WIRE World Instability

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Baseline work today: the Americas hemispheric security (AM-T2) Statement of Normalcy is refreshed below (first written 30 Oct). Next in the rotation: IP-T1. Comparisons are against the 12 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS** and the trend is still up (↑). For the first time since early September, the Gulf war has a direct Iran–US exchange on the record, though neither half is confirmed. Iranian state media say an unnamed "enemy" struck Sirik on Iran's coast east of the strait on 12 Nov. The IRGC then said it destroyed a US early-warning radar in Bahrain in retaliation. Washington and Manama have not commented. The same day, President Trump said the US does not need a deal with Iran and took the Vice President off the Iran file. Iran says six more ships hit "mines" on 12–13 Nov. The Houthis claim strikes on Saudi pipeline and Aramco targets. Brent settled up **$3.06 at $95.82**. In Europe, Putin met the US envoys and the Kremlin says a Trump–Putin meeting is planned at APEC (18–19 Nov). **RUS-19 resolves as a hit. 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	Claimed Iran–US exchange (Sirik, Bahrain); Trump says no deal needed	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	11,197 confirmed Bundibugyo cases (11 Nov)	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Sirik strike; IRGC Bahrain claim; Brent $95.82	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Daily strikes in the south; no Dahiyeh strike	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	Putin meets envoys; Trump–Putin planned at APEC; 117 drones	=
Europe: internal stability (EU-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	OAT-Bund 147.2 bp; 17 Nov strike ahead	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Mississippi county certification today	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	SoN refreshed; Salvadoran operations in Haiti	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	30 sorties, 23 across the median line	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No launch since 4 Nov	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	No dated water cannon since 8 Oct	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Blue Nile toll rises to 16	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Bamako blockade; no 20+ official toll	=

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

Level changes since 12 Nov: none. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 12 November). No band changes. Within band: **W-4** ABNORMAL ↑ (reports that the caretaker Prime Minister is pressing for a unilateral strike and that the US has blocked him at least once); **W-5** SIGNIFICANT ↑ (unclaimed strike on Sirik; IRGC claims a

hit on a US radar in Bahrain); **W-7** ABNORMAL ↑ (Brent $95.82 from $92.76); **W-8** SIGNIFICANT ↑ (Trump: "we don't need a deal"; Vance taken off the file); **R-10** ABNORMAL ↓ (toward resolution: Kremlin meeting held, Trump–Putin meeting planned, Europe to join talks); **I-1** ABNORMAL ↑ (30 sorties from 7); **EI-3** ABNORMAL ↑ (147.2 bp from 142.4).

I. GLOBAL ROLL-UP (GL-T1) | PROBABLE CRISIS

The family level stays at the Middle East's **PROBABLE CRISIS**, set by **W-1** and **W-2** at Extreme. The trend stays ↑. Four Middle East indicators rose within band, and none fell. The tripwire for IMMINENT (W-5 or W-6 at Extreme) is **not met**, but it is closer than at any point this month. If the US or Bahrain confirms an Iranian hit on a US installation, W-5 moves to Extreme and the topic goes to IMMINENT CRISIS. The de-escalatory moves are in Europe: a substantive Kremlin meeting, a planned Trump–Putin meeting and an agreed record prisoner exchange.

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. INSP SitRep 181 reports **11,197** confirmed Bundibugyo cases as of 11 Nov, with **83** new confirmed cases and 38 deaths that day (ebola-tracker, SitRep 181 summary; DRC health ministry).

Analyst Comment. GLB-01 needs 803 more confirmed cases by 30 Nov, about 42 a day. The last two daily figures were 72 and 83, so the call is now **likely (about 70%)**. The great-power picture has split further. US–Russia contact is at its warmest in months, while the US–Iran track has gone from "talks about talks" to "no deal needed" in 24 hours.

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

Sirik and Bahrain (new). On 12 Nov, IRNA, citing official sources, reported that Sirik county in Hormozgan province had been hit by an "enemy" strike. It did not name the attacker, the target or any casualties. Tasnim had first suggested the explosions might be warning shots at ships (Anadolu). The IRGC then said its Aerospace Force had "targeted and destroyed" a US early-warning radar in Bahrain, in retaliation for an air attack on a telecommunications tower in Sirik. It called the strike a "serious warning" and said it stands ready "to engage without limits" if the "violations" recur. Reuters notes it is Iran's first claim of an attack on US military assets in a Gulf country since early September. There was no immediate comment from Washington or Manama (Jerusalem Post / Reuters; Al Jazeera). IRGC commander Ahmad Vahidi promised a "horrifying and painful" response to any hostile action (Iran International live). **WAR-36** (a US-acknowledged strike on Iranian land) is **not met**: no US body has claimed Sirik.

