What the Corps Saw

A Ukrainian air-defense sector reports on Russian drones, and Moscow translates the report

Treadstone 71 · July 25, 2026 · Narrative field assessment · Version 2.1

Open source · Analytic estimate

Companion product to the Treadstone 71 CIQFM forecast for Q3 2026. The forecast carries the model and the ninety-day predictions. The present document carries the reading of the source, and now carries the grading apparatus alongside it. A reader judges every number in the pages ahead without opening a second file.

Note on content. Treadstone 71 removed certain material from the present edition because of the sensitive nature of the content. Withheld items cover confidential method internals and collection detail an adversary defeats cheaply. Analytic judgments, source grades, and scores stand unchanged.

TL;DR

An officer in Ukraine's 1st Corps sat down last month and wrote an honest account of how Russian drones beat his air defense. He named what failed. A Russian volunteer network found the text, ran the pages through a translation engine, stamped the result with a donation banner, and pushed the file to Russian operators. Speed of that harvest tells more than the text does.

The account holds up. Independent reporting confirms the low ingress, the terrain hugging, the boundary hunting, and the jet variants that outrun nearly every Ukrainian interceptor. One claim stands alone with nobody to check it, and one label appears nowhere outside the corps.

BLUF

Russia turned an ammunition problem into an arithmetic problem, and Ukraine answered the arithmetic better than anyone expected. Cheap interceptors now kill cheap drones at a price Kyiv sustains. Turbojets broke the answer. A Geran-3 outruns a Sting, and no amount of Sting production fixes a speed gap.

Assessment through Q3 2027, scored on the Sherman Kent spectrum. The number in parentheses is the forecast-confidence score defined in the next section.

Monthly Russian launch volume stays above 5,000 airframes. **Highly likely (F 88).**

Interception against subsonic Geran holds between 80 and 90 percent. **Likely (F 71).**

Interception against jet variants stays under half until Ukraine fields a mass-produced interceptor past the 450 km/h mark. **Likely (F 74).**

Russia hits the stated goal of half the strike fleet running turbojets before 2028. **Roughly even chance (F 47).** Chinese engine supply sets the ceiling, and nobody outside Beijing controls the ceiling.

How to read the grades

Three instruments run on every substantive claim below. A reader who skips the following pages will misread the numbers that follow them.

The probability spectrum

Sherman Kent built the spectrum so that analysts and consumers argue about evidence instead of arguing about adjectives. Bands read as half-open intervals. Each lower bound belongs to its own band, and the value at the top of a band belongs to the band above. Zero and 100 stay reserved for impossibility and certainty, which an estimative judgment never asserts.

Kent term	Probability band
Almost certain	95 to 99 percent
Highly likely, highly probable	85 to under 95 percent
Likely, probable	55 to under 85 percent
Roughly even chance	45 to under 55 percent
Unlikely	15 to under 45 percent
Highly unlikely, very unlikely	5 to under 15 percent
Almost no chance	1 to under 5 percent

Table 1. Sherman Kent probability spectrum, half-open intervals.

The five source-quality tags

Every factual statement in the assessment carries one tag. The tag rides alongside a classic NATO Admiralty pair, a letter for the source and a number for the claim.

Tag	Reliability	Credibility	Reading
Verified	A to B	1 to 2	Reliable source, confirmed or probably true
Corroborated	B to C	2 to 3	Usually reliable source, partial independent confirmation
Asserted	C to D	3 to 4	Fairly reliable source, single uncorroborated claim
Adversary claim	E to F	4 to 6	Source sits inside a belligerent. Content earns a grade, framing earns a flag
Inferred	Analyst	6	No external source. Analyst reasoning over graded inputs

Table 2. Source-quality tags mapped to classic Admiralty reliability and credibility.

The ASA Evidence Standard, an advanced Admiralty

Classic Admiralty grades a source A through F and a claim 1 through 6, and the code has held up for eighty years. Four evidence problems dominating the present file sit outside what the 1940s scheme reaches: machine-generated and machine-translated

content, coordinated inauthentic amplification, active counterdeception against the analyst, and adversary endgame forecasting. The Treadstone 71 ASA Evidence Standard keeps the two-axis anchor and extends across 30 factors in nine clusters.

