WIRE World Instability

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Baseline work today: the Sudan and the Horn (AF-T1) Statement of Normalcy is written below, and the topic is scored in full for the first time, at ENVIRONMENT FOR CRISIS. Next in the rotation: AF-T2 (Sahel), then ME-T2.

BLUF. The Middle East stays at **PROBABLE CRISIS** and the trend levels off at **=**, because the strike threat and the diplomacy both hardened without either one moving forward. On 30 Oct, a Qatari LNG carrier bound for Pakistan was hit by "unidentified objects" in the Gulf. Bloomberg reports that Iran had cleared it to pass hours earlier. Iran's Supreme Leader ordered an "immediate... geographically unrestricted" response to any new attack. Tehran also calls the US outreach a "positive step", but it rules out direct talks for now. The US Secretary of State says the President has **not decided** on strikes. In Israel, the opposition bloc's candidate is on course for about **60 endorsements against 46**, so WAR-24 now leans toward a miss. North Korea tested a cluster warhead on a short-range ballistic missile (**IPA-03 hit**). 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; reported strike window from 4 Nov is unchanged	**=**
Middle East: widespread war (ME-T1)	**PROBABLE CRISIS**	**EXTREME**	Iran-cleared Qatari LNG carrier hit; "unrestricted response" order; no direct talks	**=**
Middle East: Levant and Syria (ME-T2)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Demolitions, shelling and an airstrike in south Lebanon; no Beirut strike	**=**
Europe/Russia: Russian aggression (EU-T1)	**POTENTIAL CRISIS**	**SIGNIFICANT**	433 drones overnight; energy hit in four regions; Kyiv emergency cuts	**=**
Europe: internal stability (EU-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	France "Act III": 320,000 by ministry count, 520+ arrests; Polish court standoff	**=**
Americas: US election integrity (AM-T1)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	About 52.8M early ballots; no polling-place TRO/PI motion found	**=**
Americas: hemispheric security (AM-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Salvadoran force denies bombing claims in Haiti; no new boat strike	**=**
Indo-Pacific: Taiwan Strait (IP-T1)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	32 PLA sorties, 26 across the median line	↑
Indo-Pacific: Korean Peninsula (IP-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Short-range ballistic missile with cluster warhead, 31 Oct	**=**
Indo-Pacific: South China Sea (IP-T3)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Unidentified Chinese vessel still inside Scarborough lagoon	**=**
Africa: Sahel (AF-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	Bamako blockade; no verified 20+ event since 27 Oct	**=**
Africa: Sudan and the Horn (AF-T1)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	First full score: drones hit the Haya power and oil-pumping station	**=**

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

Level changes since 31 Oct: none. AF-T1 is now fully scored after its Statement of Normalcy, with no change in level. Trend changes: Middle East and Global ↑ to =; Europe/Russia region ↑ to = (EU-T2 to =). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 31 Oct). No band changes. Within band: **W-1** EXTREME ↑ (Qatari LNG carrier hit despite Iranian clearance); **W-6** SIGNIFICANT ↑ (a Qatar-owned ship hit while Qatar mediates); **W-8** SIGNIFICANT = (better tone, but conditions-first stances on both sides);

R-3 SIGNIFICANT ↑ (433 drones in one night, against 134 a day earlier); **IP-T1 median-line crossings** ABNORMAL ↑ (26, against 18); **K-1** ABNORMAL ↑ (31 Oct launch); **AF-T1** indicators scored for the first time.

