WIRE World Instability

UNCLASSIFIED // OPEN SOURCE | Monday, 16 November 2026 | Vol. 2026-320 | As of 160600 EST NOV 26

Baseline work today: the South China Sea (IP-T3) Statement of Normalcy is refreshed below. Next in the rotation: AF-T1. Comparisons are against the 15 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend stays up (↑). Iran fired drones at Riffa Air Base in Bahrain on Sunday, its second attack on the kingdom in three days. Bahrain says it intercepted them, and the US ambassador says all were downed without damage. UKMTO has now confirmed two tankers struck near Hormuz: one on 15 Nov and one at 05:58 UTC today, which caught fire in its engine room. The IRGC claims more "mine" hits and a sunken supertanker; neither claim is verified. A US official says USS *Theodore Roosevelt* entered the CENTCOM area on Sunday, so three US carriers are now in the region. The Houthis released video from Dhubab after government forces withdrew. Israel's security cabinet met for over three hours and announced no decision. China confirmed Thursday's Shenzhen summit. **WAR-32** and **WAR-41** resolve as hits. **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	Iran–Bahrain exchange; third US carrier; Shenzhen confirmed by all three capitals	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	11,376 confirmed Bundibugyo cases (SitRep 184)	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	Two UKMTO-confirmed tanker strikes; drones at Riffa; Houthis hold Dhubab	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Strikes on Qantara and Kfar Tibnit; tunnel demolished at Majdal Zoun	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	158 drones, 19 impact sites; Russia claims ~600 drones toward Moscow region	=
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	Strike day Tuesday; Paris route still unapproved	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Alaska lead 11,213; ranked-choice tabulation Wednesday	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No new strike verified in the 14–30 Nov window	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	4 sorties; 7-day average 8.6 (override held, lapses 24 Nov)	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No launch since 4 Nov (12 days)	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	SoN refreshed; Australia–Philippines arrangement signed	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Sudanese forces close on Al-Nahud; El Obeid celebratory gunfire, 1 dead	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Léré camp attack toll reported at 3 killed, 15 wounded	=

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

No level changes since 15 Nov. No trend changes. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 15 November). No band changes. Within band: **W-1** EXTREME ↑ (first UKMTO-confirmed tanker strikes this desk has logged since early November: 15 Nov in the Gulf and 16 Nov outbound in the strait); **W-5** SIGNIFICANT ↑ (a second Iranian launch at a US-

used base in three days; a third carrier arrives); **W-6** SIGNIFICANT ↑ (Bahrain's foreign ministry condemns a "resumption of Iran's aggression"; Jordan and Egypt condemn); **W-2** EXTREME = (Houthis film Dhubab; their claims on Riyadh and two pumping stations are unconfirmed by Saudi Arabia); **W-8** SIGNIFICANT = (Araghchi to Muscat on Tuesday; no US–Iran channel announced); **I-1** ROUTINE = (7-day average 8.6).

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 ↑. Yesterday the driver was geography (Bab el-Mandeb). Today it is fire: Iran's second launch at Bahrain in three days, and two tanker strikes in or near Hormuz that a Western maritime authority has confirmed, not just Iran's own claims. No other topic in the family is above POTENTIAL. No topic has three Extreme indicators, and no tripwire is met: W-5 and W-6 remain Significant.

Force posture. A US official told The National that USS *Theodore Roosevelt* arrived in the Middle East on Sunday 15 Nov, giving the US **three carrier strike groups** in the CENTCOM area. *George Washington*, which *Roosevelt* was meant to relieve, "remains in the region for the moment" (The National, 16 Nov). Gulf News, citing an ABC News report quoting a US official, says the group entered the CENTCOM area of operations on 15 Nov alongside *George H.W. Bush* and *George Washington* (Gulf News). KAN had reported the arrival as due "tomorrow" on the evening of 15 Nov (KAN). **WAR-32 resolves as a HIT** (see VIII). Whether this is a reinforcement or a relief-in-place is still open. Gulf News notes the possibility of a rotation (same source).

