

A European assessment of the Russia-Ukraine war

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NatSec Daily has heard lots of assessments on Russia's invasion of Ukraine, but none quite like the one a European official provided us this morning. We're going to detail our main takeaways, but it's worth keeping in mind that these are only one official's views and that this person would only speak on the condition of anonymity per ground rules established by this official's government.

Putin-Shoigu relationship suffering: Russian President **VLADIMIR PUTIN**'s relationship with Defense Minister **SERGEI SHOIGU** clearly isn't as close as it was during the height of the Syria War. Russia's intelligence officials are closest to Putin so far, but they aren't necessarily the right people to brief the autocrat on military strategy and tactics. "We see much less of the professional military going to brief Putin directly," the official said.

Russia wants Ukraine's southern coast: Russia wants to take much or all of Ukraine's southern coast, stretching from the Donbas all the way to the breakaway Moldovan region of Transnistria. The reason for going all-out on Mariupol is to make it easier for troops in the east to join up with those coming from ships and then target Odesa. That also explains why the Ukrainians are putting in an immense effort to hold Mariupol and why the U.S. could be considering sending anti-ship missiles to Kyiv.

'Look less awful': The official believes Putin has multiple objectives as peace talks between Ukraine and Russia proceed. "Part of it's to buy time and make him look less awful in the eyes of the world," but the other part is to put him in a position to accept a Ukrainian offer he actually likes. It's classic Putin opportunism, the official insisted.

Long-term effort: The official indicated that weapons will continue to flow into Ukraine as long as Ukrainians continue to put up a good fight. That will be costly, of course, but there is resolve among transatlantic allies to provide Ukraine with the equipment it needs to hold Russia at bay.

No U.S. endgame — yet: The shift in Russian military strategy has led to a rethink on the war within President **JOE BIDEN**'s administration. "It doesn't have an endgame yet," the official said, saying the administration is waiting to see if Russia sticks to siege tactics throughout

Ukraine or seeks to focus on one main area of battle in the east. It's also looking to see how the negotiations progress and if the U.S. should put its weight behind certain proposals.

War in Ukraine:

— Since the war began on Feb. 24, Russia has lost around 17,500 personnel, 614 tanks, 1,735 armored combat vehicles, 311 artillery systems, 96 multiple-launch rocket systems, 135 warplanes, 131 helicopters, seven ships and 83 drones. (Ukrainian Ministry of Defense)

— "The enemy is taking measures to regroup and form a group of Russian Federation armed forces in order to infiltrate the Eastern operating zone. The transfer of some of the enemy's military and equipment from the territory of the Republic of Belarus to the territory of the Russian Federation by rail transport was recorded." (Ukrainian Ministry of Defense)

— "Despite Russian statements indicating an intended reduction of military activity around Chernihiv, significant Russian shelling and missile strikes have continued. Russian forces continue to hold positions to the east and west of Kyiv despite the withdrawal of a limited number of units. Heavy fighting will likely take place in the suburbs of the city in coming days. Heavy fighting continues in Mariupol, a key objective of Russian forces, however Ukrainian forces remain in control of the centre of the city." (U.K. Ministry of Defence)

— Russia continues to hit Kyiv, Kharkiv, Chernihiv and Mariupol with airstrikes despite public signaling of deescalation. (U.S. Department of Defense)

— All of the \$350 million in U.S. weapons shipments to Ukraine pledged on March 14 has arrived, with another \$800 million set to arrive within the next two weeks. (U.S. Department of Defense)

Global response:

— **U.K.:** Britain sanctioned 14 more Russian entities and people, including propaganda outlets RT and Sputnik.

— **France:** France's military intelligence chief lost his job after assessing Russia wouldn't invade Ukraine, while other countries like the U.S. rightly concluded otherwise.

Headlines:

— **The New York Times:** "A Nation of Spy-Catchers: Fear of Saboteurs Has Ukrainians on Edge"

— **Time:** "Inside the Historic Mission to Provide Aid and Arms to Ukraine"

— **The Washington Post:** "Voices From the Siege of Mariupol"

BIDEN TO TAP OIL RESERVES: Biden will order the release of 1 million barrels of oil per day from the nation's strategic reserves and urge Congress to press the oil industry to increase drilling on federal lands in bid to tame high gasoline prices, report our own ZACK COLMAN and BEN LEFEBVRE.

