WIRE World Instability

UNCLASSIFIED // OPEN SOURCE | Saturday, 14 November 2026 | Vol. 2026-318 | As of 140600 EST NOV 26

Baseline work today: the Taiwan Strait (IP-T1) Statement of Normalcy is refreshed below (first written 22 Oct, re-baselined 29 Oct). Next in the rotation: IP-T2. Comparisons are against the 13 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend levels off (**=**) after two days up. The claimed Iran–US exchange has now been half-confirmed and half-denied. CENTCOM says the IRGC launched two one-way attack drones toward Bahrain on 13 Nov and US forces shot both down, with **no injuries or damage**. That contradicts the IRGC's claim that it destroyed a US radar. No government has claimed the 12 Nov strike on Sirik. Pressure for a new war is coming from Israel, not Washington. The Mossad director was in Washington on 13 Nov to press for renewed strikes, but Trump has so far said no, and an Israeli security source told KAN that renewed war in the coming weeks is ruled out. Brent was flat at **$95.84**. Kpler's Hormuz clearance rose to **48%**. The White House confirmed a **Trump–Xi–Putin meeting in Shenzhen on 19 Nov**. France's 10-year spread closed at **151.8 bp**: **EUR-05 resolves as a hit**, and EU-T2 returns to 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	CENTCOM downs Iranian drones aimed at Bahrain; Trump–Xi–Putin set for 19 Nov	=
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	11,197 confirmed Bundibugyo cases (SitRep 181, still the latest)	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Drones intercepted, no damage; Mossad lobbying; Kpler 48%	=
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Strikes across the south; drones over Beirut, no Dahiyeh strike	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	Trilateral confirmed for 19 Nov; Europe names its team; 96 drones	=
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	OAT-Bund 151.8 bp (EUR-05 hit); strike Tuesday	↑
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Mississippi counties certified; Alaska lead 10,412	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	Salvadoran troops base at Port-au-Prince stadium	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	SoN refreshed; 10 sorties; 7-day average 8.6 (override held)	=
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	29 PRC naval and coast guard ships in a week; no dated water cannon	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Sudanese forces claim North Kordofan gains; drone war continues	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	JNIM drone and village attacks in Ségou and Mopti	=

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

Level changes since 13 Nov: EU-T2 ENVIRONMENT to POTENTIAL (↑; the Europe/Russia region row stays at EU-T1's POTENTIAL). Trend changes: Global and ME-T1 ↑ to =. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 13 November). Band changes: **EI-3** ABNORMAL to **SIGNIFICANT** (OAT-Bund 151.8 bp on 13 Nov). **I-1** ABNORMAL to **ROUTINE** under the refreshed IP-T1 Statement of Normalcy (7-day average 8.6 sorties; the topic level is held by a written override). Within band: **W-1** EXTREME ↓ (Kpler 7-day clearance 48%, from 42%; Iran still claims "mine" hits); **W-5** SIGNIFICANT (=; an Iranian launch at US forces is now confirmed, but it was intercepted with no damage, which cancels out yesterday's upward move); **W-4** ABNORMAL ↑ (Mossad director in Washington; the security cabinet meets Sunday); **R-10** ABNORMAL ↓ (Trump–Putin–Xi meeting confirmed; EU names five states for the talks).

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 goes from ↑ to **=**. Yesterday's main risk was a confirmed Iranian hit on a US installation, which would have met the IMMINENT tripwire. CENTCOM has now said the opposite: the drones were shot down with no damage. The IRGC still claims success, and Washington is not retaliating publicly. That is a contained exchange, not a spiral, for now.

The great-power picture has a date. The White House said on 13 Nov that President Trump will meet Xi Jinping and Vladimir Putin together on the sidelines of APEC in Shenzhen on **Thursday, 19 Nov**. It is the first such three-way meeting (Washington Post; AP). Press reports of the White House briefing say Trump will raise nuclear-arms reductions and the Iran war (The Hindu). The same day, Germany's chancellor asked Washington for "no surprises" from the Putin talks. He said some in Dublin feared "a second Anchorage moment" (France 24 live, Reuters/AFP).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. The latest INSP bulletin we can find is still SitRep 181: **11,197** confirmed Bundibugyo cases as of 11 Nov (ebola-tracker report archive).

