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AIR DEEP ASSESSMENT · SAMPLE EXCERPT

Russia, Belarus, the US, China and Ukraine: where the war stands on 31 January 2027

Information cut-off: 22 Oct 2026, about 12:00 Vilnius Horizon: 31 Jan 2027, 23:59 Vilnius

See earlier. Judge clearly.

This is an excerpt. A full AIR Deep Assessment runs 10–20 pages with scenarios and sources. Selected sections are shown here: the scenario structure, our numbers, how each will be judged, the drivers, the force picture, what to watch, and how we score ourselves.

Summary judgments

1. **Base case: a frozen war with talks continuing (63%).** Diplomacy is active (Oslo on 20 Oct, St Petersburg on 21 Oct) but has produced no text. A Russian-stated date for technical trilateral talks "around 10 Nov" has not been confirmed by Washington or Kyiv.
2. **A written partial ceasefire is the main alternative (19%).** It requires a text that both Russia and Ukraine sign or formally accept. The 11 Oct energy "ceasefire" shows the gap: it was announced, never written down, and broke down within hours.
3. **Collapse with escalation is a real but smaller risk (12%).** Strikes on energy are heavier since mid-October, but contact between the parties continues, and that keeps this path below our base case.
4. **Hybrid pressure on NATO is more likely than not to cross our threshold (55%, provisional).** The bar is high: at least three incidents that a NATO member formally attributes to Russia or Belarus, or one major event.
5. **Belarus joining the fighting (5%) and an armed attack on the Baltic states (1%) remain low.** We see meetings and drills, not forces moving.

1 Scenario structure

We ask two kinds of question, and we keep them apart.

Where the war stands on 31 Jan 2027. Four end states. Exactly one will be true on the horizon date, so the four add up to 100%.

Separate yes/no questions. Four developments that can happen alongside any end state. Each has its own chance of "yes" by 31 Jan 2027. They are not added together, and one moving does not force another to move.

Every item has written criteria, fixed in advance, so that on 31 Jan 2027 we can say plainly whether we were right. Our horizon is about one quarter. It covers the talks expected around 10 Nov, the APEC summit on 18–19 Nov, the winter strike season and the expiry of the US–China trade truce on 10 Jan 2027. After 31 Jan we roll forward quarterly (30 Apr, 31 Jul and 31 Oct 2027).

Where the war stands on 31 Jan 2027		
End state	Our number	In one line
Frozen war, talks continue	63%	The war goes on, talks go on, nothing limiting the fighting is on paper.
Partial ceasefire on paper	19%	A written arrangement limiting fighting in at least one domain or place is in force between Russia and Ukraine.
Talks collapse, war intensifies	12%	The negotiating track has broken down and the war is measurably more intense.
Something else breaks	6%	A break outside these paths: a full ceasefire, a regional capital changing hands, a direct NATO–Russia clash, or a leader leaving office.
Separate questions: chance of "yes" by 31 Jan 2027		
Question	Our number	In one line
Hybrid pressure on NATO	55%	Hybrid pressure by Russia or Belarus on NATO territory crosses our escalation threshold. <i>Provisional:</i> we are checking it against a count of qualifying incidents since 1 July.
The Belarus Factor	5%	Belarus is confirmed as taking an active combat role in the war.
US–China bargain decides	10%	The US and China put on paper a link between their bargain and the war.
Threat to the Baltic states	1%	Russian or Belarusian forces carry out an armed attack on Estonia, Latvia or Lithuania, confirmed only by a formal NATO act.
OUR ASSESSMENT, NOT A FORECAST Starting numbers set 22 Oct 2026. The yes/no questions are scored separately and do not add up.		

Why "Something else breaks" is 6%. We give it roughly 3 points for a comprehensive ceasefire, 1 for a regional capital changing hands, 1 for a direct NATO–Russia clash and 1 for a leader leaving office, over about 100 days.

Why the yes/no numbers sit where they do. *Belarus:* no confirmed movement of forces, launch sites or strike systems. *US–China:* the trade truce expires on 10 Jan, inside our horizon, but there is no text linking it to the war. *Baltic states:* no Russian concentration of forces facing them; the Danish Defence Intelligence Service's public assessment expects hybrid action, not occupation. *Hybrid pressure:* high activity in the region, but a demanding bar of formal attribution.

