WIRE World Instability

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Baseline work today: the Levant (ME-T2) Statement of Normalcy is refreshed below (first written 28 Oct), and the topic is re-scored. Next in the rotation: IP-T2 (Korea), then IP-T3.

BLUF. The Middle East stays at **PROBABLE CRISIS (=)** on US Election Day, with both tracks moving at once. US forces carried out what US officials call **"limited defensive" strikes on Iran's Qeshm Island** after an Iranian missile reportedly downed a US drone, yet no US agency has acknowledged them on the record. Talks continue: Iran says the "ball is in the US court", and the Vice President sees "progress". A **tug sank in the Strait** after a projectile strike, and Kpler puts Hormuz clearance at **45% of pre-war**. Brent fell **7.6% to $104.77**. In Ukraine, guided bombs killed **29 people at an aid centre** in Komyshuvakha, and a US–Russia–Ukraine meeting is set for **Abu Dhabi on 10–11 Nov**. Taiwan logged **49 PLA sorties**, its 2026 single-day high. 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; strikes and talks run in parallel	=
Middle East: widespread war (ME-T1)	**PROBABLE CRISIS**	**EXTREME**	US strikes on Qeshm vs. active mediation; tug sunk; Hormuz 45%	=
Middle East: Levant and Syria (ME-T2)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Daily Israeli fire in south Lebanon; Suwayda clashes; SoN refreshed	=
Europe/Russia: Russian aggression (EU-T1)	**POTENTIAL CRISIS**	**SIGNIFICANT**	29 killed at Komyshuvakha aid centre; ~350 drones and missiles overnight; Abu Dhabi 10–11 Nov	=
Europe: internal stability (EU-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	48 lycées blocked; inter-union strike 5 Nov	=
Americas: US election integrity (AM-T1)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Polls open; court trims DOJ poll-monitor role; no TRO granted	=
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**	49 PLA sorties, 31 into the ADIZ: 2026 high	↑
Indo-Pacific: Korean Peninsula (IP-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	Undisclosed 2 Nov strategic cruise-missile launch reported	=
Indo-Pacific: South China Sea (IP-T3)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	PCG probes a Chinese vessel inside Scarborough's lagoon	=
Africa: Sahel (AF-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	Algerian convoy at Arlit; SA-3 anchor event ages out 7 Nov	=
Africa: Sudan and the Horn (AF-T1)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Three more substations hit; Sudan files UN complaints against Ethiopia	=

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

Level changes since 2 Nov: none. Trend changes: Indo-Pacific region and IP-T1 = to ↑; ME-T2 ↑ to = after the refreshed Statement of Normalcy. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 2 Nov). No indicator changed step. Within band: **W-1** EXTREME ↑ (a tug sunk in the Strait and two more vessels struck; Kpler clearance up to 45%); **W-5** SIGNIFICANT ↑ (US strikes on Iranian soil, reported but unacknowledged; a US drone reportedly downed); **W-7** SIGNIFICANT ↓ (Brent settles at $104.77, down 7.6%); **W-8** SIGNIFICANT ↓ (mediation "intensive"; Iran's reply delivered;

"progress" cited by Washington); **R-3** SIGNIFICANT ↑ (29 killed in one strike; about 350 drones and missiles overnight); **I-1 (Taiwan sorties)** ABNORMAL ↑ (49 in one day); **K-1** ABNORMAL ↑ (an unannounced cruise-missile launch).

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

Strikes on Qeshm. US officials told several outlets that US forces carried out "limited defensive" strikes against Iranian targets in the Strait of Hormuz, including **Qeshm Island**, on Monday evening (US time). They said the strikes followed surface-to-air missile threats against US assets, and that an Iranian missile had brought down a US MQ-9 drone (AP; ABC News; USA Today). Iran's state agency IRNA reported explosions on Qeshm and Hengam and near Bandar Abbas (The National, citing IRNA). The IRGC claimed it had shot down two RQ-170 drones; a US official called that claim false (The National, 3 Nov). The Wall Street Journal, as relayed by the Straits Times and ABC, reports that this was one of a **series of limited US strikes in recent weeks** that were not announced (Straits Times). CENTCOM did not respond to requests for comment, and we found **no on-the-record acknowledgment** from the Pentagon, CENTCOM or the White House at writing. Israel said it was not involved (Al Arabiya, 3 Nov).

