WIRE World Instability

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Baseline work today: the European internal stability (EU-T2) Statement of Normalcy is written below, and the topic is scored in full for the first time, at POTENTIAL CRISIS. Next in the rotation: AF-T1 (Sudan and the Horn), then AF-T2.

BLUF. The Middle East stays at **PROBABLE CRISIS** but turns ↑, because the post-election strike window now has a reported date. US officials have reportedly told Gulf allies to prepare for a "brief but intense" round of strikes on Iran **as early as 4 Nov**. Over the same period, Qatari mediators spent more than 12 hours in Tehran and the talks have moved to Doha. One Qatari outlet reports that a US delegation will join, but nobody has confirmed it. Iran's foreign minister still refuses to reopen Hormuz before the blockade is lifted. Brent's expiring December contract **settled at $117.64**, a six-month high. Attacks at sea continued: Oman evacuated 25 crew from a burning ship off Musandam. Riyadh logged its **fourth interception day** (WAR-20, 4 of 5). The Oleshky mission ended without violations (**RUS-15 hit**). RUS-02, RUS-05 and RUS-06 **missed**. Europe/Russia **POTENTIAL (↑)**; Americas **ENVIRONMENT (=)**; Indo-Pacific **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**	Middle East sets the level; strike window reported from 4 Nov	↑
Middle East: widespread war (ME-T1)	**PROBABLE CRISIS**	**EXTREME**	Gulf allies warned of strikes from 4 Nov; Doha talks; Brent Dec $117.64	↑
Middle East: Levant and Syria (ME-T2)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Shelling and demolitions in south Lebanon; no Beirut strike	=
Europe/Russia: Russian aggression (EU-T1)	**POTENTIAL CRISIS**	**SIGNIFICANT**	Oleshky done without violations; 134 drones; ship sunk off Bulgaria	=
Europe: internal stability (EU-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	First full score: French "Act III" today; OAT-Bund 165 bp; Polish court standoff	↑
Americas: US election integrity (AM-T1)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	48.5M early votes; still no TRO/PI motion	=
Americas: hemispheric security (AM-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Salvadoran troops patrol Port-au-Prince; no new boat strike found	=
Indo-Pacific: Taiwan Strait (IP-T1)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	PLA "joint combat readiness patrol": 22 aircraft, 18 across the median line	↑
Indo-Pacific: Korean Peninsula (IP-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	No launch since 29 Oct	=
Indo-Pacific: South China Sea (IP-T3)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Patrols continue at Scarborough; no water cannon	=
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**	RSF drones knock out Shendi power station	=

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

Level changes since 30 Oct: EU-T2 ENVIRONMENT to POTENTIAL (first full score after its Statement of Normalcy); IP-T1 NO CRISIS to ENVIRONMENT FOR CRISIS. Trend changes: Middle East and Global = to ↑; Europe/Russia region = to ↑ (driven by EU-T2); IP-T3 ↑ to =, IP-T1 = to ↑. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 30 Oct). Band changes: **IP-T1 median-line crossings** ROUTINE → ABNORMAL; **EU-T2** indicators scored for the first time (EI-1 and EI-3 SIGNIFICANT, EI-2 ABNORMAL, EI-4 ROUTINE). Within band: **W-2** EXTREME ↑ (Riyadh 30 and 31 Oct); **W-5** SIGNIFICANT ↑ (reported 4 Nov window); **W-7** SIGNIFICANT ↑ ($117.64); **W-8** SIGNIFICANT ↓ (talks move to Doha); **R-3** SIGNIFICANT ↓ (134 drones, no missiles); **R-4** SIGNIFICANT ↑ (*Contship Jet*); **R-10** ABNORMAL ↓ (Oleshky completed).

