis of an outstanding 12.5 million loan due to J.P. Morgan, which the yacht's international management company had not paid. Around this time, authorities realised Pumpyansky was included on sanctions lists – and discovered he was the beneficiary (read: owner) of the vessel.

China

Why is Chinese investment drying up in Russia and Pakistan? - New investment in Russia through China's Belt and Road Initiative (BRI) fell to zero in the first half of 2022, while Chinese outlays in Pakistan dropped by 56 percent during the same period.

These are the findings of a new report from the Green Finance and Development Center at Fudan University in Shanghai, which point to growing headwinds facing Chinese President Xi Jinping's signature foreign policy venture that he once dubbed "the project of the century."

Both Russia and Pakistan have been among the top beneficiaries of Chinese development spending through the BRI. Moscow signed deals worth about \$2 billion in 2021 alone and Islamabad hosts a \$62 billion collection of infrastructure and energy projects known as the China-Pakistan Economic Corridor (CPEC).

The Fudan University report highlights the changing nature of the BRI as it adapts to a combination of a strained global economy, China's shifting position in the world, and many countries who inked deals and took out loans through the initiative now grappling with a growing debt crisis.

BRI spending has been declining for several years as Beijing becomes more risk averse. The report shows a total of \$28.4 billion in Chinese investment across 147 BRI countries over the first half of 2022, down from \$29.6 billion over the same period last year.

The BRI's rapid expansion since 2013 has helped China become the world's largest source of development credit, and how Beijing navigates the program's future will have global consequences.

China has been trying to manage financial risks for a number of different reasons, including that the overall [Chinese] economy after [the] COVID-19 [pandemic] -- as well as in a lot of the BRI countries -- has not been performing as well as expected. Therefore, [Chinese] government sponsored projects or sovereign guarantees from these [BRI] countries are much harder to get for a variety of other projects.

Whereas, if you have resource backed projects like oil and gas it is relatively clear how you're going to get your money back. Therefore, these projects tend to be a lot lower risk and quite lucrative, particularly in today's markets of high fossil fuel prices.

Pakistan has, since the establishment of the BRI through CPEC, been one of the most prominent corridors and China and Pakistan have exchanged a number of really impressive contracts to build infrastructure for energy, road, and rail transportation over the years.

All of the involved players in China, from the ministries to the financial institutions and also the developers, are having to rethink their engagement in a number of different ways.

The number one reason is that the overall economic situation in a lot of the BRI countries is different now. A lot of the deals were done back when everybody was still in kumbaya mode believing that they could develop and finance anything. That has changed. There have been some sovereign debt crises and defaults in some BRI countries, and they have been trying to renegotiate their debt with China.

Chinese companies flock to Switzerland to raise money with new stock listings - Chinese companies looking to raise cash overseas have turned to Switzerland — and gotten speedy regulatory approval to do so.

That's according to Baker McKenzie, which said it acted as legal advisor for the first four Chinese companies to list shares via a new stock connect program with Switzerland on July 28. The companies raised about \$1.5 billion.

The latest listings are not initial public offerings but reflect a new channel for Chinese companies listed on the mainland China A share market to raise capital overseas.

The four companies — GEM, Gotion High-tech, Keda Industrial Group and Ningbo Shanshan — issued global depositary receipts (GDR) on the Six Swiss Exchange as part of a new China-Swiss stock connect program with the Shanghai and Shenzhen exchanges. The four companies operate in new energy or manufacturing industries.

Zambia cancels US\$1.6 billion Chinese loans and halts infrastructure projects in move to avoid debt crisis

Zambia has cancelled US\$1.6 billion in agreed upon but not-disbursed Chinese loans, mostly from China Exim Bank and the Industrial Commercial Bank of China, to help manage its debt woes.

It is a portion of the US\$2 billion that Lusaka has cancelled in undisbursed loans from its external creditors, coming shortly before its official bilateral lenders agreed on Saturday to provide debt relief to the Southern African nation.

Lusaka announced that it ceased the construction and rehabilitation of several roads, highways and information and technology projects, most funded by China Exim Bank, after it faced challenges in making loan payments.

Pelosi May go to Taiwan this week - U.S. House Speaker Nancy Pelosi might go to Taiwan on Aug. 2, and China is perturbed at the possibility. While Pelosi's official itinerary does not mention Taiwan and focuses on other Asian allies such as South Korea and Japan, two sources quoted by Reuters say Taiwan is on the list. China insists there will be severe consequences if Pelosi does visit Taiwan – especially if the speaker meets with Taiwanese independence activists.

Chinese Defense Minister Zhao Lijian released a statement replete with the usual bravado and veiled threats he is known for. “We would like to tell the United States once again that China is standing by. The Chinese People's Liberation Army will never sit idly by, and China will take resolute responses and strong countermeasures to defend its sovereignty and territorial integrity.”

The question is whether the US is testing Chinese resolve as to Taiwan. Realpolitik in the gravest sense.

What Might China Do? Thinking Through the Terrible

This rhetorical showdown raises the question of just what China is willing to do militarily against Taiwan, or even against the United States. The most likely scenario is that China would fly warplanes into Taiwan's air defense zone during Pelosi's visit to Taiwan. In June, the People's Liberation Army Air Force flew 29 airplanes into Taiwan's air zone. These flights usually feature various fighters and H-6 bombers, along with electronic-warfare airplanes, airborne command-and-control aircraft, and anti-submarine airplanes. The fighters could send a more serious message by test-firing missiles in Taiwan's vicinity. They could even stage a small, show-of-force kinetic attack by actually dropping a small number of bombs or firing a limited number of missiles at military targets in Taiwan such as anti-aircraft systems and air bases.

In a second scenario, China might order its navy to blockade Taiwan's critical harbors. They certainly have enough ships for such a mission, with 350 naval ships and 130 coast guard vessels, plus an assortment of fishing vessels that populate the armed maritime militia. A blockade would start with a Chinese carrier battle group securing the Taiwan Strait. The Chinese Communist Party has announced that the People's Liberation Army Navy is already executing live fire drills near the Pingtan Islands, off Fujian province. This is the part of mainland China that sits closest to Taiwan. A blockade would allow China to cut off arms shipments to Taiwan. It could also stop and inspect imports and exports to the nation, giving a disastrous shock to Taiwan's economy.

Next on the escalation ladder is an all-out amphibious attack to invade Taiwan. This would be the most serious possible operation – PLAAF aircraft would hit coastal military targets with missiles and bombs. Then, hundreds of ballistic missile launchers on China's eastern shore would soften the landing zones for an invasion.

China could also use fighters and bombers to start an attack, then use ground launchers to either test-fire or actually detonate missiles on Taiwanese territory. China could then stop the hostilities right there, with its amphibious landing ships ready to go. This feint attack would still send a message to the world that China is deadly serious about the Taiwan question.

Washington's Reaction

How would the United States respond? First, there would be a major deployment of U.S. surface vessels, comprising at least one carrier group plus submarines. U.S. ships are already in the East and South China Seas.

