

Key points

1. Delayed or insufficient Western aid is often blamed for Ukraine's lack of success on the battlefield. The truth is more complicated. There is no aid "silver bullet" for what ails Ukraine's war effort. More aid alone is unlikely to make a decisive difference in the outcome of the war, especially if Ukraine's structural disadvantages and strategic deficiencies remain unaddressed.
2. More aid is unlikely to fundamentally change the conflict because Ukraine lacks the manpower necessary to use it to generate enough new combat power to retake lost territory. Moreover, the West does not currently possess the industrial capacity needed to fulsomely sustain an indefinite Ukrainian war effort.
3. Russian adaptability and battlefield innovation have successfully blunted the effectiveness of several Western weapon systems. And Ukrainian doctrine and tactics remain suboptimal even in the third year of the war, meaning Kyiv has failed to employ the aid it does receive with maximal effectiveness.
4. Neither Washington nor Kyiv has articulated a clear theory of victory for Ukraine. Western aid was always a stopgap to buy Ukraine time, not a regime-change project to bring about the dissolution of the Russian state.
5. Instead of continuing to placate maximalist fantasies of total victory, the U.S. should advocate for a shift to a defensive strategy and openness to a negotiated settlement that ends the war, such that a sovereign and independent Ukrainian state can be preserved in the face of fighting to collapse.

Introduction

The two and a half years of war since Russia's invasion of Ukraine have produced no decisive result. After thwarting Russia's initial advances, Ukraine's hopes of regaining all of its stolen territory by military force have stalled—despite a flood of Western aid. Since the failure of Ukraine's summer counteroffensive in 2023—and after little movement along the frontlines over the past year—Russian forces have started to make incremental advances. In the spring of 2024, they consolidated moderate gains around Kharkiv—Ukraine's second largest city—in what could be a preview of Moscow's broader plans to go on a summer offensive. As the Russians moved forward quickly in May, Ukrainian defensive fieldworks in Kharkiv remained unbuilt or deficient amid allegations of corruption.¹

Confronted with far less Ukrainian progress than they'd hoped for, Washington has tended to blame itself rather than ask deeper questions. Many analysts see belated or insufficient military aid to Ukraine as the main cause of Moscow's gains and Kyiv's failures, regardless of the underlying facts. Ukraine, it is said, is losing not because of its own limitations or errors, but the irresolution of its backers. But faster or larger aid packages wouldn't have made the decisive difference many presume, either then or now.

Instead, Ukraine continues to falter on the battlefield for four main reasons: an endemic manpower shortage, an inability to generate offensive combat power, diminishing returns on a litany of supposed "game-changing" Western weapons, and poor tactics.

More military aid will do little to fix any of these problems.

Overlooking these deficiencies gives Ukraine false hope and deforms U.S. policy. Last summer, for example, Ukraine was well-funded and armed with new Western equipment.² Many experts confidently assessed that, as composed—even without F-16s or other new aid—"Kyiv's forces [could] easily break the Russian-occupied land bridge" to Crimea within a few months.³ More skeptical voices, including those within the U.S. government who

thought Kyiv should have pushed for a settlement before the offensive further undermined their position, were drowned out.⁴

In just the first two weeks of the counteroffensive, Ukraine lost nearly 20 percent of the military equipment it committed to the fight.⁵ By the end of the summer, Russia controlled about 200 more square miles of Ukraine than it had at the beginning of the year.⁶

Rather than blame well-documented Ukrainian shortcomings, Washington refused to scrutinize the feasibility of Kyiv's war aims.⁷ It now finds itself at risk of committing the same error again, as many pundits reject negotiations outright while others warn against pushing peace talks before Ukraine can use renewed aid to get on the front foot.⁸

But the idea that renewed aid can get Ukraine on the front foot is a fallacy, as not all of it will translate into weaponry immediately, and Ukraine is expected to desperately need another major aid package in just eight months,⁹ underscoring the unsustainable nature of the problem.