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

Hormuz and energy. Oman's Maritime Security Center said the navy **evacuated 25 crew** from a Panama-flagged commercial vessel. The ship had been "targeted" and caught fire **1.6 nm off Musandam** on 30 Oct. The crew received medical care, and no attacker was named (Anadolu, 30 Oct; Arab News). UKMTO also reported a vessel hit by an "unknown projectile" **south of Lavan** island, with the crew safe (CBS live, 30 Oct). The IRGC claims **four tankers "exploded"** on 30 Oct after using routes it calls unauthorized, among them a supertanker carrying more than 2 million barrels. AP could not verify the claims (CBS). On UKMTO's count, October had **just over 30 attacks** in the strait, the Gulf of Oman and the Persian Gulf. That is the highest monthly total of the war and double September's. It also counts **145 incidents** since 28 Feb, with **59 of 81** projectile strikes since 6 Jul on the US-backed southern route (CBS, citing UKMTO). The CENTCOM commander, Brad Cooper, repeated that the southern lanes are "free and clear" of mines (CBS). Reuters adds that the *Louise 1*, hit by limpet mines on 29 Oct, had been struck by Ukrainian naval drones in the Black Sea in July as an alleged Russian shadow-fleet tanker (Iran International, citing Reuters, 30 Oct). No Kpler briefing was issued after 30 Oct (about 49% of baseline). December Brent **expired at $117.64 (+$2.76)**, the highest settlement since late April; the January contract settled at **$113.43** and WTI at $104.12. Brent rose 13.6% in October (Reuters via Euronext, 30 Oct; QNA).

Houthi–Saudi front. On 30 Oct, the coalition intercepted a **drone near Riyadh** in the afternoon and a ballistic missile in the south. It said a drone toward the Mecca region was also Houthi-launched, but the Houthis denied any attack on Saudi territory that day (CBS/AFP/Reuters). On Saturday, 31 Oct, coalition spokesman Turki al-Maliki said air defences "intercepted and destroyed a hostile drone in the Riyadh region", with debris but no injuries; he did not name the launcher (AFP via The Hindu, 31 Oct; QNA, 31 Oct). The coalition's two-day total is **two missiles and three drones** aimed at Riyadh, Makkah, Madinah and the south (Saudi Gazette, 31 Oct). In Aden, two missiles hit the presidential palace compound on 30 Oct (AFP via CBS). **WAR-20 tally: 4 Riyadh days (27, 29, 30, 31 Oct)** of the 5 needed by 9 Nov. No death on Saudi soil or confirmed Aramco damage was found (WAR-16, WAR-17).

US posture and diplomacy. MSNOW, citing three senior Gulf Arab officials, reports that Washington has told Gulf allies to prepare for a possible new round of strikes on Iran **"as early as November 4"**, expected to be "brief but intense". Some Gulf states may oppose the use of bases on their territory. The White House said it does "not comment on sensitive military plans that may or may not exist" (Times of Israel, 31 Oct). The US has not struck Iran since 1 Sep (same source). According to Axios, Qatari mediators held **more than 12 hours of talks in Tehran** on 30 Oct while in contact with the White House, and talks continue in **Doha on 31 Oct**. The mediators propose UN inspection of bombed nuclear sites in exchange for some sanctions relief. The Defense and State secretaries are "highly skeptical" of a deal, while the Prime Minister of Israel is lobbying for a joint operation "immediately after the election" (Axios, 31 Oct). The President said "We have time... It's a war, but it is not a typical war" (Axios). Al-Araby Al-Jadeed reports a **"breakthrough"** and says a US delegation will join direct talks in Doha, with China and Russia as guarantors (Times of Israel, 31 Oct). Foreign Minister Araghchi still rejects reopening Hormuz before the naval restrictions are lifted and **$24 billion** in frozen assets is released (Iran International, 31 Oct). The Pentagon's casualty system lists **23 US deaths** in the war, **11 from enemy fire** (CBS, 30 Oct).

Israel's coalition. The Prime Minister met Ben-Gvir and Smotrich, and opposition leaders held talks of their own. Shas leader Deri ruled out joining an opposition-bloc government without Likud, while UTJ is weighing its options. The President's consultations follow official results, and the first mandate runs 28 days, extendable by 14 (Jerusalem Post live, 31 Oct).

