

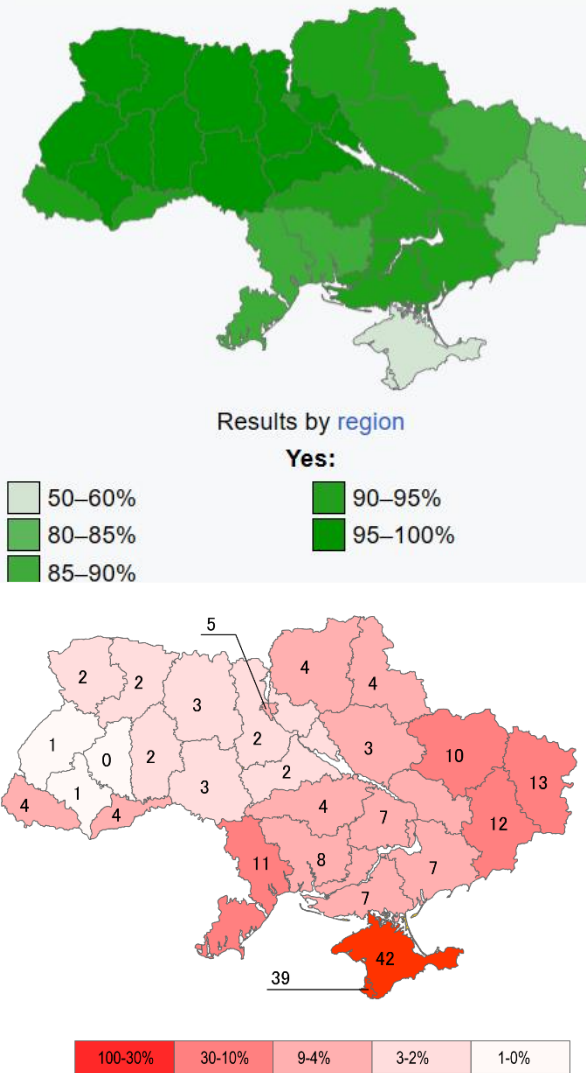
War in Ukraine - Russia's MASTER PLAN and why it is doomed #28



First published Jun 2023

Ukraine's Master Plan: Clear Objective

- Ukraine's objective is crystal clear: Expel the Russian occupiers from Ukraine territory dead or alive
- More specifically, UKR objective is to reestablish Ukrainian sovereignty as authorised by the 1991 Ukrainian independence referendum
- The referendum resulted in all Ukrainian administrative Oblasts voting in favour of independence with the voters asked "Do you support the Act of Declaration of Independence of Ukraine?"
- The national average voting in favour of independence was 90.32% with the lowest support seen in Crimea where 54.19% voted in favour of independence



Subdivision	Percentage voting for independence	
	Of votes cast ^[4]	Of electorate ^[19]
Crimean ASSR	54.19	37 ^[20]
Cherkasy Oblast	96.03	87
Chernihiv Oblast	93.74	85
Chernivtsi Oblast	92.78	81
Dnipropetrovsk Oblast	90.36	74
Donetsk Oblast	83.90	64
Ivano-Frankivsk Oblast	98.42	94
Kharkiv Oblast	86.33	65
Kherson Oblast	90.13	75
Khmelnytskyi Oblast	96.30	90
Kyiv Oblast	95.52	84
Kirovohrad Oblast	93.88	83
Luhansk Oblast	83.86	68
Lviv Oblast	97.46	93
Mykolayiv Oblast	89.45	75
Odesa Oblast	85.38	64
Poltava Oblast	94.93	87
Rivne Oblast	95.96	89
Sumy Oblast	92.61	82
Terнопil Oblast	98.67	96
Vinnitsia Oblast	95.43	87
Volyn Oblast	96.32	90
Zakarpattia Oblast	92.59	77
Zaporizhzhia Oblast	90.66	73
Zhytomyr Oblast	95.06	86
Kyiv City	92.87	75
Sevastopol City	57.07	36 ^[20]
National Total	90.32	76^[21]

Source/attribution:
https://en.wikipedia.org/wiki/1991_Ukrainian_independence_referendum