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

Hormuz and the Gulf. Qatar Gas Transport Company (Nakilat) says its LNG carrier ***Al Mayeda*** "was attacked by unidentified objects while sailing in the Arabian Gulf on Friday evening" (30 Oct). No crew were hurt, there was no environmental impact, and the vessel is "in safe condition, operational" (QNA via The Peninsula, 1 Nov; Al Jazeera, 1 Nov). Bloomberg, relayed by Investing.com, reports that the ship was carrying Qatari LNG to Pakistan, that **Pakistan had negotiated safe passage with Iranian officials**, and that Iran approved the voyage "just hours before the attack". After the hit, the ship turned back toward the Gulf. India's shipping minister said the 25 crew, six of them Indian, are safe (Investing.com, citing Bloomberg, 1 Nov). No one has claimed the attack and no government has attributed it. UKMTO's notices for 29 Oct describe the limpet-mine attack on the *Louise 1* 25 nm northeast of Khasab and a separate tanker hit by an "unknown projectile" during an outbound transit (UKMTO Warning 186-26; Arab News/Reuters). Al Jazeera, citing IMO and UKMTO data, counts **at least 29 ships hit in October**, the worst month of the war, ahead of March's 20 (Al Jazeera, 1 Nov). Bloomberg puts Hormuz LNG flows at about **30% of pre-war volumes** in October (same Investing.com source). No new Kpler crude-flow briefing was found. Markets were closed over the weekend, so the last settles stand: January Brent **$113.43** on 30 Oct, after the expiring December contract settled at $117.64 (Reuters via Euronext, 30 Oct). According to Reuters, the seven core OPEC+ members have agreed in principle to keep their **December targets unchanged** at Sunday's online meeting (12:00 GMT), and most Gulf members are still producing well below quota because of the war (Reuters via Investing.com, 1 Nov).

Houthi–Saudi front. On Saturday, 31 Oct, the coalition reported a drone intercepted in the **Riyadh region**, with debris but no injuries, and did not name the launcher. It also reported drones over the Madinah, Eastern and Southern regions, and a ballistic missile fired toward the south, all of which it attributed to the Houthis (SPA via Al-Jazirah, 1 Nov; AFP via Business Recorder; Dawn). The coalition had already counted 31 Oct yesterday, so the **WAR-20 tally stays at 4 Riyadh days (27, 29, 30, 31 Oct)**, one short of the 5 needed by 9 Nov. No Riyadh interception dated 1 Nov had been reported at writing. No death on Saudi soil and no confirmed Aramco damage was found (WAR-16, WAR-17). At the IISS Manama Dialogue, the UK's Middle East minister said Britain has deployed air-defence equipment and personnel to Saudi Arabia and has flown defensive missions over Qatar, Bahrain, Jordan and the UAE. He did not report a UK intercept over Saudi Arabia (WAR-13) (Iran International, 31 Oct–1 Nov).

US posture and diplomacy. Secretary of State Rubio said on Saturday that the President "has not decided" whether to launch new strikes and would prefer a diplomatic outcome. On contacts with Iran, he said: "There are multiple talks. Talks have actually never stopped." (Reuters via Business Standard, 1 Nov). Iranian negotiators met Qatari mediators in Doha on Saturday, after more than 12 hours of talks in Tehran on Friday that were coordinated with Washington. A senior Iranian official told Reuters that Qatar's seven-day confidence-building plan was "not deemed satisfactory". Iran's own plan asks the US to lift the port blockade, unfreeze assets and approve an Iranian-backed Hormuz route before the strait reopens (same source). Foreign Minister Araghchi called the US effort "a positive step" but said there are no plans for direct talks with US officials (Al Jazeera live, 1 Nov; Gulf News). The Supreme National Security Council secretary, Mohsen Rezaei, said the tone of a letter from the US Vice President had "completely changed". He said Tehran is "waiting for the Americans' response" and that Hormuz "cannot reopen unless Iran's seven conditions are met". He also said there has been "no new decision regarding a change in the nuclear doctrine" (Iran International, citing state TV). The Washington Post, as relayed by Iran International, reports that the Vice President offered to meet Rezaei, with Istanbul or Doha as the likely venue. The President said the negotiations are "going fine" and that he is "not in that much of a hurry" (Al Jazeera live).

