WIRE World Instability

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Baseline work today: the Korean Peninsula (IP-T2) Statement of Normalcy is refreshed below (first written 6 Nov). Next in the rotation: IP-T3. Comparisons are against the 14 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend turns back up (↑). Yemen's Saudi-backed southern forces said on Sunday they are redeploying from Dhubab airport and the Bab el-Mandeb area toward Aden, which Reuters reports leaves the Houthis in control of ground overlooking the strait. Gulf exports now face pressure at both chokepoints: Hormuz to the east, Bab el-Mandeb to the west. Iran's navies claimed four more tanker "mine" strikes in Hormuz on 13–14 Nov; none has been independently verified. CENTCOM said Gulf partners have moved more than 1.7 billion barrels through Hormuz under US protection. Israel's security cabinet meets today. Israeli press reports that the wider defence establishment sees no urgent case for a strike, though military intelligence disagrees. The Kremlin confirmed the Trump–Xi–Putin meeting in Shenzhen on 19 Nov. Three calls resolve as misses: **WAR-19**, **WAR-27** and **RUS-16**. **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	Houthis gain ground over Bab el-Mandeb; Kremlin confirms Shenzhen trilateral	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	11,254 confirmed Bundibugyo cases (SitRep 182)	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Government forces quit Bab el-Mandeb area; four more Iranian "mine" claims	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Strikes across the south; Lebanese forces raid a Dahiyeh depot	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	132 drones, 20 impact sites; Kremlin confirms 19 Nov; RUS-16 miss	=
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	OAT-Bund 151.8 bp (Friday); strike day Tuesday	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Alaska lead 11,213; ranked-choice tabulation 18 Nov	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	Strike pause 19 days; Salvadoran base in Port-au-Prince	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	1 sortie; 7-day average 8.1 (override held, lapses 24 Nov)	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	SoN refreshed; no launch since 4 Nov	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	Australia–Philippines defence pact due today at ASEAN	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Sudanese forces take Al-Khuwai, push toward Al-Nahud	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Bamako fuel blockade; JNIM village attacks in Mopti	=

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

No level changes since 14 Nov. Trend changes: Global and ME-T1 = to ↑. EU-T2 ↑ to = (no new spread print over the weekend). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 14 November). No band changes. Within band: **W-2** EXTREME ↑ (government forces withdraw from the Bab el-Mandeb area; Houthis hold the high ground over the strait); **W-1** EXTREME = (four new Iranian mine claims, all unverified; no new Kpler print); **W-6** SIGNIFICANT = (Iraq sacks nine officials over Kataib Hezbollah-area oil theft; no militia retaliation yet); **W-8** SIGNIFICANT = (the US Vice President has been taken off the Iran file and no talks are scheduled; WAR-27 misses); **I-1** ROUTINE ↓ (7-day average 8.1); **R-10** ABNORMAL = (the Kremlin confirms 19 Nov; Kushner says the next round of talks will include Europe).

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 returns to ↑. The reason is geography, not a new strike. Yemen's government-aligned southern forces announced a "redeployment operation" from Dhubab airport and the Bab el-Mandeb area west of Taiz, "based on the priority of securing the capital, Aden" (Reuters via Investing.com, 15 Nov; Jerusalem Post / Reuters). Reuters describes the result as leaving the Houthis in control of the area and creating a "dual squeeze" on Gulf producers' sea routes. No other topic in the family is above POTENTIAL. No topic has three Extreme indicators or a tripwire.

The great-power date is now confirmed from both sides. Kremlin spokesman Peskov told TASS: "An agreement has been reached to hold a trilateral meeting on the 19th [of November] between President Putin, President Xi, and President Trump. This meeting will take place in Shenzhen on the sidelines of the APEC summit" (TASS, 14 Nov; Anadolu). US officials say Iran will be on the agenda (Times of Israel, via the Hormuz Strait SITREP, 14 Nov).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. INSP SitRep 182 reports **11,254** confirmed Bundibugyo cases and 5,505 deaths as of 12 Nov, up 57 in a day. Over 1–12 Nov the count rose by about 66 a day (ebola-tracker INSP archive).

