

Assessment of the State
of the Ukraine War

July 2023

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June and early July were marked by two main events. First, the Ukraine launched its much-anticipated counteroffensive but has so far failed to achieve a significant breakthrough, taking only a few villages along the line of control. The failure of the Ukrainian counterattack shows a serious US miscalculation of the disposition of forces. The situation during the winter offered two clear options for the US and NATO. If they judged the risks of escalating the conflict with Russia too then the rational decision would have been to encourage Ukraine to end the conflict with an armistice along the actual line of control sometime during the winter of 2022-2023, to spare Ukraine from the losses of an unsuccessful counteroffensive, not to mention civilian losses throughout the months since then. If however, the US judged the situation suitable to strike a decisive blow against Russia by supporting a major Ukrainian counteroffensive, the rational choice would have been to provide Ukraine with all the necessary equipment for success, including items such as not dozens, but hundreds of M1-Abrams main battle tanks, F-16 aircraft, ATACMS missiles, at the very start of the counteroffensive, to make sure it succeeded. Instead of choosing either of these two options, the United States appears indecisive, encouraging Ukraine's counteroffensive, but as it turned out, out of the fear of escalation, it did not provide it with the equipment necessary for success. This resulted in the present situation with Ukraine starting the counteroffensive, but failing to break through. This risks the embarrassing outcome of having to end the conflict with an armistice along the present line of control, which is virtually identical to where it was several months earlier during the winter, but with the unnecessary additional human losses throughout the several-month time period since then, and the unnecessary embarrassment of a failed Ukrainian counteroffensive, as opposed to the option of an armistice last winter.

Two factors however may still enable Ukraine, the US, and the other Western supporters of Ukraine to avoid this outcome. One is the caution that Ukraine showed in the counteroffensive, deploying only three out of the twelve brigades that it amassed, preserving the remaining nine, thus avoiding unnecessary high losses, and maintaining its offensive capabilities for the future. The other factor is that observing the failure of the Ukrainian counteroffensive, the United States seems to have decided to provide more of, albeit still not all, the equipment, that Ukraine needs for a breakthrough, namely cluster ammunition¹ and possibly ATACMS missiles.² The question, however, is whether this will

be sufficient for a breakthrough, or turns out to be too little too late, and only the upcoming months will reveal the answer.

The other major event of June was the mutiny and coup attempt by the Wagner group. The Wagner group, numbering about 25 thousand soldiers, is the largest private army in Russia, owned by oligarch Evgeny Prigozhin, having its own heavy equipment, including main battle tanks and helicopters, and before the invasion of 2022, mostly known for its activities in Africa. During the war, Wagner has been more effective than the Russian military and had a leading role in taking the city of Bakhmut, the most significant Russian achievement since the summer of 2022. Wagner was granted access to recruit convicts from Russia's prisons, who were granted amnesty if they survived their 6 months of service with Wagner.

The tensions between Wagner and the Russian military have been building up ever since the winter of 2022-2023, with Evgeny Prigozhin repeatedly challenging in his public podcasts Russian Minister of Defense Sergei Shoigu, and Chief of Staff Valery Gerasimov, accusing them of corruption and incompetence. Reports of sporadic armed incidents between Wagner and the Russian military surfaced from time to time, with Wagner capturing, beating, and publicly humiliating a Russian lieutenant colonel being probably the worst incident up until the coup attempt.³ The direct prelude of the coup attempt was the Russian government's decision to bring all private armies in the country under government control by the 1st of July. The mutiny itself started on the night of the 23rd and 24th of June 2023, with Prigozhin denouncing Shoigu and Gerasimov in a public podcast, and announcing a March of Justice to Moscow to depose them. In the announcement, Prigozhin also openly stated, that Russia's officially declared reasons to start the invasion, regarding the plight of ethnic Russians in Ukraine, and Ukraine threatening the security of Russia were lies, and that the invasion only served the interests of Russia's corrupt elites.⁴ A seemingly unopposed march on Moscow ensued, covering all day of the 24th, with Wagner occupying the city of Rostov at the mouth of the river Don, then the city of Voronezh further north, then marching northwards and reportedly reaching the town of Kashira within 120 kilometers of Moscow in the late afternoon. On the way, Wagner also took control of the military airfields of Rostov, Millerovo, and Buturlinovka. While first, the declared goal of the mutiny was to depose Shoigu and Gerasimov only, after President Putin declared the mutiny high treason on the morning of the 24th, Prigozhin also declared the deposition of Putin a goal, turning the mutiny into a coup attempt. The close to thousand kilometers march from the Ukrainian front to Kashira went largely unopposed, with a few air attacks. Then in the evening, a little after 8 PM Moscow time, when unconfirmed reports already talked about the vanguard of Wagner being between 50 and 100 kilometers from Moscow, Prigozhin unexpectedly announced to cancel the coup and go home. Prigozhin's officially stated reasons to cancel the coup was the intention not to shed blood, in exchange for being granted immunity by Putin.⁵⁶ Given the reality of Russian politics, many found the official version of the deal hardly believable. First, if