From there, the US government's national command authority would have to decide what to do next. The White House would convene a National Security Council meeting for further consultations. If China actually attacks Taiwan kinetically, the Council will have a stark choice – either intervene or stay back and see how serious the attack against Taiwan is.

The US would probably send weapons to Taiwan as quickly as possible, though a blockade would limit that effort. From there, rules of engagement would have to be devised so that U.S. naval leaders know how to proceed. If fired upon, the

U.S. Navy would obviously respond in kind. The next step would be for U.S. President Biden to contact Chinese President Xi Jinping, seek a cease-fire, and try to maintain some sort of peace between China and Taiwan.

The Likeliest Choice

The blockade option is China's most probable recourse. It achieves many tactical and strategic objectives for Beijing. They have enough shipping to block key ports, and the US would be less likely to intervene. A shooting war would not be necessary to bring economic ruin to Taiwan.

China could be bluffing, starting a mere war of words over Pelosi's possible visit. Military options for China are on the table, but a full-fledged attack against Taiwan is less likely than a blockade.

US options are poor, other than a show of force with one or two carrier battle groups. With so many ships and airplanes in the region, accidents or miscalculations could lead to shots fired. This could spark a wider war. Hopefully China will refrain from the blockade or other provocations, and the United States can continue to guarantee freedom of navigation in the Indo-Pacific without having to resort to force.

Putin

Putin is really angry: NATO now has F-22 Raptors headed near Ukraine - F-22s are headed right on Ukraine's doorstep: Last week, the USAF deployed six Lockheed Martin F-22 Raptors to Europe (as reported by our War Updates).

The aircraft arrived at Royal Air Force (RAF) Lakenheath, England, on Thursday before traveling to the 32nd Tactical Air Base, Łask, Poland, to support NATO Air Shielding in the European Theater. The half dozen fifth-generation air superiority fighters were from the 90th Fighter Squadron, 3rd Wing, Joint Base Elmendorf-Richardson, Alaska, and will be supporting Air Shielding as the 90th Expeditionary Fighter Squadron.

Gen. James B. Hecker, the new head of the United States Air Force Europe, had hinted that the Raptors could be deployed to Europe at last month's Royal International Air Tattoo in the UK.

"We're bringing over F-22s... That are going to be coming over shortly, within a month, and they'll spend four or five months over here," Hecker told Air Force Magazine in an exclusive interview last month. "So we're going to constantly cycle in fifth-generation in addition to what will eventually be two permanent [F-35] squadrons at Lakenheath. So we'll be cycling it in here in the meantime."

Just last month, multiple F-35 Lightning II aircraft from the Vermont Air National Guard were forward-deployed to Amari Air Base, Estonia, also to support NATO's air shielding mission. Previously, the U.S. Air Force had moved in F-15s, F-16s, and even other F-35s from Vermont, to take part in that role. Additional aircraft have steadily taken part in Baltic air policing and enhanced air policing missions in Eastern Europe.

"What we're going to do is just kind of have six, 12 kinds of airplanes that will come in here for four months, and we'll do that for about a year or so, in addition with all the permanent aircraft that we have stationed here," Hecker told Air Force Magazine last week. "And that will increase our presence here, and then we'll have to readjust and see what this thing looks like a year from now, and then we can adjust as necessary."

Putin Is Trying To Destroy Ukraine Says Exiled Russian Oligarch - Putin's invasion of Ukraine is not going to plan, and the Russian military seems stalled at the moment. Some are arguing that Putin now has a new plan: destroy the country instead: An exiled Russian oligarch said he believes Putin has gone beyond trying to annex Ukraine and now wants to "destroy" the country.

Leonid Nevzlin, a former oil tycoon who was forced to flee Russia two decades ago, weighed in this week on what he thinks Putin intends to do next.

Nevzlin said in an interview published by The Times of Israel on Saturday that Putin was likely first looking to annex Ukraine, Moldova, and Belarus but speculated that “everything has changed.”

“Putin is trying to destroy Ukraine. We understand it from this unbearable violence and the horrific nature of this war,” Nevzlin said, per the outlet.

“He destroys Russian-speaking cities, he destroys human beings. This is his way to take revenge — against Ukraine and against Zelenskyy,” Nevzlin told The Times, referring to Ukrainian leader Volodymyr Zelenskyy.

Per the outlet, Nevzlin also posited that Putin’s wartime tactics mirror how Adolf Hitler fought during World War II.

“Did you see the field in Donbas that was sown with bombs and explosives? That’s his vision for Ukraine,” Nevzlin told The Times, referring to deadly litters of unexploded bombs and mines that remain embedded in combat zones.

He was referring to Russian siege tactics where they are sending explosive projectiles into Ukrainian areas, sewing the land as if with anti-personnel mines, all destined and intended to prevent future Ukrainian use of the land.

Putin says US, NATO ‘main threats’ to national security - Russia views the Western military alliance as an existential threat, using Ukraine's membership hopes to justify its offensive.

The US’s quest to dominate the oceans and NATO’s expansion are the biggest threats facing Russia, according to a new Russian naval doctrine signed by Putin yesterday.

The 55-page document said the “main challenges and threats” to national security and development were Washington’s “strategic objective to dominate the world’s oceans” and NATO military infrastructure moving towards Russia’s borders.

“Russia’s independent internal and external policy faces counter-measures from the United States and its allies, who aim to preserve their dominance in the world, including its oceans,” said the doctrine, signed on Russian Navy Day.

Battle for Kherson and Russia’s global downsizing - The tide of the Ukraine war has subtly shifted as the Russian offensive has exhausted itself and the Ukrainian pushback has started to gain momentum. In retrospect, the pitched battle for Sievierodonetsk and Lysychansk in late June and early July 2022 could perhaps be recognized as the high-water mark for Russia’s violent intervention aimed at exterminating Ukraine as an independent state.

Moscow had to concentrate its best fighting forces and the bulk of its big guns in order to capture the last bit of Luhansk region, and re-directing these depleted capabilities toward a new attack in Donetsk region has proven to be almost too ambitious thus far. Artillery barrages are hitting Bakhmut and Kramatorsk regularly and indiscriminately, but even the deployment of Wagner mercenaries cannot adequately compensate for the shortage of ground troops. The battle for Donbas, which became the central theater of the war after the battle for Kyiv was lost by overstretched Russian forces in early April, is deadlocked, and the new focal point is now Kherson.

Kherson, the regional capital, was captured by a column of Russian battalion tactical groups (BTGs) advancing from Crimea in the first week of the war, but attempts to keep the offensive going toward Mykolaiv failed and turned into a partial retreat.

The grouping of Russian forces to the west of the Dnieper River is vulnerable because the long supply lines from Crimea go through two bridges and a dam, which have been targeted by Ukraine’s new long-range strike weapons systems, including the US-supplied HIMARS.