US policy. On 12 Nov, President Trump said the US does not "need" a deal with Iran and told Vice President Vance to focus on corruption and crime at home rather than on Iran talks (AP; Washington Post). Asked whether he would hesitate to use force to stop Iran threatening US allies and ships, he said, "No, without hesitation" (Salem News Channel interview, via Jerusalem Post). Secretary of State Rubio has said economic pressure is working well enough that large-scale operations are unnecessary, and CENTCOM says it is still strictly enforcing the blockade of Iranian ports (Al Jazeera). An IAEA quarterly report seen by Reuters says the agency still does not know exactly where Iran's declared Isfahan enrichment plant is, or whether it holds nuclear material (Iran International live). **WAR-27** (an in-person US–Iran meeting by 15 Nov) is now **remote (about 3%)**.

Shipping. The JMIC's 12 Nov advisory lists four tanker attacks since its last update, two in the Gulf and two in the strait: an unnamed tanker 19 nm northeast of Limah (10 Nov), *NCC Fajr* north of Khasab (11 Nov), *Fujairah Energy* (10 Nov, multiple casualties) and *Dominica Prosperity*, struck in the engine room 14 nm northwest of Ras al-Khaimah (11 Nov, crew evacuated, fire). It rates the strait's threat level SEVERE, with attacks "highly likely", and counts ten attacks inside the Gulf since 7 Oct (JMIC advisory 113; gCaptain). UKMTO separately confirmed another tanker hit by an unidentified projectile in the strait, crew safe (Anadolu). Iran's regular military (Artesh) says two more tankers hit mines in the eastern strait on 12 Nov, after the IRGC's two supertankers on 11 Nov (Reuters via Investing.com). On 13 Nov, the IRGC Navy said a gas carrier "under the protection of American fighter jets" hit a mine east of the strait. ISW-CTP says it has seen no indicator that Iran has successfully re-mined the strait and reads the claims as an effort to discredit US escorts (Iran International live). No new Kpler briefing has appeared since 12 Nov (42% for the 7 days to 10 Nov). **WAR-38** is open.

Houthi–Saudi front. On 12 Nov, Houthi spokesman Yahya Saree claimed a drone strike on **Pumping Station No. 7** of the East-West pipeline, a ballistic missile on a Yanbu oil facility, a drone on an Aramco building in Riyadh, and attacks on Sharurah airport and Khamis Mushait airbase. Saudi Arabia did not confirm damage. The coalition said it destroyed two drones, one over the Riyadh region and one over the Eastern Province (SPA; Jerusalem Post / Reuters; The New Arab). Reuters notes Riyadh has rerouted about 4 mbd of crude through the East-West pipeline to Yanbu. Saudi Arabia said on 9 Nov that an earlier attack on the line caused a fire without affecting operations. No airport halt (**WAR-19**, due 15 Nov) and no facility shutdown (**WAR-34**) has been reported.

Israel. Ynet reports that senior figures in the incoming majority accuse the caretaker Prime Minister of pressing for a unilateral strike on Iran without US backing. According to their account, the chief of the general staff, Eyal Zamir, and other security chiefs oppose it, and the US has blocked such action "on at least one occasion." The report also describes a weekend phone call with President Trump that US officials called a "shouting match"; the PMO says the call went well. The security cabinet meets on Sunday, 15 Nov, for the first time since early October. Under Section 40 of the Basic Law: The Government, a caretaker government may authorise military action through the cabinet (Ynet). Gadi

Eisenkot, the designated prime minister, has asked the Attorney General to secure him regular security briefings. The commander of the US Fifth Fleet, Curt Renshaw, ended a visit to Israel on 13 Nov (Iran International live). **WAR-33** and **WAR-39** are open.

US forces and Congress. USS *Theodore Roosevelt* is heading from the Indian Ocean toward the North Arabian Sea, joining *George H.W. Bush* and *George Washington* (live-blog reporting; arrival expected in the second half of November) (Stars and Stripes). **WAR-32** awaits a USNI or DoD placement. The Senate must vote on H.Con.Res.93 no later than **20 Nov** (Senate Daily Press, 11 Nov).

