WIRE World Instability

UNCLASSIFIED // OPEN SOURCE | Thursday, 29 October 2026 | Vol. 2026-302 | As of 290600 EDT OCT 26

Baseline work today: the Taiwan Strait (IP-T1) Statement of Normalcy is re-baselined on the latest seven MND reports; the topic stays at NO CRISIS. Next in the rotation: AM-T2 (hemispheric security), then EU-T2.

BLUF. The Middle East holds at **PROBABLE CRISIS (↑)** as attacks on shipping in the Strait of Hormuz intensify. A tanker struck by an unknown projectile off Khasab early on 29 Oct was reported on fire and mostly submerged, and the IRGC says three tankers hit mines on an "unauthorised" southern route. Kpler's 29 Oct briefing puts the 7-day Hormuz average at **about 51% of baseline** (preliminary). Brent **settled at $115.32**. Washington is running two tracks. The Vice President wrote to Iran's security chief about talks, while the Defense Secretary fired the Joint Staff's chief planner as strike planning continues. Iran calls Qatar's latest draft "unacceptable ideas". Israel's near-final count shows **no bloc at 61**, and Likud now says the election was "stolen". **North Korea fired about 10 ballistic missiles**, resolving **IPA-01** (hit) and turning the Indo-Pacific trend ↑. Europe/Russia **POTENTIAL (=)**; Americas **ENVIRONMENT (=)**; Africa **POTENTIAL (=)**. **Global roll-up: PROBABLE CRISIS (↑).**

0. WIRE World Instability Dashboard

REGION / TOPIC	CRISIS LEVEL	DOM. INDICATOR	KEY DRIVER (today)	TREND
Global roll-up (GL-T1)	PROBABLE CRISIS	EXTREME	Highest regional level (Middle East); attacks on Hormuz shipping; North Korean salvo	↑
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Tanker burning off Khasab; IRGC mine claims; Kpler 51%; Brent $115.32; Vance letter vs strike planning	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Jordan–Syria committee in place; Israeli strikes in south Lebanon continue	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	112 drones overnight; Oleshky truce at 54 hours, aid due 30 Oct	=
Europe: internal stability (EU-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Paris march 31 Oct; national strike 5 Nov	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	39.6M early votes; new notice in *LULAC v. DHS*, no TRO/PI motion	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	About 10 SRBMs from Wonsan; DPRK letter to UNSC on the DMZ mine	↑
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	No water cannon since 8 Oct	=
Indo-Pacific: Taiwan Strait (IP-T1)	NO CRISIS	ROUTINE	Re-baselined: 7-day average about 2.6 aircraft a day	=
Africa: Sahel (AF-T2)	POTENTIAL CRISIS	SIGNIFICANT	Bamako blockade; no new 20+ event found	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Nyala toll disputed (36 to 188); no UN figure	=

Indicator: ROUTINE ABNORMAL SIGNIFICANT EXTREME **Crisis level:** NO CRISIS ENV. FOR CRISIS POTENTIAL PROBABLE IMMINENT

Level change since 28 Oct: none. Indo-Pacific trend moves from = to ↑ (IP-T2). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 28 Oct). No indicator changed band. Within-band moves: **W-1** EXTREME ↑ (tanker struck and reported mostly submerged; three IRGC-claimed mine strikes), with flows slightly better (Kpler 51% from 48%, preliminary). **W-5** SIGNIFICANT ↑ (the Joint Staff's J5 planning director was fired while strike options are weighed; the IRGC claims it downed an MQ-1). **W-7** SIGNIFICANT ↑ (Brent $115.32 settle). **K-1** ABNORMAL ↑ (third ballistic launch event in October).