Analyst Comment. Today's move is a structural risk, not a kinetic event. A militia that already attacks Saudi energy sites every day now holds the high ground over the second chokepoint. It does not have to fire at ships for insurers and operators to reprice the route. The Shenzhen meeting is the main de-escalation opportunity of the week. It is more likely to produce a joint call on Hormuz than an arms-control mandate, so **GLB-02** stays **unlikely (about 25%)**. **GLB-01** (12,000 confirmed cases by 30 Nov) rises to **likely (about 75%)**. At the 1–12 Nov pace, the count needs about 11 more days to reach 12,000, and 18 days remain.

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

Bab el-Mandeb. The southern forces' statement reads: "The Southern Armed Forces announce the implementation of a redeployment operation for its forces from Dhubab Airport and the Bab el-Mandeb area, west of Taiz Governorate." They called the move a step to strengthen the front lines and address "existing threats" (Reuters via Investing.com). Reuters places it in context. Government forces began a campaign in October to retake coastal areas after a Houthi push south in September brought the group within reach of the strait. Fighting is intensifying around besieged Taiz, which hosts about half of the 300,000 people displaced by the latest fighting (same source). The withdrawal follows two days of Houthi ballistic-missile strikes on government staging areas at Jabal Kharaz and Khor Amira in southern Lahij, and on Aden. Over the same days, government-aligned forces were *advancing* in southeastern Lahij with Saudi close air support (ISW-CTP Iran Update, 14 Nov). We found no Houthi statement claiming the area and no UKMTO or JMIC advisory on it yet (see GAPS).

Houthi–Saudi front. On 14 Nov the Saudi-led coalition said it intercepted drones over Riyadh and the kingdom's south. FDD's Long War Journal counts Houthi attacks on Saudi Arabia every day since 7 Nov, against military sites, airports and energy infrastructure (Long War Journal, 14 Nov). The Houthis again claim a hit on King Khalid International Airport. Saudi authorities have not confirmed it (Xinhua, 14 Nov). We found no GACA, Riyadh Airports or SPA statement of a suspension in the 26 Oct–15 Nov window. **WAR-19 resolves as a MISS** (see VIII). **WAR-34** (a Saudi-reported shutdown at a named facility) stays open at about 25%. The last confirmed damage report was the 9 Nov Energy Ministry statement of a fire at an East-West pipeline site, extinguished "without disruption" (Long War Journal).

Hormuz. Iran's two navies issued three separate claims on 13–14 Nov. The IRGC Navy said two tankers, one a supertanker, "attempting to slip through a prohibited route ... hit naval mines, exploded, and burst into flames." The regular navy said a third tanker in a "prohibited zone east of the Strait of Hormuz" struck a mine and was immobilised. Reuters "could not immediately verify" either claim, and no ship names were given (Reuters via Al-Monitor, 14 Nov; CNA/AFP). ISW-CTP says Iran "regularly issues these 'updates'" to portray the US-backed southern route as unsafe. ISW-CTP has still seen no indicator of successful re-mining. It notes that CENTCOM declared the strait fully demined on 27 Aug, and that the IRGC has started adding that hit vessels were "under US escort" (ISW-CTP, 14 Nov). CENTCOM posted F-16 patrol imagery on 14 Nov and said more than **1.7 billion barrels** of crude have moved through Hormuz under US protection. It gave no period or breakdown (Iran International, 14 Nov). Windward logged **9 transits on 13 Nov**, all dark, against about 88 a day before the war (Hormuz Strait SITREP, 14 Nov). Kpler has issued no briefing since 13 Nov (48% clearance for the 7 days to 11 Nov). **WAR-38** stays open at about 45%.

