WIRE World Instability

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Baseline work today: the Sahel (AF-T2) Statement of Normalcy is refreshed below (first written 26 Oct), and the topic is re-scored. Next in the rotation: ME-T2 (Levant), then IP-T2.

BLUF. The Middle East stays at **PROBABLE CRISIS (=)** on the eve of the US midterms: Iran now says it could reopen Hormuz **within two days** if Washington meets its conditions, while Israel's Prime Minister is reported to be pressing for strikes immediately after Tuesday's vote. Iran's delegation left Doha after three days of talks, but messages continue through Qatar; Tehran says "the ball is in the US court". The President says talks are "going fine" but that one or two nuclear sites, naming Pickaxe Mountain, still need to be "taken care of". Kpler puts oil clearance through Hormuz at **43% of pre-war** for the week to 31 Oct, and January Brent fell to about **$109** early Monday. Nobody has claimed the attack on the Qatari LNG carrier *Al Mayeda*, and Qatar is investigating. In the Sahel, **Algerian troops have entered Niger**, the country's first foreign deployment since 1973. 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 decision deferred past 3 Nov	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Iran's two-day Hormuz offer vs. Israeli pressure to strike; Hormuz 43%	=
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Israeli strikes and shelling intensify across south Lebanon	↑
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	193 drones overnight, 26 hit sites; trilateral date still open	=
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	School blockades this week; inter-union strike 5 Nov	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Eve of vote; DSCC TRO ruling due; no named-case motion	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No SOUTHCOM boat strike since 27 Oct	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	19 PLA sorties, 4 into the ADIZ (down from 32/26)	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	JCS still analysing the 31 Oct cluster-warhead test	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	PLA "combat readiness patrols" around Scarborough, 30 Oct	=
Africa: Sahel (AF-T2)	POTENTIAL CRISIS	SIGNIFICANT	Algerian-escorted convoy reaches Agadez; SoN refreshed	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Drones hit Abu Hamad and Al-Dabbah power stations; 13 in a week	=

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

Level changes since 1 Nov: none. Trend changes: Indo-Pacific region and IP-T1 ↑ to =; ME-T2 = to ↑. AF-T2 re-scored after its refreshed Statement of Normalcy, with no change in level. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 1 Nov). SA-4 ROUTINE → **ABNORMAL** (announced entry of an Algerian contingent into Niger). Within band: **W-1** EXTREME, mixed (Kpler 7-day clearance down to 43% from 49%, but Brent lower and an Iranian reopening offer); **W-8** SIGNIFICANT ↑ (Iran

shortens its plan to two days; message exchange continues); **W-5** SIGNIFICANT = (no decision; Israeli pressure reported); **R-3** SIGNIFICANT ↓ (193 drones, against 433); **IP-T1 median-line crossings / ADIZ** ABNORMAL ↓ (4 sorties into the ADIZ); **SC-1** ABNORMAL ↑ (PLA and CCG patrols around Scarborough); **LV-3** ABNORMAL ↑ (strikes intensifying, threats to Beirut's southern suburbs).

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

Diplomacy. Iran's foreign ministry spokesman, Esmaeil Baghaei, said on Monday that Tehran is considering a plan to reopen the Strait of Hormuz **within two days**, down from the one-week timeframe it proposed earlier, if the United States meets its conditions. He said the message exchange through mediators is continuing (Reuters via Arab News, 2 Nov). He also said "the ball is in the US court" and that Hormuz cannot reopen until the US naval blockade ends. He described the Vance letter as written by the US lead negotiator from the Islamabad talks and said Rezaei "would decide how to respond". He named the parliament speaker, Ghalibaf, as Iran's negotiator, and he ruled out enriched uranium leaving Iran (Iran International, 2 Nov). Foreign Minister Araghchi said the Qatari side had proposed shortening the timeline to five days and the two sides had reached a two-day proposal. His conditions are: lift the sanctions imposed after the Islamabad memorandum collapsed, scale US forces back to their previous level, restore the oil waivers, release frozen funds "including those held in Qatar", and recognise the Hormuz shipping route Iran discussed with Oman, with all other routes closed (NDTV Profit, citing Al Jazeera; Dawn, 2 Nov). Iran's negotiators left Doha on Sunday after three days of consultations. An official briefed on the talks told Reuters that the departure "was not due to difficulties" (Reuters via Arab News).