Roughly \$26 billion of President Biden's April aid package went towards direct provisioning of military equipment for Ukraine, whether by replenishing Presidential Drawdown Authority (PDA) funds, foreign military financing, or other means.¹⁰ Artillery shells, air defense interceptors, long-range missiles, and anti-tank weapons from this package have already been delivered. Another \$17 billion was set aside to fund the Ukraine Security Assistance Initiative, but arms purchased by the U.S. and contracts negotiated directly between Ukraine and American defense firms via the program can take years to materialize. This will not influence the fighting immediately. In addition, the Biden administration announced two new PDA packages in May, but both were significantly smaller than average and provided less varied equipment.¹¹

Obsessing over aid as a panacea while ignoring the structural and strategic issues facing Ukraine is a recipe for disaster that serves neither Kyiv's nor Washington's best interests.

No country for old manpower: Ukraine's dilemma

Aid is only helpful if there are sufficient numbers of trained soldiers to make use of it.

Ukraine faces a manpower shortage that may ultimately result in Kyiv lacking the troops necessary to maintain an active defense, let alone reclaiming occupied territory. Only additional mobilization efforts—which are themselves resource-intensive, can trigger social unrest, and often face political pushback—can remedy the fact that the average Ukrainian soldier on the front is now 43 years old.¹²

Recognizing that the current situation is unsustainable, the Ukrainian Rada recently approved new laws to lower the age of draft eligibility for men from 27 to 25, eliminate exemptions, and expand efforts to repatriate the 860,000 Ukrainian men estimated to have fled the country in 2022.¹³ But according to the Ukrainian government, this effort is expected to add just 50,000 new troops to the military. Russia, by comparison, is recruiting a staggering 30,000 new soldiers every month by raising military salaries and expanding conscription.¹⁴

For Ukraine to even have a chance at staying in the fight, it needs exactly what former commander-in-chief Valeriy Zaluzhnyi asked for last February: 500,000 new troops.¹⁵ Hundreds of thousands of fresh soldiers would allow Ukraine to generate entirely new combat divisions, more consistently rotate troops from the front to improve morale and decrease fatigue, expand training efforts, and increase the size of its operational reserve. Notably, clashes between Zaluzhnyi and Ukrainian President Volodymyr Zelenskyy over this very issue prefigured Zaluzhnyi's dismissal from the armed forces in February.

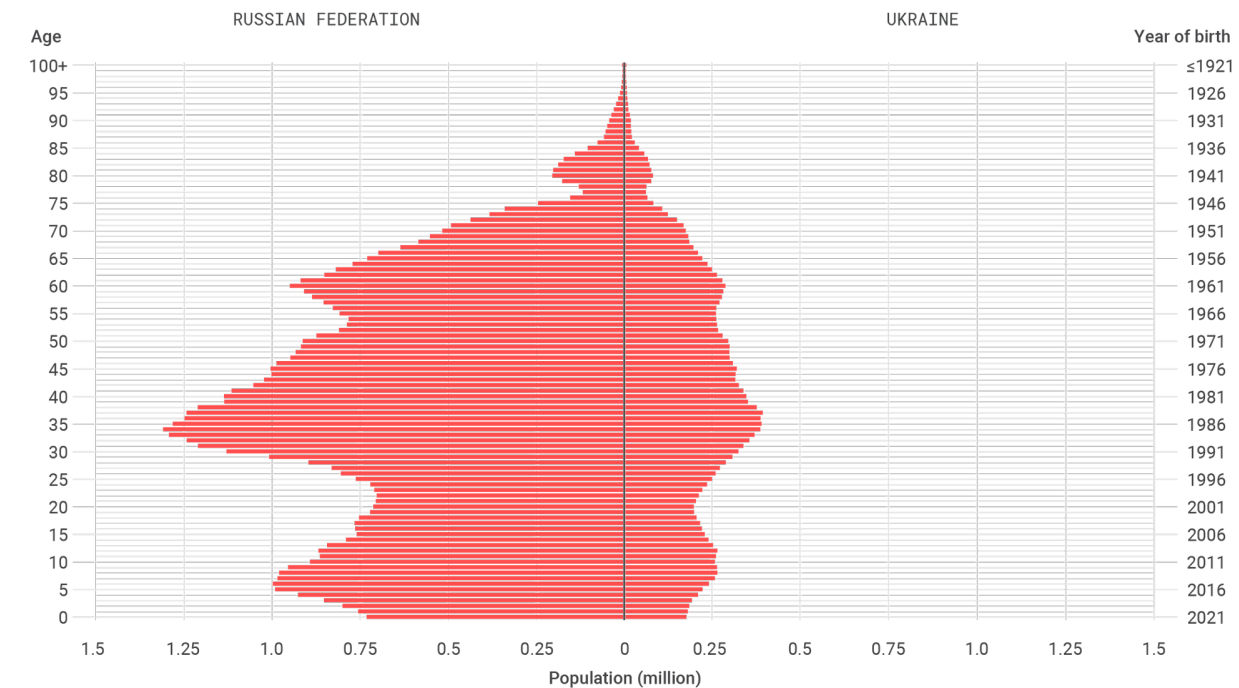
Ukraine has no pathway to this number at current mobilization levels, but even if it did, fresh troops are only cannon fodder without good training. Time is needed to shape new recruits into a fighting force capable of active defense, let alone the large-scale combined arms maneuver warfare needed for Ukraine to retake its occupied territory. By U.S. Army standards, it takes 22 weeks for a new infantryman to be considered qualified in their