It would have been strategically reasonable to withdraw these exposed troops and present the move as a measure of “goodwill,” as was the case with the recent escape from Snake Island, but the Kremlin’s political desire to keep a bridgehead for a hypothetical attack on Odesa has prevailed. This stubbornness grants Ukraine an opportunity to score an important victory, which could destroy Russian discourse that the “special military operation” proceeds according to plan (Nezavisimaya gazeta, July 25).

Instead of bragging about the “liberation” of historical Russian lands, Moscow now finds itself on the defensive against a determined adversary supported by a re-energized North Atlantic Treaty Organization (NATO) and unable to respond to the progressive tightening of the European Union’s sanctions regime (Russiaincouncil.ru, July 29). The plan of last resort is to completely stop gas exports to Europe, which is certain to produce serious economic disruptions and human suffering (Forbes.ru, July 29).

Yet, such an energy attack is certain to backfire severely, as Russia’s own gas industry will have to reduce production in the winter and many elements of infrastructure will be damaged beyond repair. Moscow tends to overestimate the discord among EU member states, but Hungary’s dissenting voice cannot undermine the renewed solidarity of the bloc, underpinned by the resolve shown by Germany, which is beginning to overcome the inhibitions of its traditional policy of engagement with Russia (Nezavisimaya gazeta, July 27).

Angrily severing multiple ties with Europe, Russia cannot gain the desired position of leadership in the presumed anti-Western and anti-globalist camp because most states of the Global South see Moscow’s brutal resolve to military force as a blunder (Rosbalt, July 28). The Kremlin has tried to show its understanding of concerns about food security by accepting the Turkey-backed initiative on facilitating the export of Ukrainian grain by sea, but the missile strikes on Odesa prove the true fragility of this compromise (Kommersant, July 29). The Russian government keeps looking for allies in Africa (where Foreign Minister Sergei Lavrov traveled last week) and Latin America, but its pretenses for sharing anti-imperialist aspirations have been exposed as false by the patently imperialist nature of Russia’s attack on Ukraine (Novayagazeta.eu, July 26).

The Russian vision of breaking the US-designed world order by boldly confronting the collective West in Ukraine has been compromised by the ambivalent character of its much-advertised strategic partnership with China.

On the one hand, Moscow is wary of its growing dependency on uncertain support from Beijing. On the other, the Kremlin is hopeful for an escalation of conflict between China and the United States centered on Taiwan, expecting to find its difficult neighbor, if such a situation occurs, more interested in upgrading the security aspects of the Russian-Chinese partnership (Izvestiya, July 29). China, however, prefers to manage this conflict on its own terms and frowns on every Russian move made toward expanding ties with India or Vietnam (Ru.valdaiclub.com, July 22).

Beijing carefully monitors the course of combat operations in Ukraine, but it is particularly focused on the health of the Russian economy, about which official data is becoming increasingly harder to find (Kommersant, July 28). The government led by Russian Prime Minister Mishustin (who prefers to eschew the official war discourse) has managed to stabilize Russia’s financial system, at least temporarily, but can do little to rehabilitate industries affected by the cuts of supply chains and stoppage of high-tech imports (Meduza, July 21). The military-industrial complex is portrayed as the main driver of growth, but even official reporting, which keeps promising wonders in “import substitution,” admits the acceleration of macroeconomic contraction (Nezavisimaya gazeta, July 28).

Every replacement of Western technological components crucial in the production of modern arms systems by a domestic “solution” involves a step back in quality and reliability. Thus, industrial degradation has become the result of following political orders to keep production going and unemployment in check (The Insider, July 14).

Putin’s mass abduction of Ukrainians explained - Genocide; it’s a word that gets thrown around a lot these days. It’s an all-encompassing accusation, and leaves no room for discussion, negotiation, or debate. Its employment signals

the end of civil discourse and insists upon the acceleration of verbal hostilities. And why wouldn't it? The word alone summons appalling imagery from the most tragic moments in our history. Through the years however, it's true definition and effect have been warped through its constant politicization.

What is occurring in Russian-occupied Ukraine subverts both our common understanding of what genocide means, and what it can look like in practice. There may not be extermination camps in Mariupol or killing fields outside of Kharkiv, but what Russia is attempting to accomplish through its occupation is nothing short of cultural and political genocide.

Back in March, as millions of people from around the world obsessed over hourly updates from the unfolding crisis in Ukraine, Moscow was already undertaking an intensive, albeit far less entertaining, effort at subduing their Slavic neighbors. Although it would not be public knowledge for another few months, the military was already kidnapping and deporting Ukrainian civilians back to Russia. While it may seem odd to us, it's a surprisingly common tactic that Russia has used before. Perhaps the most infamous example of its usage would be the 1944 deportation of half a million Chechens to Central Asia, after Soviet leader Joseph Stalin accused the group of conspiring with Nazi Germany. While curious to us, the Ukrainians who have experienced this horrific abduction have a far darker view on the subject.

On March 18, Volodymyr Khropun was driving a school bus filled with injured civilians through hostile territory in an attempt to reach safety when his vehicle was stopped by Russian troops. Promptly detained, Khropun was dragged to the basement of a nearby townhouse where he, along with 40 others, were subjected to torture.

"We were beaten with rifles, punched, and kicked. They blindfolded me and tied my hands with duct tape. They used Tasers and kept asking for information about the military," Volodymyr told the BBC. After a week, the Red Cross volunteer was forcibly deported to Russia, only escaping becoming a permanent resident thanks to a prisoner swap in Crimea. "We tried to support each other. Some days we couldn't believe this was all happening. It felt like we had been transported to the 16th Century from the 21st Century," he continued. It may be tempting to dismiss Mr. Khropun's experience as particularly unique or novel, but since his seizure, a much clearer picture of the situation has become apparent.

On July 14, US Secretary of State Anthony Blinken accused Russia of forcibly extracting over 1 million civilians from occupied Ukraine. "The unlawful transfer and deportation of protected persons is a grave breach of the Fourth Geneva Convention on the protection of civilians and is a war crime," Blinken told reporters during his press conference.

Shockingly, U.S. intelligence showed that Russian officials were even kidnapping Ukrainian children and subsequently putting them up for adoption back in Russia. In all, an estimated 260,000 Ukrainian minors have gone missing since the invasion.

Since the beginning of hostilities, Russia has made it clear that it does not consider the conflict to be of a traditional nature in terms of sovereignty. As with their 2014 seizure of Crimea, Moscow recognizes the ongoing struggle as an effort to reabsorb Ukraine back into the Russian fold. The consolidated opinion among Russian leaders is that Ukraine is not being invaded but restored back into its ancestral home. "The Ukraine that you and I had known, within the borders that used to be, no longer exists, and will never exist again," Kremlin spokeswoman Maria Zakharova told reporters on June 17. Despite all evidence to the contrary, Russia has continued to maintain that the mass-exodus of Ukrainian civilians is for safety purposes.