Russia's Master Plan: Unclear Objective

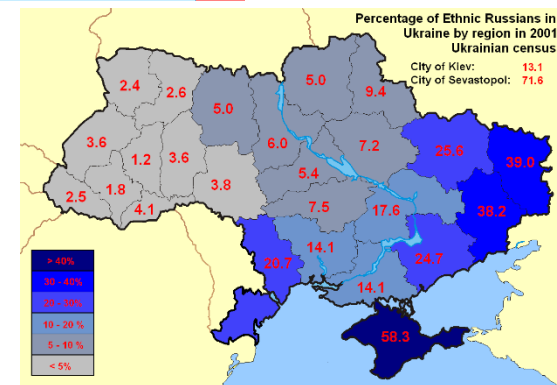
- Russia's Master Plan objective is unclear because
- 1) Russia's officially stated objective has changed over time and also because
- 2) Russia appears to have an unannounced objective that is far more ambitious about conquering land and people not only in Ukraine but also in Moldova, Georgia, Armenia, Belarus, Estonia, Latvia, Lithuania and possibly all remaining former members of the Soviet Republic
- Regarding Russia's official objective, first it was to denazify Ukraine despite Ukraine only having fringe elements of wannabe Nazi's just like any other country including Russia
- Also Zelensky, the President of Ukraine, is Jewish
- Lately Russia's officially stated objective has been the annexation of Ukraine Crimea, Donetsk, Kherson, Luhansk, and Zaporizhzhia Oblasts
- Crimea was annexed in 2014 and the other regions was annexed by Russia on 30 September 2022 despite Russia not even fully occupying these territories of Ukraine

Source/attribution:
https://en.wikipedia.org/wiki/Russian-occupied_territories_of_Ukraine



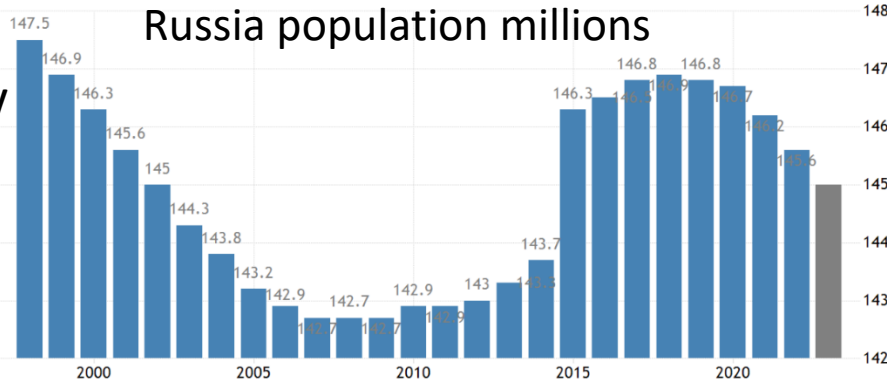
Source/attribution:
https://en.wikipedia.org/wiki/Russian_annexation_of_Donetsk,_Kherson,_Luhansk_and_Zaporizhzhia_oblasts

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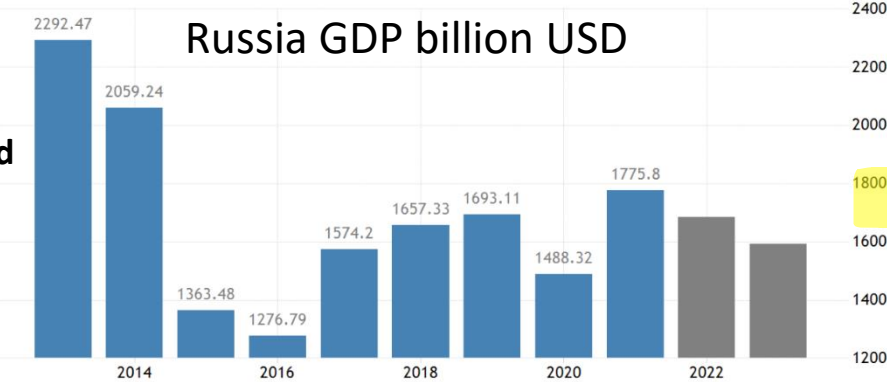


Why Russia want to expand? To stay relevant globally

- Why attack other countries?
- Russian leadership knows they have become less relevant globally for each year passing with population decline and shrinking GDP relative to other countries
- So Putin's "Master Plan" to fix this decline of Russian power is to use its "mighty military" to conquer land and people from its neighbouring countries
- Putin wants to be remembered as the great leader who expanded the Russian empire
- **Putin is not alone** in his ambition to expand Russia
- He is largely supported by the Russian establishment and also the Russian population
- 71% support current war in UKR and 91% supported the 2014 war to annex Ukrainian Crimea



