

# Assessment of the state of the Ukraine war

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## Ukraine War Report – 20 May 2023

The events of April and the first half of May 2023 in Ukraine appears to be the “calm before the storm”- a relatively quiet period before the anticipated Ukrainian counteroffensive. April 2023 has been the most passive month of the war so far. The net exchange of territory in this month was a mere 25 square kilometers net gain by the Ukrainians, as the Russian advance in Bakhmut was so little, that minor Ukrainian gains along the frontlines exceeded it.

A Ukrainian counterattack is expected to begin within weeks, as the equipment provided by the US and its NATO allies has already arrived in Ukraine and the *rasputitsa*, or mud season, that handicaps the utility of mechanized maneuvers, is expected to be over by the end of May, hard ground permitting an early summer campaign.

Nevertheless the discourse regarding the anticipated Ukrainian counterattack remains somewhat ambiguous. While on the one hand, most US and Ukrainian statements have been overtly optimistic on the prospects of the Ukrainian counterattack, on the other hand, some Ukrainian commentators, such as Ihor Zhovkva, deputy head of president Zelensky's office, expressed doubts about whether the equipment supplied by the US and its NATO allies is sufficient to mount a coherent offensive.<sup>1</sup> Thus while US decision-makers emphasize that the arms deliveries they provide are sufficient for the counterattack to be successful, such as recent statements from US Secretary of State Antony Blinken,<sup>2</sup> there continues to be a widespread criticism, that restraint by the US in weapon deliveries due to its fear of escalation, may jeopardize the war effort, suggested in a recent comment by Ben Hodges, former commanding general of the United States Army Europe.<sup>3</sup> Therefore, there is a contradiction between the US intent to deliver sufficient equipment for a Ukrainian counterattack of a game-changing magnitude, and the US intent to restrain deliveries in order to avoid further escalation of the war. This raises the question of what degree of success does the US want to achieve in Ukraine? And relatedly whether US restraint jeopardizes the chances of the upcoming counterattack, in a situation where the US could otherwise easily deliver sufficient equipment for a certain victory.

A prelude to the Ukrainian counteroffensive appears to be probing attacks, and long-range artillery and missile attacks on Russian logistical hubs behind the front lines, including the Crimea and Luhansk. On 11<sup>th</sup> May 2023, the Ukrainians started a limited counterattack around Bakhmut and pushed Russian forces back on the flanks, retaking about 20 square kilometers in about a week.<sup>4</sup>

Leader of the Wagner Group Evgeny Prigozhin, has made public comments with increasing frequency, and with an increasingly hardening tone against the Russian leadership. While Prigozhin's previous comments only targeted the Ministry of Defense, his remarks in early May started to target Russia's president, Vladimir Putin himself. Prigozhin's initial comments had often been assumed to have been encouraged by Putin and his advisors as part of Putin's tactics to incite competition between leaders of Russia's armed forces for his favors. However, Prigozhin's most recent comments seem to go far

beyond that. Prigozhin’s open criticism of Russian troops fleeing the trenches, and even calling Putin ‘a moron’ risks undermining Russian morale and Putin’s domestic support, rather than merely fueling rivalry between Putin’s generals.<sup>5</sup>

We regularly estimate how the number of main battle tanks on each side is changing during the course of the war. While we know that tanks are only part of the offensive picture, we believe that trends in tank power are indicative of trends in other equipment as well. In particular, the notable decrease in Russian artillery activity, decreasing from 60 000 shells per day in the summer of 2022 to 15 000 shells per day by January 2023,<sup>6</sup> and declining further to 10 000 shells per day by March 2023, also appears to indicate the trend of Russia’s dramatically decreasing tank capacity. We revised our estimates using our previously discussed methodology<sup>7</sup> updated by data for April 30<sup>th</sup> and May 17<sup>th</sup> by both Oryx<sup>9</sup> and the Ukrainian government,<sup>10</sup> and recent comments by US Secretary of Defense Lloyd Austin stating that the actual number of western tanks delivered to Ukraine this year is 230.<sup>11</sup> Revising our “high initial basis – high losses” scenario that we find most likely, gives the following estimates for April 30<sup>th</sup>, May 17<sup>th</sup>, and prediction for May 31<sup>st</sup>.

<b>high initial basis, high losses scenario</b>													
	<i>Russia</i>						<i>Ukraine</i>						
active main battle tanks	initial	unrefurbished from storage	refurbished	newly manufactured	losses	<b>total active</b>	initial	captured	received in 2022	received in 2023	losses	<b>total active</b>	
30.4.2023	330	390	325	260	-280	<b>1475</b>	100	275	450	230	-735	<b>1220</b>	
17.5.2023	330	405	340	270	-287	<b>1445</b>	100	275	450	230	-750	<b>1205</b>	
31.5.2023	330	420	345	280	-294	<b>1405</b>	100	275	450	230	-765	<b>1190</b>	

Even if Russia keeps 80% of its active tanks in the Ukrainian theater, it would mean that the number of Ukrainian tanks now exceeds the number of Russian tanks= 1205 Ukrainian tanks versus 1156 Russian ones. This would be a best case scenario , where Russia would have less than 300 tanks elsewhere: in the interior of the country, on the Chinese border, in the Caucasus, on the border with NATO facing Finland, the Baltic states, and Poland and in all its peacekeeping missions. Therefore it is somewhat unlikely that this would be the actual situation on the ground. A more realistic scenario would be where

Russia keeps two-thirds of its tanks in the Ukrainian theater. This would mean 963 Russian tanks there as opposed to 1205 Ukrainian ones as of 17<sup>th</sup> May 2023, and 943 Russian tanks as opposed to 1190 Ukrainian ones by 31<sup>st</sup> May 2023. Assuming that Russian and Ukrainian tanks are spread evenly along the rest of the frontline, this means that for a counteroffensive, Ukraine could theoretically accumulate the classical 3:1 ratio Clausewitz recommended across about 13% of the entire frontline.