Prigozhin was in a position where he could have only been stopped by granting him immunity, as well as the apparent lack of military units resisting him on the way, and the exodus of the Russian elite from Moscow on the day of the coup attempt, suggest that he could have taken Moscow. Moreover, Putin is not known to deal with his domestic opponents through such deals, which suggests that offering such a deal to Prigozhin meant that Putin simply lacked the military resources and capabilities to stop the mutiny by force. On the other hand, however, accepting such a deal seems to be suicide for Prigozhin, as Putin has the reputation of being unforgiving to anyone openly challenging him, removing them by clandestine means, even if they fled the country, as in the case of Alexander Litvinenko and Sergei Skripal, as well as a suspiciously high number of members of the Russian elite dying by falling out of windows since the start of the invasion of Ukraine in 2022. All this suggests, that no matter what Putin may have promised to Prigozhin, he will kill him sooner or later, not the least because letting him live after such a coup attempt would irreparably damage Putin's power of deterrence against other potential opponents. Perhaps the most plausible explanation is the one reported by *The Telegraph*, citing intelligence sources, claiming that Prigozhin was blackmailed into surrender by threats against the families of certain leaders of the Wagner group.⁷ This especially sounds plausible given the long Russian tradition of the strong grip the secret services exercise over the military, established by Stalin in the 1930s and in place ever since.

The Wagner mutiny showed the weakness of the Putin regime. First, the Wagner units managed to march close to one thousand kilometers from Rostov at the Black Sea to Kashira at the Oka River, at a mere 120 kilometers driving distance from the Kremlin. This means that the Russian hinterland is so devoid of capable military units to prevent a 25-thousand-strong mercenary army from a thousand kilometers march on Moscow. Footage of defensive measures in and around Moscow throughout the day of the mutiny showed mostly Rosgvardiya and OMON paramilitary units, lacking any main battle tanks or artillery, trying to build defenses by turning public transport buses across the highway, digging up the pavement by commercial excavators, and undermining bridges. Even if there were no capable units in or near Moscow, the timeframe should have enabled units elsewhere in the hinterland to get to Moscow before the Wagner troops: The fact that none showed up, suggests that no such troops were present in that entire area of the Russian hinterland, which is also the demographic, economic, and political heartland of the country. Illustrating this weakness, some units of the Chechen private army of Ramzan Kadyrov were flown in to reinforce Putin's defenses.⁸⁹ This all suggests, that Russia's equipment losses are at the top end of the range of estimates, and virtually all its remaining capable military units are either on the frontline, or at its international borders, such as its border with the Baltics and Finland, its border in the Caucasus, and its border with China. This suggests, our estimates of Russian tank losses, and the number of remaining Russian tanks were correct. Throughout these monthly estimates, we made

calculations estimating Russian equipment losses. Our estimates showed surprisingly high losses of tanks, and surprisingly few Russian main battle tanks remaining, with their number for the entire country by June being only slightly more than Ukraine's. Given the reputation of Russia, this may have sounded hardly believable, but the lack of capable military units to confront the Wagner group in the Russian hinterland of a thousand kilometers radius around Moscow appears to prove that our estimates were correct.

The other aspect showing Russia's weakness is how the mutiny ended. First, regarding the risk of escalation, there are widespread concerns regarding how Vladimir Putin would react if cornered. The Wagner mutiny pretty much did corner Putin. However, his reaction was anything but escalation: Flightradar data showed, that Putin's presidential airplane had taken off from Moscow, and headed towards Saint Petersburg before its transmitter was switched off halfway between the two cities. While Russian official statements claimed that Putin was staying in the Kremlin, the route of the presidential aircraft strongly suggests that Putin fled Moscow. Launching the presidential airplane without the president on board if Putin stayed in the Kremlin would have made no sense as a deceptive move, as it would have shown him to be weak. Also, no public television or video broadcast by Putin took place from the Kremlin in the time period in question, although such a move would have been crucial to boost morale in these critical hours. He also did not show up at the Rosgvardiya and OMON troops that were preparing for the defense of Moscow, in stark contrast with Boris Yeltsin's stand during the 1991 coup attempt, when he gave a speech standing on top of a tank in Central Moscow. To sum up, Putin neither showed up in public or issued any broadcast or public announcement between the takeoff of his presidential plane and the end of the mutiny. This all strongly suggests that he really was onboard the aircraft as opposed to the official statements, and fled Moscow as the Wagner troops approached. To make the situation more embarrassing, Flightradar also detected the government aircraft of prime minister Mishustin, former President Medvedev, and private jets of several Russian oligarchs, all leaving Moscow.

