

[Transcript] War on the Rocks / Looking Beyond the Offensive in Ukraine

You are listening to the Warner Rocks podcast on strategy, defense, and foreign affairs. My name's Ryan Evans, I'm the founder of Warner Rocks, and I'm sitting here with your friend and mine, Michael Kaufman, to talk about the war in Ukraine.

Thanks for coming back on the show.

Yeah, it's great to be doing this one again together.

So a lot of world attention has been on Israel for understandable reasons.

The war in Ukraine, of course, drags on.

So let's start with the state of the offensive and where you see things, the state of play.

Yeah, so it's a good question.

Naturally, a lot of attention is refocused to the Middle East, but things are staying pretty dynamic in Ukraine.

So regarding Ukraine's offensive, they have been making what at best could be called a molecule of progress.

But I think a lot of the early claims of breakthroughs in the South were premature.

Things may have appeared to be largely the way they were, but there's still a speculation out there that there's more to happen before kind of the mud season in the winter arrives later in November.

My own sense is there's probably a couple more interesting weeks to play out in this offensive operation.

If you read a lot of the information sources from the Russian side and Russian bloggers, they are quite worried about a buildup that they see opposite her son on the Ukrainian side of the Nipiro Riverbank and have been trying to attack Ukrainian assembly areas, pontoon bridges and what have you.

And I think the reason for that is they're concerned that the Ukrainian military is sort of saving up for potentially one more push, possibly an operation still trying to advance towards Tukmak from a rehab and possibly linked up with a cross river operation, which would be very ambitious at this point and very risky, especially if the Russian military knows that it's coming.

But what are the indications that Ukraine might be preparing to do that?

Obviously, it's not a secret.

My own view of it is that at this point, it's all over the Russian blogosphere, at least their interpretation is such.

And the Russian military has been conducting strikes and standoff air strikes on the Ukrainian side of the river.

So I don't know if there is an operation or if there is an attempt to pull Russian reserves from the front line in an effort to stretch the Russian lines to potentially make one more push from rehab successful.

And that's why I said it.

We don't know what's going to happen next couple of weeks, but it's still merits paying attention rather than sort of prematurely claiming that the offensive is culminating and it's done.

Do you think it's close to culminating?

Oh, most definitely.

I mean, that's been my view for some time now.

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And I think that the challenge will be is discussed previously on other versions of this podcast to find what is a point to say that now we can take stock, because that's very difficult to do while people are fighting.

Right?

It's a political decision as much as it is a military one.

Right.

But Ukraine is never going to say that this offensive is over.

Offensives are typically not declared over.

They just kind of culminate on their own.

So looking back on what's happened so far, there hasn't been a lot of territory that's changed hands in this offensive.

But of course, success is not just about lines on a map as we've discussed before on the show.

It's also what it does to the other side and its ability to continue to wage war all the way from political will down to capacity.

So we're not taking stock of the offensive yet, but what are some of your preliminary conclusions on how this offensive has affected Russia's ability to stay in the fight?

I mean, it's certainly inflicted a substantial cost on the Russian military.

I think that from the standpoint of an offensive operation, we're usually the attacker bears the larger share of casualties and material losses.

The Ukrainian military did reasonably well, certainly about as well as could be expected under the conditions and the level of training that they had available.

And I think the cost imposed on the Russian military is significant.

And my own interpretation of it is that if there wasn't any offensive operation, if there wasn't this level of pressure, and then the Russian military would have had all this time to recover, regenerate its capacity for our offensives, and it's still very much a question.

What will Russia be able to do if we look out towards the winter and then spring of next year?

My sense is that putting aside the goals of this offensive and Ukrainian leadership, military and political has been pretty clear that the minimal goals for the Southern offensive were to get to Takhmok.

And Zanjansky had mentioned Bakhmut as another goal for this year's offensive operations.

If they are not attained, the Ukrainian military and leadership can still claim some degree of a qualified success, at least in the treating Russian forces and reducing the Russian capacity for offensive operations and suppressing the Russian ability to be able to effectively take to the offensive, which is an issue that I think is going to be debated looking into next year, what that's going to look like.

I know you've used some things about this offensive and particularly certain parts of the front a little differently than other analysts.

What are some of the views that you have that might not be shared by some of

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the other observers of the war?