Washington and Jerusalem. Axios reports that the President and Israel's Prime Minister had a "tough" (Israeli source) or "direct" (US source) phone call on Saturday. According to the report, the Prime Minister is pressing for strikes on Iran **immediately after Tuesday's midterms**, while the President "for now, wants to let negotiations play out". The White House and the Prime Minister's office declined to comment (Axios, 1 Nov). The President told reporters on Saturday that talks are "going fine" but that Iran is "not very reliable". He said: "We still have to take care of, I would say one or two sites, but we can do that in 10 minutes... You probably could look at Pickaxe Mountain." Iran denies nuclear work at that site (RTÉ, 1 Nov). Secretary of State Rubio repeated that the President "hasn't made a decision" (CNBC, 2 Nov). The force flow continues. The WSJ has reported a third carrier group, an amphibious group and up to 10,000 more troops heading to the region (WSJ).

Iran's internal debate. Iran's Supreme Leader ordered commanders to update the target list to include "all types of tangible and intangible assets belonging to the American-Zionist enemy". This was his first reported meeting with the military leadership, and he has not been seen publicly since March (RTÉ, citing his statement). Rezaei, the SNSC secretary, said on 31 Oct that no new decision has been made on the nuclear doctrine. Hardline clerics and MPs, however, are publicly calling for a bomb. Nour News, a site close to the SNSC, warned against letting "the voices of crowds" substitute for national decision-making (Iran International, 2 Nov, same page).

Hormuz and the Gulf. Kpler's 2 Nov briefing puts Total Hormuz clearance at **7,359 kbd over the 7 days to 31 Oct, about 43% of the 17,147 kbd pre-war baseline**. Its 30 Oct briefing had 8,462 kbd (49%) for the 7 days to 28 Oct. Kpler warns that the latest days are preliminary floors that "have typically settled 1.5 to 2 times higher" (Kpler, 2 Nov; Kpler, 30 Oct). That is 3 points above the WAR-26 threshold of 40%. On *Al Mayeda*, Qatar's foreign ministry condemned the attack and said the authorities "have initiated the necessary investigations... and identify those responsible". Qatar "reserves its right to take all necessary measures" (Qatar MOFA). UKMTO placed the strike about 40 nm south of Lavan Island. The analytics firm Windward attributes it to Iran, but no government has done so, and Iran has neither claimed nor denied it (Defense and Tech, compiling Nakilat/UKMTO/Windward). **Prices:** January Brent fell 3.91% to **$109.00** and December WTI to $99.85 at 04:07 ET Monday (CNBC). Kpler notes that Brent "slipped below $110/bbl early on Monday".

Houthi–Saudi front. On Sunday, 1 Nov, the coalition reported intercepting a ballistic missile and a drone launched toward **southern** Saudi Arabia, and warnings were issued for Abha and Khamis Mushait (Anadolu, 1 Nov). It also said it had carried out "a precision operation to neutralise vital resources" used by the Houthis. The Houthis say Saudi strikes hit **Ras Issa port** and an oil facility in Bajil and wounded seven people (AFP via Straits Times, 2 Nov). No interception over Riyadh dated 1 Nov was found, so the **WAR-20 count stays at 4 of 5** (27, 29, 30, 31 Oct). There is still no reported death on Saudi soil and no confirmed Aramco damage (WAR-16, WAR-17).