In a background call with reporters, a senior administration official said oil companies “need to be stepping up,” adding: “There is nothing standing in their way.” The announcement is the latest attempt by the White House and Democrats to temper the volatile oil markets that drove gasoline prices to all-time highs in the weeks since Russia launched its invasion.

Although the U.S. tapped the Strategic Petroleum Reserve twice before with limited effectiveness, this new effort will be a sustained release for six months, putting as much as 180 million barrels onto the market. The addition of 1 million barrels per day represents an increase in U.S. supply of 8.5 percent.

FIRST IN NATSEC DAILY — SENATORS URGE ‘IMMEDIATE ACTION’ ON GIRLS SCHOOLS IN AFG: A bipartisan group of 21 female senators wrote to Biden asking him to take “immediate action” in response to the Taliban barring girls from attending secondary school.

“Since the Taliban’s overthrow of the legitimate government of Afghanistan in August 2021, Afghanistan’s women and girls have suffered. Women have been banned from most jobs, are required to be accompanied by a male relative and are restricted in where they can travel. When women protest this treatment, they are arrested, beaten and disappeared,” wrote the lawmakers, led by Sen. **JEANNE SHAHEEN** (D-N.H.).

“[T]here must be clear consequences for the Taliban’s disregard of the rights of women and girls and the will of the Afghan people. We welcome your decision to suspend engagements with the Taliban over the reversal of the Taliban’s promise to allow Afghan girls to attend secondary school. We urge you to use the tools at your disposal—including reinstating travel bans under the United Nations Security Council sanctions regime—to clearly convey to the Taliban that anything short of full education for girls and women is unacceptable to the United States, our allies and the Afghan people,” they continued.

The Taliban promised it wouldn’t revert to its medieval form of governance once the group reassumed power following America’s military withdrawal from Afghanistan. The cancellation of secondary school instruction for girls is a broken promise, one that some fear portends even more horrors to come for Afghanistan’s women.

PUTIN IS ‘MISGUIDED’: Sir **JEREMY FLEMING**, director of Britain’s intelligence agency GCHQ, made some astounding remarks about Russia’s invasion of Ukraine today at the Australian National University.

“[I]t increasingly looks like Putin has massively misjudged the situation. It’s clear he misjudged the resistance of the Ukrainian people. He underestimated the strength of the coalition his actions would galvanise. He under-played the economic consequences of the sanctions regime. He over-estimated the abilities of his military to secure a rapid victory. We’ve seen Russian soldiers — short of weapons and morale — refusing to carry out orders, sabotaging their own equipment and even accidentally shooting down their own aircraft,” he said.

He also said “Putin’s advisers are afraid to tell him the truth,” echoing what U.S. officials have been telling reporters in recent days.

It's as bleak a picture as the British intelligence boss could've painted, showing that things really are that bad for Russian forces in Ukraine. It helps explain why Moscow may have given up on its maximalist aims and instead shifted its focus to conquering eastern Ukraine.

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FLASHPOINTS

BURNS GETS COVID: CIA Director **WILLIAM BURNS** has tested positive for Covid-19, the agency announced today. Burns is "fully vaccinated and boosted" against the virus and has experienced "mild symptoms," the CIA [said in a news release](#). He will "continue to perform his duties" from home and "plans to return to the office after isolating for five days and testing negative."

Burns most recently saw Biden in a socially distanced meeting Wednesday morning, during which Burns was wearing an N-95 mask, according to the CIA. "Their interaction is not considered close contact as defined by CDC guidance, and Director Burns is sharing the news of his positive test out of an abundance of transparency," the CIA said.

Burns is the latest high-ranking administration official to test positive for Covid-19 in recent days. White House press secretary **JEN PSAKI** tested positive last week, and her principal deputy **KARINE JEAN-PIERRE** tested positive on Sunday.