Lebanon. Lebanon's NNA reported machine-gun fire, house demolitions and 155-mm shelling across Khiam, Qantara, Tayri, Kfar Shuba and Wadi Zibqin. It counts 4,386 killed since 2 Mar (Anadolu, 31 Oct). An airstrike hit Kfar Tebnit (Middle East Eye). No strike on Beirut was found.

Indicators. W-1 EXTREME (=; record October count, a new evacuation off Musandam). W-2 EXTREME (↑ within band; Riyadh hit on consecutive days). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (↑ within band; dated strike warning). W-6 SIGNIFICANT (=). W-7 SIGNIFICANT (↑ within band; $117.64). W-8 SIGNIFICANT (↓ within band; talks move to Doha, but the sequencing gap is unresolved). Roll-up: 2 Extreme + 5 Significant + 1 Abnormal = **PROBABLE**. Tripwires not met. Trend ↑: a dated strike warning to allies and a six-month-high oil settle outweigh unconfirmed reports of direct talks.

Analyst Comment. Both tracks now point at the same day. Diplomacy has until about 3 Nov, and the reported strike window opens on 4 Nov. Iran's stated precondition (blockade and funds first) has not moved. We judge a **US strike on Iranian soil between 4 and 30 Nov roughly even (about 45%, WAR-23, unchanged)**. Doha raises the chance of a deal, but the strike warning to allies offsets it. We judge an in-person US–Iran meeting by 15 Nov **unlikely (about 40%, new WAR-27)**. Al-Araby's report is single-source, and the President says there is no rush.

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

Strikes. Overnight into 31 Oct, Russia launched **134 drones** (72 of them jet-powered Shaheds) and no missiles. Air defences downed or jammed 105, with hits at 20 locations (Ukrainska Pravda, citing the Air Force, 31 Oct). On the evening of 30 Oct, drones struck a Kyiv critical-infrastructure facility three times, and several districts lost water (RBC-Ukraine). Russia's MoD claims it downed 433 Ukrainian drones overnight over 19 regions (bne IntelliNews). **RUS-06 misses.** No night from 15 to 31 Oct exceeded 800.

Oleshky. Ukraine's ombudsman, Dmytro Lubinets, said on 30 Oct: "those who wished to travel to Ukraine were able to leave Oleshky... Humanitarian aid has been delivered... The ceasefire has been in effect for 87 hours. No violations have been recorded." (Interfax-Ukraine). His Russian counterpart, Yana Lantratova, declared the mission concluded. Evacuees bound for Ukraine are travelling via Anapa and Homel, and the truce runs to 1 Nov (RFE/RL, 30 Oct). **RUS-15 hits.** No trilateral meeting took place by 31 Oct and no Kremlin moratorium was announced, so **RUS-02 and RUS-05 miss**.

Black Sea. The Liberian-flagged, ZIM-chartered container ship ***Contship Jet***, sailing from Haifa to Constanța, was hit by **three maritime drones** about 21 nm southeast of Shabla. That is inside Bulgaria's EEZ but outside its territorial waters. The ship sank, and all 18 crew were rescued (Bulgarian transport ministry; AP). Prime Minister Radev said a French patrol aircraft spotted the drones at least half an hour before the attack. He said their origin is not yet established and that he has raised allied support with NATO's Secretary General (Radio Bulgaria, 30 Oct). It is the second sinking near a NATO coast in a week, after the *Khoryv* off Constanța on 23 Oct, which Romania blamed on Russia (Al Jazeera).

Indicators. R-3 SIGNIFICANT (↓ within band). R-4 SIGNIFICANT (↑ within band; munitions sank a ship in a NATO EEZ). R-5 SIGNIFICANT (=). R-6 ABNORMAL (=). R-8 ABNORMAL (=). R-10 ABNORMAL (↓ within band; a truce with no violations). R-1 ROUTINE (=). Roll-up: 3 Significant = **POTENTIAL**. Tripwires not met. Trend **=**.