Source/attribution: <https://tradingeconomics.com/russia/population>



Source/attribution: <https://tradingeconomics.com/russia/gdp>

- RUS ambition to be a powerful nation is fine
- But, in a civilized world the only legitimate way for a nation to be powerful is through internal growth of people and economy not through military annexation of other countries

Country	GDP	GDP YoY
United States	23315	1.60
China	17734	4.50
Euro Area	14563	1.00
Japan	4941	1.30
Germany	4260	-0.50
India	3176	6.10
United Kingdom	3131	0.20
France	2958	0.90
Italy	2108	1.90
Canada	1988	2.21
South Korea	1799	0.90
Russia	1776	-1.80
Brazil	1609	4.00
Australia	1553	2.30
Spain	1427	3.80
Mexico	1273	3.70
Indonesia	1186	5.03
Netherlands	1013	1.90
Saudi Arabia	834	3.80
Turkey	819	4.00

Source/attribution: <https://tradingeconomics.com/matrix>



Russia's Master Plan: Implementation

- Now that we know Russia's objective and motivation for expansion **what is Russia's plan to implement this expansion objective?**
 - I found two great newspaper articles that together shed light on Russia's operational plan
1. **One is from Forbes, 20 September 2022** describing how Russia currently is unable to declare a mass mobilization because they lack weapons and personnel to train a fully mobilized army of millions of soldiers
 - **On 21 of September 2022 Russia declared a limited mobilization of 300,000** men or about what Russia was able to equip and train with remaining stocks of weapons and personnel
 2. The other article is from **The Guardian, 28 March 2023** describing a dinner party at the Russian establishment where Kremlin spokesperson **Dmitry Peskov** gives a speech where he says that Russia's plan to win the war is a multi-year plan to scale up its military industry so they can equip and train a much bigger army



Note: Russians being mobilized for war in Ukraine



Note: Kremlin spokesperson Dmitry Peskov in conversation with Putin

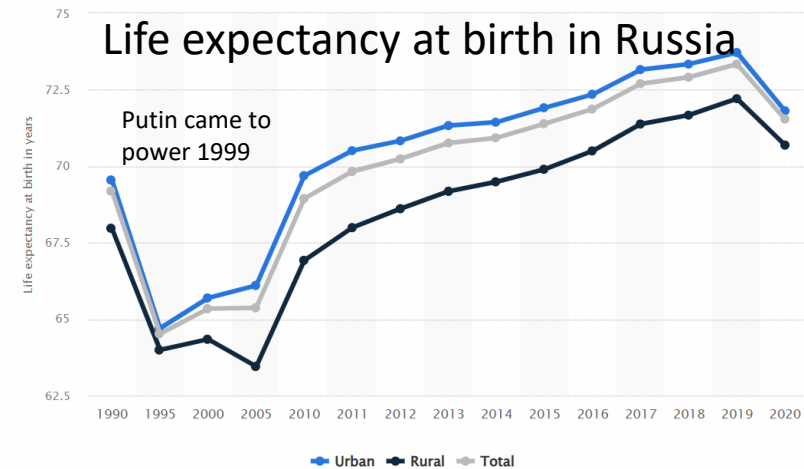


Russia's Real Master Plan: Why it is doomed

- **Russia's Real Master Plan in one paragraph:** To spend the next 5 years or so to 5X or so the military production and expand the Russian army from 1 million men to 5 million men and to use that army to reestablish as much of the Soviet Union as the military successes allow
 - **Everything I have learned and read about Russia in 2022 and 2023** makes me conclude the above is the real Master Plan and Russia is hell-bend on implementing it
 - **Is it any good:** Short answer is no, because it will lead to the same problems that caused the Soviet Union to collapse and dissolve on December 31, 1991
 - **The Soviet Union collapsed** because it spend all of its resources on sustaining an enormous military machine that sucked the life out of everything else so the society became ever more impoverished and antiquated compared to the rest of the world
1. **For Russia to 5X its military production and 5x its army** it will require Russia to reallocate about 8 million young people from industry creating economic wealth to non-productive industry (4M) & creating a big army (4M)
 2. **Moreover, Russia's life expectancy has now started to fall again** in 2020 the latest official data available