There is finally one more detail worth noting; fundamentally, Russia is dying. It's been well-established that Russia has suffered from a severe brain-drain in recent decades, but what is perhaps less obvious is that the nation's population is declining at an alarming rate. Since the 1990s, Russia's population has decreased by two million people, all while alcohol consumption, crime, and poverty rates have continued to skyrocket. Russia has among the globe's highest rates of alcoholism and death from alcohol.

Since coming to power in 2000, Putin has been very vocal about his commitment to stemming the decline. The government has feverishly provided financial assistance and monetary enticements to Russian women willing to have

babies. “Putin is obsessed with this demographic issue,” demographer Laurent Chalard told France 24 News “In his mind, the power of a country is linked to the size of its population. The larger the population, the more powerful the state.”

Whether it be for perceived historical justice or very real demographic concerns, Russia has concluded that in order to fully assimilate occupied Ukraine, it must first annihilate it culturally and politically. Ukraine, as a national identity distinct from Russia, cannot co-exist in the retro-czarist fantasy that Putin is pursuing. Instituting a national policy of mass-migration from their communities to foreign lands reflects his profound delusional obsession with resurrecting the Russian Empire. What is being done is not the extermination of a people, but of a people’s identity

It’s been nearly five months since Moscow launched its full-scale offensive against Ukraine, marking the inauguration of the first true European land conflict since the end of the Cold War.

In the decades that preceded this historic event, analysts and politicians alike bemoaned the consequences of such a possible conflict, conjuring images on day-time television of the nuclear apocalypse that was barely avoided in the 1960s.

But so far, the anatomy of the contest has proven to be entirely traditional. Moscow so far has utilized the conventional 20th century tools of conquest: aerial bombardment, naval blockades, and land-based assaults. While surely this reluctance to enhance the severity of these accepted methods of warfare is a relief, it has downgraded the sense of urgency in the West and blinded too many people to what is perhaps the true motivation of the Russian attack. Because while the international community loiters, Russian-occupied Ukraine is experiencing nothing less than an exhaustive attempt at political and cultural genocide.

Comment – as reported previously in the War Updates, Putin desperately seeks to swing the balance in upcoming, albeit illegal and illegitimate referendums, in Russia’s favor. To accomplish this he has to ensure that the majority vote is for inclusion into Russia as the mother country of the Donbas.

By abducting and forcibly relocating millions of Ukrainians to far-flung regions of Russia, and then relocating “loyal” Russians into the now vacated towns and areas, he is planning to show the world that those voting in the referendum support being part of Mother Russia.

Genocide indeed.

Containment

Ukraine just upped its artillery game after it received a new German Multiple Launch Rocket System known as MARS II. In a tweet Monday, Kyiv's military chief, Oleskii Reznikov called this most recent addition the "third brother in the Long Hand family," after the U.S.-donated HIMARS and the M270 Multiple Launch Rocket System, which both the U.K. and Norway have donated to Ukraine.

MARS II rocket launch systems are a licensed copy of the American M270 multiple launch rocket systems, according to Pravda's Ukrainian news outlet. The weapons consist of 12 fiberglass missile guides and two disposable boxes of six missiles that can all be launched within one minute, Pravda reported.



The missile range depends on the type of ammunition but can be anywhere from 38 to 300 kilometers—equating to roughly 24 to 186 miles, Pravda reported. German weapons manufacturer Krauss-Maffei Wegmann touts the missiles, which have been in use by the German military since 1990, as uniting "maximum precision with long range."

Deployment of MARS II capability dramatically increases Ukraine's ability to strike far beyond Russian front lines.

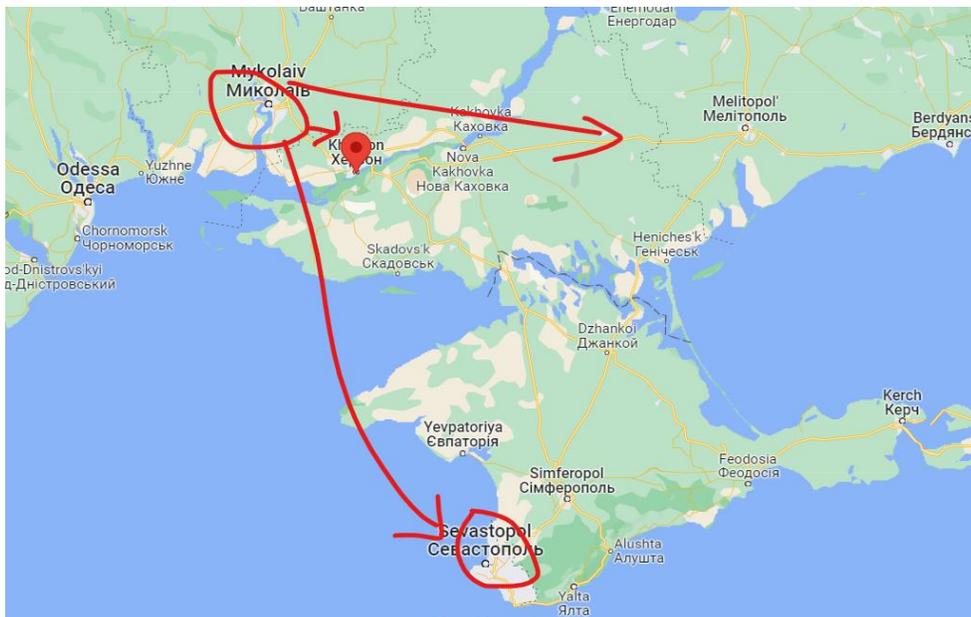
Current HIMARS systems have a range of 50 miles, extendable with upgraded propellant and technology from the US.

These – MRS II – however, provide Ukraine the ability to push Russian forces back to render them ineffective.

Looking at the map alongside, Ukrainian forces centered around Mykolaiv are 55 miles from Kherson, currently held by Russian forces.

The main bridge-head into Crimea in Armiansk is 78 miles away. Striking this bridge will stop Russian forces moving in to the Donbas to reinforce front line troops.

Experts said the psychological effects of these weapons are one of its biggest boosts to Ukrainian troop morale.



Ukraine also just received four additional HIMARS from the U.S., Reznikov tweeted separately on Monday. "We have proven to be smart operators of this weapon," said Reznikov. "The sound of the HIMARS volley has become a top hit of this summer at the front lines!" he added.

Cyber news - U.S. federal cybersecurity officials are teaming up with Ukrainians to raise Kyiv's capabilities and defenses, the U.S. Cybersecurity and Infrastructure Security Agency announced Wednesday. "Cyber threats cross borders and oceans," said CISA Director Jen Easterly in a statement. "And so we look forward to building on our existing relationship with [Ukraine's State Service of Special Communications and Information Protection] to share information and collectively build global resilience against cyber threats."

U.S. announces another \$550M In Ukraine military aid - The US will send Ukraine thousands more 155mm howitzer shells and HIMARS rockets in a new package of military aid, the White House announced today. The \$550 million package, which includes 75,000 155mm rounds, will bring the total amount of military aid the Biden administration has provided Ukraine to \$8.8 billion.