military occupational specialty and ready to report to a duty station.¹⁶ While Ukraine is forced to abridge training for new units in many cases, this problem can't be overlooked as it hampers Ukrainian force development.

Because of its manpower shortage, Ukraine also has limited operational reserves, giving it less flexibility on the battlefield. Without enough troops to bring forward quickly in a contingency, forces must be pulled from other sections of the front during a crisis, weakening defenses elsewhere. When Russia made initial gains around Kharkiv in May, Ukraine responded by pulling troops from eastern and southern axes to stabilize its defense lines in the north. If Russia encircles Kharkiv or launches an offensive in Sumy, this deficiency will only become more apparent.

Male population of Russia vs. Ukraine by age (2022)



Source: "World Population Prospects 2022," United Nations.

Russia has a significant manpower advantage over less populous Ukraine. The actual disparity is likely even worse than what's shown here, as since 2022 many Ukrainian men have been killed, injured, or fled the country.

While a defensive posture makes it easier to overcome manpower deficiencies, attacking—as Ukraine will need to do to reclaim territory—requires more personnel and firepower.

There are a number of ways to assess the military balance of power in a conflict, or to make extrapolations about outcomes, by using rates of attrition, manpower, and other data. While there is considerable debate about the utility of "bean-counting"—adding up numbers of aircraft, tanks, etc.—and methodologies like Richard Kugler's Attrition-FEBA Expansion Model or adaptive dynamic modeling, historically the "3:1 rule" is most commonly used to determine the local advantage necessary for an attacker to overpower a defender.¹⁷

It is doubtful that Ukraine could muster a 3:1 advantage in combat power anywhere along the current 745-mile (1,200-kilometer) frontline. On the Kharkiv front, where much of the recent fighting has occurred, Russia has both a local manpower advantage and a 5:1 advantage in tube artillery fires.¹⁸



Russia, with five times the population of Ukraine, has a much greater capacity for attritional warfare than Ukraine. As such, Moscow's advantage in both latent manpower and active-duty manpower at the front has allowed it to avoid full-scale mobilization.¹⁹ As of late 2023, Russia had an estimated 1.3 million active-duty troops under arms,²⁰ while the Ukrainian Ministry of Defense claimed about 800,000 Ukrainians were in active military service.²¹ The Russian military is also 15 percent larger now than before the invasion of Ukraine and is continuing to grow.²²

With a substantial manpower advantage, Russia also has the luxury of needing less airpower and fewer ground fires to generate the offensive capacity necessary to make battlefield gains.