Cluster	Name	Factors	Feeds	What the cluster grades
C1	Source credibility	F1 to F4	T	Reliability, authority, independence, depth of access
C2	Information validity	F5 to F8	T	Corroboration, consistency, specificity, classic Admiralty anchor at F8
C3	Relevance	F9 to F10	T	Topical fit, temporal currency
C4	Technical integrity	F11 to F13	T	Chain of custody, verifiability, metadata integrity
C5	Synthetic-media risk	F14 to F16	T	Generation probability, provenance adherence, manipulation forensics
C6	Influence-operation risk	F17 to F18	T	Coordinated inauthentic behavior, narrative maneuver
C7	Tradecraft fit	F19 to F20	T	Bias disclosure, confidence calibration
C8	Counterdeception	F21 to F25	D	Deception density, cross-discipline discrepancy, signature anomaly, cover-story plausibility, action-narrative gap
C9	Endgame forecasting	F26 to F30	F	Target-set convergence, capability-intent alignment, timeline compression, cross-domain coordination, endgame path probability

Table 3. The nine evidence clusters and the score each cluster feeds.

Three scores come out. The T-Score grades evidence quality across clusters C1 through C7 on a 0-to-100 ladder. The D-Score grades deception likelihood from cluster C8. The F-Score grades forecast confidence from cluster C9 and reads directly as a Kent term, so an F-Score of 62 reads as Likely.

An adversary-controlled outlet earns an E or F reliability grade and still earns a content-credibility score. The record keeps the contribution and flags the framing, which matters a great deal for the artifact at the center of the present file.

T-Score	Label	Classic Admiralty anchor
90 to 100	Apex	A / 1
70 to 89	Mature	B / 2
45 to 69	Operational	C / 3
20 to 44	Developing	D / 4
0 to 19	Nascent	E / 5
Routed	Deception review	F / 6

Table 4. T-Score bands against the classic Admiralty anchor.

D-Score	Label	Handling rule
0 to 19	Low	Normal handling
20 to 39	Guarded	Note the framing
40 to 59	Elevated	Run a counterdeception assessment before any judgment rests on the artifact
60 to 79	High	Run the assessment and discount the artifact
80 to 100	Severe	Read the artifact as adversary product

Table 5. D-Score bands and the handling rule each band triggers.

Cross-score posture

The three scores govern handling together rather than separately. A high T-Score paired with an elevated D-Score does not stop publication. The pairing changes what a reader does with the material.