Analyst Comment. The 19 Nov meeting is the week's most important event for this family. It could lower two regional estimates at once: Ukraine, through a leaders' channel, and Iran, if Moscow and Beijing press Tehran on Hormuz. It could also produce a US–Russia understanding that Europe rejects, which is the "Anchorage" fear. We judge an announced agreement to open formal nuclear arms-control talks by 30 Nov **unlikely (about 25%)**; see new call **GLB-02**. Beijing has long refused three-way arms-control talks, and a single meeting rarely produces a negotiating mandate. GLB-01 (12,000 confirmed cases by 30 Nov) stays **likely (about 65%)**, pending the next bulletin.

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

Bahrain: claim against denial. CENTCOM said: "The IRGC launched two one-way attack drones toward Bahrain and both were shot down by US forces. There were no injuries or damage." Its statement did not mention Sirik (RFE/RL; AP). The IRGC had said it "targeted and destroyed" a US early-warning radar in retaliation for an "air aggression" on a telecommunications tower in Sirik. Its statement stopped short of naming the United States as the attacker (RFE/RL; Al Jazeera). ISW-CTP calls it the first IRGC claim of a strike on a land-based US asset since early September. It assesses that Iran was likely trying to degrade US air-defence warning in Bahrain and to signal to shippers that US escorts cannot guarantee safety (ISW-CTP Iran Update, 13 Nov). Bahrain's information ministry did not respond to AP (Military.com / AP). **WAR-40** (US or Bahraini confirmation of damage by 27 Nov) is now **almost no chance (about 3%)**.

US line. Speaking to the Federalist Society on 13 Nov, Secretary of State Rubio said further US military action against Iran is unnecessary because the economic pain on Iran is so great (AP). Axios reports, citing a US official, that Trump has so far rejected the Israeli Prime Minister's pressure to resume the war, and that he has sided with Saudi Arabia, Qatar and the UAE to keep the naval blockade and economic pressure while testing whether a deal is possible (Axios). Tasnim, citing a security official, said there were no plans for a Doha meeting between Iran's security chief and the US Vice President (Tasnim, 9 Nov). **WAR-27** (an in-person US–Iran meeting by 15 Nov) will be scored tomorrow and is a near-certain miss.

Israel: the push for strikes. Mossad Director Roman Gofman was in Washington on 13 Nov to meet CIA Director John Ratcliffe and was expected to see envoy Steve Witkoff in Miami. Mossad, the CIA and the White House declined to comment (Axios; Times of Israel). Channel 12 reports that the visit was not disclosed to Gadi Eisenkot at his two-hour security briefing with the caretaker Prime Minister on 12 Nov. It also reports that the chief of the general staff, Eyal Zamir, is the lone security chief opposing an immediate strike. The Mossad and Shin Bet heads, the National Security Council chair and the ambassador in Washington are reported in favour (unsourced, per Times of Israel). KAN, citing an unnamed security source, says the military sees no immediate Iranian threat requiring a new attack, warns against a war of attrition, and "ruled out renewing the war in the coming weeks" (Anadolu). Eisenkot wrote that the government needs "strict supervision" to prevent any bid to "reap a political dividend" from security (Times of Israel). The security cabinet meets on **Sunday, 15 Nov**, for the first time since 5 Oct (Jerusalem Post). Eisenkot reports progress in coalition talks but has no majority yet (Anadolu). **WAR-33** and **WAR-39** are open.