So, yeah, it's been a long running kind of interesting disagreement debate on the distribution of forces and the emphasis on Bakhmut.

I think that at this point, it's fair to say that the supporting offensive around Bakhmut just ended up being one axis, trying to advance around the South. It's very difficult to involve a city if you're just trying to go around in one direction and that that area of advance actually regained Ukraine the least amount of territory by several margins compared to the advances in the South.

I think there's an interesting debate right now of what to make of the Russian attack at FDFK because the Russian military has been trying to take the initiative now, at least they probably...

This was a topic of the last Russia Continuity episode, which I highly recommend.

Yeah, and back then it was sort of a very earlier preliminary discussion.

I think now we know a lot more on what's happened and who was involved in that fight.

But so the Russian military over the past week has been trying to seize the initiative. They are acting as though they think the Ukrainian offensive is culminated and they have an opportunity to take the initiative and recapture as much territory as they can and try to impose some dilemmas again before the winter.

And what seems to have taken place is they launched an assault attempting an involvement around FDFK. FDFK is an important city, not far from Donetsk.

FDFK is a heavily fortified city.

It's been defended by Ukrainian forces for quite some time and they were clearly looking to see if they could get some kind of operational success there.

They've also attacked in some towns nearby, like Putsk, and tried to seize the initiative on other parts of the line.

Now, this assault did not go well for them.

They lost a significant amount of equipment.

Russia.

Yeah, for Russia.

Ukraine was able to defend it, although in the northern flank of the Russian assault, Russia was making some gains, though I think they were temporary at best. So Ukraine was able to hold out.

Now it's likely going to transition to a nutritional battle.

Although I watched it was some trepidation because I think if FDFK could, if the Russian military is focused on it, it could kind of become the next Bakhmut looking out into the winter.

You don't mean that in a good way.

Yeah, I don't mean in a good way.

I just mean another prolonged nutritional fight.

But one of the most interesting things is looking at what the Russian attack told us about the state of Russian force, Russian military today.

And online folks kind of interpreted as another repeat of the Russian failed attacks at Vuhudar last winter.

I actually saw something a bit different.

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So from my point of view, the Russian military demonstrated what I think we all knew that they don't have really the ability to restore offensive potential because of force, quality constraints and other issues.

And my view had been for a while that they would probably need to conduct another mobilization to generate the forces.

And I still think that it's not a question of if, but more when, right?

That is, they're likely going to need another partial mobilization if they want to substantially increase both their military capacity, but also if they just want to rotate forces because they have hundreds of thousands of troops in Ukraine and they have to rotate those forces.

They don't want them to get exhausted.

Their reason to act shows clearly that at least their minimal warring is still the Donbass.

They clearly are acting more confidently after being able to defend against the Ukraine offensive thus far.

It puts into question some assessment that, you know, Russian forces are stretched, that the offensive is running really closely, at least if the Russian military feels that they have the reserves, they have the additional capacity to conduct such a large scale attack.

And what happened with it because rather interesting, the Russian military was essentially attacking with the Second Combined Arms Army from Central Military District and elements of the DNR's first corps, right?

And the level of attack that's the unit of action, it looked like they were stitching together company tactical groups into something like battalion sized task forces.

So it's pretty sizable for them.

It was actually quite bigger than things we typically had seen last winter.

They had conducted extensive artillery barrages before the attack.

They were supporting them with rotor aviation, with helicopters, with aircraft strikes.

So they were trying to coordinate the actual land attack with air power.

And it wasn't successful.

They lost quite a bit of equipment, but to me, it was an interesting sign of things are potentially to come, which is the Russian military on the one hand demonstrate how difficult it is to conduct a maneuver style assault against a well-prepared defense.

They also some extent showed what it might have looked like if Ukrainians had attempted to do the things that the United States wanted them to do in the area, which, which was not good.

Yeah, to me, it's actually very, it's some sense, an interesting empirical test case of what would happen if the Ukraine military was willing to accept a large amount of losses to the equipment they were provided and just sort of try to push through the Russian defense.

And the answer is it probably will look something like the Russian

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attack at Avdivka, which is they will lost a lot of equipment and people and people and they probably would not have been a lot more successful to be perfectly honest.

So that's my own view.

But this part of a whole separate conversation on the fact that I think maneuvers grossly overestimate and are very optimistic about the ability to achieve breakthroughs against the well-prepared defense.