US–Iran track. On 12 Nov President Trump posted: "We don't need a deal with Iran. Those days have long since passed." He also asked the Vice President "to focus his complete and total attention" on domestic crime. Middle East Eye reports this sidelined Vance from his outreach to

SNSC secretary Mohsen Rezaei (Middle East Eye). Iran denied that any talks were scheduled (Tasnim, 9 Nov). We found no confirmed in-person US–Iran meeting between 31 Oct and 15 Nov. **WAR-27 resolves as a MISS.** Secretary of State Rubio repeated on 13 Nov that "there's no need for military action because we've weakened them so much" (EA WorldView).

Israel: the cabinet meets today. On Saturday night, N12 reported that Israel's wider defence establishment sees no urgent justification to attack Iran while a government is being formed, because Iran has "not yet approached" Israel's red lines. Military intelligence (Aman) disagrees and supports action. N12 also reported that Washington will not tolerate "attempts by Israeli parties to provide it with unreliable information" (Jerusalem Post, 15 Nov). Ministers are expected to review the cabinet's 4 Oct decision on attack and surprise-strike readiness (JFeed). In a recorded address on Saturday, the caretaker Prime Minister called for unity talks "without preconditions." He said Iran "is once again working to revive its nuclear program" and "will not hesitate to use nuclear weapons against us." Eisenkot called the address "another spin" and said Yashar–Likud negotiating teams were already due to meet today (Ynet). Bringing United Torah Judaism into Eisenkot's planned government would give it **55** members, six short of a majority. Talks are stuck on conscription guarantees (Jerusalem Post, 15 Nov). The Knesset speaker vote is **Tuesday, 17 Nov** (Ynet). **WAR-33** (an Eisenkot government by 6 Dec) falls to **unlikely (about 30%)**. **WAR-39** stays about 15%.

Iraq. After an emergency security meeting late on 14 Nov, Prime Minister Ali al-Zaidi referred all suspects in the Jurf al-Sakhar oil-smuggling case to the courts. He dismissed nine officials, including the Babil police chief and the director general of the state Oil Pipelines Company. A committee had entered the Kataib Hezbollah-held area and confirmed an intelligence report on pipeline tapping and refineries (The National, 15 Nov). The government statement did not name Kataib Hezbollah (same source). Khor Mor gas output is still suspended. **WAR-35** (restart by 20 Nov) is about 20%.

Iran internal (cross-reference). Bandar Abbas residents blocked a road near a fuel station on 13 Nov over empty pumps. Official inflation was 88.7% in the month to 22 Oct. The rial was about 2,720,000 to the dollar on 14 Nov (Iran International, 14 Nov). Today is the seventh anniversary of the November 2019 fuel-price protests (same source).

Prices. There was no ICE settle over the weekend. January Brent last settled at **$95.84** on Friday 13 Nov (Morningstar / Dow Jones). **WAR-31** (above $105 by 20 Nov) is about 10%. The Bab el-Mandeb news landed after Friday's close, so Monday's settle is the first market read.

Indicators. W-1 EXTREME (=; mine claims unverified, no new Kpler print). W-2 EXTREME (↑ within band; Houthi-held high ground over Bab el-Mandeb, daily attacks on Saudi Arabia). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; cabinet today, defence establishment against urgency, Aman for action). W-5 SIGNIFICANT (=; no new launch at US forces). W-6 SIGNIFICANT (=). W-7 ABNORMAL (=; $95.84). W-8 SIGNIFICANT (=; no talks, Vice President sidelined). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met (W-5 and W-6 are Significant). Trend ↑.

Analyst Comment. W-2's Extreme band already covers "strait control", so today's change raises the score within the band rather than moving it. It is still the most consequential ground change on the Red Sea since the Houthi push in September. Three things would turn it into an operational shock: a Houthi announcement of a closure or inspection regime, a UKMTO or JMIC advisory reporting an attack on a merchant ship near the strait, or a US decision to strike Houthi targets (WAR-02). We judge a confirmed Houthi attack on a merchant vessel in the southern Red Sea, Bab el-Mandeb or Gulf of Aden by 30 Nov **unlikely (about 35%)**; see new call **WAR-42**. The Houthis' focus has been Saudi Arabia and the ground war, not shipping. Holding the shore makes a shipping campaign cheaper, but it does not make one necessary. In Israel, the N12 report suggests the professional consensus is against a strike before a government forms. A split with military intelligence is the pattern to watch at today's cabinet.