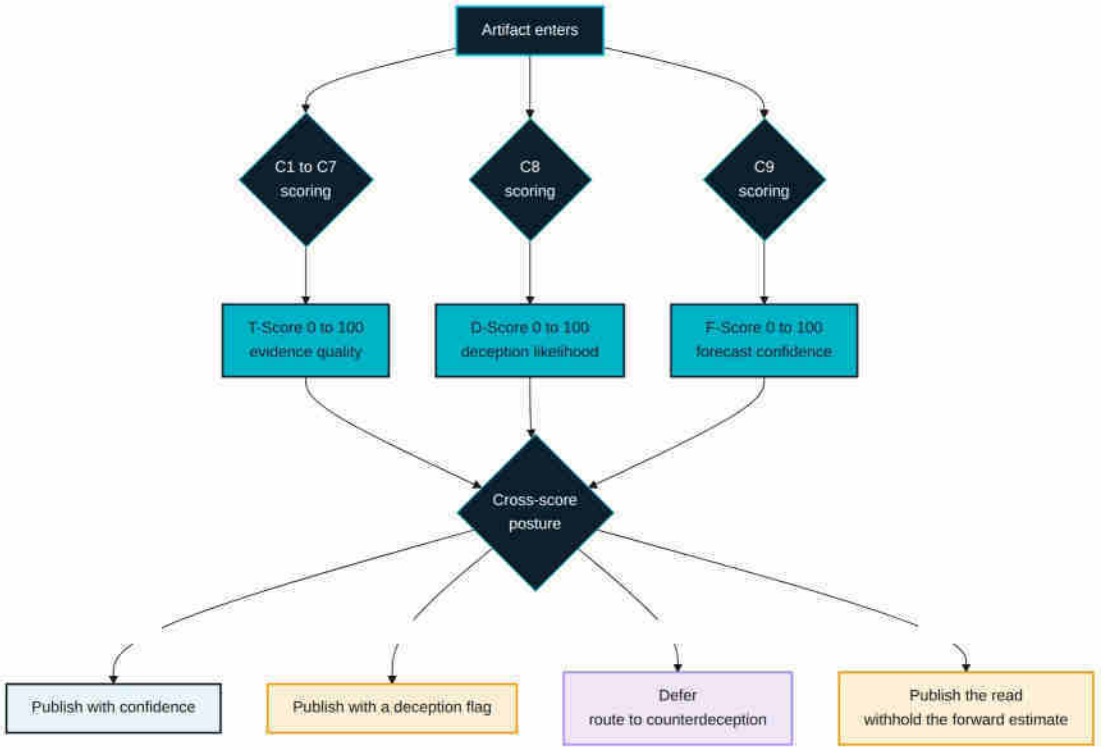

Figure 1. How the three scores combine into a handling decision.

What stays inside

Scoring publishes. The engine does not.

A reader needs the instruments to audit a number. A competitor needs the machinery to rebuild the product. The two needs separate cleanly, and the line runs here.

Published in full: the probability spectrum, the five source tags, the nine evidence clusters, the three scores, the band tables, and every score assigned to every claim in the pages ahead.

Held inside Treadstone 71: the weighting applied to each evidence cluster inside the T-Score, the structured analytic technique catalog and its numbering, the uncertainty decomposition arithmetic behind forecast confidence, the adversary cognition and leadership profiling models, the population-structure layer grounding geographic prediction, and the standing indicator catalog driving revision.

Held under restricted handling: collection priorities resting on an observable an adversary suppresses cheaply, together with the thresholds attached to them.

Anyone holding the tables below checks the arithmetic against the bands and argues with the result. Nobody holding the tables below rebuilds the model.

Read-back. A published assessment teaches the adversary what the analyst watches. The seam finding publishes because the corps document already circulates on Russian channels, so publication hands Moscow nothing Moscow does not hold. Indicators drawn from an adversary's own achieved effect publish for the same reason, since staging the effect costs the capability. Anything an adversary defeats with a cheap fitting stays out of the open edition.

Shelf life

Confidence peaks at issue and erodes across the horizon. A reader on day 85 must not treat a day-5 confidence as current.

Horizon point	How to read the confidence
Day 0 to 30 (July 25 to August 24, 2026)	Issue confidence. Evidence freshest
Day 31 to 60 (August 25 to September 23, 2026)	Step down one Kent band where no confirming indicator fires
Day 61 to 90 (September 24 to October 23, 2026)	Lower band, and the judgment flags for refresh

Table 6. Confidence decay across the ninety-day horizon.

Every prediction below enters a verification record at issue and resolves at the named date. Scored outcomes turn a confidence claim into measured skill, and a forecast nobody scores afterward earns nothing.

Scope exclusion

MITRE ATT&CK, ATLAS, and D3FEND describe tactical and technical detail. The assessment operates at the strategic and operational level. Airframe engineering detail enters as graded evidence behind a judgment, never as the object of assessment. Tactical counter-drone procedure sits outside the product.

How the document reached us

Start with the object itself. A PDF, eight pages, Russian text over a pink watermark reading машинный перевод, machine translation. A QR code sits bottom right above a red banner asking for money for a Russian victory. Photographs run through the text: a crewman in a plywood-lined dugout loading a rack of interceptors under a strip light, a Zala caught mid-frame against green fields, a Lancet blurred into the treeline.

The original came from the 1st Corps of the National Guard of Ukraine, the formation Ukraine calls Azov. The formation took its sector on the Pokrovsk and Dobropillia axis under the reform Syrskyi announced in February 2025, and its air-defense responsibility reaches roughly 50 kilometers back from the line of contact. Inside that band the corps detects Russian aircraft first by ear, then by eye, then on radar.

Whoever wrote the text writes like a practitioner. He quotes his first air-defense chief on an untested tactic, saying that combat alone will show whether the tactic works. He credits a former commander for the name of a Russian method. He admits, twice, that a fix depends on having forces he does not have. Staff officers producing public-affairs material do not write that way.

