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AIR BRIEF · SAMPLE

Diplomatic track after Oslo and St Petersburg, and what it means for the Baltic flank

Information cut-off: 22 Oct 2026, about 12:00 Vilnius Horizon: to 31 Jan 2027 Length: 4 pages

See earlier. Judge clearly.

Key judgments

- 1. The talks are moving, but nothing is on paper.** US envoy Witkoff held talks in Oslo on 20 Oct and met President Putin in St Petersburg on 21 Oct. Neither meeting produced a signed or published text. Our base case to 31 Jan 2027 stays *Frozen war, talks continue*.
- 2. The next date is Moscow's, not yet everyone's.** Kremlin aide Ushakov says Russia is "in principle" ready for technical talks with the US and Ukraine "around 10 Nov". As of 22 Oct, neither Washington nor Kyiv had confirmed that date. We treat it as provisional.
- 3. A ceasefire announced without a text did not hold.** The energy "ceasefire" announced by President Trump on 11 Oct was never written down. Strikes on energy targets resumed within hours and have since grown, on both sides. Process alone does not cool the war.
- 4. On the Baltic flank the pressure is hybrid, not military.** In the period we found one sabotage attempt in Vilnius, which the Lithuanian government blames on Russia; no evidence is public. One unmanned aircraft came down in northern Lithuania, and Vilnius says it was Ukrainian. We found no confirmed Russian or Belarusian force build-up facing the Baltic states.
- 5. Belarus: meetings and drills, no forces moving.** The item to watch is the outcome of the Russia–Belarus defence board held in Minsk on 22 Oct. It had not been published at cut-off.

1 What happened

- Oslo, 20 Oct.** Witkoff met President Zelensky, Norwegian Prime Minister Støre and Finnish President Stubb; Kushner joined by video (Norwegian PM's office; BBC). Stubb said a "partial ceasefire" was discussed. That was a discussion, with no text.
- St Petersburg, 21 Oct.** Witkoff met Putin at the Constantine Palace for nearly three hours, with Ushakov and Dmitriev present and Kushner on video, according to the Kremlin and TASS. Russia released US citizen Stephen Hubbard during the visit (AP). Putin was quoted as finding "little useful" in the Oslo proposals.
- Economic channel, in parallel.** On 16 Oct the White House waived the new Russia duties and sanctions under the Graham Act (Executive Order 14436, published in the Federal Register on 21 Oct). A US Treasury licence of 9 Oct allows Russian-origin diesel until 7 Apr 2027. Moscow's Novak says the first 40,000-tonne tanker sails on 22 Oct to an undisclosed US port. No sailing or arrival had been independently confirmed at cut-off.
- US–Ukraine friction.** On 18 Oct President Trump wrote that Zelensky "doesn't want to end this war". The same day Zelensky said US early-warning intelligence had resumed after a three-day gap; US Secretary of State Rubio denies there was any pause. There has been no Trump–Zelensky meeting or call since 7 Oct.

2 Confirmed vs reported

We separate what a public, dated source confirms from what one party says, or what rests on a single or anonymous source.