Indicators. W-1 EXTREME (= on balance; clearance at 43% and still falling on the 7-day average, against an Iranian reopening offer and lower prices). W-2 EXTREME (=; Saudi strikes on Hodeidah's ports and Houthi launches south). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; threats and an updated target list, but no launch at Israel). W-5 SIGNIFICANT (=; no decision, force flow continues). W-6 SIGNIFICANT (=; Qatar investigating, no Gulf attribution). W-7 SIGNIFICANT (↓ within band; Brent around $109). W-8 SIGNIFICANT (↑ within band; a two-day plan and continuing message exchange, but conditions still come first). Roll-up: 2 Extreme + 5 Significant + 1 Abnormal = **PROBABLE**. Tripwires not met. Trend **=**: diplomacy moved slightly forward, which is offset by reported Israeli pressure for an immediate strike and the President's naming of a specific target.

Analyst Comment. The two tracks are now explicit and run on the same clock. Tehran has put a fast reopening on the table, timed to land before Washington decides. The President has publicly named a target set narrow enough for a "10 minutes" operation. Israel's caretaker leadership, meanwhile, is lobbying for action during its own mandate window, 4 to 11 Nov. A narrow strike on a single nuclear site, followed by a deal, is now a plausible path alongside a full return to war. That would still resolve WAR-23 as a hit. We hold **WAR-23 (US strike on Iranian**

soil, 4–30 Nov) at roughly even (about 45%) and **WAR-27 (in-person meeting by 15 Nov) at about 30%**, because Tehran still rules out direct talks until its terms are met. Hormuz at 43% makes **WAR-26 (below 40% by 13 Nov) roughly even**. We judge clearance returning to 50% or more by 20 Nov **unlikely (new WAR-29, 30%)**.

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

Strikes. Russia launched **193 strike drones** (75 of them jet-powered Shaheds), plus Gerbera and Parodiya decoys, between 18:00 on 1 Nov and the morning of 2 Nov. Air defences downed or suppressed 154. Hits were recorded at **26 locations**, debris fell at nine, and more than six drones were still airborne at 08:00 (Interfax-Ukraine, citing the Air Force; Ukrainska Pravda). One person was killed in Izium. About 17 people were injured in the Odesa and Kharkiv regions (Kyiv Post; NV).

Talks. Still no date. The Kremlin aide Ushakov said the Abu Dhabi trilateral would come "after November 4", with timing depending on "the situation on the battlefield" (Report.az, citing TASS). Ukrinform reports that technical-level talks could take place in Abu Dhabi on 6–10 Nov, though the date and venue are not final (Ukrinform). RUS-13 is open.

Indicators. R-3 SIGNIFICANT (↓ within band; a lighter night after 433). R-4 SIGNIFICANT (=; no Bulgarian attribution for *Contship Jet*, no Article 4). R-5 SIGNIFICANT (=). R-6 ABNORMAL, R-8 ABNORMAL, R-10 ABNORMAL (=). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=**.

Analyst Comment. Russia alternates heavy and lighter nights as the heating season begins, and a night of 193 drones does not change the pattern. Moscow is tying the talks date to the "battlefield", which leaves room to keep hitting the energy system before the talks. **RUS-16** (a night of 500 or more, 2–15 Nov) stays **roughly even (about 45%)**.

EU-T2 (European internal stability), brief. France faces school and university blockades this week, then the inter-union strike and demonstrations on **Thursday, 5 Nov**. The CFDT, CGT, FO, Unsa and FSU are calling it over wages, public services, jobs and industry (franceinfo; franceinfo, call). We found no new development in the Polish standoff over the Constitutional Tribunal, and no Monday spread close at writing (OAT-Bund 165 bp as carried in the 1 Nov edition). EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE (all =). **POTENTIAL CRISIS (=).** Analyst Comment: the united union front draws more broadly than the Saturday marches did, but ministry counts on weekday strikes have usually run lower than the Saturday "Acts". **EUR-02** (above 300,000 on 5 Nov) stays at **about 40%**.