2 How each item will be judged, in plain words

End states are judged on the state of the world at 23:59 Vilnius on 31 Jan 2027. The yes/no questions are judged on events between 22 Oct 2026 and that date. Reports published up to seven days later may be used, but only for events before the horizon. Three house rules apply throughout. A party's claim, about itself or its adversary, cannot settle anything. A government's formal act (a decree, a signed text, a charge sheet, an official register entry) can. And meetings without text are not a deal.

Item	Counts as "yes"	Does not count
Frozen war, talks continue	None of the other three end states has happened. Meetings, calls, envoy visits and "agreements in principle" without text all sit here, as does a hotter strike war while talks continue.	— (this is the default outcome)
Partial ceasefire on paper	A text limiting strikes or fighting in one domain (energy, air, Black Sea), in a named sector, or a time-bound humanitarian pause in a named place. It must be signed or officially published by both Russia and Ukraine, or published by a mediator and formally accepted by both, and not formally renounced by the horizon. Violations alone do not void it.	Meetings, "readiness" statements, a one-sided announcement (the 11 Oct energy "ceasefire" is the test case), prisoner exchanges, US–Russia trade items, a text that has already lapsed.

Item	Counts as "yes"	Does not count
Talks collapse, war intensifies	Both: (1) no confirmed envoy-level contact on the war between the US and Russia, and none between Russia and Ukraine, for 45 days before the horizon, or a party formally ends its participation; and (2) remote-violence events in the ACLED dataset are at least 25% above their October 2026 level, or Russia or Ukraine issues a new mobilisation decree.	Harsh rhetoric; a single large raid; a talks date slipping while contact continues; US tariffs used on a buyer of Russian oil, on its own.
Something else breaks	A general ceasefire along the whole line, signed by both; a regional (oblast) capital changing hands, shown on ISW control maps and acknowledged by the losing government; NATO invoking Article 5 or formally stating that Russian forces deliberately attacked Allied territory; Putin or Zelensky leaving office, confirmed by an official act.	Interceptions of unmanned aircraft over Allied territory, sabotage and jamming (these count under hybrid pressure).
Hybrid pressure on NATO	At least 3 incidents (sabotage, cable or pipeline damage, a cyber attack on critical infrastructure, an airspace violation, an instrumentalised migration push) in the Nordic–Baltic region, Poland or Romania, each formally attributed to Russia or Belarus by an official act: charges, a court finding, an expulsion, a protest note, sanctions, an Article 4 request or a NATO/EU statement. Or 1 major event, such as an Article 4 request or an official finding that a Russian state asset deliberately entered Allied airspace and was engaged.	A minister's press remark; strays without a finding of intent (the 17 Oct Romanian shoot-downs off Sulina); cases where the host government names a non-Russian origin (the 18 Oct Lithuania case); routine jamming already in the baseline; commentary.
The Belarus Factor	Belarusian units in combat against Ukraine; missiles, rockets or unmanned aircraft launched from Belarus at Ukraine; or a Russian strike system newly deployed to Belarus and put on combat duty, or Russian ground forces newly concentrated there in combat formations. Confirmed by a Belarusian or Russian official act, or by a non-party government corroborated by independent open data.	Exercises, snap checks, CSTO drills, the annual joint defence board or new Union documents on their own (these are warning indicators); the prisoner-release and potash track; a Ukrainian claim on its own.
US–China bargain decides	A US or Chinese official text, or a joint statement, explicitly linking US–China terms (trade, tariffs, export controls, sanctions) to the war, for example Chinese commitments on Russian oil tied to US tariff relief. A summit counts only if such a text follows.	The truce or its extension without a Ukraine link; the 27 Sep "30-for-30" lists; the Graham waiver and the diesel channel (US–Russia items); Russian statements about a three-way summit.
Threat to the Baltic states	Only a formal NATO act: Article 5 invoked over such an attack, or an official NATO statement that Russian or Belarusian forces attacked or entered a Baltic state's territory with conventional arms.	Hybrid acts, sabotage, airspace incursions, jamming, exercises, social-media posts, leaks, commentary, a party's claims.