Ukraine claims it faces an existential struggle. If Ukraine is serious about reclaiming all of its territory, including Crimea, and either refuses—or is prevented by Washington—from negotiating with an already disinclined Russia, then Kyiv must consider full mobilization: a mandatory draft for all Ukrainian men over the age of 18 and the forced repatriation of Ukrainian men who have fled the country.²³ Either way, the onus should fall on Ukrainian decision-making, not on Congress to pass yet another aid package that Ukraine lacks the manpower to fully exploit.

Immaterial material: the limits of Western capacity

Ukraine has no meaningful, large-scale, indigenous defense industry. It does not produce its own fighter aircraft, surface combatants, or other core elements of any modern defense industrial base. This was true before the war, though efforts are underway to increase Ukraine's defense industrial capacity. In the third year of the war, the obvious wells to supply Ukraine—like legacy Soviet equipment and ammunition from around the world—have largely been tapped. As such, Kyiv remains reliant on the United States and Europe to produce nearly all of its defense materiel: ammunition, armor, artillery, air defense, and so on.

After decades of mismanagement, underinvestment in core capabilities, and a narrow focus on the “Global War on Terror” and the Middle East, the U.S. defense industrial base has atrophied significantly since the Cold War and faces significant headwinds today.²⁴ The Pentagon has made plans to replace just a fraction of the weaponry it has given to Ukraine, and by some estimates, would run out of several long-range precision-guided munitions in less than a week in a major conflict with China.²⁵ Washington will therefore remain hard-pressed to meet Ukraine's needs, absent either a significant revitalization of its defense industrial base, or a willingness to compromise on requirements in the Indo-Pacific and Middle East. As neither scenario is especially likely, the arithmetic on new production remains unfavorable to Ukraine, especially in the near term.

According to Ukrainian Defense Secretary Oleksij Reznikov, Ukraine needs 4.27 million artillery shells a year to “perform effectively” on the battlefield, to include conducting offensive operations.²⁶ As of May, the U.S. is able to produce just 36,000 155mm artillery shells every month, which if held constant, amounts to 432,000 shells annually.²⁷ A new factory in Texas is expected to produce an additional 360,000 shells each year. Taken together, this would put U.S. production at 792,000 shells per year, though these are rough projections and improving U.S. capacity will take time. Assuming these estimates are accurate, even if every new shell produced this year went to Ukraine—leaving none for the U.S.—that still only amounts to 19 percent of Reznikov's now prescient number. Moreover, even if all of the 1.4 million 155mm shells Europe is aiming to produce by the end of 2024 were also included, the West would be on track to meet barely half of Ukraine's artillery ammunition requirements.²⁸

Conversely, Russia is already producing three million artillery shells a year, and is on track to produce at least four million per year by 2025.²⁹ While Western production may close this gap over the next two years, Ukraine can't afford to wait. Moscow is also expanding its wartime economy, as war-related industrial outputs have increased by roughly 60 percent since the fall of 2022.³⁰

While the Pentagon downplays concerns about Army Tactical Missile System (ATACMS) production, scarcity is also a problem for other systems like Patriot air defense batteries.³¹ U.S. Secretary of Defense Lloyd Austin renewed calls for U.S. partners to provide more launchers to Ukraine, but EU ministers have stopped short of doing so.³² European states like Sweden and Greece have signaled that giving up additional air defense batteries could begin to endanger their own security. The European defense industrial base has also largely withered, as



most of the continent has relied entirely upon U.S. military might for the last 80 years. Israel's older PAC-2 Patriot fire units are due for retirement, and could be sent to Ukraine, but the impact would likely be marginal.³³ U.S. manufacturing lead times for a new Patriot fire unit are currently in excess of two years.³⁴

Another challenge is that, to be even minimally effective, Western aid must outpace Kyiv's combat losses such that Ukrainian combat power grows rather than being marginally maintained, and this has proven to be difficult. Since it began deploying U.S.-provided Bradley infantry fighting vehicles (IFV) on the battlefield 13 months ago, Ukraine has already lost nearly a third of its entire Bradley IFV fleet, as many of the vehicles have been damaged, abandoned, or captured by Russian forces.³⁵ While sending Ukraine more IFVs is feasible given large U.S. stockpiles, this rate of attrition is notably high. With relatively light armor and a limited armament, the Bradley can excel in a support role, but it faced difficulties during last summer's counteroffensive when operating against loitering munitions and dense minefields.