Analyst Comment. Oleshky shows the two sides can carry out a narrow, US-coordinated humanitarian deal. The strike pattern and the Black Sea sinkings show the wider war is unchanged. Attacks on merchant ships off two NATO coasts within a week are the fastest-moving item in this region. If an attribution to Russia is confirmed off Bulgaria, Article 4 talk becomes more likely (RUS-04, 15%, unchanged for now).

Baseline work: Statement of Normalcy, EU-T2 European internal stability

`SUBJECT: European internal stability QUESTION: could a government collapse, mass unrest or a sovereign-debt shock destabilize a core EU state? (Internal Stability; PMESII-PT: Political, Economic, Social) Normal 2024-mid 2026: frequent minority governments and confidence votes without collapse; strikes and marches below 250k nationally; OAT-Bund 70-85 bp, BTP-Bund 100-150 bp; populist gains inside existing coalitions. EI-1 Protest scale (police figures) R: < 50k nationally | A: 50-250k S: > 250k, or a declared emergency/curfew E: multi-day violent unrest in 3+ cities EI-2 Government stability (parliament sites) R: routine votes | A: a government or top court in open standoff, or a confidence vote pending | S: a government falls in a core state (FR, DE, IT, ES, PL, NL) | E: no functioning government plus a budget or debt crisis EI-3 OAT-Bund or BTP-Bund 10y spread R: < 100 bp | A: 100-150 | S: 150-250 E: > 250 or ECB TPI activation EI-4 Electoral breakthrough (official results) R: none | A: populist first place in a regional vote | S: populist first place nationally | E: populist majority government Baseline sources: French interior ministry (via AFP/Le Parisien), Conseil d'Etat orders, MF Newswires/ANSA spread closes, parliament records. Period: 1 Sep-31 Oct 2026` **Current reading.** *EI-1:* the anti-cost-of-living movement is holding its third Saturday of action today. The interior ministry is deploying **70,000 police and gendarmes**, and the Conseil d'État has banned the Bastille–Nation route in Paris. A police source counts 350 actions likely to draw **350,000–450,000** people; another describes a "pre-insurrectionary climate". Parts of Paris are under a 23:00–06:00 **curfew** on the next two nights. On 17 Oct, between 550,000 and 800,000 people marched. Since mid-September, **1,193 police and gendarmes** have been injured, and 600 of 2,500 damaged shops have not reopened (AFP via France 24, 31 Oct). *EI-2:* in Poland, government-aligned judges suspended the Constitutional Tribunal's president on 30 Oct, and riot police faced protesters, three of whom were detained. The President turned back a state flight and forced his way into the court building, calling it "a constitutional body... seized by force" (Guardian, 31 Oct). In France, the Lecornu government has not yet used Article 49.3 on the 2027 budget, which would expose it to a censure motion (Challenges). Romania's new cabinet won investiture 280–58 on 20 Oct (AP). *EI-3:* on 30 Oct, the **OAT-Bund spread was 165 bp** (OAT 4.97%, Bund 3.32%), with French yields at multi-decade highs, and **BTP-Bund was about 118 bp**. The ECB held rates on 29 Oct after raising them in June and September (MF Newswires, 30 Oct; ANSA). *EI-4:* no national vote in a core state this period.

Indicators. EI-1 SIGNIFICANT (> 250k on 17 Oct; curfews). EI-2 ABNORMAL (Polish court standoff; French budget pending). EI-3 SIGNIFICANT (OAT-Bund 165 bp). EI-4 ROUTINE. Roll-up: 2 Significant + 1 Abnormal = **POTENTIAL CRISIS (↑ from the provisional ENVIRONMENT)**. No override.

Analyst Comment. France is the driver. Mass street mobilisation, a minority government that has to force its budget through, and a widening spread are each manageable on their own. Together they are what this topic exists to watch. If 49.3 leads to a successful censure, EI-2 would move to Significant. We judge an OAT-Bund close above 175 bp by 30 Nov **unlikely (about 35%, new EUR-01)**. Today's disorder and the 5 Nov strike are the near-term tests.

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

Process. NBC's tracker shows **48,466,943** mail and early in-person votes (22M by mail, 26.5M in person), up about 4.5M in a day, with three days to go (NBC News, 05:30 ET 31 Oct).