Source/attribution: <https://www.britannica.com/event/the-collapse-of-the-Soviet-Union/The-end-of-Soviet-communism>



Source/attribution: <https://www.statista.com/statistics/1090507/life-expectancy-at-birth-in-russia-by-area/>

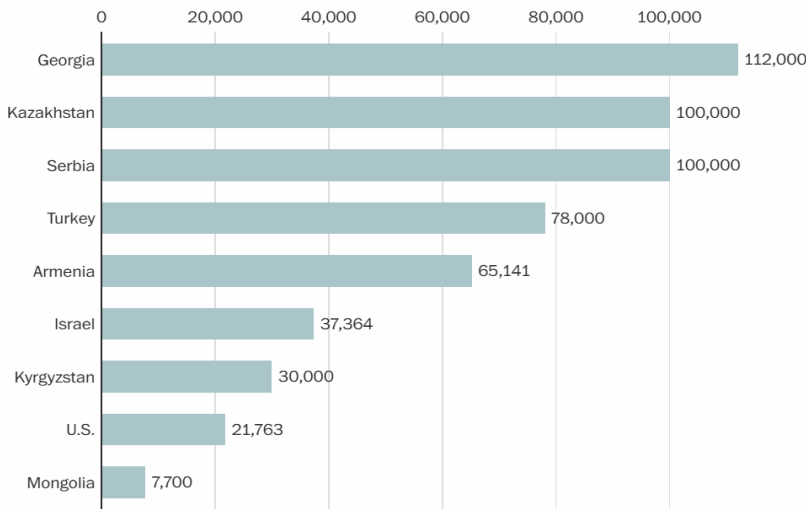


Russia's Master Plan 2: Why it is doomed

3. **Thirdly, Russia's fertility rate/birth per women is unsustainable low at 1.8 below the needed >2.1**
4. **Additionally, Russian net migration has almost certainly become negative** although official figures still say 0.621 per 1000 population for 2023. That number is certainly BS
 - The data below suggests over 500,000 Russians left Russia in 2022 alone
 - **The fact that young men in Russia can now be mobilized for war and face almost certain death or serious disability will cause net migration to become strongly negative**

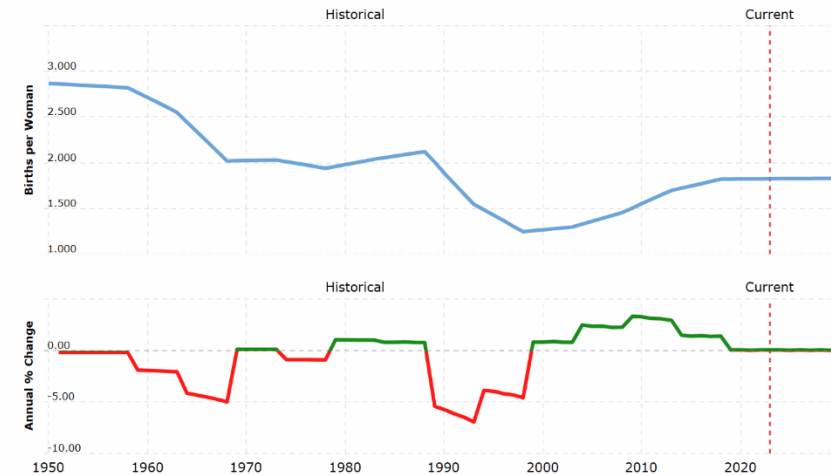
Where Russians emigrated following Feb. 24 invasion

Data for 2022



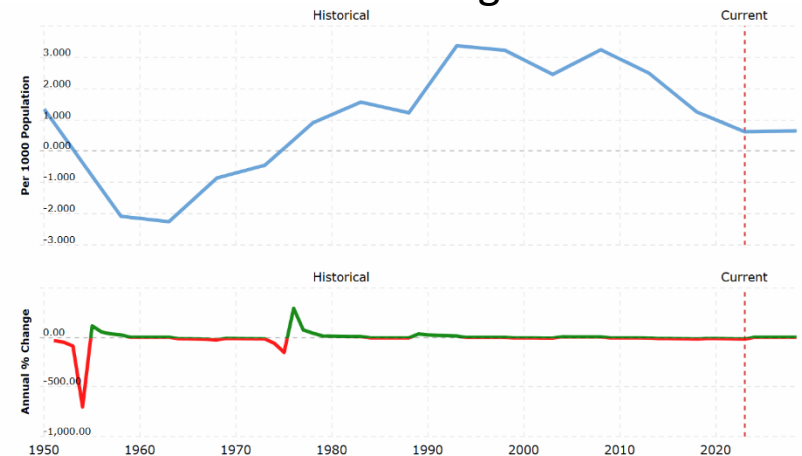
Source/attribution: <https://www.washingtonpost.com/world/2023/02/13/russia-diaspora-war-ukraine/>