Second, the coup attempt ended with a deal, brokered by Belarusian president Alexander Lukashenka, according to which Prigozhin and members of the Wagner group were -at least in theory- granted immunity. To summarize, the Russian military has no resources to stop the march of the Wagner group on Moscow, Putin and members of his elite fled the capital, and even to broker a deal that grants immunity, Putin needed the mediation of an external actor, Lukashenko. Immunity for perpetrators of a military coup attempt is unprecedented. Especially since Prigozhin appears to have violated the terms of this agreement: While the agreement obliged him to relocate to Belarus, as of the 12th of July, Prigozhin has been reported traveling back and forth between Belarus and Russia undisturbed, even making public statements. The message for Russian elites is that in Putin's Russia one can attempt a military coup, and n gets away with it. In a political culture such as Russia where strength is valued above everything else, this coup attempt

undermines the strongman image of Vladimir Putin. Even if Prigozhin was blackmailed into negotiating as intelligence sources suggest, the damage has already been done.

Third, the public reception of the coup attempt was also not favorable for Putin. Footage showed crowds fraternizing with Wagner mutineers in Rostov, cheering them even when they left the city after their surrender, and booing returning Russian authorities. On the other hand, no sympathy rallies supporting Putin were seen throughout the day of the coup either in Moscow or in any other significant towns. Also, the limited Russian forces that Wagner encountered along its march on Moscow, were reported to have stood by passively, surrendered, or even changed sides and joined Wagner. Many of the pilots sent to attack the Wagner columns reportedly ignored the orders. After the coup, reports have emerged suggesting a crackdown or even purge against members of the Russian military that collaborated or are suspected to have sympathized with the coup. The most emblematic figure likely subject to this is General Sergei Surovikin, nicknamed "General Armageddon" former commander in chief of the operation against Ukraine, who has been missing since the coup attempt and is believed to be held captive by Russian authorities.¹⁰

¹¹ Even with a purge in the Russian military however, any crackdown against members of the military who collaborated with the plotters, while granting immunity to the actual plotters, causes an extremely high degree of inconsistency, undermining Putin's image.

One more consequence of the mutiny was Putin publicly admitted that Wagner was sponsored by the Russian government. Ever since its establishment, rumors and allegations circulating about Wagner suspected that it is in fact a covert branch of the Russian government, used for the purpose to wage Russian military interventions in a way that Russia does not need to take responsibility for, as nominally Wagner is a private company. The Russian government has until now denied this, claiming that Wagner is an independent private enterprise and that the Russian government has absolutely nothing to do with its activities. On the 27th of June 2023 however, Vladimir Putin publicly announced that the Wagner Group was funded by the Russian government.¹² Putin's primary aim in this announcement was most likely to undermine Prigozhin's prestige in the eyes of the Wagner footsoldiers, by discrediting Prigozhin's claims to have privately funded their livelihood. A side effect of this announcement, however, is that by recognizing that the Wagner group was in fact paid by the Russian government, Putin recognized de facto Russian military presence in Central Africa, Libya, Mali, and Sudan, and with a political presence giving it extensive intelligence access currently in the Democratic Republic of the Congo, Equatorial Guinea, South Africa, and Zimbabwe, and formerly in Cameroon, Madagascar, and Mozambique.¹³ All this combined means an extensive Russian military and intelligence presence on the African continent.

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- ¹ <https://www.bbc.com/news/world-europe-66133527>
 - ² <https://www.nytimes.com/2023/07/11/world/europe/atacms-missiles-ukraine-us.html>
 - ³ <https://www.newsweek.com/captured-russian-colonel-claims-wagner-tortured-raped-his-soldiers-1805336>
 - ⁴ <https://www.straitstimes.com/world/europe/russian-mercenary-boss-says-moscows-war-in-ukraine-based-on-lies>
 - ⁵ https://twitter.com/nexta_tv
 - ⁶ <https://russia.liveuamap.com/>
 - ⁷ <https://www.telegraph.co.uk/world-news/2023/06/25/yevgeny-prigozhin-moscow-advance-putin-threat-wagner-family/>
 - ⁸ https://twitter.com/nexta_tv
 - ⁹ <https://russia.liveuamap.com/>
 - ¹⁰ <https://www.businessinsider.com/russian-aircrews-who-disobeyed-orders-to-attack-wagner-face-scrutiny-2023-6>
 - ¹¹ <https://news.yahoo.com/rumors-leadership-purge-russian-military-150200049.html>
 - ¹² <https://lieber.westpoint.edu/putin-admits-funding-wagner-group-implications-russias-state-responsibility/>
 - ¹³ <https://www.dw.com/en/russias-wagner-group-in-africa-more-than-mercenaries/a-64822234>