Shipping and flows. The IRGC Navy said two tankers, one of them a supertanker, hit mines and caught fire on 13 Nov while trying an "unauthorized" southern route with radar and positioning switched off. Separately it said a liquefied-gas carrier hit a mine. IRNA reported explosions near Jask but no impacts (Anadolu; Jerusalem Post / Reuters). TradeWinds reports firefighting on a tanker hit by an "unidentified

object" (TradeWinds). INTERTANKO counts 14 confirmed attacks on ships in November so far, with at least one seafarer killed. It says one hit appears to have come from an improvised floating device, and that this should not be read as evidence of mines in the Gulf (INTERTANKO, 13 Nov). ISW-CTP again reports no indicator of successful re-mining. Kpler's 13 Nov briefing puts **Total Hormuz Clearance at 8,264 kbd for the 7 days to 11 Nov, about 48% of the pre-war 17,148 kbd** (42% a day earlier). Tanker crossings average 11 a day, against 50 before the war. The last four days are preliminary, and Kpler says such readings have typically settled 1.5 to 2 times higher (Kpler media briefing, 13 Nov). **WAR-38** (a 50%+ print by 25 Nov) is open.

Houthi–Saudi front. On 13 Nov, Houthi spokesman Yahya Saree claimed one drone on Riyadh's **King Khalid International Airport**, two drones on **Pumping Station No. 3** of the East-West pipeline east of Riyadh, and two ballistic missiles at Saudi troops in al-Tuwal, Jazan. Saudi Arabia did not confirm the claims (Middle East Eye). Saudi Civil Defense said drones were intercepted near Riyadh and in the Eastern Province, and it issued a Jazan early-warning alert. Saudi aircraft flew close air support as Yemeni government-aligned forces retook al-Shatt and al-Sarih junction in Lahij on 13 Nov (ISW-CTP). Airlines keep extending suspensions: KLM to 27 Nov, Etihad to 19 Nov, SalamAir to 30 Nov, British Airways to 11 Jan 2027 (Dawn). Those are airline decisions, not an airport halt. **WAR-19** (a KKIA suspension by 15 Nov) has no qualifying GACA or SPA statement and is about **10%**. **WAR-34** has no Saudi shutdown statement.

Iraq. Iraq's government began a tightly limited, militia-coordinated inspection of Kataib Hezbollah's Jurf al-Sakhr stronghold on 13 Nov. Iraqi forces were reportedly put on their highest alert (ISW-CTP). Khor Mor production remains suspended with no restart date (Kurdistan24). **WAR-35** stays about 25%.

US forces and Congress. USS *Theodore Roosevelt* is reported heading for the North Arabian Sea. The Pentagon has not confirmed its placement (UK Fact Check live blog; Stars and Stripes). The Senate must vote on H.Con.Res.93 by **Fri 20 Nov**, after up to six hours of debate (Senate Daily Press, 12 Nov).

Prices. January Brent settled up 2 cents at **$95.84** on 13 Nov. It was down 2.52% on the week and 18.53% over two weeks (Morningstar / Dow Jones; Xinhua). DTN cites an IEA report that the oil market moved into surplus in October for the first time since the war began (DTN).

Indicators. W-1 EXTREME (↓ within band; 48% clearance, attacks continue). W-2 EXTREME (=; airport and pipeline claims, interceptions). W-3 SIGNIFICANT (=). W-4 ABNORMAL (↑ within band; Mossad lobbying, cabinet Sunday). W-5 SIGNIFICANT (=; confirmed Iranian launch at US forces, intercepted, no damage). W-6 SIGNIFICANT (=). W-7 ABNORMAL (=; $95.84). W-8 SIGNIFICANT (=). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met. Trend **=**.

Analyst Comment. The Bahrain episode ended the way contained exchanges usually do. Iran claimed a hit, the US said it shot the drones down, and neither side escalated. CENTCOM's silence on Sirik, together with the IRGC's choice not to name the US, suggests both sides want to avoid owning the exchange. The live risk has moved to Jerusalem. A caretaker government with an intelligence chief lobbying in Washington, a security cabinet meeting on Sunday and a lone dissenting military chief is a risky combination. We still judge an acknowledged Israeli strike on Iran by 6 Dec **very unlikely (about 15%)** (WAR-39), because the US is saying no and the military is reported to oppose the timing. A second Iranian launch at US forces is the cleaner test of whether 13 Nov was a one-off. We judge a US-acknowledged Iranian launch toward US forces between 15 and 30 Nov **unlikely (about 40%)**; see new call **WAR-41**.

