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INSIGHT

At the threshold of peace negotiations, Russia continues to invest in war



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Russia is ending its third year of war with significant equipment and demographic losses, but nevertheless still with sufficient resources to continue military operations. More importantly, the authorities are announcing that they will continue with a wide-ranging reform of the armed forces, in which they will draw on the experience of Ukraine. They are also determined to try to change the global security architecture and strengthen Russia's position on the international stage with potential negotiations over Ukraine. Russia will continue to pose security challenges to NATO, which it sees as its greatest adversary. For this reason, it is worthwhile for the Alliance and its member states to invest in measures to deter Russia.



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RUSSIA IS STRUGGLING TO COMPENSATE FOR LOSS OF LIFE, BUT IS ABLE TO REPLENISH EQUIPMENT

The Russian authorities embarked on a full-scale invasion of Ukraine, hoping to quickly overthrow the Ukrainian government and install a government there that would pursue Russian interests. Ukraine's resistance and the assistance of Western countries derailed this plan, and the Russian armed forces had to change their course of action. The war turned into a long-term campaign, during which unmanned systems, artillery, radio-electronic warfare systems, reconnaissance capabilities, stable communications and rapid access to the battlefield management system became particularly important. In order to conduct long-term offensive operations, Russia began to need human resources, especially as it was suffering significant losses – The Ukrainian side claims that Russia lost more than 861,000 military personnel over three years¹ and is unable to train recruits and officer and non-commissioned officer cadres quickly and effectively.

A protracted conflict means equipment losses, making the capacity to produce and procure weapons and the ability to overhaul and refurbish them important. According to the Ukrainian General Staff, Russia has lost 370 aircraft, 331 helicopters, more than 10,000 tanks and 28 ships. Meanwhile Website Oryx² identifies 136 aircraft, 151 helicopters, 3756 tanks and 28 ships as non-recoverable losses (the differences are due to the methodology of estimating losses). Considering the Oryx data, it is clear that although Russia suffers significant equipment losses, this does not prevent it from conducting military operations. *The Military Balance* from 2022³ reports that when launching full-scale aggression against Ukraine, Russia had at its disposal almost 1,200 aircraft and more than 800 helicopters of various types⁴, 3,000 tanks (plus an additional 10,000 in storage) and more than 250 vessels. Thus, the potential it still has at its disposal is considerable. It is only in the case of equipment for ground troops that the Russians have been forced to draw on the stockpile of USSR-era equipment.

At the same time, Russia has begun to expand its system of foreign partnerships and, through them, is acquiring the parts and technology necessary to renew its equipment and produce new one. It has signed strategic partnership agreements with North Korea (in June 2024) and Iran (in January 2025), both of which provide ammunition, missiles and drones.

DOCUMENTING RUSSIAN EQUIPMENT LOSSES DURING THE RUSSIAN INVASION OF UKRAINE

TANKS

3756



SELF-PROPELLED ARTILLERY

885



AIRCRAFT

136



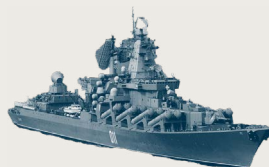
HELICOPTERS

151



NAVAL SHIPS AND SUBMARINES

28



SOURCE: ORYX (WWW.ORYXSPIOENKOP.COM).



IT IS NOT STOPPING REFORMING ITS ARMED FORCES

Using the Ukrainian experience, Russia is implementing a wide-ranging, comprehensive reform of the armed forces, which was inaugurated by the Ministry of Defence back in December 2022. The then Defence Minister Sergei Shoigu announced an increase in the size of the armed forces and the number of units in all types of armed forces, as well as changes in the territorial shape of military districts.