Fertility Rate Russia: >2.1 is sustainable



Source/attribution: <https://www.macrotrends.net/countries/RUS/russia/fertility-rate>

Russian Net Migration



Source/attribution: <https://www.macrotrends.net/countries/RUS/russia/net-migration>



Russia's Master Plan 3: Why it is doomed

- Fifth reason why Russia's Master Plan is doomed is that Russia's kill rates are 2.9 in favour of Ukraine despite Ukraine currently having fewer and lesser quality weapons than Russia**
 - A kill rate of 2.9 in Ukraine's favour means Ukraine destroy or capture 2.9 times more equipment than Russia destroy or capture of Ukrainian equipment**
 - Another key observation is that Russia has irreversibly lost 436,000 people since war started**
 - NATO has recently begun supplying UKR with more and higher quality weapons like NATO tanks, fighting vehicles, long-range missiles and soon also NATO airplanes**
 - We should expect the killing rate to improve dramatically in UKR favor because of these weapons**
 - To conclude, Russian Master Plan will require 12.5M people to be removed from Russian economy**

People Russian Master Plan will drain from its economy

Assuming Master Plan is 5X military production and 5X army	Needed people in millions	Needed people in % of employed
Military production	4.00	5.46%
Extra for army mobilization	4.00	5.46%
Losses over 5 years assuming 0.5M yr	2.50	3.41%
Net migration over 5 years, 0.4M yr	2.00	2.73%
Total drain from productive part of RUS economy	12.50	17.05%
Number of employed persons in RUS apr 2023	73.30	100.00%

Sources: Follow link below video to download spreadsheet containing clickable sources

Losses Ukraine & Russia from Feb. 24, 2022 to Jun. 15, 2023

# Type of loss	Russian stock on Feb. 2022	Russian losses confirmed	Russian losses unconfirmed	Ukraine stock on Feb. 2022	Ukraine losses confirmed	Kill ratios RUS/UKR confirmed
1 Tanks	3,300	2,043	3,955	850	533	3.8
1.2 of which captured		544			139	3.9
2 Armored fighting vehicles		885			285	3.1
3 Infantry fighting vehicles		2,402			571	4.2
4 Armored personnel carriers		316			274	1.2
5 Other APCs (MRAPs)		43			86	0.5
6 Infantry mobility vehicles		191			322	0.6
7 Command and com vehicles		243			15	16.2
8 Total armored vehicles (2 to 7)	13,758	4,080	7,667		1,553	2.6
9 Engineering vehicles special equipm.		310	519		65	4.8
10 Anti-tank vehicles		38			21	1.8
11 Artillery support vehicles		103			23	4.5
12 Towed artillery		232			127	1.8
13 Self propelled artillery		415			167	2.5
14 Multiple rocket launchers		208			45	4.6
15 Total artillery (10 to 14)	5,689	996	3,793		383	2.6
16 Anti-aircraft guns		17			4	4.3
17 Self propelled anti-aircraft guns		24			6	4.0
18 Surface-To-Air Missile Systems		117			113	1.0
19 Radars		32			63	0.5
20 Jammers and deception systems		41			3	13.7
21 Total anti-aircraft (16 to 20)		231	364		189	1.2
22 Aircraft	1,379	82	314		68	1.2
23 Helicopters	961	90	301		31	2.9
24 Combat Unmanned Aerial Vehicles		10			23	0.4
25 Reconnaissance UAVs		236			121	2.0
26 Total UAVs (24 to 25)		246	3,333		144	1.7
27 Naval ships	519	12	18		26	0.5
28 Trucks, Vehicles and Jeeps		2,570	6,506		653	3.9
29 Total equipment losses		10,660	26,770		3,645	2.9
30 of which destroyed		7,059			2,383	3.0
31 of which damaged		372			232	1.6
32 of which abandoned		405			126	3.2
33 of which captured		2,822			906	3.1
34 Killed personnel			217,910		74,511	2.9
35 Wounded personnel 3*killed			653,730		223,532	2.9
36 Total killed or wounded (34+35)			871,640		298,042	2.9
37 Irreversibly lost (0.5**36")			435,820		149,021	2.9