Track	Confirmed (dated, public source)	Reported only: one party, single or anonymous source
Diplomatic process	Oslo talks, 20 Oct. Witkoff–Putin meeting, 21 Oct. Hubbard released, 21 Oct.	Technical trilateral "around 10 Nov" (Ushakov, 21 Oct). Abu Dhabi as venue (ISW's reading). Witkoff and Kushner "may visit Moscow in the next two weeks" (unnamed TASS source).
Ceasefire	No text. Energy "ceasefire" announced 11 Oct; Russian strikes on energy sites within hours; Ukraine resumed refinery strikes on 15 Oct.	"76 Russian violations" (Zelensky's count). Peskov, 21 Oct: Russia "needs peace, not a ceasefire".
US economic levers	Graham Act measures waived (EO 14436). Diesel licence to 7 Apr 2027. No public list of the "top 5" buyers of Russian oil.	First diesel tanker sails 22 Oct (Novak). Other "large-scale joint economic projects... some nearing launch" (Ushakov).
China	Putin met Premier Li Qiang in St Petersburg, 21 Oct. China welcomed Putin's attendance at APEC, Shenzhen.	A Putin–Xi–Trump meeting at APEC: WSJ, unnamed sources. The Kremlin calls it "hypothetical"; Ushakov says China is "already making preparations"; Beijing says it has "no information".
Baltic flank	Attempted arson at a Vilnius firm storing Starlink equipment, 18 Oct. An unmanned aircraft tracked over northern Lithuania, 18 Oct. Lithuania opened consultations with NATO on engaging such aircraft on a radar track alone.	Attribution of the arson to Russia: the Lithuanian government's assessment. The aircraft was Ukrainian, diverted by Russian jamming; Vilnius's account. A claim that it was launched from Lithuania: anonymous, denied.
Belarus	Russian Defence Minister Belousov in Minsk for the annual joint defence board, 22 Oct (Interfax; Pozirk). CSTO exercises 12–16 Oct (peacekeeping and CBRN scenarios).	Russia wants ballistic missile systems in Belarus aimed at western Ukraine (Zelensky, 17 Oct; no imagery or third-party confirmation). An alert of an air assault unit in Brest, 19 Oct (single source).

3 Why it matters for the Baltic flank

A process without paper keeps the current picture in place. Meetings, envoy visits and a Russian-stated date are signs of activity, not of settlement. Until a text is signed by both Russia and Ukraine, we expect the war to go on at roughly its current shape, with strikes on energy as the main lever on each side.

Washington's easing toward Moscow is economic, not about security. The Graham waiver and the diesel licence are US–Russia trade steps. They carry no commitment on the front line, on Belarus or on the Baltic region. For flank states, the question to track is whether any later text says anything on regional security. So far nothing on paper does.

The flank risk we see is hybrid. Sabotage, jamming and stray or deliberate air incursions are the realistic pressure tools. The Danish Defence Intelligence Service's public assessment expects hybrid action rather than occupation, and notes that an invasion would need months of visible force build-up. We see none. The practical issues for flank planners are rules for engaging unmanned aircraft and protecting logistics sites, not a ground threat.

Belarus is the swing variable, and it is quiet. The Minsk defence board had on its agenda a regional grouping of forces, shared infrastructure, unified air defence and joint training, according to Interfax and Pozirk. The board meets every year. Any new Union military documents would be an early warning sign. They would not, on their own, show forces on the move.

Our numbers to 31 Jan 2027

Where the war stands on 31 Jan 2027 (the four add up to 100%)	%
Frozen war, talks continue	63%
Partial ceasefire on paper	19%
Talks collapse, war intensifies	12%
Something else breaks	6%

Separate yes/no questions: chance of "yes" by 31 Jan 2027	%
Hybrid pressure on NATO crosses our escalation threshold (provisional)	55%
The Belarus Factor: Belarus confirmed in an active combat role	5%
US–China bargain decides: a US–China text links their deal to the war	10%
Threat to the Baltic states: armed attack, confirmed only by a formal NATO act	1%

OUR ASSESSMENT, NOT A FORECAST Each item has written criteria for how it will be judged on 31 Jan 2027. The yes/no questions are scored separately and do not add up.

