WIRE World Instability

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Baseline work today: the Sudan and the Horn (AF-T1) Statement of Normalcy is refreshed below (first written 1 Nov, refreshed 9 Nov). Next in the rotation: AF-T2. Comparisons are against the 16 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend stays up (↑). Iran fired drones at a US-operated radar at Sheikh Isa Air Base in Bahrain before dawn on Tuesday, its third launch at the kingdom in five days. Bahrain says it intercepted them. UKMTO reports a third confirmed tanker attack in two days: a tanker 7 nm north of Khasab was disabled on Monday evening and then struck a second time. Its crew are now "unaccounted for". The Houthis are about 60–100 km from Aden, and Saudi Arabia has replaced its coalition commander. In Europe, Ukraine brought down a road span of the Kerch bridge, and Russia fired ballistic missiles at two Kyiv bridges, so Europe/Russia turns ↑. Araghchi met Oman's foreign minister in Muscat. Shenzhen is Thursday. No predictions resolve today; three are added. **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	Third Iranian launch at Bahrain; Kerch span down; Shenzhen in two days	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	11,376 confirmed Bundibugyo cases (no SitRep after 184)	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	UKMTO 208-26: tanker struck twice off Khasab, crew unaccounted for; Isa Air Base targeted	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Israeli strike on a reported arms shipment in the Bekaa; tunnel demolitions	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	Kerch road span in the strait; ballistic strikes on Kyiv's bridges	↑
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	Strike day today; police source expects 220,000–300,000	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Alaska: Peltola 49.98%; final count and tabulation Wednesday	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No verified strike in the 14–30 Nov window	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	5 sorties; 7-day average 8.7 (override lapses 24 Nov)	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	Russian aircraft enter the KADIZ; no launch since 4 Nov	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	US President in Manila; no confirmed water cannon in 30 days	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	SoN refreshed; fighting on the En Nahud perimeter; RSF defection	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	No 20+ security-force toll found	=

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

No level changes since 16 Nov. One trend change: EU-T1 = → ↑. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 16 November). No band changes. Within band: **W-1** EXTREME ↑ (a third UKMTO-confirmed attack in about 36 hours, and the first in this run where crew are unaccounted for); **W-5** SIGNIFICANT ↑ (third launch at a US-used site in Bahrain in five days; the

IRGC warns that use of regional bases "will not go unanswered"); **W-2** EXTREME ↑ (Houthis at Khor Omairah, about 100 km west of Aden per Reuters; Riyadh changes its commander); **W-7** ABNORMAL ↓ (Brent about $91.66, down from $95.89); **R-3** SIGNIFICANT ↑ (ballistic strikes on both Kyiv Dnipro bridges, 2 dead in Obolonskyi); **K-3** ABNORMAL ↑ (Russian aircraft in the KADIZ).

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 ↑. Two regions moved toward crisis overnight. In the Gulf, Iran launched for a third time at Bahrain, and a tanker it had already disabled off Oman was struck again; its crew are now missing. In Europe, a Ukrainian missile-and-drone campaign brought down a road span of the Kerch bridge, Russia's single most symbolic asset in Crimea. Russia answered at the same time with ballistic missiles on Kyiv's two main Dnipro crossings. No topic has three Extreme indicators, and no tripwire is met: W-5 and W-6 remain Significant, and R-4 and R-6 remain below Extreme.

Great-power track. The US President landed in Manila at about 4:30 AM ET today for the ASEAN summit and will meet Quad leaders and President Marcos there before going to Shenzhen (NBC News live, 17 Nov). China's foreign ministry has formally announced the China–Russia–US summit in Shenzhen on **19 Nov** (China MFA, 16 Nov). Its spokeswoman said the leaders will hold "in-depth exchanges on safeguarding world peace and promoting strategic stability in major-power relations". The President said they would discuss denuclearisation and the wars in Iran and Ukraine, and he said Kim Jong Un "may come" (Straits Times, 17 Nov). The White House's earlier line was that Ukraine would not be raised (CNBC, 16 Nov). So the agenda signals remain mixed.