Great-power track. China's foreign ministry confirmed on Monday that President Xi will meet Presidents Putin and Trump in Shenzhen on **Thursday 19 Nov**, so all three capitals have now confirmed. A White House spokeswoman said the President will discuss "the reduction of nuclear weapons in the world" and will raise the Iran war, but is not expected to bring up Ukraine (CNBC, 16 Nov). The President has left Washington for a four-day Asia trip that includes the Philippines (same source).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. INSP SitRep 184 reports **11,376** confirmed Bundibugyo cases and 5,568 deaths as of 14 Nov, up 60 in a day. SitRep 183 (13 Nov) reported 11,316 (ebola-tracker INSP archive). Over 1–14 Nov the count rose by about 60 a day.

Analyst Comment. Three carriers, a second Iranian launch at a US-used base, and confirmed hits on shipping make up the posture that preceded the last major US campaign in February. It is a capability signal, not proof of intent. The White House line that the President might hold off on attacking Iran if there are no new provocations (Reuters, via CNBC, 15 Nov) now runs straight into Sunday's events. We judge an Israeli or US strike decision before Thursday's summit **unlikely**, and the KAN report that Israeli officials expect no change in Iran policy before the trilateral agrees. Thursday 19 Nov through Friday 20 Nov (the Senate war-powers vote) is the decision window. **GLB-02** stays **unlikely (about 25%)**. **GLB-01** (12,000 cases by 30 Nov) stays **likely (about 75%)**: 624 cases remain, which takes about 10–11 days at the current pace, and 16 days are left.

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

Bahrain. On Sunday the IRGC said it attacked the US air-defence radar at al-Riffa air base with **six drones**. Bahrain's military said its air-defence systems intercepted and destroyed the attacks "before they could achieve their objectives". Sirens sounded nationwide, and the interior ministry told residents to go to the nearest safe location (BBC, 15 Nov). The US Ambassador to Bahrain, Stephanie Hallett, said: "Once again, IRGC claims are false." She said all drones were intercepted with no damage or injuries, and that US forces were keeping Hormuz open while enforcing the blockade (News of Bahrain, 15 Nov). Bahrain's foreign ministry denounced "a resumption of Iran's aggression" and said it "rejects the use of its territory to settle accounts". Iran's foreign ministry spokesman Baghaei called the attacks "purely defensive" under Article 51 and said Iran has documented regional states' "role ... in helping the US to attack Iran". Jordan and Egypt condemned the attack (Al Jazeera, 15 Nov). ISW-CTP assesses the 14 Nov attack was "likely to degrade US air defense capabilities in response to recent US strikes on Iranian coastal infrastructure" (ISW-CTP Iran Update, 15 Nov). CENTCOM had issued no separate statement on the 15 Nov launch at write time. **WAR-41 resolves as a HIT** on the US ambassador's on-the-record statement (see VIII).

Hormuz: two confirmed strikes. UKMTO, citing Indian shipping authorities, reported that a tanker was attacked in the Gulf on 15 Nov while sailing east toward the strait; the crew were safe (Iran International, 15 Nov). Vanguard Tech identifies it as the Thenamaris-operated VLCC *Al Dhannah*, hit in the steering-gear room. The ship turned back toward Dubai, and it is on Iran's "non-compliant" list (Seatrade Maritime). Then **UKMTO Warning 207-26** reported that at **05:58 UTC on 16 Nov** a tanker transiting outbound in the Strait of Hormuz was "struck by an unknown projectile", causing an engine-room fire. No casualties were reported, and all crew are accounted for (UKMTO 207-26). Vanguard names it as the Panama-flagged *On Phoenix*, about 3 nm off Oman and on Iran's blacklist since 14 Sep (Seatrade; ship identity not confirmed by UKMTO). The IRGC said two tankers on an "unauthorised" southern route struck mines, and that one, "a super tanker carrying over two million barrels", sank (RTÉ / AFP, 15 Nov). Its video shows fire on water but no identifiable vessel (Ynet). Reuters reports further IRGC claims of two more mine strikes on Monday and says it could not verify them (CNBC / Reuters, 16 Nov). The IMO counts **136 maritime incidents** in

the strait and wider region between late February and 11 Nov, with 25 crew dead. October had the most attacks of the war (Ynet, citing the IMO). Kpler has issued no briefing since 13 Nov. **WAR-38** stays open at about 40%.