Iraq / Khor Mor. Production remains suspended and Dana Gas has given no restart date (Kurdistan24). **WAR-35** (restart by 20 Nov) leans toward a miss.

Prices. Front-month (January) Brent settled up **$3.06 at $95.82** on 12 Nov, its largest one-day gain since 5 Nov. It is still down 18.6% month to date (Morningstar / Dow Jones). Reuters ties the rally to the Houthi claims and the Hormuz attacks (Euronext / Reuters).

Indicators. W-1 EXTREME (=; four attacks in the JMIC period, six claimed "mine" hits, JMIC rates the strait SEVERE). W-2 EXTREME (=; pipeline, Yanbu and Aramco claims, interceptions over Riyadh). W-3 SIGNIFICANT (=). W-4 ABNORMAL (↑ within band; strike push reported, US block reported). W-5 SIGNIFICANT (↑ within band; Sirik strike unclaimed, Bahrain hit claimed by Iran only). W-6 SIGNIFICANT (=). W-7 ABNORMAL (↑ within band; $95.82). W-8 SIGNIFICANT (↑ within band; US says no deal needed). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met. Trend ↑.

Analyst Comment. Two readings fit the Sirik–Bahrain sequence. In the plain one, US aircraft escorting tankers hit an IRGC targeting or communications node, Washington stays quiet to avoid owning an escalation, and Tehran answers with a claimed strike it can scale back later. That fits the IRGC's own wording ("aerial provocations", ships "under the protection of American fighter jets"). The less likely reading is a strike by a third party, with Iran retaliating against the US. We cannot separate the two until someone claims Sirik or a US official describes the Bahrain damage. Either way, the US has stopped offering a negotiating track at the moment Iran has resumed claiming attacks on US assets. That combination is how the September round started. We judge US or Bahraini confirmation of damage from the claimed strike **unlikely (about 30%) by 27 Nov**; see new call **WAR-40**. The IRGC has overclaimed before, and the US has reasons to stay quiet. A Kpler 7-day print at or above 50% by 25 Nov (**WAR-38**) slips to **roughly even (about 45%)**, given the fresh wave of attacks.

ME-T2 (Levant), brief. On 12 Nov, Israeli strikes, shelling and demolitions hit Haddatha, Al-Mansouri, Zawtar al-Sharqiyah, Qantara, Kfar Tebnit, Kounine and Mayfadoun, with drone flights over Marjayoun and Tyre (Anadolu). We found no strike on Beirut's southern suburbs (**LEV-02**) and no new Jordanian strike in Syria (**LEV-01**). LV-2 ROUTINE, LV-3 ABNORMAL, LV-4 SIGNIFICANT (LV-1 unscored). **ENVIRONMENT FOR CRISIS (=).**

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

Talks. The Kremlin published the opening of Putin's 12 Nov meeting with Steve Witkoff and Jared Kushner, attended by Ushakov, Medinsky and Dmitriev. Witkoff said, "We are resetting the trilateral talks" (Kremlin). Ushakov called the talks "substantive, constructive, frank and productive". He said both sides back "another prisoner exchange, which would likely be the largest to date", with parameters being finalised, and that the US envoys supported Putin's proposal for an Oleshky-style humanitarian operation in Kostiantynivka (Kremlin, Ushakov readout). Ushakov also said the settlement would be discussed further at the **planned Putin–Trump meeting at APEC in Shenzhen (18–19 Nov)** (RIA Novosti). China says it is in contact with the parties about a three-way meeting, with format still unsettled (AP). The envoys then met President Zelensky at Casement Aerodrome near Dublin, during the European Political Community summit. Zelensky said Europe would be "in the negotiating team" at the next round. Kushner said Putin is "willing to give it a try". Witkoff said another round is scheduled but gave no date or place. A Coalition of the Willing summit meets in Berlin next week (Kyiv Independent). Officials say the exchange could take place within two to three weeks (Ukrainska Pravda). **RUS-19 resolves as a HIT. RUS-12** (in-person Trump–Putin by 20 Nov) is now **likely (about 75%)**. **RUS-17** (a dated follow-on meeting by 25 Nov) is open; no date has been given.