The constraints on Western industrial capacity make it difficult to provide Ukraine with the hardware and ammunition necessary to generate the firepower advantage it would need to reclaim territory. While it is already a tall order for U.S. and European industrial bases to quickly close production gaps with Russia, this challenge may become insurmountable with Beijing allegedly providing lethal aid to Moscow.³⁶ China is the most productive economy in the world by manufacturing output, and if it were to serve as a wild card—furnishing Russia with combat equipment and ammunition—the West might not be able to catch up.

No true 'game-changer': diminishing returns on Western weapons

Much of the modern weaponry sent to Ukraine has fallen short of expectations, failing to make the "game changing" impact on the battlefield many had promised.³⁷ Sending Ukraine more will do nothing to change the reality that there are no *wunderwaffe* in modern warfare.

The ubiquity of loitering munitions, hunter-killer drones, and GPS jamming have diminished the effectiveness of military aid to Ukraine.³⁸ Modern sensing and electronic warfare capabilities make it easy for adversaries to make adjustments that render otherwise capable platforms like the U.S.-provided Guided Multiple Launch Rocket System (GMLRS) or UK-provided Storm Shadow far less reliable.³⁹

For example, after losing at least eight of 31 U.S.-provided "game changer" M1A1 Abrams main battle tanks, Kyiv has decided to largely sideline them because the near-constant threat of Russian drones makes it "too difficult to operate [the Abrams] without [being detected] or coming under attack," according to U.S. officials.⁴⁰

Ukraine has also reportedly limited its use of GMLRS due to Russian GPS denial.⁴¹ The accuracy of Ukrainian M982 artillery rounds reportedly declined from 70 percent to just 6 percent in a matter of weeks, according to one assessment.⁴² Russian jamming is also reducing the effectiveness of other GPS-guided systems provided by Washington, like the ground-launched small diameter bomb.⁴³

Air defenses have become less effective too. In April, Ukraine intercepted just 30 percent of Russian missile attacks.⁴⁴ But Ukrainian intercept rates have been declining steadily for over a year, suggesting that changes to Russian tactics, techniques, and procedures (TTPs) like new countermeasures, or increased use of more survivable aero-ballistic and hypersonic missiles, are most likely responsible, not a lack of air defense munitions.⁴⁵

Recently arrived weapons like the 190-mile-range (300-kilometer) ATACMS or soon-to-be-delivered platforms like the much-hyped F-16 will face similar constraints as Russia continues to adapt.⁴⁶ The F-16 won't be a "game changer" either.⁴⁷

Ukraine is set to receive 85 F-16 fighter jets, most of which are older variants without the latest avionics or upgrades, which is enough to comprise about five squadrons.⁴⁸ Pre-war Ukrainian Air Force planning estimates suggested as many as 128 modern fighter jets were needed to maintain air superiority over the country.⁴⁹ Not only would these F-16s get Ukraine to just over half of that peacetime number, but Kyiv lacks the aircrews needed



to operate more jets. This means any additional airframes sent to Ukraine, including some in this tranche, will likely sit in storage for some time—perhaps even outside the country—making little impact on the war.

Training F-16 pilots and ground crews in significant numbers will also take years. American F-16 pilots undergo a two-year process: 54 weeks of undergraduate pilot training, nine months of airframe-specific basic training, and three months of unit combat readiness training.⁵⁰ This is to say nothing of participation in large-scale combat exercises like Red Flag that have been shown to greatly improve pilot survivability in war. The first class of Ukrainian pilots attending the U.S. F-16 training program at Morris Air National Guard Base took eight months to graduate.⁵¹ Because Ukraine is short on pilots and ground crews, it is also possible that President Emmanuel Macron’s announcement that Paris will provide Kyiv with the Mirage 2000-5 will backfire, potentially requiring Ukraine to split up limited resources and manpower, or leave some jets in storage.⁵² Like Ukraine’s F-16s, the Mirage 2000-5 is an older fourth-generation multirole fighter more suited to defense and support missions than air superiority or strike roles.