Diplomacy. The track survived the strikes. Parliament speaker Ghalibaf, Iran's lead negotiator, said the "ball is now in the US court" after Tehran sent a "strong and rational response" to the latest US proposals, and he warned of an "unpredictable" response to any attack (Al Jazeera live, 3 Nov). The President posted that a deal "could happen" and that "Iran wants a settlement, as soon as possible". The Vice President said: "We've certainly made some progress" (CBS News live). A senior Iranian official told Reuters the two sides remain "far from" a deal. Qatari mediators travelled to Tehran on Monday night, and Foreign Minister Araghchi said talks with Saudi Arabia on regional security are continuing (Reuters via Arab News). Araghchi described the talks as "intensive", with Qatar and Pakistan mediating (ABC Australia, 3 Nov). President Pezeshkian said the Supreme Leader has given the government authority for the peace talks (Business Times).

Hormuz and the Gulf. NAVAREA IX warning **425/26**, issued by Pakistan's hydrographic office at 15:00 UTC on 2 Nov, states that the **tug *Selat Storm*** was "involved in a security incident and sunk" about 0.6 nm west of Jazirat Um Al Ghanam, off Musandam (NAVAREA IX 425/26). UKMTO Warning **191-26** records a merchant master relaying a Mayday from a vessel "struck by an unknown projectile" in the Strait at 15:09 UTC on 1 Nov. The Maritime Executive, citing Vanguard Tech, identifies that vessel as the UAE-owned *Selat Storm*, about 1,300 dwt (Maritime Executive, 1 Nov). **Correction:** the same NAVAREA series also records the **dhow *MSV Quba* "sunk" in a security incident** about 3.5 nm west of the same island on 29 Oct (warning 417/26). This desk reported on 2 Nov that no vessel had sunk; that was wrong. The same article reports the tanker *Largo Atom* hit by two projectiles about 70 nm east of Ras Al Khafji on the night of 1 Nov, with all crew accounted for. Kpler's 3 Nov briefing puts **Total Hormuz clearance at 7,789 kbd over the 7 days to 1 Nov, about 45%** of the 17,147 kbd pre-war baseline, up from 43%. Excluding Iranian-origin cargo, flows through the Strait were 6,461 kbd (38%). Tanker crossings averaged **11 a day against 50 before the war**, with 4 on 1 Nov, and 26 of 33 crossings from 29 Oct to 1 Nov were "dark". Loadings at Fujairah and in Oman rose 24% to 4,240 kbd (Kpler, 3 Nov). Nobody has claimed the attack on the Qatari LNG carrier *Al Mayeda*, and Qatar's investigation continues.

Prices. ICE Brent **settled at $104.77 on 2 Nov, down $8.66 (7.63%)**, after a session low of $103.28; WTI settled at $96.46. It was the largest one-day fall since 27 Jul (Business Times; NBC News). Brent rose about 0.5% to $105.25 in early Asian trade after news of the strikes (The National).

Houthi–Saudi front. On 2 Nov the Saudi-led coalition reported intercepting a ballistic missile launched toward southern Saudi Arabia, and alerts were issued for Khamis Mushait, Abha, Taif and Najran (SPA). It also reported **two drones intercepted over the Riyadh region** (SPA; Anadolu). That is the **fifth distinct date** with a Riyadh interception since 27 Oct, so **WAR-20 resolves as a hit** (see Section VII). The Houthi spokesman claims attacks on Dammam airport and a radar in Jazan; those are party claims. We found no reported death on Saudi soil and no confirmed Aramco damage since 23 Oct (WAR-16, WAR-17).