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So far, the army's target size of 1.5 million soldiers and officers has been achieved (it was 900,000 at the beginning of 2022). As announced in March 2024, the Western Military District and the Northern Fleet Military District were also reformed, and the Moscow and Leningrad Military Districts were created on their basis. Significantly, from 2024 onwards, the military

districts ceased to be commands and became a kind of department of the Ministry of Defence to manage the units located within their territories. With this, the Russians have moved away from territorial command and moved to command on the basis of types of troops. Thus, they are building the capacity of the entire armed forces, and task forces will be created not on the basis of the resources of military districts, but collected from the whole country, based on the capacity of the types and types of armed forces. In 2024, they also continued to create two combined arms armies and other units, such as the first air defence regiment with S-500 air defence systems at its disposal.

THE SIZE OF RUSSIA'S ARMED FORCES



SOURCE: MINISTRY OF DEFENCE.

Russia is also consistently increasing military spending. In 2025, 32.4 per cent of all budget expenditure (RUB 13.49 trillion = approximately USD 150 billion), or 6.31 per cent of GDP, is allocated to defence. This means that the Russian government has increased the share of projected spending by

So, at least 41 per cent of the budget will be allocated to spending in the entire area of security, the largest amount in modern Russian history.

3 percentage points compared to the plan presented in 2023 (in Russia, the budget is planned for three years). In addition, RUB 3.46 trillion (approximately USD 38 billion) will be set aside for security and law enforcement in 2025. So, at least 41 per cent of the budget will be allocated to spending in the entire area of security, the largest amount in modern Russian history.



For the coming year, the Russian Ministry of Defence has set further priorities. It intends to further develop and modernise the nuclear forces, considered the main deterrent and guarantor of state security. In 2025, the strategic forces are to receive four new Tu-160M long-range bombers and a submarine, the Kniaz Pogarsky. Non-strategic forces (those with tactical nuclear weapons), on the other hand, are to be placed on permanent alert. Russia will also invest in the construction of short- and medium-range systems (500-5,500 km), such as the Oreshnik missile. These tasks dovetail with the new version of Russia's nuclear doctrine published in November 2024, which makes it clear that nuclear weapons are the basis of Russia's deterrence. So, Russia will continue to use nuclear weapons to intimidate Western societies.

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The Ministry of Defence will also create a drone troops, which is expected to be established in the third quarter of 2025. Consequently, it will also be necessary to increase the capacity to produce unmanned platforms. According to the Russian Ministry of Defence, Russian troops currently use around 3,500 drones per day for operations in Ukraine. Russia will also be strengthening its radio-electronic warfare capabilities to secure its own forces. All of this means that the Russians will attempt to reduce their technological backwardness relative to NATO countries.

Russia plans to expand and upgrade communication systems and build a comprehensive situational awareness system from the level of the individual soldier to the command level. This system will create maps of the operational situation. Perhaps the base for it will be the Andromeda-D system used by the Airborne Forces. This will involve the creation of an integrated information space, and the aim is to automate command. This will probably be a long and difficult process, but if Russia is successful in this, it will mean additional challenges in, for example, the defence planning of Alliance members.

Deficiencies in training - both in the ranks of privates, NCOs and officers - are one of the most visible problems of the Russian armed forces

The Russian Ministry of Defence also wants to modernise military education to take into account the experience of the so-called special military operation. Deficiencies in training - both in the ranks of privates, NCOs and officers - are one of the most visible problems of the Russian armed forces since the beginning of the full-scale aggression against Ukraine. Changes in the way training was carried out were still planned as part of the first comprehensive reform of the armed forces, which was inaugurated in 2009 after the war in Georgia, but they did not produce the results expected by the Russian authorities.

Accordingly, a number of measures are to be expected in the coming months and years to modernise the Russian armed forces and prepare them for operations in the realities of the modern battlefield. At the same time Russians will continue to rely on a mass-type army and train the reserves extensively, something that NATO countries should pay attention to when making their defence plans.



WANTS TO DEVELOP AND MODERNISE THE PRODUCTION OF MILITARY EQUIPMENT

One of the most important goals the Russian Ministry of Defence has set itself for the coming months is the development of domestically produced military equipment - to this end, it is expanding the existing cooperation between the military and the arms industry. In 2025, the Ministry of Defence plans an inventory of all weapons systems. Military-experiment centres are also to be established, where new weapons will be developed and tested on the basis of the experience of the war in Ukraine. Priority is to be given to airborne and ground-based drones, defence, reconnaissance and electronic warfare systems, which play a significant role in the fighting on the Ukrainian frontline.