Ukrainian officials told CNN on Monday that the longer-range HIMARS have allowed them to hit Russian weapons storage sites in Kherson. The White House said the decision to provide additional HIMARS ammunition followed meetings between the Pentagon officials and their Ukrainian counterparts.

A senior defense official on Friday told reporters the Ukrainians were able to gain ground against the Russians in Kherson and have used HIMARS to strike Russian surface-to-air missile sites.

The \$550 million announcement brings the total aid to Ukraine from the Biden administration to \$8.8 billion, although some major systems that were previously announced, such as the NASAMS advanced anti-aircraft missile systems are still being procured and have not been delivered to Ukraine.

Geopolitics

Germany's geopolitics at a crossroads - From a long-range perspective, even though the formal establishment of Germany as a national state is a fairly recent phenomenon, its forerunners and preceding entities have played a significant role in European affairs for centuries. In the Battle of the Teutoburg Forrest, a coalition of Germanic tribes defeated professional Roman legionaries, crushing the Empire's expectation of conquering Germania and expanding throughout Northern Europe, an impressive victory considering the asymmetries involved.

Centuries later, the Holy Roman Empire – under the leadership of Germanic rulers that were the successors of Charlemagne – represented the most powerful Western European state of the Middle Ages. In the Battle on the Ice, a clash that foreshadowed the Napoleonic and Nazi campaigns to conquer Russian lands, the Teutonic Knights attacked the Novgorod Republic (a polity of Orthodox Slavs), but the attempt was repelled by Rus Prince Alexander Nevsky, a statesman whose legacy is still revered by contemporary Russians.

In the 19th century, the legendary Otto Von Bismarck masterminded the creation of a unified Germany, an accomplishment that was reached through a bold combination of both hard power and diplomatic skill. The German state became notorious for its active involvement in the deadly game of European power politics, a dangerous endeavor whose pursuit required worldly wisdom in terms of pragmatic statecraft, a strong political resolve, and the material capability to face powerful and wealthy rivals.

In parallel, the unorthodox theories of nationalist economist Friedrich List inspired Germany to seek industrialization as a path to enhance prosperity and national power. Eventually, the rise of Germany as a force to be reckoned with would eventually shape the course of history in the following century, an event that would entail tectonic geopolitical shifts and a copious amount of bloodshed.

Understanding Germany's troubled past

In a multipolar environment of simmering mutual distrust and hostility, the meteoric ascent of Germany was seen as threatening by Britain, especially considering that German strength and revisionist plans could derail the prevailing status quo (i.e. Pax Britannica).

Comment - Hansard (Hansard is the traditional name of the transcripts of Parliamentary debates in Britain and many Commonwealth countries.) reveals that when Kaiser Wilhelm II (and first cousin of the English King George V) (the third first cousin was Tsar Nicholas II of Russia) declared his intent to create a "Berlin to Baghdad" railway link, the British immediately recognized this as a threat to Pax Britannica and legislated a fund to stop this from happening. They estimated that preventive action would take around 20-odd years before execution – around the time of Archduke Ferdinand's assassination in the Balkans.

The rationale for this rail link was to decouple Germany's dependence on British maritime hegemony on the high seas. Britain literally domineered which ships navigated trade between the various countries around the globe. Not registering and insuring through Lloyd's of London, would surely lead to your vessel/s being subject to attack and piracy.

These realities ignited World War One, a conflict in which Germany was defeated. Moreover, the fallout of the confrontation triggered the collapse of most European Empires and remade the map of the continent.

However, the underlying tensions were not settled so a rematch was a matter of time. During the ensuing Weimar era, a toxic combination of popular resentment and disenfranchisement, political polarization, revanchist attitudes,

ideological extremism, economic hardship, social agitation, and widespread financial turmoil generated the atmosphere that the Nazi Party took advantage of in order to orchestrate a hostile takeover.

Under the rule of Adolf Hitler, Nazi Germany adopted an aggressive foreign policy and, in a bid to fulfil its imperial dreams of world domination, launched a campaign of conquest. In the initial stage of World War Two, the Third Reich wanted to knock out both France and Britain to settle old scores and rid itself of possible rivals; but ultimately its most important ambitions lay to the East.

Hitler's strategists wanted to destroy the Soviet Union to increase the lebensraum of the German state, control the fertile soil of Ukraine and Western Russia (chernozem) in order to achieve self-sufficiency in food supplies, and seize the oil fields of the Caspian to fuel the German war machine. Military force, genocidal violence, and mass starvation were instruments to attain these outcomes.

In 1940, it seemed that Nazi Germany could attain victory. Nevertheless, the crushing defeat of the Wehrmacht in the fateful Battle of Stalingrad marked a turning point. German forces never recovered after such a setback and the tide was reversed. Germany was vanquished by the Allies and the extinction of the Third Reich marked the ascent of both the United States and the Soviet Union as superpowers under a bipolar balance of power.

Germany was occupied and partitioned. Notably, post-war Germany almost ceased to exist. The Morgenthau plan – concocted by Henry Morgenthau Jr., US Secretary of the Treasury – proposed the demilitarization of Germany, the dispersion of local population, its territorial dismemberment, and the dismantlement of German industrial capabilities so that country's economy adopted an agricultural profile. Although the plan gained some traction at first, Germany dodged this bullet because Washington concluded that a prosperous, reindustrialized and strong West Germany would be far more useful as a shield – and maybe even potential spearhead – against the Soviet bloc.

In this regard, the creation of NATO was also a major pivotal development. As Lord Hasting Ismay – the first Secretary General of the transatlantic military alliance – claimed, its purpose was to keep “the Russians out, the Americans in, and the Germans down” in Europe.

Nevertheless, despite its subordination, West Germany did the best it could. After all, it did not have to spend on defense since the costs were mostly absorbed by the Americans, so it could focus resources on the revitalization of domestic industry. (The same applied to Japan in the east, which saw both Germany and Japan rise to become international industrial powerhouses – but with modern technology and means of production).

Likewise, the Germans benefited from the availability of funds supplied by the US, access to Western consumer markets, and the ability to engage freely in international trade – a service provided by the US Navy. Nevertheless, it would be mistaken to say that Germany was a staunchly Atlanticist state during the entire second half of the 20th century.

Being aware that it could literally be annihilated or worse if fighting between the Americans and Soviets broke out, it also relied on Östpolitik in order to encourage détente towards the bloc headed by Moscow. In turn, East Germany was a Soviet satellite, but it was one of most prosperous and industrialized states of the Warsaw Pact (living standards in the GDR were even higher than in the USSR itself) and it had a ruthless intelligence service. In other words, both German states were fairly relevant for their corresponding blocs even though they remained under foreign suzerainty.

Interestingly, a historical analysis reveals that Germany's strategic alignments have fluctuated in varying degrees between a westward orientation and a Drang nach Osten ('eastward push'). Yet this is no inconsistency. Instead, as American author Robert Kaplan asserts, such apparent contradiction is a reflection of the country's geopolitical condition in the transition zone between the heartland and the coastline.