Strikes. From 18:00 on 12 Nov, Russia launched **117 drones** (63 jet-powered) from six directions. By 07:30, 80 had been downed or suppressed, with hits at 24 locations (Ukrainska Pravda / Air Force via NV; RBC-Ukraine). A medical facility in Kyiv caught fire, six people were hurt in Rivne, a 17-year-old was killed in Zaporizhzhia, and a morning strike on Odesa killed two. Ballistic alerts covered western Ukraine overnight, but the Air Force reported no missile launches in its summary (UA.NEWS). **RUS-16** (500+ night by 15 Nov) and **RUS-18** (30+ ballistic) are not met.

NATO flank. We found no new airspace incident after the 10–11 Nov night over Lithuania and Latvia. Poland has not confirmed Lithuania's report that a drone entered Polish airspace (LRT; Defence24). No Article 4 request has been made (**RUS-04**). The UK says its latest package makes it the first country to sanction all ten of Russia's largest oil producers (Kyiv Independent headline).

Indicators. R-3 SIGNIFICANT (=; daily drone waves, deaths in four regions). R-4 SIGNIFICANT (=; no new incursion). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (↓ within band, toward resolution; leaders' meeting planned, Europe to join, record exchange agreed). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=** (talks up, strikes steady).

Analyst Comment. The process now has dates (APEC), a product (the exchange) and a format change (Europe at the table). The battlefield pattern has not changed: about 100–170 drones a night and deaths every day. Europe's participation is the real novelty, but no one has said who would sit at the table. We judge an in-person round with Russian, Ukrainian and European officials at the table by 15 Dec **roughly even (about 45%)**; see new call **RUS-21**. **RUS-20** (an exchange of at least 1,000 per side, completed by 30 Nov) rises to **roughly even (about 50%)**, given "largest to date" language from both capitals and a two-to-three-week timetable.

EU-T2 (European internal stability), brief. The OAT-Bund spread closed at **147.2 bp on 12 Nov** (OAT 4.76%, Bund 3.29%), up from 142.4 bp on 10 Nov but still below the 150 bp line (ideal-investisseur, Banque de France and Bundesbank data). The public-sector and CGT-led strike day is **Tuesday, 17 Nov**. EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 ABNORMAL (↑ within band), EI-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). EUR-05** (a close at or above 150 bp by 30 Nov) rises to **slightly better than even (about 55%)**.

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

Mississippi. Counties are due to certify today, 13 Nov. With 99% counted, Colom leads Hyde-Smith **476,120 to 470,179** (5,941 votes); state certification is due 3 Dec (USA Today). Hyde-Smith has conceded.

Alaska. Peltola leads Sullivan **125,157 to 119,357** with about 88% of precincts reporting. Ranked-choice tabulation is on 18 Nov and certification is due 25 Nov (same source; The Hill).

We have verified no refusal to certify and no suit against a called race (**MID-03** and **MID-09** open). This desk scores process risk only and takes no position on any party's programme.

Indicators. M-1 ABNORMAL (=). M-2 ABNORMAL (=). M-3 ROUTINE. M-4 ROUTINE. M-5 ROUTINE. M-6 ROUTINE. M-7 ABNORMAL (=). M-8 ROUTINE. M-9 ROUTINE. Roll-up: 3 Abnormal = **ENVIRONMENT**. Trend **=**.

AM-T2 (hemispheric security): see the Statement of Normalcy refresh below. **ENVIRONMENT FOR CRISIS (=).**

V. INDO-PACIFIC (IP-T1 TO IP-T3) | ENVIRONMENT FOR CRISIS

Taiwan. In the 24 hours to 06:00 on 13 Nov, Taiwan's defence ministry detected **30 PLA aircraft sorties**, **23** of which crossed the median line into the northern, central, southwestern and eastern ADIZ, plus **8 PLAN ships** and **3 official ships**. Taiwan responded with combat air patrols, ships and coastal missile systems (MND). That is up from 7 sorties the day before. The release does not use the words "joint combat readiness patrol" (**IPA-04** open), and 30 is below the 45 needed for **IPA-05**. Taiwan News counts 174 aircraft and 130 ship detections so far this month (Taiwan News). The G7 foreign ministers again opposed unilateral changes to the status quo across the strait. I-1 ABNORMAL (↑ within band). APEC is in Shenzhen on 18–19 Nov.