Regarding the diplomatic context, the April visit by Emmanuel Macron and Ursula von der Leyen to Beijing,<sup>12</sup> and the phone call between Xi Jinping and Volodimir Zelensky,<sup>13</sup> it is debatable whether these diplomatic exchanges was China reaching out to Europe, or Europe reaching out to China. On the one hand, especially Emmanuel Macron's comments on Taiwan appeared to distance France from the US regarding the issue of Taiwan,<sup>14</sup> while on the other hand, China appears to be showing the limits of its "friendship without limits" with Russia. As a geopolitical step, China hosting the first ever China – Central Asia summit in Xian, by inviting leaders of Central Asia's five former Soviet republics, but excluding Russia, appears to be a clear challenge to Russia in what it conceives as its core geopolitical interests.<sup>15</sup> As Macron virtually called for Europe to be neutral over the Taiwan issue, China significantly did not deliver weapons to Russia (at least not a significant amount) and offered to mediate in the war. This suggested China has shifted to emphasizing a neutral stance with regard to the Russian invasion. This raises the question whether these meetings and statements can be interpreted in a way as China and France pursuing an unwritten deal of Chinese neutrality regarding the war in Ukraine in exchange for EU neutrality regarding the issue of Taiwan. While Macron's move sparked outrage within NATO, even if the pursuit of some kind of such a deal is secretly behind this Franco-Chinese rapprochement. This diplomacy, at least in the short run, appears to be more beneficial for Europe, than it might be for China. First, while the Russian invasion of Ukraine is an ongoing, active conflict, the Taiwan issue is a dormant, frozen conflict, that has been so for decades. Second, the resources of NATO are overwhelming compared to Russia, and therefore without support from China, Russia is likely to lose the war if China remains neutral. At the same time, the resources of the Quad are greater than those of China, therefore the Quad is most likely able to contain China even if the EU remains neutral. Therefore, even if it was the intent of Macron, such a deal in a currently active war, in which whether China is neutral or not is a game-changer has significant long term consequences for Russia and also potentially for China's global power after the war concludes.

## Endnotes

- <sup>1</sup> [https://www.theguardian.com/world/live/2023/may/16/russia-ukraine-war-live-updates-kyiv-russian-air-strikes-latest-news?page=with%3Ablock-6463bfb68f08053fbe0928c7&fbclid=IwAR0sngld7Ao874fywJUZEvjSO6UtQ4NbsmTcL6DuoYtY98DnkG\\_MSDIUes#block-6463bfb68f08053fbe0928c7](https://www.theguardian.com/world/live/2023/may/16/russia-ukraine-war-live-updates-kyiv-russian-air-strikes-latest-news?page=with%3Ablock-6463bfb68f08053fbe0928c7&fbclid=IwAR0sngld7Ao874fywJUZEvjSO6UtQ4NbsmTcL6DuoYtY98DnkG_MSDIUes#block-6463bfb68f08053fbe0928c7)
- <sup>2</sup> <https://vietnam.postsen.com/world/327273/US-pledges-to-deliver-enough-weapons-for-Ukraine-to-counterattack.html>
- <sup>3</sup> [https://twitter.com/general\\_ben/status/1649032110663933952](https://twitter.com/general_ben/status/1649032110663933952)
- <sup>4</sup> <https://www.ukrinform.net/rubric-ato/3710068-ukraines-forces-retake-about-20-square-kilometers-of-land-near-bakhmut-defense-official.html>
- <sup>5</sup> <https://www.reuters.com/world/europe/mercenary-chief-makes-cryptic-profane-remark-about-russian-war-leadership-2023-05-09/>
- <sup>6</sup> <https://edition.cnn.com/2023/01/10/politics/russian-artillery-fire-down-75-percent-ukraine/index.html>
- <sup>7</sup> see metholdoolgy and other sources of data in <https://danubeinstitute.hu/hu/kutatas/assessment-of-the-state-of-the-ukraine-war-april-2023>
- <sup>8</sup> <https://youtu.be/2PHUK6zkbpc>
- <sup>9</sup> <https://www.oryxspioenkop.com/2022/02/attack-on-europe-documenting-equipment.html>
- <sup>10</sup> <https://www.minusrus.com/en>
- <sup>11</sup> [https://www.youtube.com/watch?v=I2US8RY5eKY&ab\\_channel=Reuters](https://www.youtube.com/watch?v=I2US8RY5eKY&ab_channel=Reuters)
- <sup>12</sup> <https://www.bbc.com/news/world-asia-china-65186222>
- <sup>13</sup> <https://edition.cnn.com/2023/04/27/china/china-ukraine-xi-jinping-zelensky-call-analysis-intl-hnk/index.html>
- <sup>14</sup> <https://asia.nikkei.com/Spotlight/Comment/Macron-s-Taiwan-comments-expose-muddled-China-policy>
- <sup>15</sup> <https://www.reuters.com/world/china-looks-strengthen-ties-russias-central-asian-backyard-2023-05-17/>