4 Indicators to watch

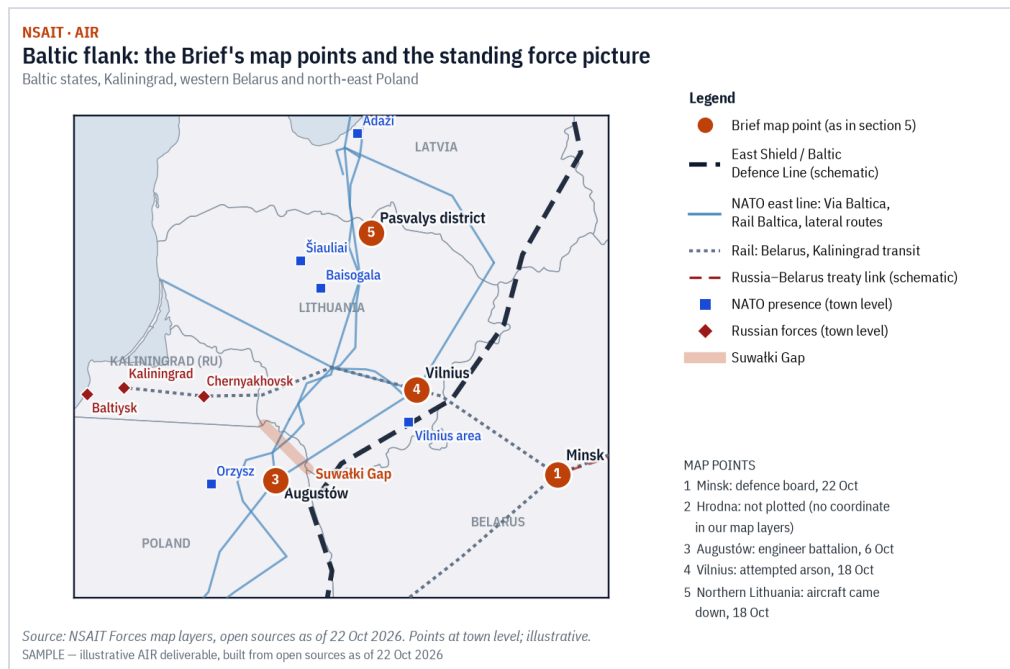
When	Indicator	What it would tell us
Now	Published outcome of the Minsk defence board	New Union military documents or air-defence decisions are an early warning for Belarus. Trucks, rail moves and new launch sites would matter more.
Late Oct	Arrival of the first Russian diesel tanker at a named US port	Whether the economic channel is delivering cargo, not just a licence.
Before ~10 Nov	Washington and Kyiv confirm the technical trilateral, with a date and venue	The process gains a date all three accept. That is still not a text.
3 Nov	US midterm elections	Coverage ties the diesel channel to fuel prices; watch for any change of pace afterwards.
18–19 Nov	APEC, Shenzhen	A Putin–Xi meeting is expected. A Trump meeting is unconfirmed. Only an official text linking a US–China deal to the war would change our numbers.
~mid-Nov	Lithuania's NATO consultation on engaging unmanned aircraft on radar alone	Rules of engagement on the flank; the Lithuanian PM spoke of "about a month" on 19 Oct.
Any time	A text signed by both Russia and Ukraine (energy, sector or humanitarian pause)	The only thing that moves us toward <i>Partial ceasefire on paper</i> .

5 Map points

Town or area level only. Hrodna is listed but not plotted: our map layers hold no coordinate for it.

#	Place	What	Status
1	Minsk, Belarus	Russia–Belarus joint defence board, 22 Oct	Meeting reported; outcome not published

#	Place	What	Status
2	Hrodna , western Belarus, near Poland	Snap readiness check of a mechanised brigade ordered on 12 Oct, according to Belarus's defence ministry	Routine type of event; no force movement confirmed
3	Augustów , Suwałki area, Poland	New Polish engineer battalion opened 6 Oct; stated role is mobility and counter-mobility in Suwałki terrain (PAP)	Confirmed; defensive
4	Vilnius , Lithuania	Attempted arson at a firm storing Starlink equipment, 18 Oct	Event confirmed; Russian role is the government's assessment
5	Northern Lithuania , near the Latvian border	Unmanned aircraft tracked by NATO jets and came down, 18 Oct	Vilnius says it was Ukrainian, not a Russian probe



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