Indicators. W-1 EXTREME (↑ within band; a vessel sunk, two struck, clearance 45%). W-2 EXTREME (=; launches at Riyadh and the south). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; Israel denies a role; no Iran–Israel fire). W-5 SIGNIFICANT (↑ within band; strikes on Iranian soil reported by US officials and a drone lost, but no US deaths reported and no ground operations, so not Extreme). W-6 SIGNIFICANT (=; strikes on Riyadh, Iran–Saudi security talks). W-7 SIGNIFICANT (↓ within band; Brent $104.77). W-8 SIGNIFICANT (↓ within band; mediation intensive, but no agreement and conditions still come first). Roll-up: 2 Extreme + 5 Significant + 1 Abnormal = **PROBABLE**. Tripwires (W-5 or W-6 at Extreme, or W-3 and W-4 both at Extreme) not met. Trend **=**: kinetic contact rose, and the diplomatic track and prices moved the other way.

Analyst Comment. Washington is running controlled force and negotiation on the same clock. The strikes were small, unannounced and described as defensive. That framing keeps them below the threshold that would force either side to end the talks, and Tehran's response so far has been rhetorical. The risk is that unannounced exchanges are hard for outsiders to count and easy for either side to escalate. The highest-risk window opens once the polls close, when the domestic reason to avoid a larger operation lapses. Israel's own government formation begins on 4 Nov. We hold **WAR-23 (US strike on Iranian soil, 4–30 Nov) at about 50%, roughly even**: the 2 Nov strike falls before its window, but it shows the threshold for small strikes is low. We judge an on-the-record US acknowledgment of a strike on Iranian

territory by 17 Nov **unlikely (new WAR-30, 40%)**. Kpler at 45% keeps **WAR-26** (below 40% by 13 Nov) **unlikely (about 35%)**, since clearance has edged up for two briefings.

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

Komyshuvakha. Russian guided bombs hit a school used as an aid distribution centre in Komyshuvakha, Zaporizhzhia region, on 2 Nov, and then a shelter. Officials say **29 people were killed**, including four police officers and two rescuers, and 48 were missing (The Guardian, 3 Nov; BBC).

Overnight strikes. Between the evening of 2 Nov and the morning of 3 Nov, Russia launched **289 drones** (120 of them jet-powered), **59 cruise missiles**, and Iskander-M/KN-23 ballistic and Zircon missiles; the Air Force did not give the number of ballistic missiles. Air defences downed 309: 3 ballistic missiles, 49 cruise missiles and 257 drones. Hits were recorded at 23 locations and debris fell at 14. The main targets were the Kyiv, Kharkiv, Vinnytsia and Dnipropetrovsk regions (Interfax-Ukraine; Ukrainska Pravda). A hospital in Kharkiv was hit, and at least 73 people were injured there; five were wounded in Dnipro (RBC-Ukraine). On our count that is about 350 or more weapons, short of the 500 needed for **RUS-16**. Zelensky had said Ukraine had intelligence of a massive attack timed for "when the world will be watching the American midterms" (Axios).

Talks. The Kremlin confirmed that its delegation will attend a **trilateral meeting with the US and Ukraine in Abu Dhabi on 10–11 Nov**. Kushner and Witkoff will lead the US side, and US officials will meet European, NATO and EU representatives in Brussels this week (Axios, 3 Nov; Anadolu). Axios also reports that the US has lifted sanctions on sales of Russian diesel.

Indicators. R-3 SIGNIFICANT (↑ within band; a mass-casualty strike and a combined missile-and-drone night). R-4 SIGNIFICANT (=; no new NATO-territory incident found). R-5 SIGNIFICANT (=). R-6 ABNORMAL, R-8 ABNORMAL, R-10 ABNORMAL (=). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=**: heavier strikes are offset by a confirmed date for talks.