ME-T2 (Levant), brief. On 13 Nov, Israeli strikes, shelling and demolitions hit towns in the Nabatieh, Marjayoun, Bint Jbeil and Tyre districts, including Kfar Tebnit, Khiam, Haddatha, Yater and Majdal Zoun. Low-flying drones flew over Beirut (Anadolu; Naharnet). 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. EU leaders meeting in Dublin on 13 Nov agreed that Britain, France, Germany, Italy, Poland and the EU institutions will represent Europe at the next Ukraine talks. They chose a team rather than a single envoy, and said Europe's security architecture should not be on the table (France 24 live, Reuters/AFP). Asked about an expanded format, Kremlin spokesman Peskov said: "Once we understand their genuine intention and readiness to contribute to the peace process, then it will be possible to make a decision on holding dialogue on a Ukrainian settlement in an expanded format" (same source). Witkoff says the next meeting is already scheduled, but no date or venue has been published (Ukrinform). Germany confirmed a Coalition of the Willing summit in Berlin on **19 Nov**, with more than 20 leaders expected (France 24). The Kyiv Post reports the White House says the envoys have begun preparing the largest prisoner swap of the war (Kyiv Post). **RUS-12** (in-person Trump–Putin by 20 Nov) rises to **very likely (about 90%)** now that the White House has confirmed 19 Nov. **RUS-17** (a dated follow-on meeting announced by 25 Nov) is open at about 50%. **RUS-21** is about 45%. Peskov's conditions cut both ways.

Strikes. From 18:00 on 13 Nov, Russia launched **96 drones** (61 jet-powered Shaheds) from Bryansk, Oryol, Primorsko-Akhtarsk, Donetsk and Crimea. By 07:30, 81 had been downed or suppressed, with hits at eight locations. The Air Force reported no missiles (Ukrainska Pravda / Air Force; Ukrainian News). Two people were hurt in Dnipropetrovsk oblast, and a jet Shahed hit Kharkiv (Kyiv Post). Ukraine's energy ministry reported outages in 12 oblasts from strikes on 13 Nov (NV). At least three large sunflower-oil processors suspended operations, citing

power cuts and security (France 24, Reuters). Ukraine says it hit a large Volgograd refinery and drone sites in Rostov-on-Don (military command, via France 24). **RUS-16** (500+ in a night by 15 Nov) is a near-certain miss, and **RUS-18** (30+ ballistic) is not met.

NATO flank. Lithuania's report that a drone briefly entered Polish airspace on 10–11 Nov remains unconfirmed by Poland's operational command (Defence24). On 13 Nov, Romania scrambled F-16s and issued an RO-Alert for northern Tulcea after radar tracked a drone in Ukrainian airspace near Snake Island. No Romanian airspace violation was reported (Observator Constanța). No Article 4 request has been made (**RUS-04**).

Indicators. R-3 SIGNIFICANT (=; nightly drone waves, grid outages in 12 oblasts). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (↓ within band; leaders' meeting confirmed; European team named; Kremlin hedges). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=**.

Analyst Comment. The process is moving faster than the battlefield. In five days it has produced an envoy–Putin meeting, a confirmed leaders' meeting, a named European team and a swap in preparation. Over the same period the nightly strikes have stayed flat at about 100–120 drones, and the grid damage has started hitting agricultural exports. Peskov's "once we understand their genuine intention" is the main obstacle to RUS-21. Moscow can accept the US-proposed format, or delay it to split Europe from Washington before Shenzhen. We see no basis to change any EU-T1 indicator band today.