Korea. The last reported launch remains the 4 Nov salvo from Sondok (Yonhap). K-1 ABNORMAL.

South China Sea. We found no dated water-cannon use after 8 Oct. One undated Manila Times page describes a Scarborough water-cannon incident, but we could not date it to this month (see GAPS) (**IPA-02** open). SC-1/SC-2 ABNORMAL.

All three topics: **ENVIRONMENT FOR CRISIS (=).**

Analyst Comment. A 30-sortie day with most aircraft crossing the median line, after a week of single digits and just after the G7 statement, reads as a calibrated signal rather than the start of a drill. Summit weeks are usually calm, which makes the timing notable. **IPA-04** (a joint combat readiness patrol in November) stays **likely (about 65%)**, below its logged 75%. **IPA-05** (a 45-sortie day) stays **unlikely (about 30%)**.

VI. AFRICA (AF-T1, AF-T2) | ENVIRONMENT FOR CRISIS

Sudan and the Horn (AF-T1). The toll from the 10 Nov RSF drone strike on displaced people at Bani Shako, Blue Nile, has risen to **16**, with six injured, according to local reporting (SudaNews; earlier figure of nine from an official via Anadolu). UN News describes long-range drone strikes as now "the norm" in Sudan's war (UN News). No UN-reported single event of 50 or more killed (**AFR-01** open, **unlikely, about 25%**). AF-1 SIGNIFICANT, AF-2 to AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

Sahel (AF-T2). We found no official toll of 20 or more security personnel killed in one attack since 27 Oct. JNIM continues attacks in central Mali (Bla, Sévaré–Konna), and in Burkina Faso it has taken several military and VDP posts in October and November, per a tracker (Darkwater Sahel situation report, 11 Nov). Al Jazeera reports rival armed groups in Burkina Faso turning on each other as the state loses ground (Al Jazeera). SA-1 ROUTINE, SA-2 SIGNIFICANT (Bamako fuel blockade), SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** (about 35%) and **AFR-03** are open.

Baseline work: Statement of Normalcy, AM-T2 Hemispheric security (refresh; first written 30 Oct)

SUBJECT: Hemispheric security QUESTION: does US-Venezuela, Mexico-cartel or Haiti violence reach sustained armed conflict or a mass-migration surge? (Regional Conflict / Internal Stability; PMESII-PT: Military, Social) Normal since Sep 2025: steady US maritime strikes on alleged drug boats; chronic gang violence in Haiti; cartel violence in Mexico; low border flows. H-1 US kinetic action R: no strikes for 30+ days | A: maritime strike campaign (status quo) | S: strike on land territory, or a declared named operation | E: sustained air/ground campaign against a state H-2 SW border (CBP) R: within +/-20% of 12-month mean | A: +/-20-50% S: > +50% | E: declared emergency closure H-3 Haiti/Mexico/Venezuela violence R: chronic pattern | A: new foreign force entry or city-wide blockades | S: ACLED fatalities > 2x the 8-week mean | E: state collapse or capital falls H-4 OAS / UNSC emergency session R: none | A: emergency session called S: Chapter VII action | E: collective-defence invocation Refresh note (13 Nov): thresholds unchanged except one clarification. H-1 drops to ROUTINE only after 30 days with no officially announced strike; a pause shorter than that is still the campaign status quo. Strikes count only when SOUTHCOM, the Pentagon or the White House announces them, with the strike date checked against the year (Nov 2025 entries in public timelines have been mistaken for Nov 2026). Baseline sources: CBP encounters data (FY2024-Oct 2026); SOUTHCOM via wires; Just Security timeline; AP, Al Jazeera, ACLED. Period: 1 Sep-12 Nov 2026 **Current reading.** *H-1:* the latest officially announced strike we can date is still SOUTHCOM's **27 Oct** strike in the eastern Pacific (5 killed), the 72nd known strike, with at least 243 killed. That makes 17 days without a verified new strike (Just Security timeline). The November entries in that timeline are dated 2025, and the eastern Pacific strike killing three that we flagged yesterday is the 15 Nov **2025** strike (Anadolu). *H-2:* CBP reports **11,443** Southwest border encounters in **October 2026**, about 2% below October 2025 and within the 12-month band (CBP data file; CBP). *H-3:* Salvadoran troops (about 2,000–2,500, mostly outside the UN-backed Gang Suppression Force) are supporting Haitian police operations around Port-au-Prince. One operation against a gang left **20 dead** (Al Jazeera, 10 Nov). Haiti's leader is to visit El Salvador to discuss the future of the offensive (AP). *H-4:* no OAS or UNSC emergency session on the hemisphere was found.