Washington. The Vice President told Fox News that the administration will not let the Iran war become "a 10- or 15-year commitment or, frankly, even a two-year commitment". He said the President "could say, 'We're done now'" or "exert more military and diplomatic pressure" (CBS News live, 16–17 Nov). A White House spokesperson played down a CNN report on Iranian contingency planning against officials in Washington: "at this time there are no credible threats to the homeland" (same source).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. ECDC's 16 Nov update repeats INSP SitRep 184: **11,376** confirmed cases and 5,568 deaths in DRC (data to 14 Nov), with 179 new cases across SitReps 182–184. Kenya (9 cases) and Nigeria (1) have closed contact monitoring (ECDC, 16 Nov). No SitRep 185 was online at write time.

Analyst Comment. In the 48 hours before Shenzhen, both wars are escalating, each driven by the weaker side. Iran is testing whether Washington will hold to its "no new provocations" restraint. Ukraine has struck the asset Moscow can least afford to lose before a summit where Kyiv fears it will be bargained over. Both moves raise the cost of a summit "deal" that ignores them. We still judge a US or Israeli strike on Iran before Thursday **unlikely**. The decision window is 19–20 Nov (the summit, then the Senate war-powers vote). **GLB-02** (an arms-control talks announcement, 18–30 Nov) stays **unlikely (about 25%)**. **GLB-01** (12,000 cases by 30 Nov) stays **likely (about 75%)**.

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

Bahrain, third launch. Before dawn on Tuesday the IRGC said its "combat drones ... carried out a precision operation this morning, targeting a radar system operated by US forces at the Sheikh Isa Air Base in Bahrain". It called the attack a response to "repeated violations of Iranian airspace by US military drones" (CBS News live, citing Sepah News). Bahrain's interior ministry warned of a "possible threat", told residents to go to the nearest safe place, and later issued an all-clear, saying "precautionary measures remain in place". State television said air defences intercepted "Iranian aerial attacks", and blasts were heard over Manama (Al Jazeera / AFP, 17 Nov; Euronews, 17 Nov). The Guards warned that continued use of regional bases against Iran "will not go unanswered" (Defence24). AP calls it Iran's third attack on US targets in Bahrain in recent days, after "a roughly two-month lull" (AP, 17 Nov). There was no CENTCOM statement on Tuesday's launch at write time. Secretary of State Rubio called Bahrain's foreign minister on Monday to condemn the attacks (Jerusalem Post, State Department readout). No damage to a US installation has been confirmed for any of the three launches. **WAR-40** (damage confirmed, strike dated 12–13 Nov) stays **remote (about 5%)**.

Hormuz: struck twice, crew missing. UKMTO Warning 208-26 reports that at **19:00 UTC on 16 Nov**, a third party reported an attack on a tanker transiting the Strait of Hormuz **7 nm north of Khasab, Oman**. The attack disabled the vessel and started an engine-room fire, and the crew were reported safe (UKMTO 208-26). In an update at **07:45 UTC on 17 Nov**, UKMTO said a maritime security agency reported that the tanker "sustained a second strike", causing another fire. "The crew are currently unaccounted for" (Reuters via Devdiscourse, 17 Nov; Anadolu, 17 Nov; Arab Times). UKMTO did not name the ship or attribute the attack. This is the third UKMTO-confirmed attack since 15 Nov, after the 15 Nov Gulf incident and Warning 207-26 (16 Nov, 05:58 UTC). The IRGC Navy claimed that a supertanker and an LNG carrier hit mines, and Tasnim later claimed that another tanker "with its navigation systems switched off" struck a mine east of the strait on Tuesday (Anadolu; CBS / Tasnim). None of those claims is tied to a named ship. The US military says the southern lanes are "free and clear" of mines (CBS, quoting CENTCOM's commander from late October). The Washington Institute's maritime tracker counts at least **16 Iranian attacks** on ships in the strait in November (Rudaw, 16 Nov).