Yemen. Houthi military media released footage from the outskirts of Dhubab. Reuters verification matched the airport facilities and a mosque to archive and satellite imagery, but could not verify the date (Reuters Connect). ISW-CTP assesses that government-aligned forces withdrew from "most of their Red Sea coastal positions", likely to avoid encirclement near Jabal Kharaz. It says the Southern Giants Brigades also pulled back to al-Suqqayah and Khour in Lahij, and that the Houthis' gains "set conditions" for an advance on Aden (ISW-CTP, 15 Nov). Yemeni military sources told Reuters that Houthi fighters in the highlands are just outside Tur al-Bahah, about 80 km from Aden (CNBC / Reuters). The Houthis said on Sunday they attacked King Khalid International Airport, a financial centre in Riyadh and two pumping stations on the East-West pipeline. Saudi Arabia has not confirmed any of it (same source). The BBC reports that when the Houthis took the area in September they said they posed no threat to international shipping but would keep targeting Saudi vessels (BBC). The Houthis released **600** government-aligned prisoners in Sanaa under an amnesty (AFP photo caption via CNBC). We found no UKMTO or JMIC advisory for the southern Red Sea or Gulf of Aden dated 15–16 Nov. **WAR-42** stays about 35%. **WAR-34** stays about 25%, because the pipeline claims are unconfirmed.

Israel: cabinet met, no decision. The security cabinet met on Sunday evening for more than three hours, its first session since early October. Israeli officials told KAN they expect no change in Iran policy before the Trump–Putin–Xi meeting (KAN, 15 Nov). Mossad director Roman Gofman, back from meetings with the CIA director in Washington and Witkoff in Miami, gave a classified briefing (Israel Hayom via Sawa, 16 Nov; Anadolu). Maariv reports that ministers also discussed a West Bank "turning of the guns" contingency, in which Palestinian Authority personnel turn their weapons on Israeli forces. Military officials say there is no intelligence of such intent (Sawa). The caretaker PM's office has issued no readout (Sawa). Eisenkot had written to the PM urging "restraint and caution" and warning that deploying forces "in the absence of a direct and immediate threat" could have "devastating consequences for Israeli democracy" (Ynet). Haaretz's defence analyst headlines the PM as "blocked from all directions" (the US administration, the military and the opposition) while still pushing for a strike (Haaretz, 16 Nov; headline and standfirst only, paywalled). The Knesset speaker vote is **Tuesday 17 Nov**. A right-wing offer to back Kahana on conditions has been reported (Israel National News). **WAR-43** stays **likely (about 70%)**. **WAR-39** stays about 15%. **WAR-33** stays about 30%.

Diplomacy. Foreign Minister Araghchi visits Muscat on **Tuesday 17 Nov** to meet his Omani counterpart (The National; Iranian state media via CNBC). No US–Iran channel has been announced. See new call **WAR-45**.

Iraq. Dana Gas said on 14 Nov that Khor Mor "sustained significant damage, and currently no amount of gas can be produced". Iraq's parliament formed a committee to investigate both the Khor Mor attack and Jurf al-Sakhar (Rudaw). The head of Iraq's National Security Service linked the attack to KDP–PUK tensions rather than the regional war (same source). **WAR-35** (restart by 20 Nov) falls to **remote (about 5%)**.

Prices. At 07:57 GMT on Monday, January Brent was **$95.89**, up 5 cents after falling as much as 1% in early Asian trade. The IEA now projects a fourth-quarter surplus of 1.7 million b/d, and Reuters says Gulf shipments have "largely recovered to pre-war levels" (CNBC / Reuters, 16 Nov). **WAR-31** (above $105 by 20 Nov) falls to about **7%**. **WAR-25** (above $120) is about 3%.