RUBLE REBOUNDS: Barely a month after a raft of sanctions sent Russia's currency crashing, the ruble has staged a dramatic recovery, reports [our own KATE DAVIDSON](#). The comeback is partly due to a surge in oil and gas prices — commodities that were explicitly carved out of the initial sanctions — that has boosted Russia's energy revenue.

Some current and former Treasury officials, foreign exchange traders and sanctions experts say the ruble's rebound doesn't necessarily mean the West's economic weapons are losing their

punch. They argue the resurgence primarily reflects the extraordinary steps Russia's central bank has taken to stop the currency's freefall.

Still, the ruble's rise puts new pressure on the U.S. and its allies to deploy even tougher measures to undercut Russia's ability to finance its invasion — through further cutting off Russian energy exports or escalating existing sanctions.

KEYSTROKES

TREASURY TARGETS RUSSIAN TECH: The Biden administration announced new sanctions today aimed at major Russian technology companies and sanctions-evasion networks, and expanded its ability to level penalties on the aerospace, marine and electronics sectors, [Davidson also reported](#).

The sanctions, which follow penalties on Russia's defense industry last week, are part of a broader administration effort to restrict the country's access to resources it needs to supply and finance its invasion of Ukraine, the Treasury Department said.

Among the sanctioned firms is Moscow-based OOO Serniya Engineering, which the Treasury said is at the center of an illicit network operating under the direction of Russia's intelligence service to help evade sanctions. The company worked with various front businesses across multiple countries, including the U.K. and Spain, to procure critical Western technology for Russia's defense sector, the Treasury said.

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THE COMPLEX

'IMMINENT' STINGER AND JAVELIN REPLACEMENTS: Per [our own CONNOR O'BRIEN](#) (for Pros!), a plan to begin replenishing U.S. stocks of Javelin and Stinger missiles sent to Ukraine will soon be sent to Congress, the Army's top acquisition official told lawmakers.

DOUG BUSH, the Army's assistant secretary for acquisition, logistics and technology, told the House Armed Services' Tactical Air and Land Forces panel that several notifications will be sent to Congress to tap into [\\$3.5 billion earmarked for the Pentagon](#) to replenish its inventories, including missiles and ammunition.

"We already have that money. Congress will very soon get the first of several responses showing how we intend to use that funding," Bush said. "It'll be specifically to Stinger and Javelin. So that is imminent. You'll see the plan to address that near-term thing."

AND SHIPS, AND SO THE BALANCE SHIFTS: Our friends at [Morning Defense](#) (for Pros!) reported on Navy Secretary **CARLOS DEL TORO**'s rebuke of critics who note China has more ships than America.

China is "probably not that great at building ships, but they build them in great numbers," he told an online forum sponsored by The Hill. "And there's a marked difference, as well, to the quality of our ships and the capabilities that we have [which] significantly outpace the quality and the capabilities that they bring to bear."

"That's more important than the comparison of how many ships we have in each other's navies," he added. "It's really not just about the ships. It's about capacity, it's about capability and the combined lethality that it brings."

The fiscal 2023 budget released this week would decommission 24 ships, further retreating from its goal of a 355-ship fleet.

ON THE HILL

CONGRESS CAN'T STOP JCPOA REENTRY: Republicans and a handful of Democrats may oppose America's return to the Iran nuclear deal, but there's very little the Senate can do to stop it from happening, our own ANDREW DESIDERIO reported.

"A disapproval resolution in the Senate would require 60 votes; even if that hurdle is cleared, opponents of the new deal would not be able to reach the two-thirds threshold required to override a presidential veto," he wrote.

Here's why: The Iran Nuclear Agreement Review Act — often shorthanded as INARA — will likely be triggered if the Biden administration completes a deal. It will focus attention on some of the same lawmakers who had an impact on the original pact, in addition to the new crop of senators who have to consider the new agreement in the context of their reelection.

The INARA gives Congress the ability to block any nuclear agreement with Iran through a resolution of disapproval. Such a vote would put immense pressure on Democrats looking to show some independence from Biden foreign policy decisions that have faced significant blowback. But opponents of the new agreement would need to recruit at least 10 Democrats to support a disapproval resolution — an unlikely prospect, and one that nuclear-deal advocates see as an easy political choice for vulnerable senators.