Indicators. H-1 ABNORMAL (campaign paused 17 days, below the 30-day test). H-2 ROUTINE. H-3 ABNORMAL (foreign-force operations under way). H-4 ROUTINE. Roll-up: 2 Abnormal = **ENVIRONMENT FOR CRISIS (=)**. No override.

Analyst Comment. The hemispheric picture is quieter than at the first baseline. The boat-strike campaign has paused for more than two weeks, and border flows are flat. Haiti carries the risk, as an unintegrated foreign force conducts lethal operations in a capital. **AMR-01** (three announced strikes dated 31 Oct–30 Nov) is at **0 of 3** with 17 days left. We now judge it **unlikely (about 15%)**, against a logged 80%.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz flows / attacks	JMIC rates the strait SEVERE; six claimed mine hits	50%+ Kpler print (WAR-38); a sinking or mass-casualty hit
EXTREME	EWP	W-2 Houthi–Saudi	Pipeline, Yanbu and Aramco claims	KKIA halt (WAR-19, 15 Nov); facility halt (WAR-34)
SIGNIFICANT	EWP	W-5 US forces	Sirik strike unclaimed; IRGC claims Bahrain radar	US/Bahrain confirms damage (WAR-40) = Extreme, IMMINENT
SIGNIFICANT	EWP	W-8 Diplomacy	Trump says no deal needed	Senate vote by 20 Nov (WAR-37)
SIGNIFICANT	EWP	W-6 Gulf/Iraq energy	Khor Mor shut; attacks off UAE and Oman	Restart (WAR-35); Gulf state attributes publicly
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	117 drones; deaths in four regions	500+ night (RUS-16); 30+ ballistic (RUS-18)
SIGNIFICANT	EWP	R-4 NATO spillover	No new incursion since 11 Nov	Article 4 request (RUS-04)
SIGNIFICANT	EWC	LV-4 Lebanon	Daily strikes in the south	Dahiyeh strike (LEV-02)
SIGNIFICANT	EWC	EI-1 France	17 Nov strike	500k+ count (EUR-04); spread over 150 bp (EUR-05)
SIGNIFICANT	EWC	AF-1 Sudan	Long-range drone war on civilians	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako	Fuel blockade	Convoy destroyed; 20+ killed (AFR-02)
ABNORMAL	EWP	W-4 Iran–Israel	Strike push reported; cabinet 15 Nov	Acknowledged Israeli strike (WAR-39)
ABNORMAL	EWP	W-7 Energy price	Brent $95.82	Above $105 (WAR-31)

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
ABNORMAL	EWP	I-1 Taiwan	30 sorties, 23 across the line	Joint combat readiness patrol (IPA-04); 45 sorties (IPA-05)
ABNORMAL	EWP	R-10 Talks	Trump–Putin planned at APEC	Meeting held (RUS-12); dated round (RUS-17, RUS-21)
ABNORMAL	EWP	K-1 DPRK	Quiet since 4 Nov	Intermediate-range or ICBM launch
ABNORMAL	EWP	SC-1/SC-2 SCS	Heavy presence, no cannon	Verified water cannon (IPA-02)
ABNORMAL	EWC	M-1/M-2/M-7 US count	MS counties certify 13 Nov; AK 18 Nov	Refusal (MID-03); suit (MID-09)
ABNORMAL	EWC	H-3 Haiti	Salvadoran operations, 20 dead	Mass-casualty clash; UNSC session
ABNORMAL	EWC	HB-1 Health	11,197 confirmed	12,000 (GLB-01)