EU-T2 (European internal stability). The OAT-Bund 10-year spread closed at **151.8 bp on 13 Nov** (OAT 4.89%, Bund 3.37%), up 4.6 bp on the day (ideal-investisseur, Banque de France and Bundesbank data). The public-sector and CGT-led strike day is **Tuesday, 17 Nov**. **EUR-05 resolves as a HIT.** Indicators: EI-1 SIGNIFICANT (575k on 5 Nov, within 30 days). EI-2 ABNORMAL. EI-3 **SIGNIFICANT** (↑ from ABNORMAL; official close above 150 bp). EI-4 ROUTINE. Roll-up: 2 Significant + 1 Abnormal = **POTENTIAL CRISIS (↑ from ENVIRONMENT)**. No override. **Analyst Comment:** both the 10-year OAT and the Bund rose on the day, so part of the move is the global rates sell-off, not France alone. The spread has crossed 150 bp five times in the last ten sessions, which makes EI-3 a coin-flip indicator day to day. **EUR-01** (above 175 bp by 30 Nov) is about 10%. **EUR-04** (500k+ on 17 Nov) stays about 30%.

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

Mississippi. All 82 counties were due to send certified results to the Secretary of State by 13 Nov (MPB). WLBT reports that the Secretary of State released final numbers on 14 Nov (WLBT). We could not read that page's figures (see GAPS). State certification is due 3 Dec.

Alaska. After the 13 Nov count update, Peltola leads Sullivan **138,240 to 127,828** (10,412 votes) with 279,334 ballots counted. That puts her at 49.84% of first choices, so ranked-choice tabulation on 18 Nov will likely be needed (Alaska Story; Anchorage Daily News; Alaska Public Media). Certification is due 25 Nov.

We have verified no refusal to certify and no suit against a called race (**MID-03** and **MID-09** open). Cross-reference: the FAA imposed a nationwide ground stop of about 4.5 hours on 13 Nov after communications failures at several en-route centres. Aviation Week reports that the FAA points to data overload on legacy switching equipment (FAA; Aviation Week). Nothing published suggests a hostile act. It is scored by the Technology & Cyber WIRE, not here. 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 (Mississippi counties certified on time, per the SoS release). M-6 ROUTINE. M-7 ABNORMAL (=). M-8 ROUTINE. M-9 ROUTINE. Roll-up: 3 Abnormal = **ENVIRONMENT**. Trend **=**.

AM-T2 (hemispheric security). Haitian police and the Task Force retook the Sylvio Cator national stadium in Port-au-Prince on 12 Nov after two years under gang control. Salvadoran troops then set up an operations base there, and President Bukele told the gangs to leave or face consequences (France 24; AP; Télé Pluriel). The Just Security timeline still lists **27 Oct** as the latest announced US strike on a vessel (the 72nd), now **18 days** ago (Just Security). Search summaries again list November strikes, but those are dated 2025. H-1 ABNORMAL (pause under 30 days), H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-01** (three strikes 31 Oct–30 Nov) is now **very unlikely (about 10%)**. New call **AMR-02** (at least one announced strike 14–30 Nov) is **roughly even (about 45%)**. If no strike comes by 26 Nov, H-1 drops to ROUTINE.

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

Taiwan. In the 24 hours to 06:00 on 14 Nov, Taiwan's defence ministry detected **10 PLA aircraft sorties**, 4 of which crossed the median line into the central, southwestern and eastern ADIZ, plus **8 PLAN ships** and **3 official ships** (MND). That is down from 30 the day before. No "joint combat readiness patrol" was reported (**IPA-04** open), and no day has reached 45 sorties (**IPA-05** open). See the Statement of Normalcy refresh below.

Korea. The last reported launch remains the 4 Nov salvo of short-range ballistic missiles from Sondok (Yonhap). K-1 ABNORMAL (=).

South China Sea. ABS-CBN reports 29 Chinese navy and coast guard ships in the West Philippine Sea over the past week (ABS-CBN, 12 Nov). We still found no Philippine government statement of a dated water-cannon use after 8 Oct. The undated Manila Times page remains uncounted (**IPA-02** open; desk estimate about 40%, down from a logged 60%). SC-1/SC-2 ABNORMAL (=).