Tactical aircraft are simply vessels for the weapons they carry. Ukrainian Sukhois and MiGs have already been modified to carry the same Western weaponry found on most F-16 weapon stations, including Joint Direct Attack Munition bomb kits, Sidewinders, and High-speed Anti-Radiation Missiles.⁵³ Whether a legacy Soviet airframe or an American airframe delivers these munitions on target is of no practical military significance. Ukrainian F-16s, Mirages, or former Soviet MiGs will all find conducting combat air patrols or suppression of enemy air defense sorties in non-permissive airspace dominated by integrated air defense systems to be equally challenging.

The F-16—like any non-stealth fixed-wing air asset in a contested environment—simply won’t be able to fly near enough to the frontlines to provide sustained close air support to Ukrainian ground forces. Instead, Ukraine is most likely to use the F-16 for barrier combat air patrol and defensive counter-air missions, setting up “screens” to shoot down incoming Russian cruise missiles and one-way attack drones. Launching stand-off attacks against Russian air defense batteries will be the most the F-16 can do to contribute on offense. This will not degrade Russian maneuver warfare capabilities or change the balance of power on the front.

Even if Ukraine had received these F-16s prior to last summer’s counteroffensive, they would have performed this same limited mission set, against an even better situated Russian air defense network at the time, and would not have been able to fly close enough to the front to provide sufficient air cover for Ukrainian ground forces.

Ukraine also lacks any airborne early warning and control aircraft (AWACS). These airborne command platforms can serve as a force multiplier by providing a real-time common operating picture to tactical air assets, greatly enhancing their situational awareness and expanding their mission profile. Without an AWACS platform, the F-16’s value is inherently diminished. While Sweden announced it will provide Ukraine with its first of these aircraft, an ASC 890, Ukraine would need several more to provide live data links to all of its F-16s.

The F-16—like the Bradley or the Abrams before it—will not be a silver bullet for Ukraine.

Bad TTPs: fire without maneuver, micromanagement, wrong targets

Perhaps the least discussed aspect of the war is Ukraine’s own TTPs. While significant attention has been paid to Russian tactics throughout the war, many analysts are reluctant to point out instances in which Ukraine could more effectively employ fire and maneuver, improve doctrine and military leadership decision-making, or better optimize its targeting strategy.

As the old Army dictum goes, “fire without maneuver is just a waste of ammunition.” Ukraine has failed to pair long-range fires with maneuver since its failed summer counteroffensive. Large-scale combined arms warfare is challenging, even for first-rate powers like the United States.⁵⁴ The idea that Ukraine could suddenly and reliably adopt Western military doctrine and execute accordingly—shaking off vestigial Soviet instincts even after a decade of NATO training—has proven to be folly. Ukraine’s inability to combine fire and maneuver, or to be consistently disciplined about either element, has made it less effective on the battlefield. Ukrainian field artillery teams have in some cases failed to “dig in” their artillery pieces during winter, causing inaccurate fires and



wasting ammunition.⁵⁵ The Ukrainian military has done little mining or demining along the front, which is an important step to prepare for any future offensive. Ukraine has also built up far fewer defensive fieldworks and trenches compared to their Russian counterparts over the last two years, at least in part due to an insistence on not “going static.”⁵⁶ Ukraine’s refusal to enhance its defenses earlier in the war in the name of holding out for some offensive breakthrough or Russian collapse has come back to bite it. Meanwhile, Russia embraced active defense much earlier than Ukraine, and the “Surovikin line” they have constructed in eastern Ukraine is now the single largest defensive fortification in Europe since World War II.