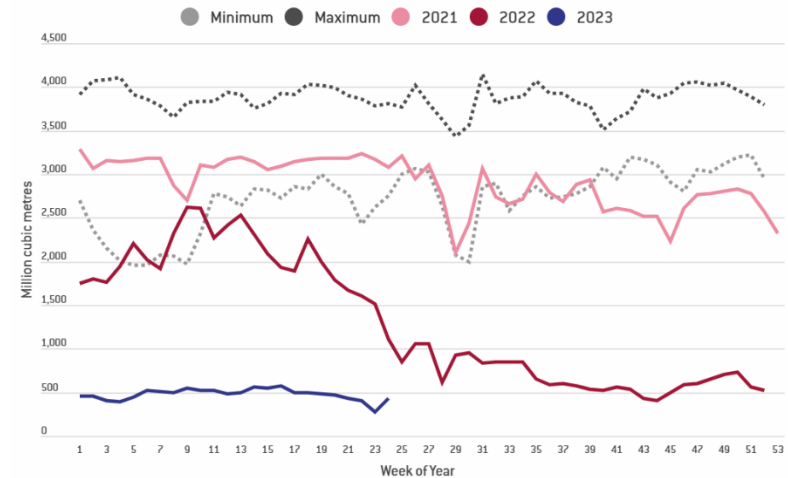
Sources: Follow link below video to download spreadsheet containing clickable sources (main data ORYX)



Russia's Master Plan 4: Why it is doomed

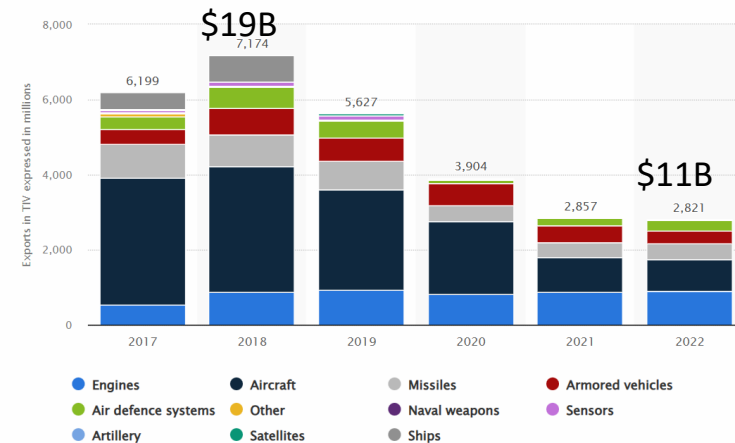
6. Another reason Russia's Master Plan is doomed is that **Russia's export of oil, gas and weapons** has catastrophically diminished since the start of the War in February 2022
- **Russian gas export to EU27 has dropped** from 3000 million cubic meters/Week to less than 500 and next year only Hungary is expected to still buy Russian gas at 137M/Week
 - **Western countries no longer buy Russian oil** so that Russia has to sell it to China and India at a huge discount of 10 to 20 USD below the world market price per barrel of oil and also paying for much higher transportation cost
 - **Russian weapons has proven to be inferior in Ukraine** so demand will go further down and also Russia need to use these weapons for war so cannot be exported going forward
7. **Economic sanctions:** Russia is already facing economic sanctions that over time will further help to cripple the Russia economy and hasten its collapse just like the Soviet Union did

Weekly Russian gas export to EU27



Source/attribution: <https://www.bruegel.org/dataset/european-natural-gas-imports>

Arms exports from Russia, by weapon



Source/attribution: <https://www.statista.com/statistics/1296245/russia-arms-exports-by-weapon/>

Russian export and GDP in billion USD

	USD	Year	USD est	Year
Arms export	\$11.00	2022	\$4.00	2023
Oil export 55 USD/barrel in 2024 8.2M daily	\$178.90	2021	\$164.84	2023
Gas export at 30EUR/MWh in 2024 500Mm3/Wk	\$61.80	2021	\$16.48	2023
Other Russian export	\$238.10	2021	\$180.00	2023
Total russian export	\$489.80	2021	\$365.33	2023
Total GDP Russia	\$1,775.80	2021	?	2023