3 Drivers

Diplomacy without paper. Oslo (20 Oct) and St Petersburg (21 Oct) were the most substantial meetings of the period. Ushakov says Russia is "in principle" ready for technical trilateral talks "around 10 Nov" on "a security system for Russia and Ukraine"; ISW reads Abu Dhabi as the likely venue. Putin was quoted as finding "little useful" in the Oslo proposals. Zelensky repeated on 21 Oct that he is open to freezing the current line, a position ISW notes he has held since 2024. *Why it matters:* this is process, which keeps the base case in place. It moves nothing toward a partial ceasefire until a text exists.

US economic levers on Russia: eased, not used. Executive Order 14436 (16 Oct) waived the new Russia duties and sanctions under the Graham Act. The waivers are open-ended, and no "top 5" list of buyers of Russian oil has been published. A Treasury licence of 9 Oct allows Russian diesel until 7 Apr 2027. *Why it matters:* the tariff tool that could have hardened the confrontation is parked. In our structure these are US–Russia items; they do not count toward the US–China question.

The energy strike war. The 11 Oct energy "ceasefire" was never written down. Russia struck energy sites within hours, Lavrov said on 12 Oct that Ukraine does not deserve "respite", and Ukraine resumed refinery strikes on 15 Oct. Peskov said on 21 Oct that Russia "needs peace, not a ceasefire". *Why it matters:* intensity is rising inside a frozen front. That pulls toward the collapse path only if contact between the parties also stops.

US–Ukraine friction. Trump's 18 Oct post said Zelensky "doesn't want to end this war". Whether US intelligence sharing paused is disputed: Zelensky says it did, Secretary of State Rubio denies it. *Why it matters:* friction weakens Kyiv's leverage at the table, but has not ended US–Ukraine contact. Zelensky spoke with Witkoff and Kushner on 18 Oct.

China. No Putin–Xi meeting or call has been confirmed since 7 Oct. Putin met Premier Li Qiang on 21 Oct. A three-way meeting with Trump at APEC (18–19 Nov) is a Russian proposal: the Kremlin calls it hypothetical and Beijing says it has "no information". *Why it matters:* only a written link between a US–China deal and the war moves our US–China number.

The flank. On 17 Oct Romanian F-16s shot down two Geran-family unmanned aircraft over Romanian waters off Sulina, according to Romania's defence ministry. Romania has not found that they were sent there deliberately. On 18 Oct there was an attempted arson at a Vilnius firm storing Starlink equipment; the Lithuanian government blames Russia, and no evidence is public. *Why it matters:* this is the hybrid pattern we expect. Neither event yet meets our formal-attribution bar.

Belarus. According to Belarus's defence ministry, a snap readiness check of the mechanised brigade at Hrodna was ordered on 12 Oct. CSTO exercises on 12–16 Oct used peacekeeping and CBRN scenarios. Belousov is in Minsk for the annual joint defence board on 22 Oct (Interfax; Pozirk). *Why it matters:* routine activity, with no forces moving. The board's outcome is the next data point.