Corroborated · Admiralty B2 · T 72 (Mature) · D 15 (Low)

The Russian courier is KTsPN, the Coordinating Center for Assistance to Novorossiya. Running since 2014, the outfit collects donations, procures quadcopters, satellite terminals, and jamming sets, and keeps a translation desk that harvests foreign tactical writing. West Point's Combating Terrorism Center placed the network at the center of Russian nationalist volunteer traffic into Donbas during the first war year. The slogan printed on the repost is Latin: Cogito ergo vinco.

Adversary claim as to framing, corroborated as to existence · Admiralty E4 on framing, B2 on organizational facts · T 41 (Developing) · D 47 (Elevated)

An Elevated D-Score triggers a rule rather than an opinion. Nothing rests on the artifact until a counterdeception assessment runs, so the assessment ran. Ask the counterintelligence question and the answer arrives fast. Who gains from an analyst reading a Ukrainian officer's list of Ukrainian weaknesses? Moscow does. Nothing in the technical passages needed softening, so nothing was softened. The political language stayed at the top, where the domestic reader sees it, wrapped around a designation of Azov that Russian law requires and Russian audiences expect.

Three findings came out. Technical content survives the trip intact. Framing carries a political payload built for a domestic Russian audience, and the payload separates cleanly from the content. Posture accordingly: publish with a deception flag, high T on content against elevated D on framing.

What makes the artifact valuable has nothing to do with its content. A Russian fundraising organization with an analytical desk found an enemy self-assessment, translated the pages, and put the result in front of Russian drone crews inside a matter of weeks. Measure that cycle. Then measure the four months Russia took to render Ukraine's first interceptor design obsolete by raising Shahed speed. Two clocks, measured by different methods, running at roughly the same rate. Convergence of the two raises confidence in the tempo figure more than either measurement alone.

Four-month adaptation clock: asserted · Admiralty C2 · T 52 (Operational) · D 16 (Low)

The year, season by season

Late winter into early spring: flying inside the weather

Cloud sat over the sector almost continuously. Fog. Drizzle that never quite became rain. Russian operators picked their routes off the forecast and flew through the thickest layers they had, where no observer sees a Geran at any hour of the day.

Water did the rest. Moisture fouled the optics on interceptor drones and settled into the outboard antenna blocks on ground control stations. A crew that cannot see the target and cannot hold the link does not intercept anything.

Clear nights brought almost nothing. Daylight brought singles and pairs, and the corps read those correctly as somebody feeling for a route. The wave came after dark, down the same line or down another line already proven.

Corroborated · Admiralty B2

Spring into early summer: down among the gullies

Warm air and clean skies ended the weather game, so the Russians dropped. Strike groups came through the corps sector at 100 to 200 meters. Sometimes under 100. Radar loses low targets against ground clutter, and an interceptor crew without clear target designation struggles to get onto a course at all.

Then came terrain. Drones ran the lowlands, the balkas, and the wide river valleys, hiding behind the radio horizon. A crew watching a target on radar loses the link to its own airframe when that airframe drops into a gully. Tracking the enemy and reaching the enemy are separate problems, and the second one has a physics answer nobody has solved cheaply.

Corroborated · Admiralty B2

The method the corps named

Russian planners lacked a map of Ukrainian air defense, so they built one by paying for it.

Launch a group along whatever route looks best. Watch the group meet layered defense and die. Study where the fire came from. Shift the approach. Study the shape again. Repeat until something reaches the far side. The corps calls the method ручеёк, a rivulet, and credits an old infantry commander for the word.

The rivulet finds the crack, and the crack sits where two units touch. Boundaries between corps and between brigades draw the deepest penetrations now. Closing a boundary costs either a repositioned battery or a mobile control point pushed into the gap, and each option costs force structure the corps has already committed.

Asserted as to the label, corroborated as to the behavior · Admiralty C3 · T 55 (Operational) · D 20 (Guarded)

Nobody outside the corps uses the term. Kyiv Post and Tochnyi lay out the identical logic without the label: provoke the guns, mark them, empty them, then push through whatever gives.