And this work consistently shows that to be a problem.

But on the Russian side, they clearly have learned to be adapted.

I don't agree with the analysts who basically said, this thing was a turkey shoot, the Russians learned nothing.

Actually, if you look at the four structure they were employing, if you look at what they were trying to do, if they were coordinating, it was looking a lot more like some of the operations they were trying to do in 2022, spring of 2022, compared to how poorly they fought in the winter of this year.

And I'm not saying that we're going to see that again.

But to me, it does say something that the Russian military is able to generate forces, get more equipment and try to conduct at least localized attacks of the scale.

And it shows that the thrust of the Ukrainian strategy to try to keep pressures correct, because if they take their pressure off the Russian military heading into the winter, if that attrition lets up, then we're going to see more of DF cuts, right?

And some other place, if they chose a location that wasn't as well-defendant fortified, maybe they might have been more successful.

So I was talking to a mutual friend of ours over the weekend.

And, you know, he made the point that a lot of people have made is it seems like the decision cycle for this administration, for the provision of certain arms and capabilities has been, you know, 90 to 120 days behind the need. I think that's no truer for cluster munitions, which, as we've discussed, could have been very useful in the shaping preparatory phase before this offensive. ATACOMs have finally been provided to Ukraine.

This is something that a lot of people have been wanting to see Ukraine get for a while. Tell us what they are, what you think about them, how they're being used and why they are or are not particularly important.

ATACOMs have come up time and time again in the conversation of things that should be provided Ukraine.

It looks like they have been provided the cluster munition variant of the ATACOM short-range ballistic missile.

It can be fired by Heimar's launchers.

It can be fired by the older M270 launchers that have been provided to Ukraine.

This variant of the missile carries a cluster munition warhead.

There's many subunits that cover an entire area and it has a range of maybe

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around 165 kilometers or 100 miles.

This is a shorter range version that's principally designed to destroy manpower equipment material out in the open, time sensitive targets.

So what ATACOMs can do a bit differently from, let's say, a cruise missile is the flight time for ATACOMs is much shorter because it's a ballistic missile, so it can hit a target within minutes, assuming that you actually have the cycle in place to be able to quickly identify targets that can move or redeploy and do all that and engage, which I'm not sure we do because I think the United States is key to a lot of the intelligence and targeting for Ukraine, so it probably has to flow through a number of hops before Ukraine is able to employ the ATACOM systems.

But on targets that are not time sensitive, and this was ironically discussed on a previous episode that we had, I suggest that one of the most obvious targets, of course, would be Russian helicopter forward operating bases in Burdansk and elsewhere in Luhansk, which are very well known, very well established with reverts and helicopters dispersed across them.

That's where a lot of these K-52s and MI-28s have been flying from and have been a big issue for Ukrainian forces.

And sure enough, we know that last night, it's clear that Ukraine has received the M-39 version of the ATACOMs, and the first target they hit were the Russian helicopter bases right off the bat.

And I don't know the damage they've inflicted, there's competing claims of how many helicopters might have destroyed, but probably the Russian military did not displace its forces.

I don't know that for a fact right now, but I just know it to be true based on the things I know about the Russian military, even though this was the most leaked and telegraphed transfer of capability that I'd seen in some time.

I honestly think that probably if we sent them the exact time and date and location of the first strike, they wouldn't have moved the helicopters.

Anyway, the Russian pattern has been to first take it on the chin and then begin adapting rather than taking anticipatory or preventive measures.

So likely Ukrainians were fairly successful, at least got some amount of Russian motor aviation.

The thing about ATACOMs that's complementary to the air-launched cruise missiles that Ukraine has, it's a useful capability.

But like everything else I tend to talk about, I don't think it's a wonder off and there's going to be a game changer for them.

Certainly not at this stage as well.

But it's useful.

It is useful.

And it might have been more useful had they had it, say, six months ago.

Almost definitely.

I mean, if you're, you know, often I always say that capabilities tend to have the most impact, as we're going to see this morning, when they're first

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introduced at scale, right?

Then your opponent begins adapting.

Mike, I know you've been interested to see all the stuff we've added to the War on the Rocks membership, War on the Rocks Platinum.

What do you think?

I mean, it looks pretty exciting to me.