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

Eve of the vote. CNN, via KESQ, reports that election officials are preparing for federal interference scenarios: agents at polling sites, ballot or equipment seizures, and challenges to results. Several states have pre-drafted court filings. Officials say there is "no evidence of planned Election Day disruptions", and there have been "no reports of major disruptions involving the federal government" during early voting. DOJ plans to send more than 1,000 election monitors (lawyers, not law enforcement). Minnesota and Wyoming bar them from direct polling-place access, and Colorado offered access with conditions, which DOJ declined (CNN via KESQ, 2 Nov). Bloomberg Law reports that DOJ said FBI and ICE agents will not serve as poll monitors (Bloomberg Law). AP reports that DHS dismissed concerns about ICE officers at polling places (AP).

Courts. Just Security's tracker (1 Nov) shows the following. A TRO in *SEIU v. DOJ* (N.D. Cal.) bars DOJ and DHS from coercing election officials over ballot processing; a stay hearing is set for **2 Nov at 11:00 PT**, and the TRO runs to 16 Nov. In *DSCC v. Trump* (D.D.C., 1:26-cv-03674), Chief Judge Boasberg indicated he would rule on the TRO/PI motion **by 2 Nov**. A PI in *California Nurses Association v. Mullin* bars DHS election-related field operations in nine states. In *United States v. Alaska*, the complaint was dismissed on 1 Nov and the government appealed (Just Security). None of these is a case named in MID-05 or MID-08, and we found no TRO or PI motion in the named polling-place cases.

Indicators. M-1 SIGNIFICANT (=; a federal enforcement posture contested in several courts). M-2 ABNORMAL (=). M-7 ABNORMAL (=). M-3 to M-9 start on Election Day. Roll-up: **ENVIRONMENT (=)**.

Analyst Comment. The federal–state contest is being fought in court and on paper, not at polling places. Courts are granting relief in some cases, which itself is a pressure valve. The highest-risk window runs from Tuesday's count through certification (MID-03, 15 Dec), not the polling day itself. This assessment takes no position on any party's prospects.

AM-T2 (hemispheric security), brief. SOUTHCOM's press page still lists **27 Oct** as its latest lethal kinetic strike (SOUTHCOM). **AMR-01 is at 0 of 3** strikes dated from 31 Oct. 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 **19 PLA aircraft sorties, 7 PLAN ships and 6 official ships** between 06:00 on 1 Nov and 06:00 on 2 Nov. **Four sorties entered** the southwestern and eastern ADIZ (MND, 2 Nov). That is down from 32 and 26 a day earlier, and the 7-day average stays below 20 a day on our count. No "joint combat readiness patrol" was reported, so IPA-04 stays open. **ENVIRONMENT FOR CRISIS (↑ to =).**

Korean Peninsula (IP-T2). No new launch. South Korea's military says it is still analysing the 31 Oct cluster-warhead test (YTN, 2 Nov; Stars and Stripes). K-1 to K-3 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

South China Sea (IP-T3). The PLA Southern Theater Command said on 30 Oct that its naval and air forces carried out **combat readiness patrols around Scarborough Shoal**, and that it had "strengthened such patrols this month". The China Coast Guard held law-enforcement patrols there the same day (Reuters via CNA, 30 Oct). A page dated 2 Nov reports a water-cannon incident against a Philippine fuel-aid mission near Scarborough, but we could not date the event, and its details match the 23–24 Jul incidents. It is in GAPS and is **not** counted for IPA-02. SC-1 ABNORMAL (↑ within band). **ENVIRONMENT FOR CRISIS (=).**

Analyst Comment. In the run-up to APEC in Shenzhen (18–19 Nov), Beijing is pulsing pressure: a heavy day around Taiwan is followed by a light one, and declared "readiness patrols" mark the Scarborough line. The pattern holds steady and has not escalated.