ME-T2 (Levant), brief. On 14 Nov Israeli airstrikes, shelling and demolitions hit southern Lebanese towns including Kfar Tibnit, Braashit, Khiam, Khraybeh, Mayfadoun, Haddatha and Qantara (Profile News, 14 Nov; Ynet). On 13 Nov the Lebanese military said it raided a warehouse in the al-Musharrafieh area of Beirut's southern suburbs and seized weapons and ammunition. It did not attribute them to Hezbollah (Alma Center, 15 Nov). We found no Israeli strike on the southern suburbs (**LEV-02**, about 25%) 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

Strikes. From 18:00 on 14 Nov, Russia launched **132 Shahed, Gerbera and decoy drones**, 78 of them jet-powered. They came from Bryansk, Oryol, Kursk, Millerovo and Primorsko-Akhtarsk, and from occupied Donetsk and Hvardiiske in Crimea. By 08:00, 106 had been shot down or suppressed (61 of them jet Shaheds), with impacts at **20 locations**. No missiles were reported (Air Force via Mezha, 15 Nov; RBC-Ukraine). That was the last night in the RUS-16 window. The largest night logged by this desk between 2 and 15 Nov was about 350 weapons (2–3 Nov). **RUS-16 resolves as a MISS.** TASS reports Russian strikes on a port administration and a power substation in Chornomorsk (TASS).

Talks. Kushner told reporters on 14 Nov that "both sides" know compromises are needed. He said he and Witkoff are working with Russia, Ukraine and Europe on next steps, including direct engagement between Europe and Moscow (Al Jazeera / Reuters, 14 Nov). The Kyiv

Independent reports the next round is expected next week with European representatives at the table (Kyiv Independent). Peskov said "it would be better to speak with the Europeans and see to what extent their position could help advance the peace process." TASS also carries an AFP report that the EU approved an expert-level team: the Commission, the EU Council, Germany, France, Italy, Poland and the UK (TASS). Zelensky said US negotiators asked in Abu Dhabi whether Ukraine would withdraw from Donbas in exchange for NATO membership (Al Jazeera). **RUS-12** (in-person Trump–Putin by 20 Nov) is now **almost certain (about 93%)**, with both capitals confirming the 19 Nov date. **RUS-17** (a dated follow-on meeting announced by 25 Nov) rises to **roughly even, leaning likely (about 55%)**. **RUS-21** is about 50%.

Indicators. R-3 SIGNIFICANT (=; 132 drones, 20 impact sites). R-4 SIGNIFICANT (=; no new NATO-territory incident found). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=**.

Analyst Comment. RUS-16 was a 45% call on a 500-plus night. It missed because Russia's November pattern has been steady volume, about 100–170 drones a night, with one ballistic-heavy outlier (7 Nov), not saturation raids. The process track now has two confirmed dates in the same week, Shenzhen on 19 Nov and a European-inclusive round expected around then. That makes this week the likeliest time for a Russian "pressure" raid. Moscow used one before Abu Dhabi, so a heavy ballistic night before 25 Nov remains plausible (**RUS-18**, about 25%).

EU-T2 (European internal stability). Markets were closed for the weekend. The last OAT-Bund close is **151.8 bp** (13 Nov) (ideal-investisseur). For the **17 Nov** strike, the Île-de-France union coalition filed a march route from Invalides to Place d'Italie on 12 Nov. The police prefecture had not approved it as of 13 Nov (Le Parisien). Rhône unions describe a "dialogue de sourds" with the prefecture (Lyon Capitale). EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE. **POTENTIAL CRISIS (=). EUR-04** (500k+ per the Interior Ministry) stays about 30%. **EUR-01** stays about 10%.