Courts. On 30 Oct, the D.D.C. feed for the consolidated *LULAC v. DHS* (1:26-cv-03157) shows an **order**, a "Remark – Consolidation" and reset deadlines. The feed shows no TRO or PI motion (CaseMagic docket feed). We have not read the text of the order.

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. Three days out, MID-08 (a TRO/PI motion) is **unlikely** and MID-05 (a court order) is **remote**. The Election Day indicators (M-3 to M-9) start on Tuesday. This assessment takes no position on any party's prospects.

AM-T2 (hemispheric security), brief. More than 2,000 Salvadoran troops made their **first patrols in Port-au-Prince** on 30 Oct, including armoured convoys near the airport (El Universo; Infobae, 31 Oct). SOUTHCOM has announced no new boat strike since 27 Oct (SOUTHCOM releases); AMR-01 is at 0 of 3. H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=).**

IV. INDO-PACIFIC

Taiwan Strait (IP-T1). Taiwan's MND said that from 13:15 on 31 Oct it detected **22 PLA aircraft**, including J-10s, J-16s, a KJ-500 and a YY-20 tanker. Of these, **18 crossed the median line** or its extension and worked with PLA ships in a **"joint combat readiness patrol"**. Taiwan responded with aircraft, ships and shore-based missile systems (MND, 31 Oct; CNA). The 24 hours to 06:00 on 31 Oct had already brought 13 sorties, 6 of them across the line (MND daily). T-1 (7-day average) stays below 20 a day on our count, so ROUTINE. **Median-line crossings ABNORMAL** (band change). **ENVIRONMENT FOR CRISIS (↑, from NO CRISIS).** No override.

Analyst Comment. A joint combat readiness patrol around Taiwan in the same week as the PLA's combat-readiness patrols at Scarborough points to coordinated pressure on two fronts ahead of APEC in Shenzhen (18–19 Nov). We judge another such Taiwan patrol in November **likely (about 75%, new IPA-04)**.

Korean Peninsula (IP-T2). No ballistic launch has been reported since the 29 Oct salvo, so IPA-03 is open. K-1 to K-3 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

South China Sea (IP-T3). China Coast Guard "law-enforcement" patrols and PLA patrols continue around Scarborough (Manila Times, 31 Oct). The Philippine Coast Guard is working out the identity and capabilities of a Chinese vessel inside the shoal (ABS-CBN, 29 Oct). No water cannon or ramming has been reported since 8 Oct. SC-1 ABNORMAL (=). **ENVIRONMENT FOR CRISIS (=).** IPA-02 open.

V. AFRICA

Sudan and the Horn (AF-T1). RSF drones hit **Shendi's transformer station** (now "completely out of service"), a Nile Petroleum fuel depot and an air-defence building on 30 Oct. That followed a 29 Oct strike that knocked out **Um Dabaker**, Sudan's largest thermal power station. In under two weeks, RSF drones have hit 11 power and fuel stations in at least seven states, and **Sudan's government accuses Ethiopia** of letting drones launch from its territory (Sudan Tribune, 30 Oct). OHCHR counted at least 306 people killed by drone strikes in the first three weeks of October (UN News, 23 Oct). AF-1 SIGNIFICANT, AF-2 to AF-4 ABNORMAL (the Ethiopia allegation is noted under AF-4 but unproven). **ENVIRONMENT FOR CRISIS (=).** AFR-01 open.

Sahel (AF-T2). No official report of a single attack killing 20 or more security personnel since 27 Oct was found. The Bamako blockade continues (Soufan Center). SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 SIGNIFICANT, SA-4 ROUTINE. **POTENTIAL CRISIS (=).** AFR-02 open.