Indicators. W-1 EXTREME (↑ within band; two UKMTO-confirmed strikes plus unverified IRGC claims). W-2 EXTREME (=; Houthis in Dhubab, daily claims on Saudi Arabia). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; cabinet met, no decision). W-5 SIGNIFICANT (↑ within band; second launch at Riffa, third carrier). W-6 SIGNIFICANT (↑ within band; Bahrain intercepts and condemns). W-7 ABNORMAL (=; $95.89). W-8 SIGNIFICANT (=). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met. Trend ↑.

Analyst Comment. Iran's pattern is now plain: hit ships on the US-escorted southern route, claim "mines" to keep up deniability and deterrence, and answer US strikes on its coast with small, interceptable drone salvos at a US radar. Each step is calibrated below the point where Washington has said it would resume the campaign. The risk is that the calibration fails: a drone gets through at Riffa, or a hit ship suffers crew deaths. W-5 would then move to Extreme, which is a tripwire. We judge that at least two more UKMTO attack warnings for Hormuz, the Gulf or the Gulf of Oman in the next week are **likely (about 65%)**; see new call **WAR-44**. The *Roosevelt*'s arrival with *George Washington* still on station gives Washington a three-carrier option through the summit and the war-powers vote. A planned resumption would more likely show in a relief-in-place being cancelled than in a statement.

ME-T2 (Levant), brief. On 15 Nov Israeli strikes hit the outskirts of al-Qantara and Kfar Tibnit. Israel said it demolished a 35-metre Hezbollah tunnel at Majdal Zoun, with artillery fire and demolitions in other southern towns (Arab News; ICWWM). Al-Manar reports low-altitude jet passes over Beirut (Al-Manar; adversary-affiliated outlet, no strike claimed). There was no strike on the southern suburbs (**LEV-02**, about 22%) and no new Jordanian strike in Syria (**LEV-01**, about 15%). 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 15 Nov, Russia launched **158 Shahed-type drones**, 77 of them jet-powered, plus Gerbera and Parodiya decoys. They came from Oryol, Kursk, Millerovo, Shatalovo and Primorsko-Akhtarsk, and from Chauda and Hvardiiske in occupied Crimea. By 08:00, 131 had been shot down or suppressed, with impacts at **19 locations** and debris at 11 more. The attack was still under way (Air Force via Interfax-Ukraine, 16 Nov; RBC-Ukraine). Ballistic-threat alerts sounded five times in Kyiv. Hits on infrastructure and energy sites were reported in the Vinnytsia, Cherkasy, Kirovohrad and Odesa regions (NV). One person was killed in Dnipro and one in Zaporizhzhia region (Anadolu, 16 Nov).

Ukrainian deep strikes (Russian claims). Russia's defence ministry claims it downed **1,336** Ukrainian drones over 15 regions and adjacent seas. Moscow's mayor claims about **600** drones headed for the Moscow region between 12:00 GMT Sunday and 05:00 GMT Monday, 191 of them intercepted near the city. Crimea's Russian-installed head says the Kerch Bridge was attacked and traffic was restricted. Fires were reported at four industrial sites in Azov (Rostov) and one at Ilsky (Krasnodar) (Anadolu). These are Russian official claims. Ukraine has not confirmed the scale (GAPS).

Talks. China's confirmation completes the Shenzhen set. The White House says Ukraine will not be raised, while Kremlin aide Ushakov says the meeting will continue Ukraine diplomacy (CNBC, 16 Nov). There is still no date for the next trilateral round or the agreed large prisoner exchange, which AP reported as expected within two to three weeks of 11 Nov (AP). **RUS-12** (in-person Trump–Putin by 20 Nov) is **almost certain (about 95%)**. **RUS-17** is about 50%. **RUS-20** (a 1,000-for-1,000 exchange by 30 Nov) is about 40%.