Learning from the operations in Ukraine, Russians have significantly increased the production of drones of various types. Russian manufacturers have developed a whole line of drones that use fibre-optic communication links instead of traditional radio control. This is supposed to protect them from being neutralised by radio-electronic warfare systems, although it increases production costs and limits the drones' manoeuvrability. The Russians are therefore trying to overcome the problems posed by Ukraine's radio-electronic warfare systems.

One example of new production drones using fibre optics is the Prince Vandal Novgorod kamikaze drone, which can attack heavy equipment used by Ukraine. The Hortensia drone, on the other hand, is used as a grenade launcher. The Russian arms industry is also producing more radio-controlled drones. One of the priorities is the large reconnaissance and strike drone Inochodets, which is designed to eliminate air defence systems used by Ukraine. The arms industry's production is complemented by the civil sector. On January 31, 2025, The Ministry of Industry and Trade reported that 16,400 civilian-manufactured drones were produced in 2024, a 2.5-fold increase over 2023. Russia has also invested in the production of aerial bombs equipped with a universal planning and correction module, which turns unguided munitions into long-range precision weapons. Their carriers are tactical aviation aircraft, which allows for their indiscriminate use, including shelling of critical infrastructure facilities and civilian use.

IT IS CAPABLE OF REPLACING LOST AIRCRAFT AND SHIPS, BUT NOT TANKS

The production and refurbishment of heavy equipment, such as tanks and infantry fighting vehicles, is also crucial for securing the operations carried out by the Land Forces. Russia's largest tank manufacturer, the Uralvagonzavod plant, has delivered at least 200 T-72B and T-72B1 tanks, which have been upgraded to the T-72B3 standard, and up to 80 new T-90M tanks to the army in 2024. This is a small number for the needs of the battlefield – to cover losses, the Land Forces should receive at least 1200-1300 tanks per year. However, there are no production figures for other types of machinery, such as the T-80s produced by the Omsk Transport Machine Building Plant. At the same time, losses are being replenished on an ongoing basis in the Air and Space Forces. In 2024, the Air Force received approximately 24 combat aircraft, which is equal to the average number of aircraft lost annually.



According to official figures, more than 30 vessels of various classes were delivered to the Russian navy last year, outnumbering total war losses. Russia is also investing in expanding the production of sea drones, and in 2025 their manufacturers will create a single plant for their manufacture on

Russian government will be strengthening its maritime capabilities. One aim will be to increase its presence in the Arctic and secure the Northern Sea Route

the basis of the St Petersburg-based military-industrial holding company Kingiseppskiy Machine Building Plant. At the same time, within the framework of the Maritime College, established in August 2024 and headed by Nikolai Patrushev (formerly secretary of the Russian Security Council), a working group was set up to draft a law on state regulation of the ship-building industry. The political decisions made in 2024 and the organisation of the largest naval exercise in Russia's recent history - "Ocean 2024" - show that the

Russian government will be strengthening its maritime capabilities. One aim will be to increase its presence in the Arctic and secure the Northern Sea Route, creating additional challenges on the Alliance's northern flank.

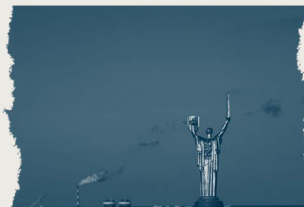
LACK OF LABOUR FOR WEAPON PRODUCTION AND CORRUPTION REMAIN A CHALLENGE

The Russian government also aims to provide for the army's current needs. At an enlarged Defence Ministry Collegium held on December 16, 2024, Defence Minister Andrei Belousov said that last year, compared to 2022, the arms industry had increased production of infantry fighting vehicles and armoured personnel carriers threefold, tanks sevenfold, ammunition twenty-twofold and unmanned aerial vehicles twenty-threefold. However, these figures have so far not been confirmed by increased equipment deliveries to the Russian armed forces. Moreover, the challenge for the Russian arms industry will be a shortage of workers, estimated at up to around 400,000 people, 120,000 of whom are university graduates.