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

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

Sudan and the Horn (AF-T1). Sudan's armed forces and allied units say they retook areas of North Kordofan from the RSF (Anadolu Agency, 13 Nov, article 4124609 on aa.com.tr). Tribal clashes in East Darfur killed seven, and the RSF says it has arrested suspects (Sudan Times). UN News describes long-range drone strikes, in both directions, as now "the norm" (UN News). We found no UN-reported single event with 50 or more killed (**AFR-01** open, **unlikely, about 20%**). AF-1 SIGNIFICANT, AF-2 to AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

Sahel (AF-T2). RFI reports JNIM attacks on civilians in Mali's Ségou and Mopti regions. In Nampala, a drone hit the market, killing one man and wounding about ten. In Mopti, the villages of Diengo, Goundaka, Djongué-Bambara and Kabio have been emptied by the group's attacks and drone fire (RFI, 14 Nov; PressAfrik relay). JNIM also claimed an IED attack on a vehicle carrying Malian and Africa Corps personnel between Sévaré and Konna. Casualties were not confirmed (Modern Ghana, news item 1541551, relaying the JNIM claim). We found no official toll of 20 or more security personnel killed in one attack since 27 Oct. SA-1 ROUTINE, SA-2 SIGNIFICANT (Bamako fuel blockade), SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** (about 30%) and **AFR-03** are open.

Baseline work: Statement of Normalcy, IP-T1 Taiwan Strait (refresh; first written 22 Oct, re-baselined 29 Oct)

`SUBJECT: Taiwan Strait QUESTION: is the PLA moving from coercion to a blockade or quarantine posture? (Regional Conflict; PMESII-PT: Military) Normal since 2022: daily PLA air/naval presence; periodic one-day patrol spikes of 20-45 sorties; "official" (coast guard) ships around Taiwan. I-1 PLA aircraft R: 7-day average < 20 sorties/day, at most one spike (>= 20) in 7 days | A: 7-day avg 20-40, or 2+ spikes in 7 days | S: 7-day avg > 40, or a named exercise or "joint combat readiness patrol" | E: declared blockade, quarantine or exclusion zone I-2 CCG boarding/inspection claims R: none | A: claimed inspection near Kinmen/Matsu | S: inspection around Taiwan proper | E: enforced quarantine I-3 Median-line crossings R: post-2022 pattern (crossings on spike days) | A: crossings on 4+ days in 7 | S: PLAN ships inside 24 nm | E: inside 12 nm I-4 "Official" ships R: up to 10/day | A: 10+ for 3 days running | S: inside restricted waters | E: blockade role Refresh note (14 Nov): thresholds unchanged. Two clarifications: (1) a "spike" is a single MND report of 20+ sorties; the 2026 high is 49 (3 Nov); (2) the 7-day average uses the seven most recent MND daily reports (06:00-06:00 Taipei). I-2 is now scored from MND/CGA releases. Baseline sources: Taiwan MND daily PLA reports 16 Oct-14 Nov 2026; Taiwan News monthly tallies; family plan. Period: 16 Oct-14 Nov 2026` **Current reading.** *I-1:* the seven MND reports to 06:00 on 14 Nov show **4, 1, 4, 4, 7, 30 and 10** sorties (MND 8 Nov; 9 Nov; 10 Nov; 11 Nov; 12 Nov; 13 Nov; 14 Nov). That is a **7-day average of 8.6** with one spike (30 on 13 Nov). *I-2:* we found no claimed coast-guard inspection. *I-3:* crossings were reported on 3 of 7 days (2, 23 and 4 sorties). *I-4:* 1 to 3 official ships a day.

Indicators. I-1 ROUTINE (↓ from ABNORMAL under the clarified rule). I-2 ROUTINE. I-3 ROUTINE. I-4 ROUTINE. Strict roll-up: **NO CRISIS**. **Override +1 to ENVIRONMENT FOR CRISIS**, justified as follows: two spikes of 30 or more in 11 days (49 on 3 Nov, 30 on 13 Nov, the second with 23 median-line crossings), plus the APEC and leaders' meeting week, are a pattern of calibrated pressure that the 7-day average smooths away. Trend **=**.