V. AFRICA

Sahel (AF-T2). Algeria's first foreign troop deployment since 1973 is under way. RFI reports that Algerian forces escorted a convoy of about **sixty fuel tankers** across the border, where Niger's forces joined it. It reached **Agadez on Saturday, 31 Oct**. According to several sources, a unit could be based in Niamey and at a former French site in the northeast (RFI, 2 Nov). Reuters, relayed by The New Arab, reports that the first Algerian military convoy reached **Arlit**, the uranium town. Algeria says the deployment protects its energy and economic interests and has not given the size or the timetable (The New Arab, 2 Nov). The upper house approved the deployment on 25 Oct by **148 of 174** votes. The constitution requires two-thirds of each chamber. President Tebboune had said earlier in October: "We will protect Niger whatever happens" (AFP via L'Orient-Le Jour, 25 Oct). The French defence site Opex360 (Zone Militaire, 26 Oct) reports that a unit will be based at **Madama**, the former French base near the Libyan border. Its link is withheld under the desk's style rules. In Mali, the corridor watch at Vigil Consilium found **no tanker attack and no escorted Bamako arrival reported after 10 Oct**. It also notes that fuel supply in Niamey was gradually returning around 23 Oct (Vigil Consilium, reviewed 1 Nov).

Baseline work: Statement of Normalcy, AF-T2 Sahel (refresh; first written 26 Oct)

`SUBJECT: Central Sahel (Mali, Burkina Faso, Niger) QUESTION: is a junta, a capital or the regional order about to break beyond the 2023-26 norm? (Internal Stability + Strategic Competition; PMESII-PT: Political, Military, Infrastructure) Normal 2024-26 (a war-time norm): AES juntas in power and backed by Russia's Africa Corps; JNIM and IS Sahel hold much of the countryside; recurrent mass-casualty raids on posts; Bamako under a declared JNIM fuel blockade with supply by escorted convoy; coups plotted and foiled at intervals. SA-1 Regime stability (L) R: juntas in place, no attempt in 60 days | A: officially reported plot or officer arrests | S: failed coup or mutiny within 60 days | E: a successful coup SA-2 Pressure on capitals (L) R: rural posts and roads | A: declared blockade of a regional town or corridor | S: declared blockade of a capital with escorted supply only, or an attack inside a capital | E: a capital's fuel cut 14+ days, or a capital stormed/encircled SA-3 Lethality vs state forces (Lg) R: events under 20 killed | A: one event of 20-49 in 45 days | S: one event of 50+, or 50+ in one day | E: 100+ in one event, or a regional capital overrun SA-4 Foreign forces (L) R: Africa Corps and Turkish drone support as now | A: announced entry or exit of a foreign contingent | S: foreign forces in direct large-scale combat | E: foreign intervention to defend or topple a government Baseline sources: RFI/AFP, Reuters, official communiques, ACLED, ISS Africa, Vigil Consilium corridor watch (named as secondary). Period: 1 Sep-1 Nov 2026` **Current reading.** *SA-1:* Niger's junta put down a mutiny at Air Base 101 in Niamey in late August with help from Russia's Africa Corps. The Russian ambassador publicly acknowledged the help (BBC Afrique, 7 Sep). That falls outside the 60-day window, and no new plot has been officially reported, so SA-1 is ROUTINE, with a raised base rate. *SA-2:* the Bamako blockade continues, with escorted supply and no reported escorted arrival or tanker attack since 10 Oct (Vigil Consilium), so SIGNIFICANT. *SA-3:* ISSP attacks killed **57 security personnel on 23 Sep** in Niger (dpa via GNA). That is SIGNIFICANT until the event leaves the 45-day window on **7 Nov**. No newer official toll of 20 or more was found. The Ménaka camp killings of 18 Oct (at least 48 civilians, Studio Tamani) were civilians, so they do not count for SA-3. *SA-4:* an **announced foreign contingent entering** (Algeria), so **ABNORMAL**.