Another problem that the Russian defence ministry will have to face is the fight against corruption and the excessively high costs of arms production dictated by state monopolies. Making the most rational use of funds allocated to the armed forces and putting arms expenditure in order are among the most important tasks of Defence Minister Andrei Belousov, who was appointed in May 2024 and served as Minister of Economic Development from 2012 to 2013.

IDEOLOGICALLY, RUSSIA IS FIGHTING FOR EMPIRE STATUS

The war in Ukraine has an ideological basis based on the concept of *russki mir* (Russian world)⁵. It can also be seen as a proxy war against Western states, as has been suggested more than once by representatives of the Russian political elite. Russia is using the war as an important element in building an anti-Western coalition, as well as a response to public expectations for Russia to regain its rightful position in the international arena.



Russian politicians and the media have also shaped a message in which the war in Ukraine is a struggle for the existence of the Russian state similar to the Patriotic War (the Napoleonic Wars) and a confrontation with Nazism along the lines of the Great Patriotic War (the military actions that the USSR waged between 1941 and 1945). Soldiers fighting in Ukraine are compared primarily to the heroes of the Great Patriotic War.

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The manner in which military operations are conducted shows that modern Russia is pursuing concepts of war to destroy the opponent that date back to the USSR, as evidenced by attacks on critical infrastructure and civilian facilities in Ukraine. In addition, in the information domain, the adversary continues to be dehumanised, so that the media does not refer to Ukrainians but to Nazis, fascists, or Bandera; the Ukrainian authorities are referred to only as the Kyiv regime; and the events of

2014 (overthrow of President Viktor Yanukovich as a result of the Revolution of Dignity) as a coup d'état, regardless of the fact that Russia recognised the results of the elections that followed 2014.

IS CARRYING OUT INTENSIVE "PATRIOTIC EDUCATION" AND PROPAGANDA

Children and teenagers in particular have been targeted. Patriotic teaching starts as early as kindergarten and is taught during 11 years of school education. In grades 10-11, the teaching of the subject "introduction to basic military training" has already started in 2022, which includes not only the ability to use weapons, but also first aid under battlefield conditions. This year, a new textbook "Military History of Russia" has been prepared for students of cadet schools and uniformed classes, and for anyone interested in military history, from which students will learn aspects of the so-called special military operation in Ukraine. The oldest students will learn about the types of weapons used by the Russian ammunition and the equipment provided to Ukraine by NATO members. The textbook, edited by Vladimir Medinsky, advisor to the President of the Russian Federation and President of the Russian Military History Society, has been published in three workbooks: for grades 6-7, 8-9 and 10-11. It is synchronised with the school history course and approved by the Ministry of Education. It also fits in with the programme changes introduced earlier, and it can be assumed that it will be used in other types of schools in the future.

In the militarisation of society and the propagation of the cult of the armed forces and the Great Patriotic War, cinematography plays an indispensable role. In 2024 alone, more than a dozen war-themed films entered cinemas, most of which focused on the period between 1941 and 1945 and the fight against Nazism. Some were already aimed at older children. Russian television continued with historical super-productions showing the heroism of Russian and Soviet soldiers, as well as the USSR-U.S. confrontation of the Cold War period. In this way, the authorities in modern Russia use the experience of the USSR period, when education and culture were supposed to format thinking along government lines.



The militarisation of society will also be fostered by this year's grand celebrations of the 80th anniversary of the so-called "Great Victory", which will culminate in a military parade in Moscow on May 9. Many world leaders have received invitations to attend. A number of new film and television productions, school and university activities and an even stronger presence of military and historical themes in the media are also to be expected. Russia will continue to use historical politics in its information war against Western countries, including Poland, including by blaming them for actions that foster the revival of Nazism.