The machines

Each system below carries the tag, the Admiralty pair, and the tri-score. Read the T column as evidence quality behind the parameters, and the D column as the risk that somebody shaped what reached the analyst.

System	What the system does	Numbers	Tag	Adm.	T	D
Geran-2	Subsonic strike drone, the volume backbone	Warhead grew from 50 kg to a thermobaric charge packed with 9 mm steel balls, then to a 90 kg combined charge that costs range	Verified	B1	82	11
Geran-3	First jet variant, Chinese Telefly JT80 turbojet	Roughly 370 km/h, thousand-kilometer reach. Ukrainian counts logged 138 launches to autumn 2025	Corroborated	B2	74	18
Geran-4	Faster jet variant	Assessed to 500 km/h. No recovered airframe anchors the figure	Asserted	C2	51	27
Geran-5	Fastest jet variant in service	Assessed to 600 km/h, about 90 kg warhead, 950 to 1,000 km, recorded between 200 m and 3 km altitude, first combat use January 11, 2026	Corroborated	B2	68	24
Gerbera	Plywood and foam decoy, now doing five jobs	Near 10,000 dollars apiece. Fills about half the nightly package. Also flies strike, reconnaissance, relay, and radar-sniffing	Verified	B1	79	13
Molniya	The workhorse of the near rear	300 to 1,000 dollars. 5 to 10 kg of explosive. Reach stretched from 20 km out to 50, sometimes 60	Corroborated	B2	70	21
Lancet	Loitering munition, paired with a Zala spotter	Peaks at dawn and after dark. The Zala relays, corrects, and films the hit	Verified	B1	80	15
Fiber-optic FPV	Ambush drone on a glass leash	Russian output passed 50,000 a month by September 2025. Spools run 10, 15, 20, and past 40 km	Verified	A2	84	9
S8000 Banderol	Drone-missile slung under an Orion	500 kilometers, 620 to 650 km/h, a 114 kg warhead carrying 49.5 kg of HMX. Struck Kyiv in June 2026	Corroborated	B2	69	22

Table 7. Russian strike inventory in the corps sector, graded.

Geran-4 sits lowest in the table for a reason worth naming. Assessed speed rests on assessment rather than on a recovered airframe, so the T-Score falls to Operational and the D-Score rises. A figure nobody has pulled off a wreck stays a figure nobody has pulled off a wreck.

A note on the glass leash. Fiber-optic drones emit nothing, so jamming does not touch them and video-interception sets like Chuika and Yulya never hear them. Paying for that immunity costs speed and agility, which leaves rifle fire as the practical answer. Ukrainian fire groups now sit along supply roads shooting at transiting drones and hunting the ones parked in ambush, waiting for a truck.

Waiting is the word the corps uses. Ждуны. Lurkers. A drone squatting in a treeline beside a logistics route with its camera live, spending nothing, until fuel or people come past.

What the numbers show

Period	Launches	Leak-through	Interception	What drove the number
Aug 2024 to Feb 2025	Climbing	2 to 3 percent	94 to 97	Heavy guns still reached what flew
March 2025	Climbing	About 9 percent	Falling	Russians climbed above the machine guns
All of 2025	54,538 airframes, roughly 32,200 armed	Rising	Bottomed near 80 in October	Sheer count, plus decoys
April 2026	Around 219 nightly, 144 armed	Rising	85 to 90	Interceptors arrive in numbers
May 2026	8,161, a record	6.65 percent, and 10.48 against strike drones	Holding	Maximum effort
June 2026	5,749	8.07 percent, and 12.61 against strike drones	Slipping against strike drones	Jets and saturation

Table 8. Launch volume, leak-through, and interception, August 2024 to June 2026.

Corroborated · Admiralty B2 · T 72 (Mature) · D 26 (Guarded, defender-sourced). Ukrainian Air Force counts tabulated by the Institute for Science and International Security. Treat the percentages as the defender's best case.

Put May and June beside each other. Fewer drones flew in June. More of them arrived. Something changed in the mix, not in the count.

One night carries the whole saturation story. Overnight on September 6, 2025, radio-technical troops held 823 objects on plot. Of those, 810 were Shahed-type airframes and decoys. Nine Iskander-K and four ballistic rounds rode in with them. Crews killed 751. A drone reached the Cabinet of Ministers in Kyiv for the first time since the invasion began.

