

Spot Report: UN General Assembly analysis, Trump's pivot away from pressure on Ukraine

Your inside partner in Ukraine

KI INSIGHTS WEEKLY REPORT

Saturday, September 27

This spot report was prepared in response to recent key developments. We endeavor to keep our analysis timely but note that events are fast-moving.

Executive summary:

- **Diplomatic win for Kyiv:** Zelensky's visit secured a surprising shift in Trump's rhetoric against Russia, removing US pressure for concessions and giving Ukraine and Europe space to continue the war.
- **But limits to US support:** Trump stepped back from mediating and offered no U.S. security guarantees, military, or financial support – all now expected to come from Europe.
- **Keith Kellogg's renewed influence:** Sources suggest that Kellogg has been pivotal in sharing Ukraine friendly narratives on the frontline situation with Trump and is regaining influence – a positive development, albeit with risks.
- **Strategic landscape:** The war will likely continue into 2026; Ukraine gains time and Western backing, but remains dependent on European aid and still lacks binding US commitments.

THE SPOT REPORT

Donald Trump's abrupt shift in public (and private) rhetoric marks a significant symbolic win for Zelensky but substantive risks remain. On Tuesday, following his meeting with Volodymyr

Zelenskyy, President Trump announced that he would support Ukraine's bid to join NATO. This move is seen as a significant symbolic win for Zelenskyy, but it also raises concerns about the potential for a more aggressive US posture towards Russia. The report discusses the implications of this shift in rhetoric and the risks it poses for Ukraine's future.

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In the next few weeks, we will be releasing a report on the next time Ukraine's deceptions come to light.

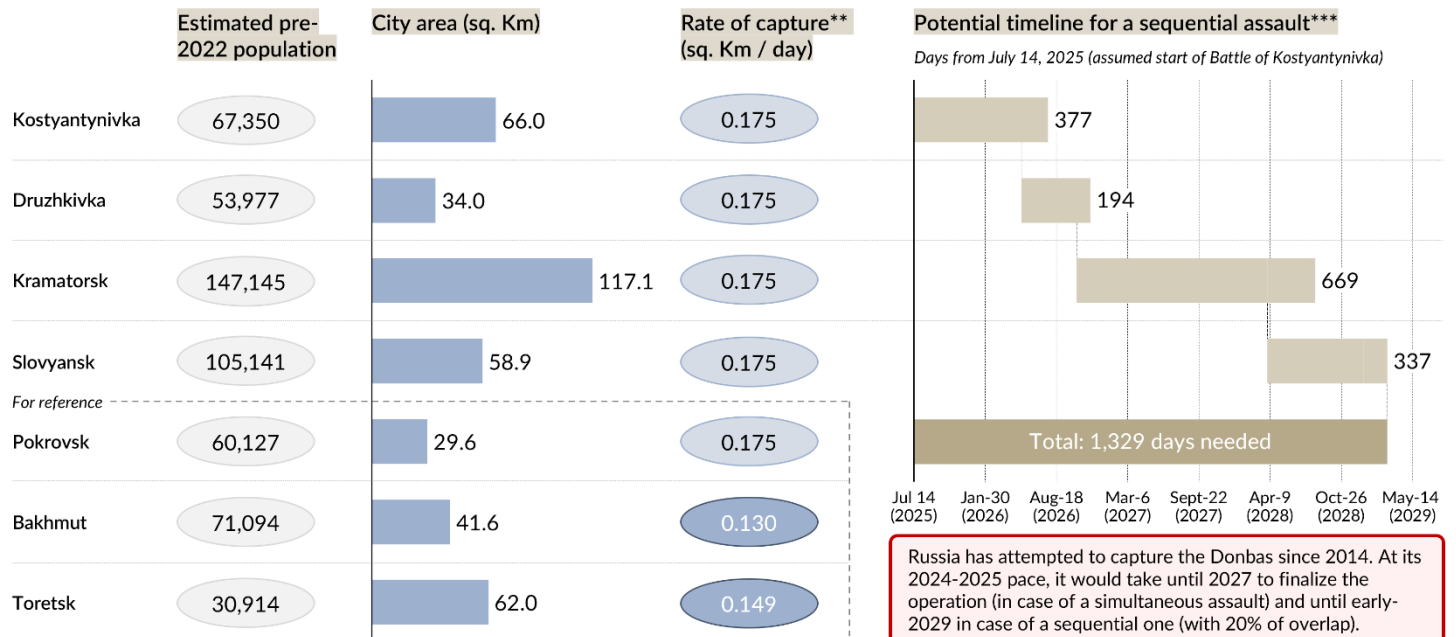
President Zelensky is convinced that Donald Trump has now decided to step back as a mediator for at the

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breakthrough, and minor episodes like Dobropillya would be contained.

Possible timeline of the battle for Ukraine's Donbas fortress belt*



* This analysis only reflects the main four urban centers in the so-called Donetsk fortress belt. Unoccupied Donetsk oblast includes multiple additional towns and urban centers.
 ** Actuals for Bakhmut and Toretsk. For others, the average pace of capture in 2024-25, 0.175 km2 per day, is assumed. Official start and end dates based on Wikipedia consensus.
 *** Assumes the Russian offensive would be sequenced (one center after another) with just 20% of overlap. A simultaneous assault could be quicker but would require more resources.
 Source: KI Insights Research, DeepState

Note: We assess that — given the current dynamics — it is unlikely Russia will succeed in capturing the... are
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the... not
neces... and
his lead on foreign policy, Andy Baker).

Russia's Summer Offensive slowed sharply in September

Monthly Ukrainian Troop

750
700
650
600

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For...
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Donetsk fortress belt.

Expecting heavy pressure, the Ukrainian side was ready once again to promote the idea of halting hostilities by

Key

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pressure. They had hesitated to say this openly for fear of angering Trump, as had already

happened during the Zelensky-Trump meeting in the Oval Office in February 2025. But now, the US President is expected to return to Ukraine, raising the possibility of a meeting with the Ukrainian leader.

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The report focuses on probing the flashpoints for conflict.

He also said that international law does not function fully if a country lacks powerful allies or nuclear weapons. He said that the US cannot afford to be seen as the only nuclear power. He said that the US should be seen as a nuclear power. He said that the US should be seen as a nuclear power.

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As a result of the Trump–Zelensky conversation, it can be said that Kyiv and Europe achieved their minimum objective: preventing Trump from resuming pressure on Zelensky (from scenario 1 to 2).

They also significantly complicated further Moscow–Washington dialogue and undercut Trump’s earlier efforts to reach a deal with Moscow. This is a significant development that could impact Ukraine’s ability to keep fighting.

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But...
arrang...
Ukraine’s ability to keep fighting.

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