I see Ankit Panda, who's also at Carnegie.

So we've been up at the same place together starting a great podcast.

I see a bunch of newsletters coming around.

I'm almost a little bit jealous looking from a standpoint of my own show, but excited to see that there's a whole bunch of new content.

Well, Russia contingencies going to remain.

It's not going anywhere, of course, but, you know, I'm excited about Ankit show too.

It could I persuade you to do a crossover episode?

Maybe you appear on thinking the unthinkable.

You can, you can actually be pretty interested in doing it.

Yeah, I think that'll be fun.

And then, of course, we got The Adversarial, which is a newsletter that features little bits of analysis by experts, but unsigned on Russia, China, North Korea, Jihadists, and Iran.

We got in brief, we got the Warcast.

We have a new newsletter called Rewind and Reconnoiter, where we take authors of older pieces on War on the Rocks and interview them again.

We got a lot of really exciting ones coming out on that related to Hamas and the war in Israel, but I'm excited.

I hope you're excited too.

I think the new content coming up was pretty great.

So be like Mike and head on over to warontherocks.com slash membership and sign up today.

And now back to Ryan and Mike's conversation.

I think this is one of the problems with the way that US policy has worked on this and it's reflected in the quote unquote discourse.

So a lot of people on social media are like, you know, since the beginning of war, they're like, give Ukraine everything and give it now.

There was the discussion with the MIGs in the early days of the war.

And then there's the discussion with the tanks and then the cluster munitions and now this and different missiles.

And sometimes it was actually really important for Ukraine to get these things earlier.

And I would say it's ATACOMS, I'd say that for artillery launch cluster munitions, MIGs in the early days of the war, I don't think would have been particularly useful.

But what the administration has done is they've just been so slow on everything across the board that I think it's really hurt Ukraine's ability

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to be more successful in this war.

And now we have this looming political issue that will compound that.

And, you know, Mike and I aren't experts on Congress and appropriations, but, you know, Jim Jordan, a speaker, if that's what happens, is not going to be good for US efforts to arm Ukraine.

And so all these slow decisions are now going to bite even more.

That's what I worry about.

Yeah, looking at the political situation here, I'm growing more concerned and a bit less optimistic than I was even as we discussed this with Aaron on the Russia contingency last week regarding weapon systems like ATACOMS.

Of course, it would make better sense to provide it at the beginning of the offensive or major operation than at the end.

And I've been saying that for a while as well.

I think part of the issue also is that these sort of capabilities by themselves, I see them as much more ordinary rather than extraordinary.

That's always been my belief, but the administration's decision-making cycle and their approach to them has made them appear extraordinary, right?

It's sort of frayed at them with this.

Well, enough ordinary capabilities, though, scale into something extraordinary.

I mean, the most, you know, the most important unit in this war is not particularly extraordinary.

It's the 155 artillery shell, but it's critically important, right?

So I see what you're saying.

There are no wonder weapons that like this provision will change the course of the war.

It's not like nukes at the closing days of the war against Japan.

But these do add up to important things.

Yeah, they aggregate.

And so the one noticing one of the puzzles was why was ATACOMS going to be a line that was held until it wasn't, right?

And the one that's being provided isn't the long range, the long range version of this missile system, but even a shorter range one.

I think that in general, I agree with you.

I just, I think looking out over the past, probably year and a half plus, that at first the administration approach may have been sort of a factor inhabited by the concerns of escalation management, but then down the line, it's these seem to have been case by case decisions.

And I myself don't know and can only wonder as to what the political decisions are that.

Whatever it is, we don't know what the actual process is beyond what's been reported in the press, but it's slow.

And I think my impression without any inside knowledge is that a lot of this stuff gets hung up at the White House presidential level, not at the working level, but that's just my opinion.

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Sure.

And just to add, we're still at least ahead of Germans who seem to be hung up in the debate with a very low bar.

The Taurus air launch cruise missile many months after the British and French have provided the storm shadow.

Don't get me started.

We're going to have a good episode on German defense and its role in Europe and Ukraine pretty soon.

How significant is it that Russia has had to turn to North Korea for munitions? A lot of people are reading different things into this.

What's your impression?

I thought it was probably going to be inevitable because we knew that the Russian military was suffering to some degree shell hunger and was trying to employ artillery conservatively after the winter offensive.