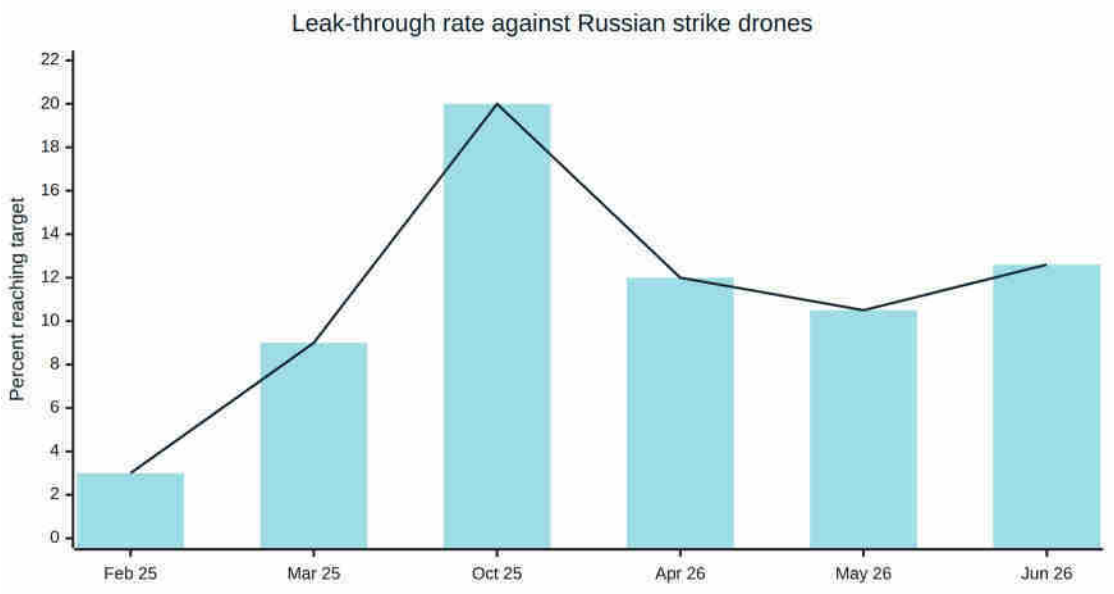

Figure 2. Leak-through against strike drones. October 2025 marks the low water mark.

The October 2025 point is the low water mark for Ukrainian air defense. Everything after reflects interceptor drones arriving in quantity, and everything after May 2026 reflects turbojets arriving to undo that.

Where the money decides

Price a Geran-2 at 20,000 to 70,000 dollars. Price a Gerbera at 10,000. Price a Patriot round above three million.

Shooting a three-million-dollar missile at plywood wins the engagement and loses the campaign. Ukraine saw the trap and built the Sting. Between 1,000 and 2,500 dollars. Ten thousand a month out of Wild Hornets. Speed between 280 and 315 kilometers an hour, 37 kilometers out, seven kilometers up. Interceptor drones took about 70 percent of Shahed kills over the Kyiv region by February 2026. In March one two-man crew killed 23 in a single night's work.

Cost exchange: corroborated · Admiralty B2 · T 75 (Mature) · D 14 (Low). Interceptor performance figures: asserted, manufacturer-adjacent · Admiralty C2

Then the jets came, and the arithmetic reset at the top of the threat set. A Sting cannot catch a Geran-3. Ukraine's defense minister announced on April 17, 2026 that private air defense had downed a jet Shahed above 400 kilometers per hour for the first time. A minister announcing one kill measures the size of the problem better than any assessment.

