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Friday, September 6, 1968
1:20 p. m.

MR. PRESIDENT:

Herewith a tentative judgment which, of course, could be overturned by new facts tomorrow.

1. The enemy may have opted for the second of Abrams' four alternatives; that is, a stretch-out of military operations at relatively low casualty rates.

2. The enemy may have decided to shift his weight away from the cities to provincial areas and the countryside.

3. Since the enemy's military operations always have a political purpose, his political situation may be this:

- He failed in his attempt to soften the Democratic convention on Vietnam.
- He is most actively engaged in trying to build up his political organization in the countryside for bargaining purposes and, possibly, for a cease-fire situation. Rural and provincial military operations could help in this effort.
- He may be planning to conserve military assets for a program of steady, limited pressure, rather than dramatic major action, as a background to serious negotiations; but we will require some days -- or a few weeks -- to make this judgment.
- Or he may be planning a program of limited pressure and conservation of assets so he has bargaining strength in the early months of 1969, as a new President takes stock.

4. A part of the background to these speculations is evidence derived from [communications] in Vietnam and reports of special meetings that usually precede or follow major policy decisions in Hanoi which affect military operations in the South:

- There has been a great deal of unusual activity [in high-level communications recently. This began on August 27 with a series of lengthy, urgent messages from the B-3 Front Headquarters which controls most of the II Corps area to the High Command in Hanoi. Then on September 2 Hanoi High Command sent an unusual high precedence message to COSVN.]

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- During the past several days the Military Affairs Committee of COSVN has been engaged in unusual activity which included the transmission of a number of "decrypt immediately" messages to its subordinates.
 - We have information from scattered points on meetings of political cadre. At least one of these appeared to be rather urgent in that the unit itself was going into combat without some of its officers who were attending a meeting.
 - A COSVN Military Intelligence Conference is scheduled to be held on September 15 and will last 10 to 12 days. Tactical representatives from various units were directed to be present.

W. W. Rostow