Their rate of fire might have been something around five to 10,000 shells per day of main type of artillery, fairly close to Ukraine's rate of fire overall over the past summer and fall.

The Russian military, those, of course, very heavily depend on artillery fire.

This war has been artillery war.

Yes, drones have been heavily involved.

Other capabilities have been heavily involved, but it has very much been driven by land-based fires.

So to me, Russia turning to North Korea, there was an overture that we knew about, I think last fall, but it was just literally by pre-Gosje, I think, to buy something along the lines of one train.

I can't remember the exact details of the story.

Yeah, Russia turning to North Korea is a very significant development because North Korea is pretty much one of the world's largest artillery army, if not the largest artillery army.

I don't quote me on that because I'm not a North Korea expert.

And it also has significant production capacity.

Russia has been purchasing from Iran.

It's been making investments in other countries to increase their artillery production capacities, planning to buy from them.

North Korea, it appears, has shipped a notable volume of artillery ammunition to Russia already.

And from what I know, from what I've read, there is more on the way.

And it is going to make a difference.

A lot of people see this and they're seeing it as evidence that Russia will inevitably lose.

It's like, oh, you have to turn to a country like North Korea for weapons.

Must suck to be you.

And I think that what you just pointed to is we should actually be reading the opposite into this.

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It's also sort of displays a lack of self-awareness as we're going all over the world for munitions.

Granted, we're not going to weird family dictatorships for weapons, but like each side and their backers are trying to find weapons wherever they can.

Yeah, point of order.

We turn to South Korea in order to find the ammo for the offensive, without which it is very difficult to see how this offensive would have even been prosecuted.

Yeah.

And of course, South Korea, North Korea are very different countries, but that's the point is that we're all trying to find as many munitions as we can and to say that, oh, this, this is a ratings on the wall for Russia, because they're having to turn North Korea.

Not at all.

It's ridiculous.

More to that point, Russian efforts to mobilize defense industrial production are starting to bear fruit.

They're certainly not producing sufficient anything relative to their needs in this war, but their production of artillery ammunition, of drones, of key systems like landsets, of air launch cruise missiles is increasing.

And it's going to increase further next year.

Russian artillery production is going up on top of what they are now able to buy in places like North Korea and Iran.

Yes, people may listen to this and say, well, North Korea and artillery ammo is going to be of lower quality.

Sure, but artillery ammunition is definitely one of those areas where quantity has a quality of its own, especially if you last year you fired something like eight million shells.

I'm sure the dud rate is more significant in the North Korean armament than ours, but you're right.

There's going to be a lot of them.

The other issue I would raise is that Russian military has been adjusting doctrine to try to reduce how much artillery they use, realizing that they don't have that ammunition, trying to use more precision guided shells like cross and pull would have you without going into the weeds.

The main point here is that next year actually is potentially a difficult year.

It's a good segue into European defense industrial production.

Let's talk about that.

European countries, I think this past March, had made an agreement to provide a million artillery shells for Ukraine about a year too late.

Absolutely.

And I've been, I've been kind of banging that drum for quite some time because whatever you may have cost us over not providing this or that in time, artillery ammunition and air defense ammunition are critical issues.

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There are two treadmills that we have to keep running on in order to sustain Ukraine's war.

So if you look going to next year, artillery ammunition and interceptors for air defense are going to be at the top of the list of that million they were planning to provide, it looked like they took about 250,000 out of inventory, which is the easy part.

That's what they had and they didn't have that much.

Right.

The hard part is what are they going to make?

So a lot of European defense industries like Rymethal had been putting on pretty lofty sounding targets that they think they might be able to meet by the end of next year, but those require caveats.

First, not all that's necessarily for Ukraine.

Right.

A bunch of that could be to capitalize European stocks and for other buyers.

Second, it's not clear that they can get there.

And third, those are their optimistic targets for the end of 2024, but any normal person listening to us right now is going to say, but tell me a bit more about the next 12 months, right?

Now, what the end of 2024 looks like?

What is, what is much of the coming next year is going to be like, and on top of that, you know, there's lies, damned lies and defense industry promises on what they're going to be able to deliver if you give them the money.

Right.

So there's always going to be issues with supply chain and other things you can expect to run into.