Analyst Comment. The pattern of the past month holds: Moscow hits hardest just before a negotiating date and around moments of US distraction. A confirmed meeting date makes **RUS-13 (trilateral meeting by 20 Nov) likely, about 80%**, unless a strike or an incident derails it. **RUS-16** (a night of 500 or more, 2–15 Nov) stays **roughly even (about 45%)**: last night's raid was large in missiles but not in total count.

EU-T2 (European internal stability), brief. France's education ministry counted **48 lycées blocked** out of about 3,700 at 09:30 on 3 Nov (Ouest-France). Three people were arrested after a fire at the Nelson-Mandela lycée in Nantes (20 Minutes). The inter-union strike and demonstrations go ahead on **Thursday, 5 Nov**. We found no new development in the Polish standoff over the Constitutional Tribunal. EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE (all =). **POTENTIAL CRISIS (=). EUR-02** (above 300,000 on 5 Nov) stays at **about 40%**.

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

Election Day. Polls opened from 05:00 ET in the first states (CBS News live). NPR reports that federal agents have no legal authority to police polling places (NPR, 3 Nov). Newsweek reports that DOJ monitors are barred from some polling places by state rules. Early reports of federal agents near polls have so far had unrelated explanations, according to Scripps: Border Patrol agents seen near a Florida site were there to vote. We found no verified report of federal interference at a polling place at writing.

Courts. In *NAACP v. Blanche* (D.D.C., 1:26-cv-03626, the case against DOJ's poll-monitor plan), the plaintiffs filed a **motion for a TRO on 1 Nov** (motion, ECF 14). Judge Walton **denied it without prejudice on 2 Nov**. He found that monitors who are unarmed, out of uniform and without arrest powers would not intimidate a reasonable voter, and said his view of irreparable harm "would differ" if DOJ sent officers with arrest authority. He then **ordered DOJ to comply with its counsel's concession**: monitors must be administrative or clerical staff, not law-enforcement officers, not in uniform or insignia, unarmed and without arrest powers (memorandum opinion and order, ECF 22). Separately, Chief Judge Boasberg denied the TRO/PI motion in *DSCC v. Trump* on 2 Nov for lack of standing (opinion). The TRO motion in *NAACP v. Blanche* resolves **MID-08 as a hit**. Judge Walton's order is a denial with a compliance order, not a TRO or PI, so **MID-05** is held to the close of 3 Nov (Section VII).

Indicators. M-1 SIGNIFICANT (=; DOJ monitors deployed under court-ordered limits). M-2 ABNORMAL (=). M-7 ABNORMAL (=). M-3 to M-9 are scored from today's conduct of the vote, and the first readings will appear in the 4 Nov edition. Roll-up: **ENVIRONMENT (=)**.

Analyst Comment. The courts drew a working line on the eve of the vote: federal personnel may watch, but not as armed officers with arrest powers. That lowers the near-term risk of a polling-place confrontation. The higher-risk window remains the count, any federal move on ballots or equipment, and certification (MID-03, 15 Dec). 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 strike (SOUTHCOM). **AMR-01 stays 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 **49 PLA aircraft sorties, 6 PLAN ships and 6 official ships** between 06:00 on 2 Nov and 06:00 on 3 Nov. **Thirty-one sorties entered** the central, southwestern and eastern ADIZ (MND, 3 Nov). TaiwanPlus reports this as the highest single-day count of 2026. MND did not label it a "joint combat readiness patrol", so **IPA-04 stays open**. On the Statement of Normalcy of 29 Oct, the 7-day average is now about 22 a day on the six days we have (6, 6, 22, 32, 19, 49), which is ABNORMAL, with repeated spikes inside a week. A single day above 40 is short of the SIGNIFICANT bar, which needs the sustained level or a named exercise. **ENVIRONMENT FOR CRISIS (= to ↑).**

Korean Peninsula (IP-T2). South Korea's JCS said it had withheld disclosure of the 31 Oct test until its analysis was complete. FN News and Asia Today report that the JCS also did not immediately announce a **strategic cruise-missile launch on 2 Nov**, citing the limits of low-altitude detection (FN News, 3 Nov; Asia Today). K-1 ABNORMAL (↑ within band), K-2 and K-3 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