Verified against claimed

Statement	Standing	Adm.	T	D
Jet Geran variants fly faster than fielded Ukrainian interceptors	Verified across Ukrainian intelligence, wreckage, and ministerial statement	B1	—	—

Statement	Standing	Adm.	T	D
Fiber-optic drones defeat jamming and radio interception	Verified	A2	84	9
Lancet operates paired with Zala	Verified	B1	80	15
Boundaries between units draw the deepest penetrations	Corroborated. Ukraine restructured into corps in 2025 precisely to fix accountability where units touch, and 2026 reporting shows the gap open	B1	—	—
Low ingress under 200 meters through the first defense line	Corroborated for the frontline band. Deep-strike transit runs high, above 2,000 meters, so two altitude regimes operate at once	B2	—	—
The rivulet method	Behavior corroborated. The name appears in one source	C3	55	20
Daytime singles function as route probes	No outside confirmation. Operationally plausible	C3	—	—
Nothing effectively counters the Banderol	An adversary-facing claim from one corps in one sector, not a national assessment	C4	—	—
Russia plans 110,000 long-range drones in 2026, reaching about 455 a day by December	Ukrainian intelligence reporting a Russian plan. Defense Express, working the same material, calls the widely repeated 1,000-a-day figure unsupported	C2	54	31

Table 9. Claim-level standing. A dash marks a claim carrying a tag and an Admiralty pair without a full tri-score assigned in the companion forecast.

Dashes are honest, not decorative. Scores appear where the companion forecast assigned them against the full factor set. Nothing here got a number to fill a column.

Three flags belong on that table. Ukrainian shoot-down percentages come from the side being shot at. Russian production numbers come from Ukrainian intelligence, which gains from a figure large enough to move Western budgets. And the corps wrote about one sector, not a front.

Ninety days

Near-term judgments resolve on October 23, 2026 and enter the verification record on that date.

Judgment, resolving October 23, 2026	Kent term	F
Monthly launch volume stays between 5,000 and 8,500 airframes	Highly likely	88
Jet Geran variants grow as a share of the strike package without reaching half	Likely	72
Ukraine announces further single jet-Shahed kills rather than a sustained rate	Likely	69
At least one further drone incursion into NATO airspace draws a formal alliance response	Likely	71

Judgment, resolving October 23, 2026	Kent term	F
Further Banderol employment from Orion platforms against central Ukraine	Likely	64
A serial Ukrainian interceptor above 450 km/h enters mass production inside the horizon	Unlikely	31

Table 10. Ninety-day judgments with Kent term and forecast-confidence score.

Outlook to Q3 2027

Four things decide the next eighteen months, and only one of them sits on a battlefield.

Chinese turbojet supply sets the ceiling on Russian jet production. Ukrainian interceptor speed sets the floor under Ukrainian defense. Russian autonomy software decides whether jamming keeps mattering. Western funding decides whether Ukraine's gun and missile layer survives the winter.

Branch	Kent term	F	Turbojet supply	Interceptor speed	Autonomy	Western funding
Grinding parity	Likely	57	Sustained	320 to 450 km/h	Partial fielding	Sustained
Defender recovery	Unlikely	20	Constrained	Above 450 km/h	Demonstration only	Sustained
Saturation breakthrough	Unlikely	18	Sustained	Under 320 km/h	Partial fielding	Reduced
Autonomy shock	Highly unlikely	5	Sustained	Any	Routine use	Any

Table 11. Four branches, with the driver settings that produce each one.

Grinding parity runs down the middle. Likely (F 57). Russia grows volume toward the planned figure but misses the fifty-percent jet goal on engine supply. Ukraine holds subsonic interception in the low-to-mid eighties and keeps losing to jets. Winter costs the grid. The dangerous belt behind the line keeps creeping outward past 60 kilometers.

Defender recovery sits on one branch. Unlikely (F 20). Mass-produced interceptors clear the 450 mark during 2027, alongside AI gun turrets running near 150,000 dollars a mount. A city needs 10 to 30 of them by the manufacturer's own reckoning, so money decides, not physics. Interception climbs past 92 percent and Russian cost per hit doubles.

Saturation breakthrough sits on the other. Unlikely (F 18). Output beats plan, jets pass 40 percent of the package, decoy ratios climb to drain magazines, interception drops under 75 percent, and damage outruns repair.

Autonomy shock sits outside the cone. Highly unlikely (F 5), and severe. Machine vision and mesh coordination mature together during 2027 instead of 2028. Jamming stops mattering. Every defense falls back on kinetic kill at the exact moment kinetic kill is scarce. Russia already guided drones to one named man's house in Brovary in real time on April 20, 2026, so the precision exists.