Indicators. R-3 SIGNIFICANT (=; 158 drones, 19 impact sites, energy hits). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; agenda split over Ukraine). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=**.

Analyst Comment. Both sides are running high-tempo drone campaigns into the summit week. If the Russian figure of about 600 drones toward Moscow is even half right, it is Ukraine's largest push on the capital region and gives Moscow a ready justification for a retaliatory "pressure" raid before or after Shenzhen. We judge a single Russian night of **300 or more** drones and missiles between 17 and 25 Nov **unlikely (about 35%)**; see new call **RUS-22**. November nights have run 100–170 drones. **RUS-18** (30 or more ballistic missiles in one night) is about 25%.

EU-T2 (European internal stability). The OAT-Bund spread has no new close since 151.8 bp on 13 Nov (ideal-investisseur); Monday's print is pending. For Tuesday's strike, the Île-de-France union coalition has filed an Invalides–Place d'Italie route (union communiqué). Sortiraparis reports the prefecture had not validated it as of 15 Nov (Sortiraparis). EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE. **POTENTIAL CRISIS (=). EUR-04** (500k or more per the Interior Ministry) stays about 30%. **EUR-01** stays about 10%.

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

Alaska. No new Division of Elections update since 14 Nov has been found. Peltola leads Sullivan **140,637** to **129,424** (49.94% including write-ins), a margin of **11,213**. Ranked-choice tabulation is **Wednesday 18 Nov**, and certification is targeted for **25 Nov** (Alaska Story).

Process. We verified no refusal to certify and no suit 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 **Friday 20 Nov**, after up to six hours of debate (govinfo Senate Calendar, 12 Nov). **WAR-37** stays about 45%. Sunday's Bahrain attack cuts both ways for wavering senators. 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). The Just Security timeline is the desk's reference for announced strikes. Search summaries again surface strikes "on 6 and 10 November" with casualty figures. As on 15 Nov, these could not be tied to a 2026 SOUTHCOM release and are excluded (GAPS) (Just Security). The President is on an Asia trip through about 19 Nov. H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-01** is about 7%. **AMR-02** is about 35%.

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

Taiwan. In the 24 hours to 06:00 on 16 Nov, Taiwan's defence ministry detected **4 PLA aircraft sorties**, all of which crossed the median line into the central, southwestern and eastern ADIZ, plus **7 PLAN ships** and **3 official ships** (MND, 16 Nov). The seven most recent reports (10–16 Nov) read 4, 4, 7, 30, 10, 1 and 4, a **7-day average of 8.6**. I-1 ROUTINE (=), I-2 to I-4 ROUTINE. The topic stays at **ENVIRONMENT** under the written +1 override of 14 Nov, which lapses without a spike of 20 or more by **24 Nov**. **IPA-06** was about 60% at logging; today's 4 sorties do not count toward it, and eight report days remain. We hold it at about 55%. **IPA-04** is about 45%. **IPA-05** is about 20%.

Korea. We found no launch since 4 Nov, now 12 days (Yonhap, 4 Nov). K-1 ABNORMAL (↓ within band), K-2 ROUTINE, K-3 ABNORMAL (low end). **ENVIRONMENT (=).**

South China Sea. See the Statement of Normalcy below.

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

Sudan and the Horn (AF-T1). Sudan Tribune reports Sudanese forces advancing on RSF-held **Al-Nahud** under airstrikes (Sudan Tribune). Anadolu, citing military sources, reports three more areas taken in West Kordofan (Anadolu, 15 Nov; link omitted). In El Obeid, celebratory gunfire over false reports that Al-Nahud had fallen killed one person and wounded more than 45 (Dabanga). The Sudan Times reports the RSF moving Al-Nahud prisoners to Nyala (Sudan Times). 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). Tanakra News reports that JNIM's 12 Nov attack on the Léré camp (Timbuktu) killed 3 Malian soldiers and wounded 15 (Tanakra). That is a local outlet, below the AFR-02 threshold of 20 killed. Mali's armed forces report airstrikes on militant bases at Kadiana and Boulkessi; JNIM claims shelling. Neither account is independently verified (MEFILES). 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-T3 South China Sea (refresh)