Iran's deterrent signalling. In a message on his official Telegram channel, the Supreme Leader said "any level or type of threat must be met with an immediate, impactful, and geographically unrestricted response". Commanders reported high readiness on the Gulf coast, in Hormuz and the Gulf of Oman, and on the northwestern and southeastern borders (Reuters via Business Standard; Khaleej Times). The chief of staff of Iran's armed forces, Abdolrahim Abdollahi, said a new target list covering a wider area is being prepared (Iran International). At Manama, Egypt's foreign minister warned that a "second round will be more dangerous, more destructive", and the GCC secretary general said "diplomacy needs partners, partners who respond in kind" (Iran International, citing Reuters).

Israel's coalition. Official results go to the President on **Wednesday, 4 Nov**. He must assign the mandate within seven days of publication, which makes **11 Nov** the deadline. On Ynet's count, Netanyahu's bloc holds **53 seats**, Eisenkot's bloc **48**, and the two Arab parties **19**. Eisenkot is projected to receive about **60 endorsements** (67 if Yisrael Beiteinu joins) and Netanyahu **46**, with UTJ's 7 seats undecided (Ynet, 1 Nov). A senior Joint List official told Walla that the Joint List and Ra'am are expected to recommend Eisenkot (Jerusalem Post, 1 Nov). The President urged leaders to "stop climbing" the trees they climbed during the campaign and to avoid another election (same sources).

Indicators. W-1 EXTREME (↑ within band; a Qatari LNG carrier hit despite Iranian clearance; October was the worst month). W-2 EXTREME (=; multi-region salvo on 31 Oct). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; threats only). W-5 SIGNIFICANT (=; no decision, posture unchanged). W-6 SIGNIFICANT (↑ within band; a Qatar-owned ship hit during Qatari mediation). W-7 SIGNIFICANT (=; no trading). W-8 SIGNIFICANT (=; the tone improved, but both sides set conditions first and there are no direct talks). Roll-up: 2 Extreme + 5 Significant + 1

Abnormal = **PROBABLE**. Tripwires not met. Trend **=**: a softer tone on both sides is offset by the attack on an Iran-cleared ship and by the "unrestricted response" order.

Analyst Comment. The *Al Mayeda* incident matters more than its damage. Pakistan brokered the ship's passage with Tehran, and Qatar is mediating, so the hit undercuts the bargaining chip Iran's diplomats offer, which is controlled, permitted passage. There are three plain explanations: IRGC units acting on their own (the decentralized posture), misidentification, or deliberate pressure on the mediators. A third-party act is possible but has no evidence behind it. We see no basis yet to choose among them, and attribution is the next thing to watch. Both sides are keeping their options open through Election Day. We still judge a **US strike on Iranian soil between 4 and 30 Nov roughly even (about 45%, WAR-23)**. We now judge an in-person US–Iran meeting by 15 Nov **unlikely (about 30%, WAR-27, down from 40%)**, because Tehran has publicly ruled out direct talks for now.

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

Strikes. From 18:00 on 31 Oct, Russia launched **433 drones** (64 of them jet-powered Shaheds) plus Gerbera and Parodiya decoys. By 07:30 on 1 Nov, 371 had been downed or suppressed, more than 40 were still airborne, and hits were recorded at 16 locations (Ukrinform, citing the Air Force, 1 Nov; RBC-Ukraine). President Zelensky said energy sites in the Dnipropetrovsk, Vinnytsia, Zhytomyr and Khmelnytskyi regions were hit and that "hundreds of thousands of families" are without power. Kyiv has moved to emergency outages, and Lviv's suburbs were struck on Sunday morning (BBC Ukrainian, 1 Nov). More than 650 settlements in the Zhytomyr region lost power (Ukrmedia).

Talks. No date has been fixed for the Abu Dhabi trilateral. Zelensky said he hopes for 6–10 Nov and expects the US to confirm around 4 Nov (Kyiv Independent, 28 Oct). TASS reports that Moscow and Washington have begun coordinating a November date (TASS). RUS-13 is open.

Black Sea. Bulgaria has made no formal attribution for the *Contship Jet* sinking. Radio Bulgaria reports that the Prime Minister expects evidence to show who carried out the attacks (Radio Bulgaria). BGNES quotes the Bulgarian defence chief as saying the drones "came from the east" (BGNES). No NATO member has requested Article 4 consultations (RUS-04).