ME-T2 (Levant), brief. No new Jordanian strike in Syria was found (LEV-01 open). Lebanon's military court has charged 13 people, 12 of them Hezbollah members, over a seized shipment of explosives (AFP via CBS, 30 Oct). 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	Record October; Musandam evacuation; Kpler 49%	Merchant sinking (WAR-07); Kpler under 40% (WAR-26)
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Riyadh 4 of 5 days; Aden palace hit	Fifth Riyadh day (WAR-20); a Saudi death (WAR-16)
SIGNIFICANT	EWP	W-5 US forces	Gulf allies told to prepare for strikes from 4 Nov	Any strike (WAR-05 to 3 Nov; WAR-23 4–30 Nov)
SIGNIFICANT	EWP	W-8 Diplomacy	Qatari talks in Tehran, then Doha; reported US delegation	A confirmed direct meeting (WAR-27)
SIGNIFICANT	EWP	W-7 Energy price shock	Dec Brent expired at $117.64; Jan $113.43	>$120 (WAR-08 to 3 Nov; WAR-25 4–30 Nov)
SIGNIFICANT	EWC	EI-1/EI-3 France	"Act III" today; OAT-Bund 165 bp	Disorder tonight; 5 Nov strike; 49.3; >175 bp (EUR-01)
SIGNIFICANT	EWP	R-4 NATO spillover	*Contship Jet* sunk in Bulgaria's EEZ	Attribution; NATO consultations (RUS-04)
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	134 drones; Kyiv water outage	A night over 400
SIGNIFICANT	EWC	AF-1 Sudan lethality / infrastructure	Shendi and Um Dabaker power stations out	UN figure of 50+ in one event (AFR-01)
SIGNIFICANT	EWC	SA-2/SA-3 Sahel	Bamako blockade	20+ killed in one attack (AFR-02)
SIGNIFICANT	EWC	M-1 Federal posture on elections	48.5M early votes; no motion	Election Day M-3 to M-9
ABNORMAL	EWP	IP-T1 median-line crossings	Joint combat readiness patrol, 18 crossings	Another patrol (IPA-04); a named exercise = Significant
ABNORMAL	EWC	EI-2 Government/court standoffs	Polish Constitutional Tribunal	A government falls in a core state
ABNORMAL	EWP	SC-1 South China Sea	Patrols at Scarborough; Chinese vessel inside	Water cannon (IPA-02)
ABNORMAL	EWP	K-1 DPRK launches	Quiet since 29 Oct	Further launch (IPA-03)
ABNORMAL	EWC	H-3 Haiti foreign forces	Salvadoran patrols begin	Mass-casualty clash

VII. PREDICTION LEDGER CHECK (WI prefixes)

Resolved today: - **RUS-15** (aid to or evacuation from Oleshky by 7 Nov, 55%): **HIT.** Lubinets: aid "has been delivered" and evacuees have left (Interfax-Ukraine, 30 Oct). Brier 0.2025. - **RUS-02** (in-person trilateral by 31 Oct, 35%): **MISS.** No meeting; the next round in Abu Dhabi is due in November (Reuters via Devdiscourse). Brier 0.1225. - **RUS-05** (Kremlin confirms an energy-strike moratorium by 31 Oct, 20%): **MISS.** No confirmation, and energy strikes continued on 30 Oct (bne IntelliNews). Brier 0.04. - **RUS-06** (a night over 800, 15–31 Oct, 30%): **MISS.** The final night was 134 drones (Air Force). Brier 0.09.

Open WI calls due within 7 days (by 7 Nov): - **WAR-07** (merchant sinking near Hormuz by 3 Nov, 45%): the Musandam vessel was evacuated after a fire, but no sinking has been confirmed. **Unlikely** (about 30%). - **WAR-05 / 14** (US or Israeli strike on Iranian soil by 3 Nov): the reported window opens on 4 Nov. **Remote.** - **WAR-06 / 10 / 13** (US joins Saudi strikes; Egyptian units in Saudi Arabia; UK intercept over Saudi Arabia, by 3 Nov): none. **Unlikely.** - **WAR-16 / 17** (Saudi death; Aramco damage, by 3 Nov): debris only, no injuries. **Unlikely.** - **WAR-08** (Brent >$120 by 3 Nov, 20%): $117.64 on the expiring contract; front-month January is $113.43. **Unlikely** (about 15%). - **WAR-11 / 15** (Brent <$100; Hormuz at baseline, by 3 Nov): **Remote.** - **MID-05 / 08** (court order; TRO/PI motion, by 3 Nov): none in the feed. **Remote / unlikely.**