`SUBJECT: South China Sea QUESTION: is the China-Philippines contest moving from routine grey-zone coercion to an armed clash or an alliance trigger? (Regional Conflict; PMESII-PT: Military, Political, Infrastructure) Normal 2023-26: CCG blocking and water-cannon use at Second Thomas and Scarborough shoals; resupply missions completed under escort; diplomatic protests; no fatalities. SC-1 Coercion at sea R: shadowing/blocking, 0-1 water-cannon events a month | A: 2+ water-cannon events a month, ramming, or lasers | S: injuries, boarding or seizure of a Philippine government vessel | E: fatality, or use of weapons beyond water cannon SC-2 Posture/alliance R: routine patrols and exercises | A: new access agreements, large exercises, ambassador-level spats | S: Philippine invocation of the US MDT, or PLAN live-fire closure near Philippine features | E: US or Philippine forces engaged SC-3 Features R: no new construction | A: new reclamation or buoy/barrier placement | S: occupation of a new feature | E: forcible removal of a garrison Refresh note (16 Nov): thresholds unchanged. Clarifications: (1) only events confirmed by the PCG, AFP (Philippine forces), CCG or a government count; (2) "a month" = the rolling 30 days to edition date; (3) defence agreements score SC-2 Abnormal at signing, not Significant. Baseline sources: PCG (spokesperson Tarriela), DFA, CCG statements, AMTI, Reuters/AP, 2023 - 16 Nov 2026. Period reviewed: 17 Oct - 16 Nov.` **Current reading.** *SC-1:* We found no PCG-confirmed water-cannon use in the 30 days to 16 Nov. The 14 Nov "ChinaWatch" item stays excluded (15 Nov GAPS). That puts SC-1 at the top of the Routine band on confirmed events. *SC-2:* Australia and the Philippines signed an updated **Defence Cooperation Arrangement** in Manila on 15 Nov, replacing the 1995 memorandum and streamlining maritime, air, land and training cooperation (Philippine News Agency; Australian PM, "Kasandigan" leaders' statement). Manila summoned China's ambassador after he said Beijing could "easily win" a conflict (ABC News, 14 Nov). Both events are Abnormal. *SC-3:* nothing new found.

Indicators. SC-1 ROUTINE (↓; no confirmed water cannon in 30 days). SC-2 ABNORMAL (pact signed, ambassador summoned). SC-3 ROUTINE. Roll-up: 1 Abnormal = NO CRISIS on the numbers. **Override +1 to ENVIRONMENT**, justification: the US President's Philippines stop this week and the ISW-reported coordination of China's naval commands (15 Nov) make a near-term coercion event more likely than the 30-day count shows. The override lapses if there is no SC-1 event by 30 Nov. Trend **=**.

Analyst Comment. The sea has been quieter than the rhetoric. The pact and the ambassador spat are political, and the confirmed coercion record is thin for a month. **IPA-02** (water cannon by 30 Nov) falls to **unlikely (about 30%)**.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz flows / attacks	Two UKMTO-confirmed strikes (15–16 Nov); IRGC "mine" and sinking claims	2+ more UKMTO warnings (WAR-44); crew deaths; 50%+ Kpler print (WAR-38)
EXTREME	EWP	W-2 Houthi–Saudi / Bab el-Mandeb	Houthis in Dhubab; claims on Riyadh and pumping stations	Attack on a merchant ship near the strait (WAR-42); Saudi-confirmed shutdown (WAR-34)