Indicators. SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 SIGNIFICANT (expires 7 Nov), SA-4 ABNORMAL (↑ from Routine). Roll-up: 2 Significant + 1 Abnormal = **POTENTIAL CRISIS**. Trend **=**: SA-4 rises, but the deployment is defensive and was invited by the host, and SA-3's anchor event drops out within the week. No override.

Analyst Comment. Algeria's move changes the Sahel's strategic map more than its level. A second outside guarantor now protects Niger's junta and energy sites alongside Russia. This is Algeria's first deployment in five decades, and it raises the stakes for Algiers if jihadists or rivals test it near Arlit or Madama. If no new mass-casualty attack occurs, AF-T2 could ease to ENVIRONMENT after 7 Nov. **AFR-02** (20 or more security personnel killed in one attack by 30 Nov) stays **likely (60%)**. We judge an officially confirmed Algerian presence at a named fixed site by 30 Nov **likely (new AFR-03, 60%)**.

Sudan and the Horn (AF-T1). At dawn on Sunday, 1 Nov, drones struck the **Abu Hamad** transformer station in River Nile State and set it on fire. Drones also hit the **Al-Dabbah** power station in Northern State. Al Jazeera counts **13 power stations attacked since last Monday** in Khartoum, Gezira, Sennar, Gedaref, River Nile and Red Sea states. Sudanese authorities blame the RSF, which usually does not comment (Al Jazeera Arabic, citing Anadolu, 1 Nov). Youm7 reports a woman killed in an attack on a fuel station in Al-Dabbah (Youm7). AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL, AF-4 ABNORMAL (all =). **ENVIRONMENT FOR CRISIS (=).** Analyst Comment: the campaign against the grid now reaches the far north. This is economic warfare against SAF-held territory. It is not yet a single mass-casualty event, which is what AFR-01 (55%) needs.

ME-T2 (Levant), brief. L'Orient Today reports that Israeli attacks continued overnight into Monday. There were air raids on **Kfar Tibnit** and **Qsair**, artillery fire on Mansouri, Wadi Zibqine, Wadi Slouqi and Mais al-Jabal, machine-gun fire on Zawtar Sharqieh and Beit Yahoun, a large demolition blast in Bani Hayan, and tank movements near Qantara and Arnoun. Its correspondent's summary for Sunday counts air raids on three villages, artillery fire on 18 others and demolitions in three locations. According to L'Orient Today, the Israeli daily Maariv relayed threats to extend the occupation as far as Saida and to bomb **Beirut's southern suburbs** if Hezbollah joins a new war (L'Orient Today, 2 Nov). No strike on Beirut and no Jordanian strike in Syria was found (LEV-01 open). LV-3 ABNORMAL (↑ within band), LV-4 SIGNIFICANT. **ENVIRONMENT FOR CRISIS (↑).** Analyst Comment: south Lebanon is the most likely first front if Iran is struck. We judge an Israeli strike on Beirut's southern suburbs by 30 Nov **unlikely (new LEV-02, 35%)**.