Analyst Comment. Under its own numbers, the strait is quieter than the topic level implies, and the override is the honest way to show that gap. If no spike of 20 or more occurs between now and 24 Nov, the override lapses and IP-T1 drops to NO CRISIS. **IPA-04** (a joint combat readiness patrol in November) falls to **roughly even (about 50%)** with 16 days left. **IPA-05** (45+ sorties) is **unlikely (about 25%)**.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz flows / attacks	14 attacks in November; Kpler 48%	50%+ Kpler print (WAR-38); a sinking or mass-casualty hit
EXTREME	EWP	W-2 Houthi–Saudi	KKIA and Pumping Station 3 claims	KKIA halt (WAR-19, 15 Nov); facility halt (WAR-34)

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
SIGNIFICANT	EWP	W-5 US forces	Iranian drones at Bahrain intercepted, no damage	Second launch at US forces (WAR-41); US casualties = Extreme
SIGNIFICANT	EWP	W-8 Diplomacy	US says pressure suffices; no talks date	Senate vote by 20 Nov (WAR-37); Shenzhen 19 Nov
SIGNIFICANT	EWP	W-6 Gulf/Iraq energy	Khor Mor shut; Iraqi forces on top alert	Restart (WAR-35); militia retaliation in Baghdad
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	96 drones; outages in 12 oblasts	500+ night (RUS-16); 30+ ballistic (RUS-18)
SIGNIFICANT	EWP	R-4 NATO spillover	Romania scrambles F-16s; no violation	Article 4 request (RUS-04)
SIGNIFICANT	EWC	EI-1/EI-3 France	151.8 bp close; strike 17 Nov	500k+ count (EUR-04); spread over 175 bp (EUR-01)
SIGNIFICANT	EWC	LV-4 Lebanon	Strikes across four districts; drones over Beirut	Dahiyeh strike (LEV-02)
SIGNIFICANT	EWC	AF-1 Sudan	Two-way long-range drone war	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako	Fuel blockade; villages emptied in Mopti	Convoy destroyed; 20+ killed (AFR-02)
ABNORMAL	EWP	W-4 Iran–Israel	Mossad lobbying; cabinet 15 Nov	Acknowledged Israeli strike (WAR-39)
ABNORMAL	EWP	W-7 Energy price	Brent $95.84; IEA surplus	Above $105 (WAR-31)
ABNORMAL	EWP	R-10 Talks	Trump–Xi–Putin 19 Nov; EU team named	Meeting held (RUS-12); dated round (RUS-17, RUS-21)
ABNORMAL	EWP	GL-T1 arms control	Nuclear cuts on the Shenzhen agenda	Agreement to open talks (GLB-02)
ABNORMAL	EWP	K-1 DPRK	Quiet since 4 Nov	Intermediate-range or ICBM launch
ABNORMAL	EWP	SC-1/SC-2 SCS	29 PRC ships in a week	Verified water cannon (IPA-02)
ABNORMAL	EWC	M-1/M-2/M-7 US count	AK ranked-choice tabulation 18 Nov	Refusal (MID-03); suit (MID-09)
ABNORMAL	EWC	H-1/H-3 Hemisphere	Strike pause 18 days; Salvadoran base in the capital	Announced strike (AMR-02); mass-casualty clash
ABNORMAL	EWC	HB-1 Health	11,197 confirmed	12,000 (GLB-01)

VIII. PREDICTIONS

Resolved today: - **EUR-05 (HIT).** The OAT-Bund 10-year spread closed at 151.8 bp on 13 Nov 2026 (Banque de France and Bundesbank data via ideal-investisseur). Logged at 45%; Brier **0.3025**.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 21 Nov). - **WAR-19** (KKIA halt by 15 Nov, 30%): Houthi claim on the airport; airlines suspended; no airport halt statement. *Open; about 10%.* - **WAR-27** (in-person US–Iran meeting by 15 Nov, 40%): no meeting; Tehran denies Doha plans. *Open; near-certain miss (about 2%).* - **RUS-16** (500+ night by 15 Nov, 45%): latest nights 117 and 96. *Open; near-certain miss (about 3%).* - **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%): White House confirms a meeting with Xi and Putin on 19 Nov. *Open; very likely (about 90%).* - **WAR-31** (Brent above $105 by 20 Nov, 40%): $95.84. *Open; very unlikely (about 10%).* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): no restart date. *Open; unlikely (about 20%).* - **WAR-37** (Senate adopts H.Con.Res.93 by 20 Nov, 45%): vote due by 20 Nov. *Open; about 45%.*