Flows. Kpler's head of crude analysis told Rudaw that Middle East crude exports are running at **15.3 million b/d in November, about 90% of pre-war**, down from 16.5 in October, with **60%** moving through Hormuz versus 80% before the war. Iranian crude exports are "down to zero" under the blockade. CENTCOM says it has escorted more than 1.7 billion barrels out of the strait since late February (Rudaw). An ANZ note puts Hormuz throughput at **49% of pre-war** (Arab News / Reuters, 17 Nov). That is not a Kpler clearance figure, and Kpler has issued no media briefing since 13 Nov. **WAR-38** stays about **40%**.

Prices. January Brent was **$91.66** at 07:30 Saudi time, down 78 cents. Reuters cites the IEA's call for a fourth-quarter surplus, and KCM Trade says the risk premium is "taking a back seat for now". The US Strategic Petroleum Reserve fell to 276.4 million barrels, its lowest since August 1982. OPEC+ meets on **29 Nov** (Arab News / Reuters). **WAR-31** (above $105 by 20 Nov) falls to **remote (about 3%)**. **WAR-25** (above $120 by 30 Nov) is about 2%.

Yemen. Reuters reports that Saudi Arabia replaced the commander of its coalition on Monday by royal decree. The chief of the general staff, Fayyad Al-Ruwaili, takes on command of the joint forces, and two Western diplomats tied the change to the battlefield. Yemeni military sources say the Houthis have reached Khor Omairah, about **100 km west of Aden**, and are 25 km from government lines at Qawah. Aden residents report more checkpoints (Reuters, 16 Nov). France 24 cites military sources putting the Houthis "within 60 kilometres" (France 24, 15 Nov). The coalition spokesman said two Houthi drones were intercepted over the Mecca and Riyadh regions on Monday. Houthi health authorities claim 37 killed or wounded by Saudi strikes in 24 hours, a figure Riyadh has not addressed (CBS / AFP). Pakistan's foreign minister says the Pakistan–Saudi–Turkey "Mecca" defence pact's apex committee will meet in Islamabad at the end of the month (CBS / AFP). We found no UKMTO or JMIC confirmation of a southern Red Sea or Gulf of Aden merchant attack dated 15–17 Nov. **WAR-42** stays about **35%**. **WAR-34** stays about **25%**.

Israel. Ynet reports that briefings to Sunday's security cabinet said Iran "is rebuilding its capabilities and resuming nuclear activity". The US "is satisfied with the results of the economic blockade" and is "not eager for battle, even aside from the summit in China". A senior official says Israel "could operate independently" but prefers to act with the US: "The question is when we do it, and whether we do it alone or with the Americans" (Ynet, Eichner). The IAEA's confidential 13 Nov report says the agency is "increasingly concerned" because it has had no access to the Isfahan Fuel Enrichment Plant and does not know its exact location or status (CNA / Reuters). **Knesset:** the plenum meets at 16:00 Israel time today on replacing speaker Ohana with **Matan Kahana** (Yashar). Globes counts **67** MKs expected in favour, and Kahana rejected a Religious Zionist offer conditioned on excluding Arab-party deputies (Globes, 17 Nov). UTJ will not back him and has not decided whether to oppose or abstain. Channel 12 reports concern about a filibuster, and the vote is expected "a number of hours" after debate opens (Times of Israel). **WAR-43** rises to **very likely (about 85%)**. **WAR-39** stays about 15%, and **WAR-33** about 30%.

Diplomacy. Araghchi and Oman's foreign minister Badr Albusaidi met in Muscat today on the "diplomatic options available to contain tensions and revitalise tracks of dialogue and negotiation", according to Oman's news agency (CBS / AFP). On Monday Araghchi met Pakistan's military chief Asim Munir in Islamabad (CBS, citing Araghchi's Telegram). No dated US–Iran round has been announced. **WAR-45** stays **unlikely (about 15%)**.

Iraq. The government has given Kataib Hezbollah until **20:00 on Friday 20 Nov** to leave Jurf al-Sakhar. The ruling Coordination Framework failed to agree on a plan late Monday, and a phased handover to the Sistani-linked Atabat brigades is emerging as the likely compromise. If no deal is reached, the government's plan is a limited counter-terrorism entry with air cover (The National, 17 Nov). See new call **WAR-47**. **WAR-35** (Khor Mor restart by 20 Nov) stays **remote (about 5%)**.