VI. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz flows / attacks	Kpler 43% of baseline; *Al Mayeda* unattributed	Kpler under 40% (WAR-26, 13 Nov); 50%+ (WAR-29); attribution
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Saudi strikes on Ras Issa; launches south	Fifth Riyadh day (WAR-20, 9 Nov)
SIGNIFICANT	EWP	W-5 US forces	"No decision"; Pickaxe Mountain named; Israeli pressure for an immediate strike	Any strike (WAR-23, 4–30 Nov)
SIGNIFICANT	EWP	W-8 Diplomacy	Iran's two-day reopening plan; "ball in the US court"	US reply; Rezaei's answer to Vance; any in-person meeting (WAR-27)
SIGNIFICANT	EWP	W-7 Energy price shock	Brent ~$109 early Monday	>$120 (WAR-25)
SIGNIFICANT	EWP	W-6 Gulf belligerency	Qatar investigating *Al Mayeda*	A Gulf state attributes publicly
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	193 drones; 26 sites hit	A night of 500+ (RUS-16)
SIGNIFICANT	EWP	R-4 NATO spillover	*Contship Jet* unattributed	Formal attribution; Article 4 (RUS-04)
SIGNIFICANT	EWC	EI-1/EI-3 France	5 Nov inter-union strike	Ministry count (EUR-02); >175 bp (EUR-01)
SIGNIFICANT	EWC	M-1 Federal posture on elections	DOJ monitors; DSCC TRO ruling due	Election Day M-3 to M-9
SIGNIFICANT	EWC	SA-2/SA-3 Sahel	Bamako blockade; 23 Sep anchor event ages out 7 Nov	20+ killed in one attack (AFR-02)
SIGNIFICANT	EWC	AF-1 Sudan	13 power stations hit in a week	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWP	LV-4 Lebanon	Strikes intensify; threats to the southern suburbs	Beirut strike (LEV-02)
ABNORMAL	EWP	SA-4 Foreign forces in the Sahel	Algerian convoy at Agadez and Arlit	Fixed basing confirmed (AFR-03)
ABNORMAL	EWP	SC-1 South China Sea	PLA readiness patrols at Scarborough	Verified water cannon (IPA-02)

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
ABNORMAL	EWP	IP-T1 Taiwan ADIZ / median line	4 into the ADIZ (down)	Joint combat readiness patrol (IPA-04)
ABNORMAL	EWP	K-1 DPRK launches	Cluster-warhead test still being analysed	A launch with a Japan MOD report
ABNORMAL	EWC	LV-3 South Lebanon fire	Raids, shelling, demolitions daily	Mass-casualty strike

VII. PREDICTION LEDGER CHECK (WI prefixes)

Resolved today: none. No WI call was due on or before 2 Nov.

Open WI calls due within 7 days (by 9 Nov): - **WAR-05 / WAR-14** (US / Israeli strike on Iranian soil by 3 Nov): none. The President says talks come first before the vote. **Remote.** - **WAR-06 / 10 / 13** (US joins Saudi strikes; Egyptian units in Saudi Arabia; UK intercept over Saudi Arabia, by 3 Nov): none found. **Unlikely.** - **WAR-07** (merchant sinking near Hormuz by 3 Nov, 45%): none. *Al Mayeda* is operational. **Unlikely** (about 15%). - **WAR-08** (Brent >$120 by 3 Nov, 20%): about $109 Monday. **Remote.** - **WAR-11** (Brent <$100 by 3 Nov, 20%): Brent about $109, though WTI is below $100. **Remote.** - **WAR-15** (Kpler Hormuz at baseline by 3 Nov): 43%. **Remote.** - **WAR-16 / 17** (Saudi death; Aramco damage, by 3 Nov): none. **Unlikely.** - **MID-05 / MID-08** (court order or TRO/PI motion in the named polling-place cases, by 3 Nov): none in the named cases. Other cases (*SEIU v. DOJ*, *DSCC v. Trump*) do not count. **Remote / unlikely.** - **EUR-02** (France 5 Nov count >300k, due 6 Nov): pending, **about 40%**. - **WAR-20** (5 Riyadh days by 9 Nov): 4 of 5, nothing on 1 Nov. **Likely** (about 65%).

Other open WI calls: WAR-28 (Eisenkot gets the first mandate by 11 Nov, 70%) firmed. Bennett's party will recommend Eisenkot (Jerusalem Post, 1 Nov), and consultations begin Wednesday, 4 Nov (Ynet). **Likely. WAR-24** (Netanyahu) is about 25%. **WAR-26** is roughly even at 43%. **WAR-27** is about 30%. **RUS-13**: date "after 4 Nov". No qualifying event yet for **WAR-01 / 02 / 04 / 19 / 23 / 25, RUS-01 / 04 / 12 / 16, LEV-01, IPA-02 / 04, AFR-01 / 02, AMR-01 (0 of 3), EUR-01, or MID-01 / 02 / 03**.