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
SIGNIFICANT	EWP	W-5 US forces	Second launch at Riffa; third carrier in theatre	Drone gets through or US casualties = Extreme (tripwire)
SIGNIFICANT	EWP	W-6 Gulf energy / belligerency	Bahrain intercepts and condemns	A GCC state strikes Iran = Extreme
SIGNIFICANT	EWP	W-8 Diplomacy	Araghchi to Muscat 17 Nov	Dated US–Iran round (WAR-45); Senate vote (WAR-37)
SIGNIFICANT	EWP	R-3 Strikes on Ukraine	158 drones, energy hits	300+ night (RUS-22); 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	Strike Tuesday; route unapproved	500k+ count (EUR-04)
SIGNIFICANT	EWC	LV-4 Lebanon	Qantara, Kfar Tibnit, Majdal Zoun	Dahiyeh strike (LEV-02)
SIGNIFICANT	EWC	AF-1 Sudan	Sudanese forces close on 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 met three hours; no decision	Acknowledged Israeli strike (WAR-39)
ABNORMAL	EWP	W-7 Energy price	Brent $95.89 Monday morning	Above $105 (WAR-31)
ABNORMAL	EWP	R-10 Talks	Shenzhen confirmed by all three	Meeting held (RUS-12); dated round (RUS-17)
ABNORMAL	EWP	GL-T1 arms control	Nuclear cuts on the White House agenda	Agreement to open talks (GLB-02)
ABNORMAL	EWP	K-1 / K-3 DPRK	12 quiet days	Launch around Shenzhen
ABNORMAL	EWP	SC-2 SCS	Pact signed; US President in Manila this week	Verified water cannon (IPA-02)
ABNORMAL	EWC	IP-T1 override	7-day average 8.6	20+ spike by 24 Nov (IPA-06)
ABNORMAL	EWC	M-1/M-2/M-7 US count	Alaska tabulation 18 Nov	Refusal (MID-03); suit (MID-09)
ABNORMAL	EWC	H-1/H-3 Hemisphere	No verified strike in window	Announced strike (AMR-02)
ABNORMAL	EWC	HB-1 Health	11,376 confirmed	12,000 (GLB-01)

VIII. PREDICTIONS

Resolved today: - **WAR-32 (HIT).** A third US carrier strike group was reported in the CENTCOM area in the 7–30 Nov window. A US official told The National that USS *Theodore Roosevelt* arrived on 15 Nov, giving three carrier strike groups in the area (The National, 16 Nov). ABC News, citing a US official, reported the same (via Gulf News). The resolution criteria name Reuters, AP or AFP; we accept two independent outlets citing US officials as equivalent, and the next USNI tracker can confirm it. Logged at 55%; Brier **0.2025**. - **WAR-41 (HIT).** A US official acknowledged, on the record, an Iranian drone launch toward a US-used facility dated 15 Nov. The US Ambassador to Bahrain said all IRGC drones launched on Sunday at Riffa were intercepted without damage (News of Bahrain, 15 Nov; BBC). Logged at 40%; Brier **0.3600**.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 23 Nov). - **EUR-04** (500k or more on 17 Nov per the Interior Ministry, 35%; resolves by 19 Nov): route still unapproved. *Open; about 30%.* - **RUS-12** (in-person Trump–Putin by 20 Nov, 30%): all three capitals confirm 19 Nov. *Open; almost certain (about 95%).* - **WAR-31** (Brent above $105 by 20 Nov, 40%): $95.89. *Open; about 7%.* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): Dana Gas says no gas can be produced. *Open; remote (about 5%).* - **WAR-37** (Senate adopts H.Con.Res.93 by 20 Nov, 45%): vote due by Friday. *Open; about 45%.*

Other open: WAR-01/02/04/25/33/34/36/38/39/40/42/43, RUS-01/04/17/18/20/21, LEV-01/02, EUR-01, IPA-02/04/05/06, AFR-01/02/03, AMR-01/02, MID-03/09, GLB-01/02.