VIII. PREDICTIONS

Resolved today: - **RUS-19 (HIT).** Witkoff and Kushner met Putin at the Kremlin on 12 Nov, per the Kremlin's own transcript and Ushakov's readout (Kremlin). Logged at 40%; Brier **0.36**.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 20 Nov). - **WAR-19** (KKIA halt by 15 Nov, 30%): interceptions over Riyadh, no halt. *Open; leaning miss (about 10%).* - **WAR-27** (in-person US–Iran meeting by 15 Nov, 40%): Vance taken off the file. *Open; near-certain miss (about 3%).* - **RUS-16** (500+ night by 15 Nov, 45%): latest nights 123 and 117 drones. *Open; near-certain miss (about 5%).* - **EUR-04** (500k+ on 17 Nov per the Interior Ministry, 35%; resolves by 19 Nov). *Open; about 30%.* - **RUS-12** (in-person Trump–Putin by 20 Nov, 30%): Kremlin says a meeting is planned at APEC. *Open; likely (about 75%).* - **WAR-31** (Brent above $105 by 20 Nov, 40%): $95.82. *Open; unlikely (about 15%).* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): no restart date. *Open; unlikely (about 25%).* - **WAR-37** (Senate adopts H.Con.Res.93 by 20 Nov, 45%): vote due by 20 Nov. *Open; about 45%.*

Other open: WAR-01/02/04/25/32/33/34/36/38/39, RUS-01/04/17/18/20, LEV-01/02, EUR-01/05, IPA-02/04/05, AFR-01/02/03, AMR-01, MID-03/09, GLB-01.

New predictions (dated 2026-11-13): - **WAR-40:** CENTCOM, the Pentagon, the White House or the Bahraini government confirms that an Iranian strike dated 12–13 Nov damaged a US military installation or equipment in Bahrain, with confirmation by 27 Nov 2026. **30%, unlikely.** Resolve by 2026-11-27. - **RUS-21:** An in-person round of Ukraine peace talks takes place between 13 Nov and 15 Dec 2026, with Russian and Ukrainian official delegations and at least one European government or EU representative at the table. **45%, roughly even.** Resolve by 2026-12-15.

IX. GAPS AND UNVERIFIED

- **Sirik:** IRNA reports an "enemy" strike but names no attacker, target or casualties. The IRGC says the target was a telecom tower. No US, Israeli or other government has claimed it.
- **Bahrain radar:** IRGC and Fars claim only. There has been no US or Bahraini comment and no imagery we could verify.
- **"Mine" hits (11–13 Nov):** Iranian military claims, unverified by Reuters. ISW-CTP sees no evidence of successful re-mining. UKMTO projectile reports may overlap with the Iranian claims.
- **Houthi claims (12 Nov):** Saudi Arabia has confirmed no damage at Pumping Station No. 7, Yanbu or the Aramco building. The Houthis did not say which day the attacks took place.
- **Israel:** the reported strike push, the US block and the "shouting match" call come from unnamed sources (Ynet, citing figures in the incoming majority and US officials). The PMO disputes them.
- **Kpler:** no briefing after 12 Nov. The last four days of that print were preliminary.
- **APEC:** the Putin–Trump meeting is "planned" per Ushakov. China says a three-way format is still under discussion. No time or venue has been confirmed.
- **Prisoner exchange:** "largest to date" per both sides; no numbers or date are official.
- **Americas:** a secondary search summary and a news site described Nov strikes that turned out to be dated Nov **2025**. We corrected the AMR-01 count on that basis (still 0 of 3).
- **South China Sea:** a Manila Times page on a Scarborough water-cannon incident carries no date. Its image path suggests 2025, so we did not count it.
- **Sudan:** the rise in the Blue Nile toll to 16 is from local media, not the UN.

- **France:** ideal-investisseur gives 147.2 bp for 12 Nov (OAT 4.76%, Bund 3.29%), while another compiler shows 140.2 bp. We score the ideal-investisseur figure, which is EUR-05's named source.
- **Levant:** no ACLED pull, so LV-1 is unscored.
- Rates and mortgage detail is in the owner-only note (cross-ref Economics WIRE).

Sources

All sources are linked inline. Primary and data sources: Kremlin transcripts (12 Nov); RIA Novosti (Ushakov); JMIC advisory 113 and UKMTO; Saudi Press Agency (coalition statements); Taiwan MND PLA activity report (13 Nov); Ukrainian Air Force (via NV, RBC-Ukraine); Senate Daily Press (11 Nov); Dow Jones Market Data (Brent settle); INSP SitRep 181 (via ebola-tracker) and DRC health ministry; CBP encounter data; Banque de France and Bundesbank yields (via ideal-investisseur). Reporting as linked (Reuters-relayed outlets, AP, AFP, Al Jazeera, Anadolu, Ynet, Jerusalem Post, Kyiv Independent, Iran International, USA Today, regional press).

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