Indicators. R-3 SIGNIFICANT (↑ within band; over 400 in one night, with emergency cuts in Kyiv). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 ABNORMAL (=). R-8 ABNORMAL (=). R-10 ABNORMAL (=; the Oleshky truce runs out on 1 Nov and no trilateral date is set). R-1 ROUTINE (=). Roll-up: 3 Significant = **POTENTIAL**. Tripwires not met. Trend **=**.

Analyst Comment. The pattern is a familiar one: a narrow humanitarian deal is followed by a heavy energy strike as the heating season begins. A night of 433 drones is about half the 800 that would make R-3 Extreme. Even so, the sustained wave (three Air Force reports since 30 Oct) is grinding down the grid. We judge another night of **500 or more drones and missiles by 15 Nov roughly even (about 45%, new RUS-16)**.

EU-T2 (European internal stability), brief. The interior ministry counted **320,000 marchers** in France on 31 Oct, 70,000 of them in Paris; organisers claimed about 500,000. The interior minister said "the marches went well" but condemned evening clashes. He called a Molotov cocktail thrown at a gendarme an "attempted murder". There were **520 arrests** by 20:00, against about 1,000 the week before. Curfews in parts of Paris run from 23:00 to 06:00 through Monday morning. School blockades are called for Tuesday and Thursday, and an inter-union strike for **Thursday, 5 Nov** (France 24/AFP, 31 Oct; Ouest-France: 565 arrests by 21:00). In Poland, the Prime Minister rejected a compromise while the President held talks with party leaders (Polskie Radio), and protesters gathered outside the Constitutional Tribunal for a second night (AP). There is no new spread close because of the weekend (OAT-Bund 165 bp on 30 Oct). EI-1 SIGNIFICANT (= ; above 250k by the official count, with curfews), EI-2 ABNORMAL (=), EI-3 SIGNIFICANT (=), EI-4 ROUTINE. **POTENTIAL CRISIS (=).** Analyst Comment: turnout was below 17 Oct's level and there was less disorder, but the movement is spreading to schools and unions. We judge the official national count for 5 Nov to be **unlikely to exceed 300,000 (about 40%, new EUR-02)**. A strike day draws a different crowd from a Saturday march.

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

Process. The University of Florida Election Lab puts early ballots at about **52.8 million** two days before Election Day (UF Election Lab; Seoul Economic Daily, 1 Nov). NBC's tracker had 48.5M at 05:30 ET on 31 Oct (NBC News). The trackers count differently.

Courts. We found no TRO or PI motion in the consolidated polling-place case *LULAC v. DHS* (1:26-cv-03157) (CaseMagic docket feed). A separate suit over DHS's voter-data policy had a TRO hearing set before Judge Chutkan, according to one tracking site. That matter does not count for MID-05 or MID-08 (Capture Cascade timeline).

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. With two days to go, MID-05 (a court order) is **remote** and MID-08 (a TRO/PI motion in the named cases) is **unlikely**. Both resolve on 3 Nov. The Election Day indicators (M-3 to M-9, covering polling-place incidents, armed federal presence and certification) take over from Tuesday. This assessment takes no position on any party's prospects.

AM-T2 (hemispheric security), brief. The Gang Suppression Force denied that it had carried out aerial bombings in Haiti and said its Salvadoran contingent does not use explosives. President Bukele defended the troops against the allegations (Infobae, 1 Nov; Anadolu). SOUTHCOM has announced no lethal boat strike since 27 Oct (SOUTHCOM); AMR-01 stands 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 detected **32 PLA aircraft sorties**, 7 PLAN ships and 2 official ships between 06:00 on 31 Oct and 06:00 on 1 Nov. **Twenty-six sorties crossed the median line** into the northern, central, southwestern and eastern ADIZ (MND, 1 Nov). That 24-hour window includes the 31 Oct "joint combat readiness patrol" reported yesterday (MND, 31 Oct). On our count, T-1 (the 7-day average) is still below 20 a day. Median-line crossings ABNORMAL (↑ within band). **ENVIRONMENT FOR CRISIS (↑).** No override.