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

Alaska. The Division of Elections report timestamped 3:15 pm on 14 Nov lists 283,618 ballots counted (+4,284). Peltola has **140,637** (49.94% including write-ins) to Sullivan's **129,424**, a lead of **11,213** votes. Ranked-choice tabulation is Wednesday, **18 Nov**, also the deadline for overseas absentee ballots. Certification is targeted for **25 Nov** (Alaska Story, 14 Nov). Ballot Measure 2, which would repeal ranked-choice voting, trails 46.38% to 53.62% (same source).

Process. We verified no refusal to certify and no suit seeking to halt certification of a called race (**MID-03**, **MID-09** open). The Senate must vote on H.Con.Res.93 (Iran war powers) by **Fri 20 Nov** under the unanimous-consent agreement (govinfo Senate Calendar, 12 Nov). **WAR-37** stays about 45%. 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). Salvadoran forces now hold security at the Sylvio Cator stadium in Port-au-Prince, retaken from gangs on 12 Nov, and plan to use it as a base (France 24; AP). Axios reports that the US embassy in San Salvador sent a formal protest note on 5 Nov over a "lack of coordination" with the UN-backed Gang Suppression Force, after an exchange of fire near the US embassy in Port-au-Prince (via CEPR live updates). Politico reports that the President told an interviewer, "I want to get Cuba done before I leave" (via CEPR). The Just Security timeline still lists **27 Oct** as the latest announced US strike on a vessel, now **19 days** ago (Just Security). Search summaries listing strikes on 1, 6 and 10 November are dated 2025 and are excluded. H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-01** is about 7%. **AMR-02** is about 40%.

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

Taiwan. In the 24 hours to 06:00 on 15 Nov, Taiwan's defence ministry detected **1 PLA aircraft sortie**, which entered the eastern ADIZ, plus **8 PLAN ships** and **3 official ships** (MND, 15 Nov). The seven most recent reports (9–15 Nov) read 1, 4, 4, 7, 30, 10 and 1, a **7-day average of 8.1** with one spike. I-1 ROUTINE (↓ within band), I-2 to I-4 ROUTINE. The topic is held at **ENVIRONMENT** by the written +1 override of 14 Nov, which lapses if no spike of 20 or more comes by **24 Nov**. See new call **IPA-06**. ABC reports that ISW sees a "rare" coordination of China's naval commands and judges that the deployment points to a major PLA exercise simulating the isolation of Taiwan. The MND has not named an exercise (see GAPS) (ABC News, 14 Nov). **IPA-04** (a joint combat readiness patrol in November) is about 45%. **IPA-05** (45+ sorties) is about 22%.

Korea. See the Statement of Normalcy refresh below.

South China Sea. Australia and the Philippines are due to sign a defence cooperation agreement today on the sidelines of the ASEAN summit in Manila. It expands reciprocal access and information sharing and supports the Philippine navy and coast guard (ABC News). Manila summoned China's ambassador after he said Beijing could "easily win" a conflict (same source). A web item claiming a 14 Nov water-cannon

attack at Second Thomas Shoal had no date, a confidence score of 8/100 and no traceable Philippine Coast Guard release, so it is excluded (GAPS). **IPA-02** is about 35%. SC-1/SC-2 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

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

Sudan and the Horn (AF-T1). Sudanese government forces and the Joint Force of former Darfur rebel movements took **Al-Khuwai**, a locality headquarters held by the RSF since May 2025. Sudans Post geolocated footage at the locality building. They then took Al-Murkab on 14 Nov, about 60 km east of the RSF stronghold of **Al-Nahud** (Sudans Post, 14 Nov). The Joint Force's claims of 20 RSF vehicles destroyed and 40 captured are unverified (same source). Al Jazeera assesses that the Kordofan gains could "turn the tide" against the RSF (Al Jazeera, 14 Nov). We found no UN-reported single event with 50 or more killed (**AFR-01**, about 20%). AF-1 SIGNIFICANT, AF-2 to AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=).**

Sahel (AF-T2). RFI's 14 Nov report on JNIM attacks and drone strikes that emptied villages in Mopti and hit a market in Nampala (Ségou) is the latest verified reporting (RFI). A search hit reporting 54 killed at a Malian military post is a republished November 2019 Reuters story (Indelimane) and is excluded. SA-1 ROUTINE, SA-2 SIGNIFICANT (Bamako fuel blockade), SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** is about 25%. **AFR-03** is open.