New predictions (dated 2026-11-02): - **WAR-29:** A Kpler media briefing dated **3–20 Nov 2026** reports 7-day average Total Hormuz Clearance at **50% or more** of the pre-war baseline (8,574 kbd or more). **30%, unlikely.** Resolve by 2026-11-20. - **LEV-02:** Israel strikes **Beirut's southern suburbs** between **2 and 30 Nov 2026** (IDF statement, or Reuters/AP/AFP/L'Orient Today citing officials). **35%, unlikely.** Resolve by 2026-11-30. - **AFR-03:** Algerian forces are officially confirmed as stationed at a **named fixed site in Niger** by **30 Nov 2026** (Algerian MoD or presidency, Niger government, or Reuters/AP/AFP/RFI citing officials; convoy escorts alone do not count). **60%, likely.** Resolve by 2026-11-30.

VIII. GAPS AND UNVERIFIED

- ***Al Mayeda*:** the only attribution is Windward's, a private analytics firm. Iran has neither claimed nor denied the attack. Bloomberg's report that Iran cleared the voyage rests on unnamed sources.
- **Trump–Netanyahu call:** the content comes from Axios's unnamed Israeli and US sources, and both governments declined to comment. The WSJ report on the force flow was read as a headline and search summary.
- **Brent:** Monday figures are intraday (CNBC, 04:07 ET; Kpler: "below $110"). A search summary giving Monday "closes" of about $108.4 was published before any close and is **not used**.
- **South China Sea:** a Manila Times page dated 2 Nov describes a water-cannon incident at Scarborough during a fuel-aid mission. The event date is not given, and its details and image match the 23–24 Jul incidents. **Not counted** for IPA-02 until the PCG or Reuters/AP confirm a date.
- **SOUTHCOM:** a third-party summary listed boat strikes on "1, 4, 6, 9, 10 and 15 Nov". Most of those dates are in the future, so it is misdated and excluded. SOUTHCOM's own page lists 27 Oct as its latest strike.
- **Sahel:** Algerian force size, mandate and basing are not official. Madama and Niamey come from Opex360 and RFI's sources. Vigil Consilium is a secondary aggregator. ISSP's claim of 400 or more JNIM killed at Gonadaouri is a party claim and is not used.
- **Lebanon:** ILKHA reports 11 killed in Israeli strikes on Ansar and Deir ez-Zahrani on Saturday. It is a single, partisan-leaning source and is not scored.
- **Sudan:** the Abu Hamad strike rests on eyewitness accounts relayed by Anadolu and Al Jazeera. The Al-Dabbah fatality is reported only by Youm7.
- **AP "where things stand" (2 Nov)** timed out and was read only as a snippet. **Polish and OAT-Bund updates** were not available at writing.

Sources

All sources are linked inline. Primary and data sources: Iranian foreign ministry (via Reuters/Arab News, Iran International), Iran's Supreme Leader's statement (via RTÉ), Qatar MOFA, Kpler media briefings (30 Oct, 2 Nov), Saudi-led coalition (via Anadolu), Houthi health ministry (via AFP), Ukrainian Air Force (via Interfax-Ukraine, Ukrainska Pravda), Taiwan MND, PLA Southern Theater Command (via Reuters/CNA), SOUTHCOM, French unions (via franceinfo), Algerian parliament (via AFP), Just Security litigation tracker, ACLED-cited and UN figures as noted. Reporting: Reuters, AP, AFP, Axios, CNBC, RTÉ, Dawn, NDTV Profit, Al Jazeera, Defense and Tech, Straits Times, Kyiv Post, NV, Report.az/TASS, Ukrinform, CNN/KESQ, Bloomberg Law, YTN, Stars and Stripes, RFI, The New Arab, L'Orient-Le Jour, Opex360 (unlinked), BBC Afrique, GNA/dpa, Studio Tamani, Vigil Consilium, Youm7, L'Orient Today, Anadolu, Jerusalem Post, WSJ.

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