Accordingly, the Western portion of Germany – mostly Catholic – has an industrial profile as well as a mercantile mindset and it also holds a cosmopolitan Atlanticist worldview. In contrast, its Eastern half – which roughly corresponds with historical Prussia – has long harbored nationalist attitudes and Spartan-like virtues.

Said region is also known for a military tradition and a warrior ethos that go back to the days of Frederick the Great. Arguably, so far the Germans have been able to blend aspects of both in accordance with their evolving circumstances.

Nevertheless, it is foreseeable that reconciling contrasting geopolitical inclinations in an era in which the Russian behemoth is colliding in multiple domains with the bloc headed by the American leviathan is going to be complicated. There is no easy way for Berlin to perform a masterful balancing act in the context of a major systemic crisis which will likely redefine the architecture of European security.

Reunified Germany as the cornerstone of the EU

In the final decade of the 20th century, the reunification of Germany fueled strategic anxieties that were not entirely unreasonable. In fact, it is known that both Margaret Thatcher and François Mitterrand were reluctant to welcome what they likely regarded behind the scenes as some sort of Anschluss 2.0, and even tried to approach Soviet Premier Mikhail Gorbachev in order to prevent it.

Furthermore, in 1990 American realist thinker John Mearsheimer pointed out that an assertive Germany would likely try to get its own nuclear weapons in a strategic environment in which the dissolution of bipolarity would give birth to an era of trouble and heightened tensions amongst competing powers.

In the 90s, US billionaire George Soros – an ardent supporter of Atlanticism – voiced concerns over the rise of a reunited Germany as a great power whose influence could engulf much of Eastern Europe as its lebensraum, and he even directly operated against the deutschemark's exchange rate.

However, as Stephen Szabo has convincingly argued, in the period of the Bundesrepublik, Germany managed to reinvent itself as a mercurial geoeconomic power. Its national strength was underpinned not by conventional military capabilities or weapons of mass destruction, but by following a strategic policy of commercial realism, a path that harnessed German industrial prowess and its various comparative advantages. After all, considering the productivity of the German economy, it needed to secure consumer markets to which its manufactured goods could be exported. In turn, it also required reliable access to both energy and raw materials. This was done through mutually beneficial collaborative frameworks, trade, and the projection of influence through unconventional vectors such as the expansion of German private business interests.

Unsurprisingly, the German state positioned itself as the ultimate cornerstone of the European Union, even though the bloc included other heavyweights such as France, Italy and, until not ago, Britain. Germany achieved through mercantile means what it had been unable to accomplish previously through sheer coercion.

EU enlargement has configured an economic bloc whose territorial reach dwarfs that of the Holy Roman Empire. Under German leadership, the process of European integration has advanced to such degree that it even shares not only a single economic space but also a common currency, which is basically a rebranded version of the deutschemark.

Nevertheless, the EU is no supranational confederation with a unified structure of political authority. It is a framework whose members are sovereign national states, and therefore there are asymmetries, imbalances, diverging interests and disagreements. For example, it is no problem that competitive German high-end goods – like luxury cars – are sold in international markets via a currency with a high exchange rate because they are bought for their outstanding quality and added value – not because they are cheap.

The same cannot be said about the primary products exported by less-developed EU members. Indeed, the German dominance in the EU is often resented in other states, especially after the 2008 Global Financial Crisis, the economic downturn experienced by several Mediterranean EU members, and Berlin's heavy-handed approach toward the Greek sovereign debt crisis.

Navigational challenges

As a result of the Ukraine war, Germany is now caught in a very awkward and uncomfortable position. In the aftermath of said crisis, in which the global correlation of forces is at stake, Berlin's critical vulnerabilities have been exposed and they are being taken advantage of.

First, since Germany has basically outsourced its defense and national security to the nuclear umbrella provided by the US since the Cold War, it cannot autonomously address security challenges in its own neighborhood. Therefore, the Germans have no choice but to follow Washington's strategic agenda even if that means that some German national interests are being disregarded. In turn, since the Teutonic nation is not self-sufficient in the field of energy, German industry is heavily reliant on the supply of Russian natural gas. Accordingly, Berlin's foreign policy cannot afford to alienate Moscow whether it likes it or not. It remains to be seen whether these contradictions can be reconciled in the current zeitgeist.

Both Americans and Russians are certainly aware of Germany's compromised position. It must be borne in mind that, in accordance with the geopolitical thinking of Anglo-American authors (both classical and contemporary), it is an imperative to prevent the development of a Russo-German partnership.

Combination of Russian weaponry, manpower, and natural resources plus German wealth and technology has the potential to alter the global balance of power, control the so-called Eurasian 'heartland,' and even challenge the might of maritime powers from the area known as the 'outer crescent.'

Comment - Couple to this control of Ukrainian and Russian grains and food stocks and one sees a distinct global powerhouse, capable in terms of capital, weaponry, manpower, natural mineral resources, food and geographic location.

Tellingly, a retired high-ranking German senior military officer, Jochen Scholz, has argued that one of the key drivers of US foreign policy toward Europe has been to avoid the emergence of a Berlin-Moscow collaborative axis. Therefore, the instigation of upheaval and geopolitical tensions by the US in Eastern Europe and some states of the post-Soviet space could be understood as a deliberate effort to remove potential bridges that could facilitate the rise of stronger ties between Russia and Germany. If this hypothesis is accurate, then the ongoing Ukraine war gives the Americans a window of opportunity worth harnessing to undermine the prospects of a Russo-German rapprochement.

Furthermore, the late Zbigniew Brzezinski – former National Security Advisor during the Carter administration and geopolitical scholar – explained that, since its defeat in World War Two, Germany had been essentially co-opted by the Americans as a junior partner. Indeed, the continuous presence of US forces and strategic military facilities like the Ramstein Air Base is a powerful reminder of Germany's subordinate status vis-à-vis the US. It is also telling – but not surprising – that, based on the revelations made by Edward Snowden, former Chancellor Angela Merkel was under the direct surveillance of the NSA. Even though this incident deserved to be investigated, nothing could be done about it for political reasons. In other words, German sovereignty is compromised to a certain extent by these asymmetries.