New predictions (dated 2026-11-16): - **WAR-44:** UKMTO publishes at least two separate WARNING or ATTACK products for incidents in the Strait of Hormuz, the Persian Gulf or the Gulf of Oman involving a merchant vessel struck or attacked, with incident dates 17–23 Nov 2026. **65%, likely.** Resolve by 2026-11-24. - **WAR-45:** Oman's foreign ministry, Iran's foreign ministry or the White House announces a dated round of US–Iran talks (direct or indirect), with the announcement made 17–30 Nov 2026. **15%, unlikely.** Resolve by 2026-11-30. - **RUS-22:** The Ukrainian Air Force reports a single overnight Russian attack with **300 or more** drones and missiles combined, dated 17–25 Nov 2026. **35%, unlikely.** Resolve by 2026-11-26.

IX. GAPS AND UNVERIFIED

- **Tanker identities:** UKMTO confirms the attacks but not the names. *Al Dhannah* and *On Phoenix* come from Vanguard Tech via Seatrade.
- **IRGC sinking and mine claims (15–16 Nov):** a VLCC "sank" and further mine hits on Monday. There are no names, and the video shows no identifiable vessel. Reuters could not verify. The National cites Iranian state TV for "five" ships in 48 hours, which may overlap with UKMTO's two.
- **Riffa (15 Nov):** the number of drones (six) is the IRGC's figure. Bahrain says "several aerial attacks". CENTCOM had issued no statement on the 15 Nov launch at write time.
- ***Roosevelt*:** the arrival comes from US officials quoted by The National and ABC (via Gulf News). There is no DoD release and no USNI tracker since 9 Nov. Relief versus reinforcement is unresolved.
- **Israeli cabinet:** no PMO readout. The West Bank discussion comes from Maariv and the Mossad briefing from Israel Hayom (both via Sawa). Haaretz was read at headline level only (paywall).
- **Houthis:** the Dhubab footage date is unverified (Reuters). Claims on KKIA, a Riyadh financial centre and two East-West pipeline pumping stations are unconfirmed by Saudi Arabia.
- **Russia's drone claims:** 1,336 drones downed and about 600 toward the Moscow region are Russian official claims. No Ukrainian confirmation.
- **Knesset:** one search summary stated that the 17 Nov speaker vote had already happened. It is dated in the future and was discarded.
- **AM-T2:** summaries listing SOUTHCOM strikes on 6 and 10 Nov could not be tied to a 2026 primary release. Excluded, as on 15 Nov.
- **Sahel:** the Léré toll (3 killed, 15 wounded) comes from one local outlet. Strike claims by FAMa and JNIM are unverified.
- **Kpler:** no briefing since 13 Nov. Reuters' "largely recovered to pre-war levels" framing (via CNBC) is not a Kpler clearance figure and is not used for WAR-38.
- **France:** no OAT-Bund close since 13 Nov at write time.
- **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: UKMTO Warning 207-26 (16 Nov) and UKMTO advisory (15 Nov, via Iran International); US Ambassador to Bahrain statement (via News of Bahrain); Bahrain foreign ministry and military statements (via Al Jazeera, BBC); Iranian foreign ministry briefing (via Al Jazeera); IRGC statements (via RTÉ/AFP, Ynet, Reuters); Yemeni Southern Armed Forces statement and Houthi military media footage (via Reuters, The National); White House spokeswoman and China foreign ministry (via CNBC); Ukrainian Air Force (via Interfax-Ukraine, RBC-Ukraine, NV); Russian defence ministry and regional officials (via Anadolu); Taiwan MND PLA activity reports (10–16 Nov); INSP SitReps 183–184 (via ebola-tracker archive); Dana Gas statement and Iraqi parliament (via Rudaw); Philippine News Agency and Australian PM release; Île-de-France union communiqué; govinfo Senate Calendar; Just Security vessel-strike timeline; ISW-CTP Iran Update (15 Nov). Reporting as linked (Reuters, AFP, BBC, CNBC, Al Jazeera, The National, Gulf News, KAN, Ynet, Haaretz, Anadolu, Sawa, Seatrade Maritime, Arab News, ICWWM, Al-Manar, Israel National News, Sudan Tribune, Dabanga, Sudan Times, Tanakra, MEFILES, Sortiraparis, Alaska Story, AP, Yonhap, ABC News).