Propaganda operations will also aim to divert attention from the losses, especially demographic

The aim of the militarisation of society is to prepare for a long-term confrontation with Western states and the sacrifices necessary for this. The Russian authorities, including through the media, will build a sense of state strength based on military capabilities. Propaganda operations will also aim to divert attention from the losses,

especially demographic⁶ (those killed and wounded at the front, those who left in fear of being drafted, etc.) that Russia has suffered in its war with Ukraine. In the long term, this will mean a reconstruction of public thinking, which will see NATO and Western states more broadly only in the category of a threat to be defended against no matter the cost.

CONCLUSIONS

1. **For Russia, the Ukraine negotiations are also bargaining over its superpower status.**
2. **For the Russian authorities, the basic guarantee of maintaining superpower status is the possession of military capabilities.** Thus, further investment in the capabilities of the armed forces is to be expected.
3. **Russian losses in Ukraine have been uneven.** Land units, which bear the brunt of the fighting, have suffered the most, while the Aerospace Forces and the Navy have suffered relatively little damage, and their capabilities may pose a threat to Western states in the longer term.
4. **The militarisation of society will be maintained.** And Russia will base its foreign and security policy on its ability to use hard power and this is how it will shape its position as one of the world's superpowers.
5. **The Russian political elite will maintain a highly confrontational posture towards Western states.** This will be reflected in further hostile hybrid actions (attacks on critical infrastructure, confrontational cyber activities) and information warfare, one of the most important elements of which will be a policy of threatening the possibility of another war, including a nuclear one.



RECOMMENDATIONS

1. **NATO countries should follow particularly closely the progress of the Russians in reforming their armed forces**, rebuilding their capabilities and introducing modern solutions. This includes, in particular, the construction of drone troops, the creation of a system of unified situational awareness and information sharing, and the formation of a radio-electronic warfare capability.
2. **Alliance members should prepare a comprehensive strategy towards Russia**, including the use of an element of economic pressure. Its premise should be that Russia will maintain its confrontational approach to the Alliance and build up its military capabilities.
3. **NATO states should be ready to counter hybrid actions**, conduct operations in cyberspace, and should expand the capacity of their arms industry to be able to meet their needs. All this will have a significant impact on the credibility of the Allied deterrence policy.
4. **In order to hinder Russia's expansion of its military capabilities, it will be necessary to maintain a policy of sanctions**, particularly on technologies essential to the arms and mining industries. Restrictions should also be maintained on hydrocarbon imports from Russia, the sale of which is an important source of revenue that allows the Russian government to continue rearmament.
5. **The lack of a clear and unambiguous deterrence policy will encourage Russia to become further militarised**, confrontational towards Western states. It will also prompt it to pose strategic challenges to NATO states and allow it to use slogans about Western weakness to build a broad anti-Western coalition.
6. **It will be crucial for the credibility of the Western countries that they continue their policy towards Ukraine**, and therefore not only their readiness to rebuild the country and support reforms, but also to maintain the military aid necessary to develop its defence capabilities. It will also be important to assist with Ukraine's possible accession to the European Union and to develop the country's cooperation with the Alliance.

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ENDNOTES

1. Killed and seriously injured.
2. Attack On Europe: Documenting Russian Equipment Losses During The Russian Invasion Of Ukraine, "Oryx", <https://www.oryxspioenkop.com/2022/02/attack-on-europe-documenting-equipment.html>
3. The International Institute for Strategic Studies, The Military Balance 2022, , <https://www.taylorfrancis.com/books/mono/10.4324/9781003294566/military-balance-2022-international-institute-strategic-studies-iiss>
4. Without taking into account Army aviation resources and those used by the Navy.
5. The concept of unification under Russian leadership of Russian-speaking people throughout Eurasia. It is also based on cultural, civilisational, political and religious commonality.
6. According to Rosstat, the natural population loss, excluding the occupied Kherson, Donetsk, Luhansk and Zaporizhzhya regions of Ukraine between 2022 and 2024 would be around 1.7 million people, despite a number of programmes to increase fertility rates introduced by the Russian authorities.