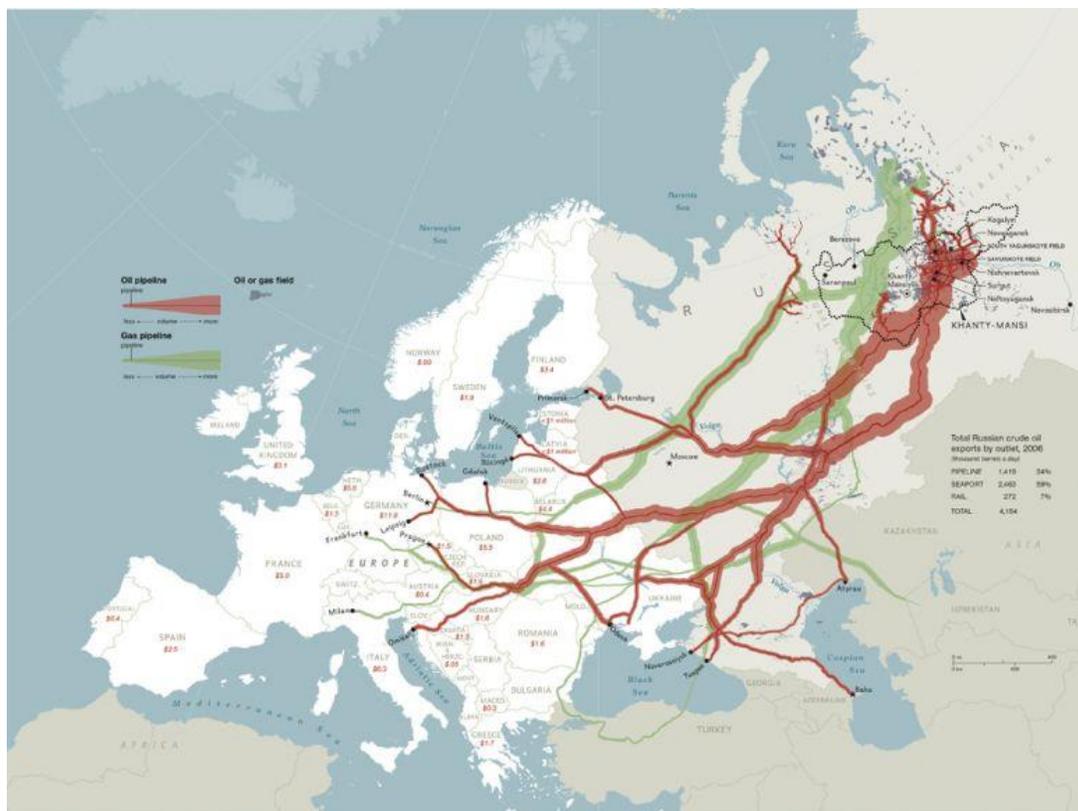
On the other hand, the Russians have correctly identified Germany as the linchpin and engine of the EU. Hence, they have invested a great deal of resources, time and effort in order to pull Germany from the geopolitical orbit of the US.

From the Russian perspective, without Germany there can be no meaningful transatlantic consensus and yet Moscow believes that Germany lacks the wherewithal to control much of Europe – with an iron fist if necessary – on its own as a regional hegemon. Thus, through the development of infrastructure projects (networks of pipelines) to supply substantial

amounts Russian energy to the German consumer market, the Kremlin has made sure that Berlin does not adopt a confrontational attitude toward Russia. Such deliveries are not only a source of hard cash, but also a strategic and political vehicle of influence.

Through the threat of disruption, the Kremlin can pull the trigger to wreck the German economy. Thus, the recent drastic reduction in the deliveries supplied by Gazprom through Nord Stream has been officially attributed to maintenance reasons, but since the alleged technical difficulty of restoring full capacity is being blamed on the implementation of Western sanctions, it is likely an outspoken political demonstration of how energy flows can be weaponized.

If the Germans no longer want to be held hostage through their dependence on Russian fossil fuels, they do not have pleasant alternatives in the short term: they can either rely on coal or the revival of nuclear power or witness the utter collapse of their industrial capabilities.



Also, the Russians have realized that, since Germany's intellectual world is mostly dominated by worldviews anchored to liberal internationalism and even postmodern ideologies, the resulting overall lack of savoir faire in terms of Machiavellian statecraft and a reluctance to engage in fighting is a weakness that can be used to strategically outfox the Germans in the ruthless chessboard of realpolitik.

Finally, although the behavior of geopolitical forces is mostly determined by impersonal factors, it must be borne in mind that, since his days as a KGB spook in Dresden in the late Cold War, Putin himself is deeply aware of the importance of Germany for Russian national interests.

So far, there are ambivalent views toward Russia in Germany. Voices aligned with militant Atlanticism are staunchly hostile to Russia. For instance, policymakers such as German Foreign Minister Annalena Baerbock and specialized commentators like Florence Gaub apparently abhor Russia and everything it stands for.

In contrast, realists believe that antagonizing Russia is an unwise course of action. For example, last January Vice Admiral Kay-Achim Schönbach stated that Russia should be respected as a force to be reckoned with, and that facts on the ground like the takeover of Crimea cannot be undone. The comments were so controversial that he had no choice but to tender his resignation.

Another development that needs to be considered is that China regards Germany as a pivotal state for the completion of its ambitious long-term geoeconomic plans. Thanks to its logistical infrastructure, Germany is positioned as a platform to reach most European markets.

Likewise, the advanced profile of the German economy makes it an attractive partner for Beijing. This is the rationale behind the establishment of freight railways as terrestrial corridors that foster economic interconnectedness between China and Europe in the framework of the Belt and Road Initiative.

Moreover, China is one of Germany's top trade partners for both exports and imports and Germany is also a full member of the Asian Infrastructure Investment Bank (AIIB), a development bank headed by Beijing which represents the largest multilateral institutional project ever launched by the Middle Kingdom. Likewise, considering Germany's sophisticated know-how and world-class prestige in the domain of finance and banking and China's interest in fostering the projection of its financial sector and in boosting the process of renminbi internationalization, there are signs of an emerging Sino-German financial co-operation. Officials from the Deutsche Bundesbank, Germany's Central Bank, have manifested their willingness to add holdings denominated in Chinese yuan to their foreign exchange reserves. Hence, China offers a valuable opportunity for Germany to diversify its partnerships and increase business opportunities for German companies.

Notably, China's foreign policy is not revisionist when it comes to Europe; the spheres of influence of both countries do not overlap and China is too far away to threaten German national security in any meaningful way. Undoubtedly, China is America's top strategic competitor, but it is not in Germany's national interests to automatically replicate Washington's rivalries.

Moreover, Germany is experiencing societal problems that pose complex challenges, such as declining birth rates. With a fertility rate of 1.607 per woman in 2022, Germany is already below replacement levels – a reality that encourages reasonable doubts in its viability as a leading power in the long run – and the absorption and assimilation of immigrants has not sailed as smoothly as expected. As a result, Germany is witnessing the simultaneous empowerment of militant Islamism and hardline nationalist forces. These internal tensions are not going away any time soon. In fact, their strength will likely grow under conditions of economic hardship. In addition, the increasing influence of Turkey as an aspiring great power with an ambitious Neo-Ottoman agenda is something that needs to be taken into account in Berlin. For example, back in 2017 Turkish President Recep Tayyip Erdoğan urged Turkish immigrants in Germany to vote in national elections against Merkel and traditional mainstream parties because they allegedly represented “enemies of the Turkish state,” a blatant act of interference that sparked outrage among German politicians. Although the situation did not escalate, such incident demonstrate that –through the overt mobilization of diaspora communities – foreign states can at least try to shape German politics in accordance with their preferences.