Baseline work: Statement of Normalcy, IP-T2 Korean Peninsula (refresh; first written 6 Nov)

`SUBJECT: Korean Peninsula QUESTION: is the DPRK moving from routine testing to a crisis posture (strategic launch, nuclear test, lethal border clash)? (Regional Conflict; PMESII-PT: Military, Political/Information) Normal 2022-26: periodic SRBM and cruise-missile tests, occasional NLL warnings, hostile KCNA copy; no nuclear test since 2017. K-1 Launch events R: 0-1 a month | A: 2-4 a month, or a multi-missile salvo in one day | S: IRBM/ICBM or any overflight of Japan | E: nuclear test, or impact near ROK/Japan territory with casualties K-2 Border/maritime R: routine NLL warnings | A: fire into buffer zones, ramming | S: casualties or multi-hour exchange | E: shelling of a populated ROK island or ground raid K-3 Doctrine R: standard hostile KCNA copy | A: new doctrine edict or a named US/ROK city in an official target statement | S: announced simulated nuclear strike on a US target | E: publicly confirmed warhead mating/arming order Refresh note (15 Nov): thresholds unchanged. Clarifications: (1) "a month" = the rolling 30 days to the edition date; (2) one launch day = one event, however many missiles; (3) a rejection of dialogue alone is Routine K-3 copy unless tied to doctrine or targeting language. Baseline sources: ROK JCS/Yonhap, Japan MOD, Reuters/AP relays of KCNA, 2024 - 15 Nov 2026. Period reviewed: 16 Oct - 15 Nov 2026.` **Current reading.** *K-1:* On 4 Nov Seoul called the Sondok salvo North Korea's "fourth such weapons launch in a month" (Reuters via NBC, 3 Nov EST; Yonhap). Pyongyang also reported testing a new air-defence missile and holding a strategic cruise-missile drill that simulated a strike on an airport target (NBC News). We have found no launch since 4 Nov, 11 days. The rolling 30-day count is at least three events (31 Oct, 2 Nov, 4 Nov), inside the Abnormal band. *K-2:* we found no NLL or DMZ clash. *K-3:* Kim Yo Jong ruled out dialogue with Washington until it drops its "hostile policy" (same Reuters report). Under clarification (3) that alone is Routine copy, but the simulated strike on an airport target keeps K-3 at the low end of Abnormal.

Indicators. K-1 ABNORMAL (↓ within band; 11 quiet days). K-2 ROUTINE. K-3 ABNORMAL (low end). Roll-up: 2 Abnormal = **ENVIRONMENT FOR CRISIS**. No override. Trend **=**.

Analyst Comment. The peninsula is doing what it usually does: a burst of tests around allied air drills, then a pause. If the quiet lasts to about 4 Dec, the rolling count falls into the Routine band and IP-T2 drops to NO CRISIS on its own numbers. The Shenzhen meeting is the near-term variable. Pyongyang has in the past tested around great-power summits that do not include it.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Government forces quit the strait area; daily attacks on Saudi Arabia	Attack on a merchant ship near the strait (WAR-42); US strikes on Houthis (WAR-02)
EXTREME	EWC	W-1 Hormuz flows / attacks	Four more unverified mine claims; 9 dark transits on 13 Nov	50%+ Kpler print (WAR-38); a verified sinking
SIGNIFICANT	EWP	W-5 US forces	No new launch at US forces since 13 Nov	Second launch (WAR-41); US casualties = Extreme
SIGNIFICANT	EWP	W-8 Diplomacy	No talks; Vice President sidelined	Senate vote by 20 Nov (WAR-37); Shenzhen 19 Nov