Other open WI calls: WAR-20 4 of 5 Riyadh days (9 Nov), **likely**; **WAR-26** (13 Nov) no new Kpler briefing; **WAR-19** no airport halt; **WAR-23 / 24 / 25, LEV-01, IPA-02 / 03, AFR-01 / 02, AMR-01, WAR-01 / 02 / 04, RUS-01 / 04 / 12 / 13, MID-01 / 02 / 03**: no qualifying event.

New predictions (dated 2026-10-31): - **WAR-27:** US and Iranian government officials hold an **in-person direct meeting** dated **31 Oct–15 Nov** (confirmed by either government, or Reuters/AP/AFP citing officials; proximity talks do not count). **40%, unlikely.** Resolve by 2026-11-15. - **EUR-01:** The **OAT-Bund 10-year spread closes above 175 bp** on any trading day **2–30 Nov** (MF Newswires, ANSA, Radiocor or Reuters

closes). **35%, unlikely.** Resolve by 2026-11-30. - **IPA-04:** Taiwan's MND reports another PLA **"joint combat readiness patrol"** dated **1–30 Nov**. **75%, likely.** Resolve by 2026-11-30.

VIII. GAPS AND UNVERIFIED

- **Direct US–Iran talks:** the Al-Araby Al-Jadeed "breakthrough" and US-delegation report is single-source and unconfirmed by either government. The **4 Nov strike warning** rests on MSNOW's Gulf sources (relayed by the Times of Israel); the WSJ and AP versions were not read in full.
- **Musandam vessel:** named "RITI"/"RIT1" in some reports and not confirmed; whether it sank and who attacked it are unknown. A 31 Oct UKMTO projectile report (Anadolu) may repeat the 29 Oct event.
- **IRGC claims** of four tankers exploding on 30 Oct are unverified (AP), and Iran's claim that it destroyed a US unmanned vessel is unconfirmed by the US.
- **Houthi denial** of the 30 Oct Mecca-region drone conflicts with the coalition's attribution. The 31 Oct Riyadh drone's launcher was not named.
- ***Contship Jet*:** the strike date (reported as 28 Oct) and the drones' origin are unconfirmed; Bulgaria has made no attribution.
- **France 31 Oct:** turnout and disorder are not yet known at writing. The 350,000–450,000 figure is a police-source forecast.
- **LULAC 30 Oct order:** we have not read its text. A ToI headline about ten US transport planes landing in Israel was not read in full.
- **Kpler:** no briefing since 30 Oct. **Taiwan 7-day average** is computed from MND daily releases, not published by MND. **Sahel** and **Sudan casualty** collection is thin, and the Ethiopia drone allegation is the Sudanese government's.

Sources

All sources are linked inline. Primary and data sources: Oman Maritime Security Center (via Anadolu, Arab News), UKMTO (via CBS), Saudi-led coalition (via AFP, QNA, Saudi Gazette), Ukrainian Air Force (via Ukrainska Pravda, RBC-Ukraine), Ukraine and Russia ombudsmen (via Interfax-Ukraine, RFE/RL), Bulgarian transport ministry and Prime Minister (via Radio Bulgaria), Taiwan MND, French interior ministry and Conseil d'État (via AFP), NBC early-vote tracker, D.D.C. feed (CaseMagic), SOUTHCOM, OHCHR (UN News), Sudanese local authorities (via Sudan Tribune), MF Newswires/ANSA spread closes, ICE settles (via Reuters, QNA). Reporting: Axios, Times of Israel, Jerusalem Post, Iran International, CBS, AP, AFP, Reuters, Anadolu, Middle East Eye, bne IntelliNews, Guardian, France 24, Challenges, Al Jazeera, Manila Times, ABS-CBN, CNA (Taiwan), El Universo, Infobae, Soufan Center.

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