I. MIDDLE EAST: ME-T1 WIDESPREAD WAR (ISRAEL-ORIGINATED) | PROBABLE CRISIS

Hormuz and energy. The maritime security firm Vanguard reported a tanker struck by an unknown projectile **9 nm north of Khasab** in the southern corridor of the strait at 03:00 UTC on 29 Oct. The master of a passing tanker saw it **"on fire and mostly submerged"**, and another vessel was possibly assisting. UKMTO relayed the fire report with crew status unknown (Seatrade Maritime, 29 Oct; Anadolu, 29 Oct). Separately, the IRGC said **three tankers "exploded and caught fire" after hitting sea mines** on an "unauthorized route" south of the strait over the past 24 hours, after switching off their navigation systems and ignoring warnings. It said they were abandoned on the southern shore (Reuters & AFP via Arab News, 29 Oct). Kpler's 29 Oct briefing (flow data to 27 Oct) puts 7-day Total Hormuz Clearance at **8,746 kbd, about 51% of the 17,147 kbd baseline**. Tanker crossings averaged 12 a day against 50 pre-war, and Fujairah and Oman loadings ran about 31% above baseline (Kpler media briefing, 29 Oct). Front-month Brent **settled at $115.32 on 28 Oct (+$1.44)**, and WTI at $102.78 (CNBC, 28 Oct).

Houthi–Saudi front. The coalition intercepted a Houthi ballistic missile aimed at **Taif** early on 28 Oct. Civil-defence alerts in Jeddah and Yanbu were lifted, and no casualties were reported (SPA; Anadolu, 28 Oct). Early on 29 Oct it destroyed a ballistic missile fired toward the **Eastern Province**, after alerts in Najran and the Eastern Province (Middle East Eye, 29 Oct). Saudi authorities still have not commented on the Houthi claim of a Ras Tanura hit (AP via Newser). **WAR-20 tally: still 1 Riyadh day (27 Oct)** of the 5 needed by 9 Nov; the 28 and 29 Oct intercepts were not toward Riyadh.

US posture and diplomacy. The Wall Street Journal reported that the Vice President wrote to SNSC secretary Mohsen Rezaei to revive negotiations. Axios, citing a US official, says the letter states that talks "require discussions on the nuclear issue" and that the President "was enthusiastic" about it (Axios, 28 Oct). The President told reporters he had not directed peace talks: "Iran needs help with medical supplies" (Iran International, 28 Oct). Qatar presented Tehran with a new draft on 25 Oct: a seven-day timeline of daily confidence-building steps, with guarantor states. A senior Iranian official called it "unacceptable ideas and not an offer" with no nuclear flexibility. The foreign minister said Tehran remains in close contact with mediators on its own seven-day plan (Reuters via Straits Times, 28–29 Oct). On the military side, the Defense Secretary fired **Brett Sylvia, the Joint Staff's director for strategy, plans and policy (J5)**. A Pentagon official alleges leaks of classified information on the Iran and Ukraine wars, and no replacement has been named. A third US carrier is moving to the region (CBS/AP, 29 Oct). The IRGC says it shot down an MQ-1 drone east of the strait off Sirik, its 14th, without naming the operator (ISNA via Middle East Eye, 29 Oct). No US or Israeli strike on Iranian soil was found (WAR-05, WAR-14 open).

Israel's election. With about 93% of votes counted, the Netanyahu bloc stood at **53 seats**, the Eisenkot bloc at **48** and the Arab-led lists at **19**; Likud had 26 and Yashar 21. The Central Elections Committee began counting **430,000–480,000 double-envelope ballots**, due to finish Thursday evening (Guardian live, 28 Oct; Haaretz live, 29 Oct). The committee chair, Justice Noam Sohlberg, asked the Shin Bet to investigate "serious suspicions" of hostile foreign influence through funding, including a claim of Qatari money for Arab turnout. Likud responded that "Israel's election was stolen!" A senior police official called the fraud claims "spin" with "no basis whatsoever". Yashar warned against using it to shift the Knesset swearing-in date (Haaretz). **WAR-22** (Yashar out-seats Likud) is very unlikely, pending official results.