Longer horizon

Glass-leashed drones take over as the primary tactical killer in contested sectors, on either side. **Likely (F 68).** Spool price is the brake, and spool price drops whenever a line scales.

Onboard vision guides better than a quarter of the Russian tactical airframes Ukraine recovers. **Roughly even chance (F 50).**

Ukraine shuts the boundary gap by command change rather than by equipment. **Unlikely (F 34).** The last attempt stalled when resources ran short.

European NATO states field intercept at under 10,000 dollars a shot. **Unlikely (F 32).** Procurement runs in years. Russian adaptation runs in months. Nothing in the file matters more than that mismatch.

What to watch

Polarity marks direction. An escalatory indicator pushes the estimate toward the saturation end. A de-escalatory indicator pushes toward recovery. Mixed indicators cut across the structure and suspend rather than shift it.

Watch item	Threshold	Polarity	What the item moves
Monthly launch volume	Above 9,000 for two straight months	Escalatory	Saturation branch becomes the baseline
Jet share of the strike package	Past 40 percent of the package	Escalatory	Speed gap becomes decisive
Reported interception	Under 78 percent	Escalatory	Saturation confirmed
Reported interception	Above 92 percent	De-escalatory	Recovery confirmed
Strike against a target designated after launch	Two independently reported cases	Escalatory	Autonomy arrives early
Mass-produced interceptor past 450 km/h	Confirmed killing, not demonstrating	De-escalatory	Recovery branch opens
Chinese export action on turbojets	Any formal step	De-escalatory	Two branches collapse at once
Ceasefire talks reaching technical annexes	Credible reporting from two sources	Mixed	Whole assessment suspends

Table 12. Watch items, thresholds, and polarity.

What nobody knows

Five holes sit between the present read and a firmer one.

Actual Russian jet output against the stated goal has never been measured against an agreed baseline. Recovered-wreckage forensics carry the count, and coverage runs uneven across sectors.

Molniya volume rests on one Ukrainian figure of up to 50,000 launches a month. No second count exists anywhere.

Ukrainian interceptor production against the 600-to-800-a-day target has never been confirmed by anyone outside the Ukrainian government.

Chinese vendor exposure to sanctions pressure stays opaque, and the vendors sit upstream of every jet judgment in the file.

The publication date of the Azov original remains open. Summer 2026 fits every internal reference. A precise date sharpens the adaptation clock, which is the number the whole forecast rests on.

Where the effort belongs

Go upstream. Chinese turbojets and control boards sit above every jet judgment in the file, and a single move against that supply touches Russian, Iranian, and North Korean programs together. No shot fired at a drone reaches three adversaries.

Buy against the reflex clock, not against the threat. Russia answered every Ukrainian countermeasure inside one to two seasons. A counter-drone program fielding in three years arrives dead. Build for a six-month refresh or skip the program.

Buy cheap kill now, at Ukrainian prices, from the people who solved the problem while being shot at. Sting costs 2,000 dollars. European cities own neither the turrets nor the interceptors, and the requirement arrives whether or not the procurement does.

Measure the turn toward autonomy by what airframes achieve against defended targets rather than by what airframes carry. Behavior against live defense is the harder thing to stage.

Treat organizational boundaries as terrain. Russia bought its map of Ukraine's unit seams one dead airframe at a time. Boundaries between national air-defense sectors inside NATO deserve the same survey, run from the inside and run first.

Production note. Produced under Treadstone 71 house analytic discipline: the Sherman Kent probability spectrum with half-open intervals, the five-tag source-quality scheme, and the ASA Evidence Standard tri-score anchored on classic NATO Admiralty grading, with verified fact separated from adversary claim throughout. Quantitative series on launch volume and interception draw on Ukrainian Air Force figures compiled by the Institute for Science and International Security. Production estimates draw on Ukrainian defense intelligence reporting through Defense Express and United24. Technical parameters draw on Ukrainian military intelligence, wreckage forensics, and Defense Express analysis. Corps reform reporting draws on Kyiv Independent, Jamestown, and Forces News. KTsPN characterization draws on the West Point Combating Terrorism Center and open Russian-language channel material. Every figure originating with a belligerent carries the flag in the text above. Model internals stay inside Treadstone 71, as set out under What stays inside.