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
SIGNIFICANT	EWP	W-6 Gulf/Iraq energy	Nine officials sacked over Jurf al-Sakhar	Militia retaliation; Khor Mor restart (WAR-35)
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	132 drones, 20 impact sites	30+ ballistic (RUS-18)
SIGNIFICANT	EWP	R-4 NATO spillover	No new incident	Article 4 request (RUS-04)
SIGNIFICANT	EWC	EI-1/EI-3 France	151.8 bp; strike Tuesday	500k+ count (EUR-04); spread over 175 bp (EUR-01)
SIGNIFICANT	EWC	LV-4 Lebanon	Strikes across the south; Lebanese raid in Dahiyeh	Dahiyeh strike (LEV-02)
SIGNIFICANT	EWC	AF-1 Sudan	Sudanese forces push toward Al-Nahud	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako	Fuel blockade	20+ security personnel killed (AFR-02)
ABNORMAL	EWP	W-4 Iran–Israel	Cabinet today; defence establishment against urgency	Acknowledged Israeli strike (WAR-39)
ABNORMAL	EWP	W-7 Energy price	Brent $95.84 (Friday)	Monday settle after Bab el-Mandeb; above $105 (WAR-31)
ABNORMAL	EWP	R-10 Talks	Shenzhen confirmed by both sides	Meeting held (RUS-12); dated round (RUS-17)
ABNORMAL	EWP	GL-T1 arms control	Nuclear cuts on the Shenzhen agenda	Agreement to open talks (GLB-02)
ABNORMAL	EWP	K-1 / K-3 DPRK	11 quiet days	IRBM/ICBM launch
ABNORMAL	EWP	SC-1/SC-2 SCS	Australia–Philippines pact	Verified water cannon (IPA-02)
ABNORMAL	EWC	IP-T1 override	7-day average 8.1	20+ spike by 24 Nov (IPA-06)
ABNORMAL	EWC	M-1/M-2/M-7 US count	Alaska ranked-choice tabulation 18 Nov	Refusal (MID-03); suit (MID-09)
ABNORMAL	EWC	H-1/H-3 Hemisphere	19-day strike pause; "get Cuba done" remark	Announced strike (AMR-02)
ABNORMAL	EWC	HB-1 Health	11,254 confirmed	12,000 (GLB-01)

VIII. PREDICTIONS

Resolved today: - **WAR-19 (MISS).** King Khalid International Airport did not suspend operations because of a Houthi attack in the 26 Oct–15 Nov window. We found no GACA, Riyadh Airports or SPA statement. The coalition reported interceptions only, and airline suspensions are airline decisions (Long War Journal, 14 Nov). Logged at 30%; Brier **0.0900**. - **WAR-27 (MISS).** There was no confirmed in-person US–Iran meeting between 31 Oct and 15 Nov. Iran denied plans, and the US President said "We don't need a deal with Iran" and pulled the Vice President off the file (Middle East Eye). Logged at 40%; Brier **0.1600**. - **RUS-16 (MISS).** No night of 500 or more drones and missiles between 2 and 15 Nov. The last night in the window was 132 drones (Air Force via Mezha), and the window's peak was about 350. Logged at 45%; Brier **0.2025**.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 22 Nov). - **EUR-04** (500k+ on 17 Nov per the Interior Ministry, 35%; resolves by 19 Nov): route not yet approved in Paris. *Open; about 30%.* - **RUS-12** (in-person Trump–Putin by 20 Nov, 30%): Kremlin and White House confirm 19 Nov in Shenzhen. *Open; almost certain (about 93%).* - **WAR-31** (Brent above $105 by 20 Nov, 40%): $95.84 Friday; Bab el-Mandeb is new upside risk. *Open; about 12%.* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): no restart date. *Open; 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-01/02/04/25/32/33/34/36/38/39/40/41, RUS-01/04/17/18/20/21, LEV-01/02, EUR-01, IPA-02/04/05, AFR-01/02/03, AMR-01/02, MID-03/09, GLB-01/02.