South China Sea (IP-T3). The Philippine Coast Guard is investigating a Chinese vessel inside Scarborough Shoal's lagoon carrying unidentified equipment with sensors and antennas. It was first seen on 3 Oct (The Defense Post, 3 Nov). No water-cannon use with a verified date was found (IPA-02 open). SC-1 ABNORMAL (=). **ENVIRONMENT FOR CRISIS (=).**

Analyst Comment. Beijing's heaviest day of the year fell on the eve of the US vote and two weeks before APEC in Shenzhen. It fits a pattern of signalling at moments of US distraction, the same timing logic visible in Russia's strike plan. We judge another MND daily report of **45 or more sorties between 4 and 30 Nov unlikely (new IPA-05, 35%)**: spikes have usually come singly and then fallen back.

V. AFRICA

Sahel (AF-T2). The Algerian-escorted convoy is reported at **Arlit**, heading for **Madama** near the Libyan border, according to afrik.com and The Soufan Center's IntelBrief of 3 Nov. Neither Algiers nor Niamey has confirmed a fixed site, so **AFR-03 stays open**. JNIM claims an IED attack on Malian forces and Russia's Africa Corps between Sévaré and Konna on 2 Nov; that is a party claim, and no toll is verified. SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 SIGNIFICANT (anchor event expires 7 Nov), SA-4 ABNORMAL. **POTENTIAL CRISIS (=).**

Sudan and the Horn (AF-T1). Drones struck three more substations on 2 Nov: **New Halfa and Aroma** in Kassala and **Al-Ghazali** near Merowe, causing wide outages. That makes about 15 to 18 stations hit in a week (Al Jazeera, 2 Nov). Sudan has filed complaints with the UN against **Ethiopia** over the drone campaign (Al Jazeera, 2 Nov). AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL (↑ within band; a state-to-state accusation), AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).** Analyst Comment: a formal complaint naming a neighbour moves Sudan's war from an internal fight with foreign backers toward an open interstate dispute. It is not yet a border clash. AFR-01 (a UN-reported event of 50 or more killed) stays at 55%.

ME-T2 (Levant): see the Baseline work below.

Baseline work: Statement of Normalcy, ME-T2 Levant and Syria (refresh; first written 28 Oct)

SUBJECT: Levant and Syria internal stability (focus: Syria, Lebanon, Jordan border) Normal for this theatre since the 2024-25 transition in Damascus is a weak but recognised central government, localised clashes (Suwayda, the coast, the north-east), a heavily armed southern Lebanon under a contested ceasefire and a US-sponsored framework (26 Jun 2026), and periodic foreign strikes. LV-1 Violence volume (Security; L): ACLED weekly events vs 8-week mean. ROUTINE <= +25%; ABNORMAL +25-75%; SIGNIFICANT +75-150%; EXTREME > +150% LV-2 Displacement (Social; Lg): UNHCR/IOM new displacement per week. ROUTINE < 10k; ABNORMAL 10-50k; SIGNIFICANT 50-200k; EXTREME > 200k LV-3 Central control (Political/Security; L): ROUTINE no loss of a provincial capital; ABNORMAL a provincial road cut or a governorate in armed standoff with the centre; SIGNIFICANT loss of a provincial capital; EXTREME loss of Damascus or Beirut security LV-4 Foreign-force incursions (Military; L): ROUTINE isolated cross-border fire; ABNORMAL repeated foreign strikes in one country; SIGNIFICANT foreign strikes in two countries in one week, or foreign forces holding ground; EXTREME a foreign ground offensive toward a capital Refresh note (3 Nov): thresholds unchanged. Watch item added under LV-4: a strike on Beirut's southern suburbs is scored as the upper edge of SIGNIFICANT (LEV-02). Baseline sources / period reviewed: Lebanese Health Ministry and NNA (via Anadolu), Naharnet, L'Orient Today, SANA and Syrian monitors (named as secondary), Jordanian statements (Mar-Nov 2026) **Current reading.** *Lebanon:* Israeli artillery struck around Ibl al-Saqi (more than 10 shells), Mansouri and Majdal Zoun on 2 Nov; forces fired machine guns into the Hujeir and Saluki valleys and carried out a demolition in Bani Hayyan. Lebanese figures count **at least 4,389 killed and 12,428 injured since 2 Mar** (Anadolu, 2 Nov), up from about 4,386 and 12,407 at the first baseline on 28 Oct. Naharnet's running log adds strikes on Kfar Tebnit and Qsair (Naharnet). Israeli forces still hold ground about 10 km inside Lebanon.