Following the departure of Valeriy Zaluzhnyi, the soundness of Ukrainian doctrine and military leadership should also be more closely scrutinized. In President Zelenskyy’s national address following Russian advances near Kharkiv, he reported that Ukrainian Commander-in-Chief General Oleksandr Syrskyi was, “in the key battlefields, working with brigades and combat positions,” revealing Kyiv’s struggle between a top-down Soviet command model and distributed Western approach that empowers officers in the field to make individual decisions that best reflect their commander’s intent.⁵⁷ If Ukraine is trying to implement NATO military doctrine, then Syrskyi—Ukraine’s commander-in-chief—should never be micromanaging brigade-level leaders. Beyond assuming command in Kharkiv, Syrskyi also has a long history of chastising subordinates publicly on social media, overriding personnel decisions made by other commanders, and personally intervening on equipment allotments for specific units.⁵⁸

Ukraine is also prioritizing the wrong targets, squandering some of its most advanced U.S.-provided missiles on Russian oil refineries.⁵⁹ While impressive, these strikes do nothing to help Ukraine gain an upper hand in the trenches. U.S. Secretary of Defense Lloyd Austin said as much, arguing that “Ukraine is better served in going after tactical and operational targets that can directly influence the current fight,” rather than pursuing high-profile strikes.⁶⁰ These attacks on refineries are usually answered with heavy reprisals from Moscow that damage vulnerable Ukrainian civilian infrastructure and cause Kyiv to expend precious air defense munitions in large numbers.

No number of missiles or artillery shells can overcome poor tactics or bad doctrine. More Western aid can’t fix structural or organizational issues that can spread like rot throughout even the most professional militaries if not corrected.

Conclusion: it’s time to talk

It is now clear Ukraine cannot reclaim all of its occupied territory via military force. It lacks both the manpower and hardware necessary to generate new combat power or achieve an advantage in fires that will lead to sufficient offensive capacity. Russia is getting better at blunting the impact of Western weapons, and Ukraine’s poor tactics can’t simply be ignored forever.

Because more aid alone is unable to rectify these problems, both Washington and Kyiv must now consider other avenues to end the war.

Ukraine’s deputy chief of military intelligence recently stated there is no pathway for Ukraine to win on the battlefield.⁶¹ If the best Kyiv can do—as Biden administration officials are now admitting—is to hold what it has, then Washington should press Kyiv to begin talks before Ukraine loses more territory.⁶²

But even a shift to a defensive strategy aimed at demonstrating enough resilience to Moscow to force talks will be difficult to execute.⁶³ The hope that Putin begrudgingly accepts that the frontlines are unlikely to move, thereby increasing Moscow’s willingness to negotiate, seems farfetched. As long as Russia has a 5:1 latent manpower advantage, it has time on its side.

The alternative, however, is to continue down a path that is not just failing but carries significant risk for U.S. security going forward. Because more aid alone can’t fix the problems ailing Ukraine for the reasons discussed at length in this paper, a strategy of military aid to win the war is therefore not a viable one. As such, continuing to send aid to Ukraine with no conditions and no theory of victory will only needlessly fuel escalation risks at a



dangerous inflection point in the conflict. The Biden administration is now allowing Ukraine to attack Russia with U.S. weapons, NATO countries are planning to station military trainers on Ukrainian soil, and overconfidence in escalation management has reached all-time highs.⁶⁴

Increasingly, the endgame for the war appears to be a stark and unfortunate choice: Ukraine can accept a sovereign and independent rump state—vigorously backed by Western capital and security assistance—or fight to exhaustion and risk collapse.

Washington needs to guide Ukraine towards a diplomatic theory of victory, rather than continuing to participate in the delusion that a military one still exists—if it ever did. Additional U.S. aid to Ukraine should be conditioned upon Kyiv's willingness to explore no-condition talks with Moscow.

If Washington doesn't help Kyiv change course before it's too late, no one should be surprised if things end up exactly where more realistic voices warned they might a decade ago.⁶⁵

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