Korean Peninsula (IP-T2). South Korea's JCS said it "detected a missile that North Korea launched" on 31 Oct from around Jeongju toward the Yellow Sea, and that it had tracked preparations with the US beforehand. KCNA called it a test of a "Standard Type 2" **cluster-bomb warhead for tactical ballistic missiles** (Yonhap, 1 Nov; Financial News). Seoul did not announce the launch in real time, and Japan's MOD made no announcement (Financial News). The Japan Times reports that KCNA images show Hwasong-11-series short-range ballistic missiles (Japan Times). K-1 ABNORMAL (↑ within band), K-2 and K-3 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). IPA-03 resolved: hit** (see section VII).

South China Sea (IP-T3). The Philippine Coast Guard is still working out the identity and capabilities of the Chinese vessel inside the Scarborough lagoon, first seen on 3 Oct, including equipment that could be an ROV (Manila Times, 1 Nov). No water cannon or ramming has been reported since 8 Oct. SC-1 ABNORMAL (=). **ENVIRONMENT FOR CRISIS (=).** IPA-02 open.

Analyst Comment. Pyongyang is testing short-range systems built for use on the peninsula ahead of a possible leaders' meeting at APEC in Shenzhen on 18–19 Nov. Beijing is keeping up joint pressure around Taiwan in the same run-up. Neither development is a step change. The quieter, lower-altitude DPRK launch is a detection problem worth noting.

V. AFRICA

Sudan and the Horn (AF-T1). On 31 Oct, RSF drones hit the **Haya transformer station** and a nearby oil pumping station in Red Sea State. The pumping station lies on the pipeline that carries crude to the **Bashayer** export terminal. It was the second strike on Haya in three days. More than 13 electricity distribution stations in seven states have been badly damaged (Sudan Tribune, 1 Nov). The government says Ethiopia is facilitating the launches and cites flight data and drone fragments. Ethiopia's response was not found, and the claim has not been independently verified (Sudan Tribune; Radio Tamazuj).

Baseline work: Statement of Normalcy, AF-T1 Sudan and the Horn / Red Sea coast

SUBJECT: Sudan and the Horn / Red Sea coast QUESTION: could the SAF-RSF war produce a mass-atrocity, famine or regional-war shock beyond its 2023-26 norm? (Internal Stability + Regional Conflict; PMESII-PT: Military, Social, Infra) Normal 2024-mid 2026 (a war-time norm, not peace): ACLED-recorded deaths of roughly 1,000-2,500 a month; famine (IPC Phase 5) confirmed in pockets of Darfur/Kordofan; ~12M displaced; foreign arms and drone supply alleged but no state openly fighting on Sudanese soil. AF-1 Lethality (ACLED via HDX; OHCHR/UN) R: below the 8-week mean | A: within +25% | S: > +25%, or a UN-reported single event of 50+ killed | E: a UN-reported massacre of 200+, or a city of 500k+ changing hands AF-2 Famine (IPC portal) R: no Phase 5 | A: an IPC alert of famine risk | S: a new Phase 5 (Famine) classification in any area E: Phase 5 classified across multiple states AF-3 Cross-border flows (UNHCR data portal) R: under 10k/week | A: 10-30k | S: > 30k/week, or a new receiving state opens camps E: > 100k/week AF-4 Foreign-state involvement, Red Sea littoral R: allegations only by partisans | A: a government formally accuses a named state | S: verified launch from or strike on a neighbour's territory, or a foreign naval base deal activated | E: a neighbouring state's forces in open combat Baseline sources: ACLED/HDX, OHCHR and UN News, IPC, UNHCR data portal, Sudan Tribune / Radio Tamazuj (local reporting, named as such). Period: 1 Sep-31 Oct 2026 **Current reading.** *AF-1:* ACLED, cited by AP on 28 Oct, puts the war's toll at **at least 59,000** deaths, and ACLED warns that its Sudan figures are a conservative minimum (AP, 28 Oct; ACLED methodology). The latest HDX country-month file runs to 23 Oct (HDX). OHCHR counted at least 306 people killed by drones in the first three