No strike on Beirut's southern suburbs was found (LEV-02 open). *Syria:* clashes between government forces and Suwayda's National Guard on the Majdal–Mazraa axis on 2 Nov followed a drone strike on a National Guard checkpoint, according to Shafaq News and conflict trackers (secondary). Security forces were reinforced after suspected IS movements east of Suwayda. *Jordan border:* no new Jordanian strike since 26 Oct; Nassib stays open.

Indicators. LV-1 not scored (no ACLED pull; data gap). LV-2 ROUTINE (no weekly displacement surge found). LV-3 ABNORMAL (Suwayda still in armed standoff with the centre; the 2 Nov clashes are inside the band). LV-4 SIGNIFICANT (Israeli forces holding ground in Lebanon, with daily fire). Roll-up: 1 Significant + 1 Abnormal = **ENVIRONMENT FOR CRISIS**. No override. Trend ↑ **to =**: yesterday's rise in tempo held but did not grow, and there was no strike on Beirut.

Analyst Comment. The Levant's risk is now set mostly by the Iran track. Lebanese figures rose by only a few deaths over six days, which points to steady, low-casualty pressure rather than a campaign. A strike on Iran that Hezbollah answered would quickly move LV-4 to the edge of Extreme. **LEV-02** (a strike on Beirut's southern suburbs by 30 Nov) stays **unlikely (35%)**, and **LEV-01** (another Jordanian strike in Syria by 30 Nov) stays **unlikely (30%)**.

VI. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz flows / attacks	Tug *Selat Storm* sunk; *Largo Atom* struck; Kpler 45%	Under 40% (WAR-26, 13 Nov); 50%+ (WAR-29)
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Fifth Riyadh interception date (WAR-20 hit)	A death on Saudi soil; Aramco damage confirmed
SIGNIFICANT	EWP	W-5 US forces	Unacknowledged US strikes on Qeshm; MQ-9 reportedly lost	On-the-record acknowledgment (WAR-30); any US casualties; a strike 4–30 Nov (WAR-23)
SIGNIFICANT	EWP	W-8 Diplomacy	Iran's reply delivered; Qatari mediators in Tehran	US answer; any in-person meeting (WAR-27)
SIGNIFICANT	EWP	W-7 Energy price shock	Brent $104.77 settle, down 7.6%	Under $100 or above $120 (WAR-25)
SIGNIFICANT	EWP	W-6 Gulf belligerency	Riyadh targeted; Iran–Saudi security talks	A Gulf state attributes *Al Mayeda*
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	29 killed at an aid centre; ~350 weapons overnight	A night of 500+ (RUS-16)
SIGNIFICANT	EWP	R-4 NATO spillover	No new incident	Formal attribution; Article 4 (RUS-04)
SIGNIFICANT	EWC	EI-1/EI-3 France	48 lycées blocked; strike 5 Nov	Ministry count (EUR-02); spread >175 bp (EUR-01)
SIGNIFICANT	EWC	M-1 Federal posture on elections	Court limits on DOJ monitors	Election Day M-3 to M-9 readings
SIGNIFICANT	EWC	SA-2/SA-3 Sahel	Bamako blockade; anchor event ages out 7 Nov	20+ killed in one attack (AFR-02)
SIGNIFICANT	EWC	AF-1 Sudan	15–18 power stations hit in a week	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWP	LV-4 Lebanon	Daily fire; forces holding ground	Beirut strike (LEV-02)
ABNORMAL	EWP	I-1 Taiwan sorties / ADIZ	49 sorties, 31 into the ADIZ	Joint combat readiness patrol (IPA-04); another 45+ day (IPA-05)
ABNORMAL	EWP	K-1 DPRK launches	Undisclosed 2 Nov cruise-missile launch	A launch with a Japan MOD report
ABNORMAL	EWP	SA-4 Foreign forces in the Sahel	Convoy at Arlit, heading for Madama	Fixed basing confirmed (AFR-03)
ABNORMAL	EWP	AF-3 Sudan regional spillover	UN complaints against Ethiopia	A border clash or Ethiopian denial with counter-charges
ABNORMAL	EWP	SC-1 South China Sea	Chinese vessel with sensors in Scarborough lagoon	Verified water cannon (IPA-02)
ABNORMAL	EWC	LV-3 Syria central control	Suwayda clashes on the Majdal–Mazraa axis	A provincial capital lost