Other open: WAR-01/02/04/25/32/33/34/36/38/39/40, RUS-01/04/17/18/20/21, LEV-01/02, EUR-01, IPA-02/04/05, AFR-01/02/03, AMR-01, MID-03/09, GLB-01.

New predictions (dated 2026-11-14): - **WAR-41:** US officials acknowledge at least one more Iranian drone or missile launched toward US forces or a US facility in the Gulf (intercepted or not), launch dated 15–30 Nov 2026. **40%, unlikely.** Resolve by 2026-11-30. - **GLB-02:** The White House, the Kremlin or China's foreign ministry announces an agreement to open formal nuclear arms-control talks (bilateral or trilateral), dated 18–30 Nov 2026. **25%, unlikely.** Resolve by 2026-11-30. - **AMR-02:** The US military announces at least one lethal strike on an alleged drug-trafficking vessel, strike dated 14–30 Nov 2026. **45%, roughly even.** Resolve by 2026-11-30.

IX. GAPS AND UNVERIFIED

- **Bahrain:** the IRGC claims a radar was destroyed; CENTCOM says two drones were shot down with no damage. There is no imagery or Bahraini statement. Al Jazeera's headline speaks of "two radar sites", which we could not match to an IRGC text.
- **Sirik:** no government has claimed the 12 Nov strike. The IRGC calls it an "air aggression" but does not name the attacker. RFE/RL notes Sirik has been hit repeatedly by US and Israeli strikes since February.
- **"Mine" hits (13 Nov):** IRGC claims only. INTERTANKO cautions against reading one floating-device hit as evidence of mines, and ISW-CTP sees no re-mining. Ship names are not public.
- **Houthi claims (13 Nov):** Saudi Arabia has not confirmed damage at KKIA or Pumping Station No. 3.
- **Israel:** the line-up of security chiefs for and against a strike is an unsourced Channel 12 report. KAN's "ruled out in the coming weeks" comes from one unnamed security source. Gofman's meetings were reported by Axios, citing three sources; all agencies declined to comment.
- **INTERTANKO** writes that US–Iran talks are "planned to take place in Doha next week". Tasnim denies plans for a Doha meeting, and no government has announced one. Not counted.
- **Shenzhen:** the date (19 Nov) is White House-confirmed. The agenda (nuclear cuts and Iran, reportedly not Ukraine) comes from press accounts of the briefing that we could not read in full.
- **Prisoner exchange:** "largest" per the White House, as reported by the Kyiv Post. No numbers or date are official.
- **Mississippi:** WLBT headline says final numbers were released; we could not load the page's figures.
- **Ebola:** no INSP bulletin newer than SitRep 181 (11 Nov) was found.
- **Kpler:** the 13 Nov print's last four days are preliminary.
- **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: CENTCOM statement (via RFE/RL, AP); Kpler media briefing (13 Nov); ICE Brent settle (Dow Jones Market Data, Xinhua); Taiwan MND PLA activity reports (8–14 Nov); Ukrainian Air Force (via Ukrainska Pravda, Ukrainian News); Senate Daily Press (12 Nov); Banque de France and Bundesbank yields (via ideal-investisseur); FAA statement; INTERTANKO member advice; ISW-CTP Iran Update (13 Nov); Just Security vessel-strike timeline. Reporting as linked (AP, Reuters-relayed outlets, AFP, Axios, Washington Post, Al Jazeera, Anadolu, Times of Israel, Jerusalem Post, Middle East Eye, France 24, RFI, Kyiv Post, Alaska and Mississippi press, regional press).