Concluding remarks

In a nutshell, the Germans are facing a complicated dilemma. They cannot recover their strategic independence from the US because they do not have their own autonomous nuclear deterrent, and they also lack a powerful military. Likewise, getting rid of Russian energy supplies would be problematic and the potential substitutes are imperfect, costly, and partial. Of course, Germany is an industrial powerhouse so, if it wants, it has what it takes to develop a nuclear weapons program, a stronger military, and a more diversified energy infrastructure.

However, the Ukraine War and its shockwaves are literally accelerating the course of history and the Germans are running out of time. For instance, the UK is promoting the establishment of a new security alliance of European states that share three common denominators: a fierce opposition to Russia, a strong Atlanticist strategic orientation, and a distrustful view of Germany.

Decisions must be made, challenges must be faced, and costs will have to be paid one way or another. Berlin needs to assess its situation and play its cards wisely. If an inertial trajectory prevails, a Weimar-like disaster is conceivable. Now that history is back, Germany can have either the American security guarantee or the comfort of being a wealthy industrialized economy; but it will not be able to enjoy both at the same time anymore. Such convenience can no longer be taken for granted.

In fact, the status quo that favored the Germans until recently is gone and existing partnerships will not do the trick. Since overreliance on others can backfire, the Germans will be pretty much on their own now. Therefore, Berlin's best move would be to assume a much more autarkic, proactive, and assertive role on the world stage in accordance with the full weight of its national power.

Otherwise, it will fade into oblivion as its fate is determined by external stakeholders. Being at the mercy of others is obviously dangerous for any rational state, particularly in times of trouble. Hence, the Germans will probably soon experience a rude awakening whose consequences will be felt for generations to come. The clock is ticking.

Comment – The “Great Game” continues.....

(Jose Miguel Alonso-Trabanco)

Poland: Europe's newest military Superpower? - The Russian Invasion of Ukraine has caused a wind of change in Europe. A continent in which many states gradually lowered their military spending after the Cold War, governments are now looking to remilitarize, realizing that the Russian threat of expansion will remain for the foreseeable future. One of those European nations is Poland, which is now on-pace to become Europe's largest and most sophisticated non-nuclear military power.

The sense of urgency from Poland comes from broken treaties and the renewed Russian ultranationalism coming out from Vladimir Putin's United Russia party. Poland's remilitarization is not solely based on preparing for whatever threats come from the Kremlin, but also reflects a desire to no longer rely on word powers which, in the past, promised to protect Warsaw but never did.

Comment – When in Poland on my many visits, the one memory I always departed with was that Poles will never forget the 1939 invasion by Germany on the first day of school, but they despise Russia with a special vengeance.

In the wake of the Russian invasion of Ukraine, Poland has embarked on the largest procurement of conventional American weapon shipments in history. In March, Warsaw signed off on \$4.75 billion worth of Patriot missiles, bolstering the nation's anti-missile defense system.

As the war progressed in Ukraine, involving a massive barrage of MLRS and submarine-launched cruise missiles, Poland also requested an additional six Patriot systems in late May. This was not the first major purchase by the country, which prepared for the worst in February and laid the groundwork for its largest ever tank purchase, ordering 250 M1 Abrams tanks from the U.S.

As the geopolitical landscape evolved, with Russia seeking to extract concessions through territorial annexation, a manufactured famine, and the weaponization of European energy supply, Poland continued to strengthen its defensive capabilities. This includes a major weapons purchase from military tech giant South Korea, including 180 K2 tanks to be delivered by 2024 and another 400 by 2030. Additionally, Poland purchased 48 FA50 light attack aircraft, 1,400 IFVs, and 670 plus K9 self-propelled howitzers. Defense Minister Blaszczak also stated Poland will increase its active-duty forces to 400,000 with an increase in defense allocations to 3% of the nation's GDP.

Arguably the top defense investment Poland made was the procurement of 500 HIMARS from the U.S. The MLRS system has become a game-changer for Ukraine, with just sixteen systems hitting key targets such as fuel depots, ammunition storage sites, and command and control centers. The HIMARS have also found a way to bypass Russia's notorious S400 anti-missile system, which could give NATO members an edge in the event of a future conflict.

This renewed will on the part of the Polish defense industry to prepare itself for the worst not only stems from Europe's evolving geopolitics, but also Poland's past of being betrayed by superpowers that “promised” to protect the nation.

Russia's attempts to leverage its favorable position in energy and food supply chains to extract concessions from the EU has put Poland in a precarious position, as Ukraine is not only increasingly a close ally of Warsaw, but also a major buffer against Russian expansion into Eastern Europe. It should also be noted Russia has ramped up militaristic rhetoric with regard to Poland; for example, by disrespecting the victims of the Katyn Massacre and suggesting that the country should be next in line to be "denazified."

Whereas Western Europe has historically interpreted threats to Eastern and Central Europe as relatively minor and able to be solved with diplomacy, the Poles and many people in the Baltics still bear the scars of Chamberlain-type appeasement policies.

Poland was given assurances by both the West and Russia on the country's territorial sovereignty only to see Russian troops betray them and later forcibly incorporate Poland as a Soviet satellite. This process included the execution and murder of the near entirety of the Polish officer corps and the deportation of 1.5 million Poles to Central Asia. The Western Allies also betrayed the Free Polish legions, not even recognizing them in the Allied Parade of 1945, thus further cementing Stalin's hold over half of Europe.

Today, Eastern Europe will not be caught off-guard, as Polish defense capabilities also serve as a shield for the Baltics. Warsaw has solidified relations with Vilnius and supported the Lithuanian transit ban to Kaliningrad amid growing border tensions with Belarus. These important shows of support contrast starkly with some other EU powers, which have opted instead for appeasement. Along with holding defensive capabilities to solidify a defensive line reaching all the way to the Baltics, Poland has also ratified the permanent presence of the U.S. 5th Army Corps and sought growing ties with the British military.

As many nations now look to remilitarize in the face of looming threats – Japan, Germany, Spain, and the Baltics to name a few – Poland has come to the forefront of these efforts, situating itself as the frontline of European defense. With the tragedies of history still embedded in the collective memory, it appears as though Poland will not be caught off-guard again. (Julian McBride).

Syria safe zone plan resurrected by Erdogan - Turkish President Erdogan wants to launch yet another military incursion into northeast Syria.

Pledged almost two months ago yet awaiting what analysts say is probably a green light from Moscow, the operation raises questions about Turkey's ultimate plans for Syria.

Erdogan says he wants to initiate his fourth operation in the country's north since 2016, targeting a zone which includes the two key towns of Manbij and Tel Rifaat. The goal, according to the President, is to rid the area of fighters allied to the Kurdistan Workers' Party (PKK), a militant group that Turkey deems terrorist.



"We are going into the new phase of our determination to form a 30-km (20-mile) deep safe zone along our southern border," Erdogan told lawmakers from his ruling AK Party in June. "We will clear Tal Rifaat and Manbij of terrorists, and we will do the same to other regions step-by-step."