Lebanon. Israeli artillery and drone strikes hit Deir Mimas, Mansouri, Majdal Zoun and Zawtar al-Sharqiyeh on 28 Oct (Naharnet). Drone flights over the southern suburbs were reported, but no strike there was found.

Indicators. W-1 EXTREME (↑ within band). W-2 EXTREME (=). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (↑ within band). W-6 SIGNIFICANT (=). W-7 SIGNIFICANT (↑ within band; $115.32). W-8 SIGNIFICANT (=). Roll-up: 2 Extreme + 5 Significant = **PROBABLE**. Tripwires (W-5 Extreme, W-6 Extreme, or W-4 and W-3 both Extreme) not met. Trend ↑: a probable new loss of a tanker and claimed mine strikes outweigh the Vance outreach and the small Kpler uptick.

Analyst Comment. The pre-vote maritime escalation Kpler flagged is under way. The IRGC is now *claiming* hits and framing them as enforcement of its own route rules. That is consistent with coercion aimed at the 3 Nov vote, not deniable sabotage. In Washington, the Vance letter makes a nuclear-first demand that Tehran has just rejected, so it reads more as a final offer before the post-midterm decision than as a new track. The J5 firing looks like a personnel and leak matter, not a planning signal, and does not change our estimate. We judge a US strike on Iranian soil between 4 and 30 Nov **roughly even** (about 45%, WAR-23 unchanged). If the Khasab tanker is confirmed sunk, WAR-07 resolves as a hit.

II. EUROPE/RUSSIA: EU-T1 RUSSIAN AGGRESSION | POTENTIAL CRISIS

Strikes. Overnight into 29 Oct, Russia launched **112 drones** (about 40 jet-powered); air defences downed 97, with hits at seven locations. One man was killed at an industrial site in Rivne oblast, and an educational facility in Kharkiv was hit (Ukrainska Pravda, 29 Oct; RBC-Ukraine).

Oleshky. The ombudsman says the ceasefire has held **54 hours with no violations**. Route demining is under way and an aid shipment is due on **30 Oct**. Evacuation terms (route, date, destination) are not yet agreed, and the truce ends at 22:59 on 1 Nov (Ukrainska Pravda, 29

Oct). RUS-15 stays open. Talks are still dated after 10 Nov, so RUS-02 (by 31 Oct) is remote.

Indicators. R-3 SIGNIFICANT (=). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 ABNORMAL (=). R-8 ABNORMAL (=). R-10 ABNORMAL (=). R-1 ROUTINE (=). Roll-up: 3 Significant = **POTENTIAL**. Tripwires not met.

Analyst Comment. Friday's aid delivery is the first real test of whether the Oleshky arrangement can carry more than a pause in fire. We judge delivery by 7 Nov **likely** (about 60%; RUS-15 was logged at 55%).

EU-T2 (European internal stability), brief. The Paris march (31 Oct) and national strike (5 Nov) stand (Le Parisien, 26 Oct). No new reading. **ENVIRONMENT FOR CRISIS (=).**

III. AMERICAS: AM-T1 US ELECTION INTEGRITY (MIDTERMS) | ENVIRONMENT FOR CRISIS

Process. NBC's tracker shows **39,636,514** mail and early in-person votes (18.6M mail, 21.0M in person) with five days left, up about 4.3M in a day (NBC News, 29 Oct).

Courts. The D.D.C. feed for the consolidated *LULAC v. DHS* (1:26-cv-03157) shows a new **notice on 29 Oct (ECF 29)**. There is still no TRO or PI motion, and the last order is the 23 Oct consolidation (CaseMagic docket feed). Agencies were due on 28 Oct to produce threat assessments for polling places and drop boxes and the rules on federal personnel near them (Justia, ECF 41 in 1:26-cv-03263). Whether they complied, and what the notice contains, was not found.

Indicators. M-1 SIGNIFICANT (=). M-2 ABNORMAL (=). M-7 ABNORMAL (=). M-3 to M-9 pending Election Day. Roll-up: 1 Significant + 2 Abnormal = **ENVIRONMENT**.