New predictions (dated 2026-11-15): - **WAR-42:** UKMTO, JMIC, CENTCOM or a flag-state government confirms an attack (missile, drone, boat or boarding) on a merchant vessel in the southern Red Sea, Bab el-Mandeb or Gulf of Aden, dated 15–30 Nov 2026 and attributed to the Houthis or unattributed. **35%, unlikely.** Resolve by 2026-11-30. - **WAR-43:** The Knesset elects Matan Kahana (Yashar) as Speaker in the vote scheduled for 17 Nov 2026, or in any vote held by 24 Nov 2026. **70%, likely.** Resolve by 2026-11-24. - **IPA-06:** A Taiwan MND daily report dated 16–24 Nov 2026 lists 20 or more PLA aircraft sorties for its 24-hour period. That is the condition that keeps the IP-T1 override. **60%, likely.** Resolve by 2026-11-24.

IX. GAPS AND UNVERIFIED

- **Bab el-Mandeb:** the southern forces' statement and the Reuters framing ("leaving the Houthis in control") are verified. We found no Houthi statement claiming Dhubab or the strait area, no imagery, and no UKMTO or JMIC advisory. The exact line of control is unknown.
- **Mine claims (13–14 Nov):** IRGC and regular-navy claims only. There are no ship names and no UKMTO confirmation. Reuters could not verify. Investing.com mentions "at least four" vessels, which may double-count.
- **CENTCOM 1.7 billion barrels:** no period or breakdown was given.
- **UKMTO "65% below pre-war":** this traffic figure appears only in an Investing.com summary. We could not find a UKMTO primary text.
- **Iran SITREP aggregator:** iransitrep.com shows "4% of pre-war transits" and a Brent spot of $91.03. This conflicts with Kpler's 48% clearance and the ICE settle. Not used.
- **Israel:** the N12 account of defence-establishment and Aman positions is unsourced. We have no readout of today's cabinet meeting (it meets later on 15 Nov, Israel time).
- **KKIA:** the Houthi claim of an airport hit on 13–14 Nov is unconfirmed by Saudi authorities.
- **Ukraine talks:** "next week" timing comes from press accounts. No official date or venue has been published.
- **Taiwan exercise:** the ISW assessment of a blockade-simulating naval deployment (via ABC) has no matching MND statement or named exercise.
- **SCS:** the "ChinaWatch" water-cannon item is undated, rated low-confidence and untraceable. Excluded.
- **Sahel:** the "54 killed" headline is a 2019 republication. Excluded.
- **Sudan:** Joint Force casualty and equipment claims are unverified. The Sudanese military had issued no separate statement as of Sudans Post's publication.
- **Ebola:** SitRep 182 (12 Nov) is the latest INSP bulletin found.
- **Kpler:** no briefing since 13 Nov. A 14 Nov URL returned 404.
- **Levant:** no ACLED pull, so LV-1 is unscored.
- Rates and mortgage detail are in the owner-only note (cross-ref Economics WIRE).

Sources

All sources are linked inline. Primary and data sources: Yemeni southern forces' statement (via Reuters); Saudi-led coalition statements (via Long War Journal, Xinhua); IRGC Navy and regular-navy statements (via Reuters, AFP); CENTCOM post (via Iran International); Kremlin (TASS); Ukrainian Air Force (via Mezha, RBC-Ukraine); Taiwan MND PLA activity reports (9–15 Nov); Alaska Division of Elections report (via Alaska Story); INSP SitReps (via ebola-tracker archive); Iraqi government statement (via The National); govinfo Senate Calendar; Just Security vessel-strike timeline; ISW-CTP Iran Update (14 Nov). Reporting as linked (Reuters, AP, AFP, Al Jazeera, Jerusalem Post, Ynet, JFeed, Middle East Eye, EA WorldView, Al-Monitor, CNA, Kyiv Independent, ABC News, France 24, RFI, Le Parisien, Lyon Capitale, CEPR, Alma Center, Profile News, Sudans Post, NBC News, Yonhap).