4 Force picture by area



Area	What we see (as of 22 Oct)	Change since 7 Oct
Ukraine theatre	Long-range strike capacity steady. Ukraine's military intelligence estimates Russian Iskander-M output at about 65 a month, with stock up 13% since August and about 700 ballistic missiles in all; it puts unmanned aircraft output at about 10,000 a month, including about 4,000 jet-powered (as reported by ISW, 21 Oct). Russian strikes on the grid after 11 Oct; Ukrainian refinery strikes from 15 Oct; a large raid on St Petersburg on 18 Oct.	Refined. Posture unchanged; the energy strike war is hotter; no large new ground movement confirmed.
Belarus	Snap checks (12 and 19 Oct), CSTO drills not aimed at the Suwałki area, the annual defence board in Minsk (22 Oct, outcome pending). No rail or air lift and no ballistic deployment confirmed.	No confirmed change in forces. Watch the board's outcome.
Baltic and Kaliningrad	No Russian concentration. A Su-30SM training crash near Chernyakhovsk on 21 Oct, according to Russia's defence ministry. Attempted arson in Vilnius on 18 Oct (Russian role is Lithuania's assessment). The 18 Oct aircraft over northern Lithuania was Ukrainian, according to Vilnius.	No change in posture. One sabotage event, attribution unproven.
Black Sea	Romania shot down two Geran-family unmanned aircraft over its waters on 17 Oct. NATO Secretary General Rutte said on 13 Oct the alliance will adjust its Black Sea posture "as needed".	Changed. An ally used force in its own airspace; no finding of deliberate intent.
Space and electronic warfare	Russia's Kosmos-2612 matched orbit with the Finnish-built ICEYE-X36 satellite and made close passes in mid-October; reported minimum distance ranges from about 26 m to about 500 m (CNN; SpaceNews). Satellite-navigation jamming continues.	Confirmed, no kinetic change.
Diplomatic process	Oslo (20 Oct); St Petersburg (21 Oct); the Russian-stated trilateral around 10 Nov; Graham measures waived.	Changed. The process has a Russian-stated date. Still no text.
Energy and external	Diesel licence (9 Oct); first tanker announced for 22 Oct by Novak, not yet confirmed. Iraq closed the Sheeb crossing with Iran on 21 Oct (Arab News/Reuters).	Refined. The diesel channel moved from licence to an announced first cargo.

5 Indicators and warnings

Indicator	Would push toward	Timing
Washington and Kyiv confirm the trilateral with a date and venue	Keeps the base case; a precondition for any text	Before ~10 Nov
Any text signed or formally accepted by both Russia and Ukraine (energy, sector, humanitarian pause, e.g. Oleshyky)	Partial ceasefire on paper	Any time
A trip by Witkoff and Kushner to Moscow (so far an unnamed TASS source)	Process continues	~Early Nov
A party formally suspends talks, or 45 days pass with no envoy-level contact	Talks collapse (needs higher intensity as well)	Rolling
A new mobilisation decree, or remote-violence events 25% above October levels	Talks collapse, war intensifies	Rolling
US tariffs used on a named buyer of Russian oil (now waived)	Raises the collapse path; does not settle it alone	Open-ended
New Union military documents, air-defence or grouping decisions from the Minsk board	Early warning for the Belarus Factor (not resolution)	Now
Rail or air lift, new launch sites or strike systems on combat duty in Belarus	The Belarus Factor	Rolling
A NATO member formally attributes an incident to Russia or Belarus (charges, expulsion, protest note)	Hybrid pressure on NATO	Rolling
Lithuania's NATO consultation on engaging unmanned aircraft on radar alone	Context for flank rules of engagement	~Mid-Nov
APEC Shenzhen, followed by any US or Chinese text linking a deal to the war	US-China bargain decides	18–19 Nov

Indicator	Would push toward	Timing
US–China truce expiry, renewal terms	US–China bargain decides, only with a Ukraine link	10 Jan 2027
Visible, months-long force build-up facing the Baltic states	Threat to the Baltic states	Rolling

6 How we score ourselves

- **Written criteria first.** Every number above has criteria fixed before the outcome is known (section 2). Earlier versions of our board had no horizon and no criteria; they stay in our log for reference and are not scored.
- **A standard score.** On the horizon date we score the end-state table with a multi-category Brier score, and each yes/no question with a binary Brier score. Brier scores run from 0 (perfect) upward; for the end states, putting everything on the wrong outcome scores 2. We score the weekly cut as the main series and the daily cuts as a secondary one.
- **Evidence rules carry into scoring.** Only primary sources settle an outcome: a signed text, an official release, a register entry. A party's claim never does. Until then every item is marked unresolved. Outcomes are never filled in by assumption.
- **Separate review.** One function grades the evidence, another drafts the resolution memo, and the desk rules within 10 days of the horizon. Any annulment is logged with its reason.
- **Published.** We will publish how this assessment scored after 31 Jan 2027.

Sources (opened 22 Oct 2026)

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