Analyst Comment. A motion now would leave a court only days before 3 Nov, so MID-05 stays remote. This assessment takes no position on any party's prospects.

IV. INDO-PACIFIC

Korean Peninsula (IP-T2). South Korea's JCS said North Korea fired **about 10 short-range ballistic missiles** from the Wonsan area at about 12:30 local time on 29 Oct; they flew about 250 km. It was the first ballistic launch in 17 days. Japan's defence ministry separately confirmed a launch that fell outside its EEZ (KBS World, 29 Oct; Al Jazeera/AFP/Reuters, 29 Oct). It follows a DPRK letter to the UN Security Council calling the 21 Sep DMZ mine blast, which a joint South Korea–UN probe attributed to the North, a fabrication and warning of "self-defence" (Al Jazeera). **IPA-01 resolves as a hit.** K-1 ABNORMAL (↑; three ballistic launch events in October, none ICBM), K-2 ABNORMAL, K-3 ABNORMAL (↑; UNSC letter's "self-defence" warning). **ENVIRONMENT FOR CRISIS (↑).**

South China Sea (IP-T3). The 27–28 Oct Scarborough fuel mission ended without interference. The last water-cannon use found is 8 Oct at Second Thomas Shoal (Philstar, 28 Oct; Manila Times, 10 Oct). IPA-02 open. **ENVIRONMENT FOR CRISIS (=).**

Baseline work: Statement of Normalcy, IP-T1 Taiwan Strait (re-baseline)

`SUBJECT: Taiwan Strait INDICATOR: I-1 PLA aircraft around Taiwan (Regional Conflict; PMESII-PT: Military) Normal since 2022: daily PLA air/naval presence, periodic one-day patrol spikes of 20-45 sorties. ROUTINE: 7-day average under 20 aircraft sorties a day ABNORMAL: 7-day average 20-40 a day, or repeated patrol spikes within a week SIGNIFICANT: 7-day average over 40, or a named large-scale exercise around Taiwan EXTREME: a declared blockade, quarantine or exclusion zone Companion indicators: I-2 China Coast Guard boarding/inspection claims (Routine none); I-3 median-line crossings (Routine: post-2022 pattern); I-4 "official" ships (new: Routine up to 10 a day; Abnormal 10+ for 3 days running or ships inside restricted waters) Baseline sources / period reviewed: Taiwan MND daily reports, 16-29 Oct 2026; family plan` **Current reading.** MND daily reports for the seven days to 0600 on 29 Oct show aircraft sorties of 0 (23, 24 and 25 Oct), 3 (26 Oct), 3 (27 Oct), 6 (28 Oct) and 6 (29 Oct): a **7-day average of about 2.6 a day**, down from about 9.6 at the 22 Oct baseline. PLAN ships ran 1–8 a day and "official" ships 1–9, with 9 on 26 Oct. One sortie crossed the median line in the 26 Oct report (MND, 26 Oct; MND, 27 Oct; MND, 29 Oct; MND, 24 Oct).

Indicators. I-1 ROUTINE. I-3 ROUTINE. I-4 ROUTINE. I-2 not scored (no source read). Roll-up: **NO CRISIS (=)**. No override.

Analyst Comment. Air activity is low. Coast-guard presence now carries more of the signal, so I-4 is added to catch any shift toward inspection-style operations.

V. AFRICA

Sudan and the Horn (AF-T1). Tolls for the 26 Oct **Nyala** market strike still diverge. MSF reports 36 bodies received and more than 150 wounded (MSF), Emergency Lawyers reported more than 100 killed, and the RSF-aligned Tasis administration now claims 188 killed and 356 wounded, unverified (Sudan Times). The UN rights chief had earlier counted at least 306 people killed by drone strikes in the first three weeks of October (OHCHR via Scoop). No UN figure for Nyala has been published, so AFR-01 stays open. AF-1 SIGNIFICANT, AF-2 to AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

Sahel (AF-T2). No official report of a single attack killing 20 or more security personnel was found since 27 Oct. JNIM continues ambushes in Sikasso and Ségou, and JNIM–IS fighting continues in the tri-border area (Soufan Center, 28 Oct). SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 SIGNIFICANT, SA-4 ROUTINE (all =). **POTENTIAL CRISIS (=).** AFR-02 open.