weeks of October (UN News, 23 Oct). Estimates for the 26 Oct military drone strike on a Nyala market range from 21 dead (Sudan Doctors Network) to more than 100 (Emergency Lawyers); MSF received 36 bodies (Al Jazeera, 29 Oct; Eastern Herald). *AF-2:* the IPC's 12 Oct alert flags a **rising risk of famine** in Greater Darfur and Greater Kordofan but has issued no new Phase 5 classification. The May analysis estimated 135,000 people in Phase 5 (WHO, 12 Oct; IPC). *AF-3:* Chad's refugee population stood at **1,584,253** on 5 Oct (UNHCR Chad portal). No weekly arrival figure above 30,000 was found. *AF-4:* Sudan's government has formally accused **Ethiopia** of hosting drone launches (Sudan Tribune). The strikes now reach the Red Sea State export chain (Haya–Bashayer).

Indicators. AF-1 SIGNIFICANT (the UN-documented drone toll is well above the norm; no single event of 50 or more is UN-verified). AF-2 ABNORMAL (IPC alert, no new Phase 5). AF-3 ABNORMAL (high but steady). AF-4 ABNORMAL (a formal state accusation, not verified). Roll-up: 1 Significant + 3 Abnormal = **ENVIRONMENT FOR CRISIS (=, now fully scored)**. No override.

Analyst Comment. The RSF drone campaign has shifted from front-line cities to the electricity and export system in SAF-held states, Red Sea State included. That raises the economic cost of the war and draws a neighbour into the dispute, without yet producing a verified cross-border act. We judge a UN-reported single event killing 50 or more by 30 Nov (AFR-01, 55%) still **roughly even**. If the Ethiopia allegation were verified, AF-4 would move to Significant and the topic would move to POTENTIAL.

Sahel (AF-T2). No official or wire report of a single attack killing 20 or more security personnel dated since 27 Oct was found. One search result reported a Nigerien defence-ministry toll of 29. It turned out to be a **2023 event** on a mirror site and is excluded (see GAPS). 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. On the evening of 31 Oct, Lebanon's NNA reported a large Israeli demolition blast in Baraachit (Bint Jbeil district), artillery fire on Beit Yahoun and near Maifadoun, an airstrike on Mansouri, and low-level mock raids over Tyre. It also reports new Israeli roads linking the outposts in the south. An airstrike hit Kfar Tibnit on 31 Oct (Middle East Eye via Hatha Alyoum, 1 Nov). No strike on Beirut was found, and no new Jordanian strike in Syria (LEV-01 open). At Manama, Syria's foreign minister said Damascus opposes "using Syria to threaten the neighboring countries" (Iran International). 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	Iran-cleared Qatari LNG carrier hit; record October; LNG flows ~30%	Attribution of *Al Mayeda*; a sinking (WAR-07, 3 Nov); Kpler under 40% (WAR-26)
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Four regions targeted on 31 Oct; Riyadh 4 of 5 days	Fifth Riyadh day (WAR-20, 9 Nov); a Saudi death (WAR-16)
SIGNIFICANT	EWP	W-5 US forces	No decision (Rubio); window reported from 4 Nov	Any strike (WAR-05 to 3 Nov; WAR-23 4–30 Nov)
SIGNIFICANT	EWP	W-8 Diplomacy	Doha consultations; Iran rules out direct talks; Vance–Rezaei channel	Confirmed in-person meeting (WAR-27); a US reply to Iran's conditions
SIGNIFICANT	EWP	W-6 Gulf belligerency	Qatar-owned ship hit during Qatari mediation	A Gulf state blames Iran publicly; base-use refusals
SIGNIFICANT	EWP	W-7 Energy price shock	Jan Brent $113.43; OPEC+ holds December targets	>$120 (WAR-08 to 3 Nov; WAR-25 4–30 Nov)
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	433 drones; four regions' energy hit	A night of 500+ (RUS-16); 800+ = Extreme
SIGNIFICANT	EWC	EI-1/EI-3 France	320k on 31 Oct; curfews; OAT-Bund 165 bp	5 Nov strike (EUR-02); 49.3; >175 bp (EUR-01)
SIGNIFICANT	EWP	R-4 NATO spillover	*Contship Jet*: drones "from the east"	Formal attribution; Article 4 (RUS-04)
SIGNIFICANT	EWC	AF-1 Sudan lethality / infrastructure	Haya power and oil-pumping station hit	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	~52.8M early ballots; no motion	Election Day M-3 to M-9
ABNORMAL	EWP	IP-T1 median-line crossings	26 crossings in 24 h	Another joint combat readiness patrol (IPA-04)
ABNORMAL	EWP	K-1 DPRK launches	SRBM cluster-warhead test, 31 Oct	Launch with a Japan MOD/EEZ report