Bottom line, I think the United States, together with European countries, and the depick and cluster munitions stockpile, we activate the summer.

I think we're probably perfectly fine for sustaining Ukraine's war effort into next year, but the challenge lies resourcing another offensive.

Correct.

100%.

The challenge lies in attaining enough ammunition set aside to resource another offensive operation and in providing Ukraine any sort of decisive advantage in fires based on what I see coming out of Russia, especially if we add North Korean to the mix, that's not going to happen.

The advantages we provide will have to be qualitative and they will have to be asymmetric in some areas.

And it will require a functioning House of Representatives or at least one that's willing to keep appropriating money for this effort.

It will require money and it will require Europeans also very much to step up as well.

I think that they spent quite a bit of time while we were depleting our reserves of some of these munitions and capabilities and have gotten about the business of

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investing in their defense industry rather late.

And that just briefly takes to a second issue, which is ammunition for your defense.

Yeah, this winter we're going to see the Russian campaign resume targeting

Ukrainian energy infrastructure over the winter.

And that's going to be a critical issue, air defense.

Well, Russia has been stockpiling missiles and it's access to Iranian

drones, including the ones that is producing locally in Russia.

Those numbers have increased as well.

And they're probably going to take another run at Ukraine critical infrastructure.

In some respects, cities like Kiev are pretty well defended, but other areas

out like Odessa maybe are not.

We'll see what happens.

But on top of that, the issues that, well, artillery production is going to go

up in the West over time is just a question of time and money.

The air defense picture is more complex.

You see, outside of Russia, they don't really make air defense missiles

for us 300s, Buckham ones, Osakis and what have you, right?

So Ukraine is going to be increasingly more and more dependent on Western

air defense systems as far a few of those than the Soviet ones that it inherited.

And some of those, like the German, Irish tea, whatnot, the production

capacity is very low.

The munitions are expensive as you can predict.

Others like Patriot, actually the same story.

The munitions are very expensive and the production capacity is not high.

So there's an, this is an area where I might be actually a little bit more

worried looking out past this winter as to what things look like in 2024.

My big picture takeaway of all this is given US commitments to another part of

the world, I mean, Israel is going to take up a lot of political attention

and resources for the time being, increasing pressure to focus more on

China from the Republican party and lessening, diminishing, I would say,

gradually enthusiasm for unrestrained support of Ukraine.

The picture is not good long term for Ukraine.

And unless Europe and particularly Germany step up in a really big way,

instead of all the hand-ringing we see from Berlin about how they might

step up and they're going to do this maybe and that maybe, I mean, unless

Germany really changes the way it behaves as a geopolitical actor right now.

I just don't think things look that good for Ukraine achieving victory.

So I was just in Berlin and I came back last night and well, I said there wasn't

meant to be pessimistic, but I wanted to really shake folks out of complacency

and belief that Russia can't sustain the war, that Russian production isn't

doing well or that Russia won't have the money because Russia is likely to be

spending more on defense and national security next year than it ever has been

since the collapse of the Soviet Union.

It's spending has increased significantly.

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The output is going up.

I don't think that they're going to be in a place where they can achieve things like decisive victories.

Don't get me wrong.

I'm not super pessimistic on Ukraine's behalf and think that Russia is going to be able to.

You mean in terms of its ability to survive.

Yeah.

Yeah.

That part isn't keeping me up awake at night, but I am very concerned that this whole narrative of strategic defeat for Russia has made folks somewhat complacent and that there isn't a clear-eyed look at how difficult next year might be, right? And that there's a lot of issues that will have to be solved next year.

Some based on the experience and the learning that we can do from this recent offensive, but also not looking at Russian attacks of Devka and just sort of hand waving it away as some kind of turkey shoot that shows us the Russians have learned nothing.

The Russians come out on Devka before Ukraine's offensive is over.

It merits asking question.

What are the things we're going to see next year?

And maybe none of them will be successful, but nonetheless, you have to prepare.

Yeah.

As a military analyst, I always obviously tend to worst case things and prepare for the worst case scenarios intellectually rather than the best case.

But you have to consider these things.

Thanks for joining us, Mike.

Thanks for listening to this episode of the War on the Rocks podcast.

Check out our membership program.

We added a whole bunch of new stuff in there and we really would like you to join our tribe and become a member at warrentherocks.com slash membership.