ME-T2 (Levant), brief. Jordan and Syria have stood up their joint security committee to probe the 26 Oct strikes and coordinate on threats (Petra; AP). No new Jordanian strike was found (LEV-01 open). LV-3 ABNORMAL, LV-4 SIGNIFICANT. **ENVIRONMENT FOR CRISIS (=).**

VI. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz attacks / flows	Tanker burning, mostly submerged off Khasab; IRGC claims 3 mine strikes; Kpler 51%	Confirmed sinking (WAR-07); flows >70%
EXTREME	EWP	W-2 Houthi-Saudi / Bab el-Mandeb	Intercepts toward Taif and the Eastern Province	Riyadh days (WAR-20, 1 of 5); Aramco damage confirmed (WAR-17)
SIGNIFICANT	EWP	W-5 US forces	J5 planner fired; third carrier flowing; MQ-1 claim	Any strike (WAR-05 to 3 Nov; WAR-23 4–30 Nov)
SIGNIFICANT	EWP	W-8 Diplomacy	Vance letter (nuclear first); Iran rejects Qatar draft	Iranian response to mediators "by end of week"
SIGNIFICANT	EWP	W-7 Energy price shock	Brent $115.32	>$120 (WAR-08 to 3 Nov; WAR-25 4–30 Nov)
SIGNIFICANT	EWP	W-6 Gulf-state belligerency	Houthi threats to Egypt; no deployment	Egyptian units in Saudi Arabia (WAR-10)
SIGNIFICANT	EWC	W-3 Lebanon front	Daily strikes in the south	Strike on southern suburbs
SIGNIFICANT	EWC	LV-4 Levant foreign strikes	Joint committee formed	Further Jordanian strike (LEV-01)
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	112 drones; one killed	>800 in one night (RUS-06)
SIGNIFICANT	EWC	AF-1 Sudan lethality	Nyala toll 36–188	UN figure of 50+ (AFR-01)
SIGNIFICANT	EWC	SA-2/SA-3 Sahel	Bamako blockade	20+ killed in one attack (AFR-02)
SIGNIFICANT	EWC	EI-1 French unrest	Act III 31 Oct	5 Nov strike
SIGNIFICANT	EWC	M-1 Federal posture on elections	Threat assessments due 28 Oct; new notice	MID-08 motion; any order (MID-05)
ABNORMAL	EWP	K-1 DPRK launches	About 10 SRBMs on 29 Oct	Further launch (IPA-03); ICBM = Significant
ABNORMAL	EWC	W-4 Iran-Israel exchange	Israel's results contested by Likud; caretaker in place	Any launch (WAR-04); Israeli strike (WAR-14)
ABNORMAL	EWP	R-10 Negotiation track	Oleshky 54 hours clean	Aid delivered 30 Oct (RUS-15)
ABNORMAL	EWP	SC-1 South China Sea	No water cannon since 8 Oct	Water cannon (IPA-02)

VII. PREDICTION LEDGER CHECK (WI prefixes)

Resolved today: - **IPA-01** (DPRK ballistic launch 23 Oct–15 Nov, 45%): **HIT.** About 10 SRBMs on 29 Oct (JCS via KBS World; Japan MOD). Brier 0.30.