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
ABNORMAL	EWC	AF-4 Red Sea littoral	Sudan accuses Ethiopia over drone launches	Verified cross-border launch = 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	Unidentified Chinese vessel in the lagoon	Water cannon (IPA-02)
ABNORMAL	EWC	H-3 Haiti foreign forces	Bombing allegations denied	Mass-casualty clash

VII. PREDICTION LEDGER CHECK (WI prefixes)

Resolved today: - **IPA-03** (another DPRK ballistic missile launch, 30 Oct–30 Nov, 55%): **HIT.** South Korea's JCS reported a missile launched on 31 Oct from around Jeongju toward the Yellow Sea. KCNA describes it as a tactical ballistic missile carrying a cluster warhead, and Yonhap and Financial News report it as a ballistic launch (Yonhap, 1 Nov). Brier 0.2025.

Open WI calls due within 7 days (by 8 Nov): - **WAR-05 / 14** (US or Israeli strike on Iranian soil by 3 Nov): none; Rubio says there is no decision. **Remote.** - **WAR-06 / 10 / 13** (US joins Saudi strikes; Egyptian units in Saudi Arabia; UK intercept over Saudi Arabia, by 3 Nov): none found. The UK confirms air-defence deployments but no intercept. **Unlikely.** - **WAR-07** (merchant sinking near Hormuz by 3 Nov, 45%): the *Al Mayeda* is operational and the *Louise 1* resumed its voyage. **Unlikely** (about 20%). - **WAR-08** (Brent >$120 by 3 Nov, 20%): January at $113.43, with only Monday's session left. **Remote** (about 5%). - **WAR-11 / 15** (Brent <$100; Hormuz at baseline, by 3 Nov): **Remote.** - **WAR-16 / 17** (Saudi death; Aramco damage, by 3 Nov): debris only, no injuries. **Unlikely.** - **MID-05 / 08** (court order; TRO/PI motion in the named cases, by 3 Nov): none in the feed. **Remote / unlikely.**

Other open WI calls: WAR-20 at 4 of 5 Riyadh days (due 9 Nov), **likely**. **WAR-24** (Netanyahu receives the first mandate by 25 Nov, 55%) now **unlikely (about 25%)**: projections give Eisenkot about 60 endorsements against 46, and the mandate must be assigned by 11 Nov (Ynet). **WAR-27** is now about 30%. **RUS-13** has no date set. **WAR-19** has no airport halt. No qualifying event yet for **WAR-23 / 25 / 26, WAR-01 / 02 / 04, RUS-01 / 04 / 12, LEV-01, IPA-02 / 04, AFR-01 / 02, AMR-01, EUR-01, or MID-01 / 02 / 03**.