That explains why Sen. **BEN CARDIN** (D-Md.), who opposed the deal in 2015, told Desiderio, "I think at the end of the day the president will get his way."

BROADSIDES

'DISQUALIFYING': Rep. **ADAM KINZINGER** (R-Ill.), the outgoing lawmaker who is one of the few Republicans criticizing former President **DONALD TRUMP**'s behavior, bashed his choice to ask Putin to release information on Biden's family.

"No former President should ever ask an evil man like Putin for a favor ... like Trump did just yesterday," Kinzinger tweeted Wednesday evening. "This is absolutely undermining the national security of this country and should be disqualifying for any re-election. @GOPLLeader must address this, as must every Republican."

Trump’s comment was reminiscent of his infamous July 2016 request of Russia to release a tranche of HILLARY CLINTON’s emails. Top Republicans have remained silent since Trump asked Moscow again for help against his political opponents.

TRANSITIONS

— **DAVID NORQUIST**, who previously served as deputy Defense secretary in the Trump administration, has been announced as the next president and CEO of the National Defense Industrial Association, effective May 1. He replaces **HERBERT “HAWK” CARLISLE**, who announced his resignation earlier this month amid a clash with NDIA’s board over the direction of the trade group, per our own LEE HUDSON (for Pros!).

— **JOHN SMITH** and **ANDREA DELISI** are part of a team of attorneys from law firm Morrison & Foerster that Ukrainian President **VOLODYMYR ZELENSKYY** has enlisted to advise his office on sanctions regimes and engaging with the federal government, per our own CAITLIN OPRYSKO. Smith is a former director of the Treasury Department’s Office of Foreign Assets Control, and Delisi worked in OFAC until last year. **NATHANAEL KURCAB**, **REILEY JO PORTER** and **SONJA NICOLE SWANBECK** also will work on the account.

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WHAT TO READ

— **ANNE APPLEBAUM**, *The Atlantic*: “There Is No Liberal World Order”

— **CHOE SANG-HUN**, *The New York Times*: “North Korean ICBM Launch May Have Been Fake. It’s Still Important.”

— **EMILY SCHULTHEIS**, *POLITICO Magazine*: “Will Putin’s War Hurt His Best Friend in Europe?”

TOMORROW TODAY

— **The Atlantic Council, 8 a.m.**: “How to End Russia’s War in Ukraine — with **PHILIP BREEDLOVE**, **MELINDA HARING**, **JOHN HERBST**, **ILLIA PONOMARENKO** and **OLGA TOKARIUK**”

— **The Middle East Institute, 9 a.m.**: “Russia’s Invasion of Ukraine and Implications for Black Sea Security — with **PHILIP BREEDLOVE**, **IULIA JOJA**, **GONUL TOL** and **MAMUKA TSERETELI**”

— **The Center for a New American Security, 10 a.m.**: “Assessing the FY 2023 Defense Budget Request — with **FREDERICO BARTELS**, **MACKENZIE EAGLEN**, **TODD HARRISON**, **STACIE PETTYJOHN** and **BECCA WASSER**”

— **House Armed Services Committee, 10 a.m.:** “Subcommittee Hearing: FY23 Hearing to Review Department of Defense Strategy, Policy, and Programs for Countering Weapons of Mass Destruction — with **COLLIN PATRICK GREEN, JOHN PLUMB, DEBORAH G. ROSENBLUM** and **RHYS M. WILLIAMS**”

— **The Atlantic Council, 10:30 a.m.:** “Protecting the Global Marine Transportation System Against Cyber Threats — with **KAREN ANDREWS, KURT JOHN, FREDERICK KEMPE, ALEJANDRO MAYORKAS** and **DILAN YEŞILGÖZ-ZEGERIUS**”

— **The Cato Institute, 12 p.m.:** “Reducing Risk From Arms Sales — with **JEFF ABRAMSON, JORDAN COHEN, ERIC GOMEZ** and **SARA JACOBS**”