VII. PREDICTION LEDGER CHECK (WI prefixes)

Resolved today (events already settled): - **WAR-07 — HIT.** NAVAREA IX 425/26 records the tug *Selat Storm* sunk after a "security incident" off Um Al Ghanam on 2 Nov, and UKMTO 191-26 records a vessel struck by a projectile there on 1 Nov (Section I). The dhow *MSV Quba* (NAVAREA IX 417/26, 29 Oct) would also qualify. Forecast 45%; Brier $(1 - 0.45)^2$ = **0.3025**. Yesterday's "none" was a desk error. - **WAR-15 — MISS.** The last Kpler briefing in the window (3 Nov) shows 45% of baseline, against a bar of 100%. Forecast 20%; Brier **0.04**. - **WAR-20 — HIT.** Riyadh interceptions on 27, 29, 30 and 31 Oct and 2 Nov make five distinct dates (SPA N2716349). Forecast 65%; Brier $(1 - 0.65)^2$ = **0.1225**. - **MID-08 — HIT.** A TRO motion was filed in 1:26-cv-03626 on 1 Nov (ECF 14). Forecast 45%; Brier **0.3025**.

Held to the close of 3 Nov ET (resolved in the 4 Nov edition): - **WAR-05** (acknowledged US strike on Iranian soil, 14 Oct–3 Nov, 10%): strikes reported by anonymous US officials, but no DoD, CENTCOM or White House acknowledgment at writing. A hit only if one comes by the end of today; otherwise a miss. - **WAR-08** (Brent settle above $120, 20%): $104.77. **Remote. WAR-11** (Brent settle below $100, 20%): $104.77; needs a fall of more than 4.5% today. **Unlikely.** - **WAR-06 / 10 / 13** (US joins Saudi strikes; Egyptian units in Saudi Arabia; UK intercept over Saudi Arabia): none found. **Remote.** - **WAR-14** (Israeli strike on Iran, 20 Oct–3 Nov, 15%): Israel denies involvement in Qeshm. **Remote.** - **WAR-16 / 17** (death on Saudi soil; Aramco damage, from 23 Oct): none found. **Remote.** - **MID-05** (TRO or PI restricting armed agents or DOJ monitors, 15%): the 2 Nov order denied the TRO and enforced DOJ's concession; it is not a TRO or PI. **Remote** unless a new order is entered today.

Open WI calls due within 7 days (by 10 Nov): - **EUR-02** (France 5 Nov count above 300,000, due 6 Nov): **about 40%**.