New predictions (dated 2026-11-01): - **WAR-28:** Israel's President assigns the first mandate to form a government to **Gadi Eisenkot** on or before **11 Nov 2026** (President's Office statement, or Times of Israel/Reuters/AP report). **70%, likely.** Resolve by 2026-11-11. - **RUS-16:** Ukraine's Air Force reports a single overnight attack of **500 or more drones and missiles combined**, dated **2–15 Nov 2026**. **45%, roughly even.** Resolve by 2026-11-15. - **EUR-02:** France's interior ministry reports a national count of **more than 300,000 demonstrators** for the **5 Nov 2026** strike and mobilisation day (ministry figure via AFP, France 24, Le Monde or Reuters). **40%, unlikely.** Resolve by 2026-11-06.

VIII. GAPS AND UNVERIFIED

- ***Al Mayeda*:** the attacker, the weapon and the exact location are unknown. The report that Iran cleared the voyage rests on Bloomberg's unnamed sources, relayed by Investing.com. We found no IRGC claim or denial specific to this ship. Nakilat says "Arabian Gulf", while some headlines say "near Hormuz".
- **US–Iran contacts:** the Vance letter and the offer to meet Rezaei come from WSJ and Washington Post reports relayed by Iran International; we did not read the originals. The "seven conditions" have not been published in full.
- **Israel:** endorsement counts are Ynet projections until the consultations on 4–6 Nov. Yisrael Beiteinu and UTJ are undecided.
- **Sahel:** a search result claiming 60 Nigerien soldiers killed on 1 Nov came from a mirror site ("bbcbreakingnews.pages.dev"). Its details match Niger's 2023 Tabatol attack (29 killed, per the defence ministry; AP), so we excluded it. Sahel collection remains thin.
- **Sudan:** ACLED monthly data end on 23 Oct, so AF-1 against the 8-week mean is estimated, not computed. The Nyala toll is disputed (21 to 100+). The Ethiopia drone allegation is the Sudanese government's.
- **Lebanon, 1 Nov:** Anadolu, citing NNA, reports further airstrikes, artillery fire and demolitions on 1 Nov across the Nabatieh, Bint Jbeil, Marjayoun and Tyre districts, including a mosque near a Lebanese military checkpoint in al-Amiriyah. We read this only as a search summary, so it is not scored.
- **Haiti:** we could not open AP's "biggest attack on new force" report (fetch timed out), so it is not used.
- **DPRK:** we read the JCS wording through Yonhap and Financial News. Japan's MOD issued no notice. We infer the missile type from KCNA images.
- **Kpler:** no crude-flow briefing since 30 Oct. The **Taiwan 7-day average** is our computation from MND daily releases. **OPEC+** reflects the sources' account before the meeting; there is no official communiqué yet. **WHO/IPC** alert page timed out; we used the search summary and the IPC portal.

Sources

All sources are linked inline. Primary and data sources: Nakilat statement (via QNA/The Peninsula), UKMTO warnings, Saudi-led coalition (via SPA/Al-Jazirah, AFP), Iran's Supreme Leader's office and SNSC (via Reuters, state TV relayed by Iran International), Ukrainian Air Force (via Ukrinform, RBC-Ukraine), Ukrainian presidency (via BBC Ukrainian), French interior ministry (via AFP/France 24, Ouest-France), Taiwan MND, South Korea JCS and KCNA (via Yonhap), Philippine Coast Guard (via Manila Times), UF Election Lab, NBC early-vote tracker, D.D.C. feed (CaseMagic), SOUTHCOM, Israeli President's Office (via Jerusalem Post, Ynet), OHCHR (UN News), IPC, UNHCR data portal, ACLED/HDX, NNA (via Middle East Eye). Reporting: Reuters, AP, AFP, Bloomberg (via Investing.com), Al Jazeera, Iran International, Gulf News, Khaleej Times, Business Standard, Business Recorder, Dawn, Kyiv Independent, TASS, Radio Bulgaria, BGNES, Polskie Radio, Infobae, Anadolu, Financial News (Korea), Japan Times, Sudan Tribune, Radio Tamazuj, Eastern Herald, Soufan Center, Capture Cascade.