Sources: Follow link below video to download spreadsheet containing clickable sources



Sources/attribution for previous slides

- GoTo www.hmexperience.dk look up video #24 and download excel spreadsheet with data and clickable links to sources
- Slide 2-1991 Ukrainian independence referendum: https://en.wikipedia.org/wiki/1991_Ukrainian_independence_referendum
- Slide 3-Russian official declaration of annexation 2014 and 2022 of parts of Ukraine: https://en.wikipedia.org/wiki/Russian_annexation_of_Donetsk,_Kherson,_Luhansk_and_Zaporizhzhia_oblasts and https://en.wikipedia.org/wiki/Russian-occupied_territories_of_Ukraine
- Slide 3: War in Donbas: [https://en.wikipedia.org/wiki/War_in_Donbas_\(2014%E2%80%932022\)](https://en.wikipedia.org/wiki/War_in_Donbas_(2014%E2%80%932022))
- Slide 3: History of Chimea, Ukraine: [https://en.wikipedia.org/wiki/History_of_Crimea#Russian_Civil_War_\(1917%E2%80%931922\)](https://en.wikipedia.org/wiki/History_of_Crimea#Russian_Civil_War_(1917%E2%80%931922))
- Slide 4-Russians in general support expansion through war: “71 percent support for the “decision to conduct a special military operation.” That is compared with 75 percent of Russians who supported Moscow’s military action in Chechnya in 1999 and 91 percent for Putin’s annexation of Crimea in 2014.”: <https://www.washingtonpost.com/world/2022/03/08/russia-public-opinion-ukraine-invasion/>
- Slide 4-Article explaining Putin’s obsession with the decline of Russian population and the real motivation for Russia’s lust for annexation through war: <https://www.france24.com/en/europe/20220524-population-decline-in-russia-putin-has-no-other-choice-but-to-win-in-ukraine>
- Slide 5- Article from Forbes basically saying that currently Russia is unable to declare a general mobilization because they do not have the military gear and organization to arm or train millions of Russians for an expanded army: <https://www.forbes.com/sites/davidaxe/2022/09/20/russia-mulls-mass-mobilization-it-wont-save-its-army-in-ukraine/?sh=4515c9ff50e7>
- Slide 5-Russia's mobilization of 300,000 men in September 2022: https://en.wikipedia.org/wiki/2022_Russian_mobilization#External_links
- Slide 5-Article from The Guardian describing that Russia’s plan for winning the war is to essentially recreate the big red army from the cold war by boosting military production over several years: <https://www.theguardian.com/world/2023/mar/28/putin-prepares-russia-for-forever-war-with-west-as-ukraine-invasion-stalls?ref=kyivindependent.com>
- Slide 6: End of Soviet Union in 1991: <https://www.britannica.com/event/the-collapse-of-the-Soviet-Union>
- Slide 8: Main source for confirmed Russian material losses: <https://www.oryxspioenkop.com/2022/02/attack-on-europe-documenting-equipment.html>
- Slide 8: Main source for confirmed Ukrainian material losses: <https://www.oryxspioenkop.com/2022/02/attack-on-europe-documenting-ukrainian.html>
- Slide 8: Other key source for unconfirmed Russian losses: <https://www.minusrus.com/en>
- Slide 8: 405,000 dead US soldiers for all of WW2: https://en.wikipedia.org/wiki/United_States_military_casualties_of_war
- Slide 8: 14 million Russians died in WW2 both soldiers and civilians: https://en.wikipedia.org/wiki/World_War_II_casualties#Soviet_Union
- Hungary gas imports from Russia at 137 million cubic meters per week slide 5 PP see my video #16 at HMexperience: <https://youtu.be/TC1eCOX0pxc>



Sources/attribution for previous slides

- Slide 9-Russia in 2018 exported 19 billion USD worth of weapons: https://en.wikipedia.org/wiki/Defense_industry_of_Russia#Exports
- Slide 9: USD 11 billion in Russian arms export in 2022: <https://www.defensenews.com/global/europe/2022/08/29/russia-forecasts-drop-in-arms-export-revenue/>