Other open WI calls: WAR-28 (Eisenkot gets the first mandate by 11 Nov, 70%) firmed further. Arab parties now back Eisenkot, which on reported counts gives him about 67 recommendations against about 46 for Netanyahu; consultations start Wednesday with Likud last (Al Jazeera, 2 Nov; Ynet). **Likely. RUS-13** firmed to about 80% on the confirmed Abu Dhabi date. **WAR-23** is about 50%. **WAR-26** is about 35% at 45% clearance. **WAR-29** (50% or more by 20 Nov) stays about 30%. No qualifying event yet for **WAR-01 / 02 / 04 / 19 / 24 / 25 / 27, RUS-01 / 04 / 12 / 16, LEV-01 / 02, IPA-02 / 04, AFR-01 / 02 / 03, AMR-01 (0 of 3), EUR-01, or MID-01 / 02 / 03**.

New predictions (dated 2026-11-03): - **WAR-30:** The White House, the Department of Defense or CENTCOM acknowledges **on the record** (named official, statement or release) a US strike on **Iranian soil** carried out on or after 1 Nov 2026, with the acknowledgment dated **4–17 Nov 2026**. Strikes on vessels at sea do not count. **40%, unlikely.** Resolve by 2026-11-17. - **IPA-05:** A Taiwan MND daily report dated **4–30 Nov 2026** lists **45 or more PLA aircraft sorties** for its 24-hour period. **35%, unlikely.** Resolve by 2026-11-30.

VIII. GAPS AND UNVERIFIED

- **Qeshm strikes:** all US detail comes from unnamed US officials via AP, ABC, CBS and the WSJ. The MQ-9 loss and the "series" of earlier strikes are not officially confirmed. The IRGC's RQ-170 claim is a party claim and was called false by a US official. IRNA's explosion reports are not independently confirmed.
- **Haaretz** reports that the Israeli military is reluctant to launch a joint strike on Iran during coalition talks. The article is paywalled and was read only as a headline; it is not used.
- **Ship strikes:** the *Selat Storm* identification links UKMTO 191-26 to NAVAREA 425/26 through Vanguard Tech and the Maritime Executive; neither official notice names an attacker. Crew status is unknown. The *Largo Atom* identification is Vanguard Tech's.
- **Houthi claims** on Dammam airport and a Jazan radar are party claims.
- **Ukraine:** the Komyshuvakha toll and the missing count may change. The number of ballistic missiles launched overnight was not given.
- **Times of Israel** (Israel pressing Lebanon to keep Hezbollah out of an Iran war) returned an access error and was read only as a search summary; it is not used.
- **Syria:** the Suwayda clash reports rest on Shafaq News and conflict trackers, not on Syrian government or UN statements.
- **Sahel:** the convoy's position at Arlit and its destination at Madama are not officially confirmed. The JNIM IED claim is a party claim.
- **SOUTHCOM:** a third-party timeline again lists boat strikes on future dates in November. It is misdated and excluded.
- **US polls:** Election Day reporting is early, and the first conduct-of-vote indicators (M-3 to M-9) will be scored on 4 Nov.

Sources

All sources are linked inline. Primary and data sources: NAVAREA IX warnings 417/26 and 425/26 (Pakistan hydrographic office), UKMTO Warning 191-26, Kpler media briefing (3 Nov), Saudi Press Agency, Ukrainian Air Force (via Interfax-Ukraine, Ukrainska Pravda), Taiwan MND, South Korea JCS (via FN News, Asia Today), US District Court for D.C. filings in 1:26-cv-03626 and DSCC v. Trump, SOUTHCOM, Lebanese Health Ministry and NNA (via Anadolu), French education ministry (via Ouest-France). Reporting: AP, ABC News, CBS News, USA Today, The National, Straits Times (citing WSJ), Al Jazeera, Al Arabiya, Arab News (Reuters), ABC Australia, Business Times, NBC News,

Maritime Executive, Anadolu, The Guardian, BBC, RBC-Ukraine, Axios, NPR, Newsweek, Scripps, 20 Minutes, Naharnet, Shafaq News, The Defense Post, afrik.com, The Soufan Center, Ynet, Democracy Docket, Just Security.