Open WI calls due within 7 days (by 5 Nov): - **WAR-07** (another sinking near Hormuz by 3 Nov, 45%): Khasab tanker "mostly submerged", sinking unconfirmed. **Likely.** - **WAR-16 / WAR-17** (death on Saudi soil, 60% / confirmed Aramco damage, 50%, by 3 Nov): none since 23 Oct; no Saudi confirmation of Ras Tanura. **Unlikely.** - **WAR-06 / WAR-13** (US joins Saudi strikes, 40% / UK intercept over Saudi Arabia, 50%, by 3 Nov): none. **Unlikely.** - **MID-08** (TRO/PI motion by 3 Nov, 45%): none. **Unlikely.** - **WAR-05 / WAR-14 / WAR-10** (US strike on Iran, 10% / Israeli strike on Iran, 15% / Egyptian units in Saudi Arabia, 25%, by 3 Nov): none. **Very unlikely.** - **WAR-08 / WAR-11** (Brent >$120 / <$100 by 3 Nov): $115.32. **Unlikely / remote.** - **RUS-02 / RUS-05 / RUS-06** (trilateral, moratorium, >800 in a night, by 31 Oct): talks after 10 Nov; no moratorium; latest 112. **Remote.** - **WAR-15** (Hormuz at baseline, 20%): 51%. **WAR-22** (Yashar out-seats Likud, 70%, due 5 Nov): 21 vs 26 at 93% counted. **MID-05** (court order, 15%): no motion. All **remote.**

Other open WI calls: **WAR-20** 1 of 5 days; **WAR-19** no airport halt; **RUS-15** aid due 30 Oct; **WAR-23 / 24, LEV-01, IPA-02, AFR-01 / 02, WAR-01 / 02 / 04, RUS-01 / 04 / 12 / 13, MID-01 / 02 / 03** no qualifying event.

New predictions (dated 2026-10-29): - **WAR-25:** Front-month ICE Brent **settles above $120** on any trading day between **4 and 30 Nov 2026** (Dow Jones/ICE settlement via Morningstar, CNBC or Reuters). **40%, unlikely.** Resolve by 2026-11-30. - **IPA-03:** North Korea conducts **another ballistic missile launch event** between 30 Oct and 30 Nov 2026 (JCS or Japan MOD; cruise missiles excluded). **55%, roughly even.** Resolve by 2026-11-30.

VIII. GAPS AND UNVERIFIED

- **Khasab tanker:** name, flag, crew status and whether it sank are unconfirmed. "Mostly submerged" comes from a passing master via Vanguard; WAR-07 is not resolved on that.
- **IRGC mine claims:** the three tankers are not named, and no independent body (UKMTO, JMIC) has confirmed three mine strikes. They may overlap with the Khasab vessel.
- **Kpler** latest-day figures are preliminary floors that typically settle 1.5–2 times higher.
- **Vance letter:** the WSJ original is paywalled; it was read via Axios, Iran International and The Business Times. The send date is undisclosed.
- **MQ-1 shootdown:** IRGC claim only; no US comment found.
- **J5 firing motive** rests on one anonymous Pentagon official (CBS/AP).
- **Israel:** counts are partial pending the double-envelope ballots. The foreign-funding allegations are unproven, and the Shin Bet has not responded.
- **LULAC v. DHS:** the content of the 29 Oct notice and whether the 28 Oct productions were made are unknown (feed labels only).
- **Nyala toll:** the 188 figure is from an RSF-aligned authority and unverified.
- **Taiwan I-2** (coast-guard boarding claims) not checked. **Sahel** collection thin. **EU-T2** carried from 26 Oct.

Sources

All sources are linked inline. Primary and data sources: Kpler (29 Oct briefing), UKMTO via Seatrade/Anadolu, SPA, Taiwan MND, South Korea JCS (KBS World), Ukrainian ombudsman and Air Force (Ukrainska Pravda), D.D.C. feed (CaseMagic, Justia), NBC early-vote tracker, MSF, OHCHR. Reporting: Reuters, AFP, AP, CBS, CNBC, Axios, Al Jazeera, Haaretz, The Guardian, Middle East Eye, Iran International, Straits Times, Arab News, Naharnet, RBC-Ukraine, Le Parisien, Philstar, Manila Times, Sudan Times, Soufan Center, Petra.