Indicators. W-1 EXTREME (↑ within band; three UKMTO-confirmed attacks since 15 Nov, crew unaccounted for). W-2 EXTREME (↑ within band; Houthis about 60–100 km from Aden, Saudi command change). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=; cabinet weighs action, no decision). W-5 SIGNIFICANT (↑ within band; third launch in five days, explicit threat against basing states). W-6 SIGNIFICANT (=; Bahrain intercepts, US–Bahrain call). W-7 ABNORMAL (↓ within band; $91.66). W-8 SIGNIFICANT (=; Muscat meeting, no channel announced). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met. Trend ↑.

Analyst Comment. The second strike on an already disabled tanker matters more than the third Bahrain launch. Hitting a ship that is dead in the water is not interdiction. It punishes the ship and deters salvage and escort. If the missing crew are confirmed dead, Washington has its "new provocation" with casualties, and W-1 reaches the most serious form this desk has scored. We judge it **roughly even (about 45%)** that crew deaths are confirmed in a Hormuz-area merchant attack dated 16–30 Nov; see new call **WAR-46**. The Bahrain pattern holds: small, announced, interceptable salvos at radars, now with an explicit threat against basing states. That pressure on Manama and its neighbours is political as much as military. **WAR-44** (two or more UKMTO attack products for incidents dated 17–23 Nov) rises to **likely (about 70%)**. The 208-26 incident is dated 16 Nov and does not count toward it. The date of the second strike is not yet given.

ME-T2 (Levant), brief. Israeli aircraft struck what Israel said was a weapons shipment for Hezbollah in the eastern Bekaa near the Syrian border, the first Bekaa strike reported in months. Lebanon reported no casualties (Al Arabiya, 16 Nov). Israel also reported more tunnel demolitions in the south and two detentions (Arab News). The US ambassador to the UN, visiting Lebanon, said "No country can have two armies" (CBS / AFP; quoted). There was no strike on Beirut's southern suburbs (**LEV-02**, about 20%) and no 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

Kerch. Overnight, Ukraine struck the Kerch (Crimean) bridge for a second day. Crimea's Russian-installed head Sergey Aksyonov said traffic is suspended, and Russia's transport ministry said movement across the bridge has stopped (Rossiyskaya Gazeta, 17 Nov; RIA, preliminary: no casualties). The Guardian reports that photos show a **227-metre road arch span in the Kerch Strait**, with the adjacent rail span also damaged. Debris appears to block the main navigable channel used by ships from the Sea of Azov ports (Guardian, 17 Nov). President Zelensky called it "a response to Russian strikes on our infrastructure". He said it was the end of a campaign that first destroyed air defences and radars on the approach, and that Palianytsia drones and Neptune and other missiles were used. Video shows a Flamingo cruise missile before impact (Guardian). Kremlin spokesman Peskov said a deputy prime minister briefed Putin after an emergency government meeting and that the bridge will be repaired "even better than before" (Guardian, citing Izvestia). See new call **RUS-23**.

Russian strikes. From about 23:26 on 16 Nov, Russia fired ballistic missiles at Kyiv. Mayor Klitschko confirmed hits on the **Northern and Southern bridges**, both now closed, with water and heating disruptions in some districts. The State Emergency Service reports **2 killed** in Obolonskyi district (Kyiv Independent, 17 Nov). Smila (Cherkasy) was hit by eight missiles, injuring six. Strikes also hit Kharkiv, Zaporizhzhia, Dnipro and Kryvyi Rih. Morning drone swarms crossed Khmelnytskyi and Ternopil toward Rivne and Lutsk, where more than 300 settlements lost power (RBC-Ukraine; RIA-Pivden). One woman was killed in Vinnytsia (RIA-Pivden). The Air Force's consolidated tally was not out at write time; the attack was still under way at 10:00 Kyiv time (24 Kanal). Russia's defence ministry claims **1,441** Ukrainian drones downed overnight. Moscow's mayor claims about **800** headed for the Moscow region (UNITED24, citing Russian MoD). These are Russian claims (GAPS).

Talks. Zelensky said Ukraine held new online talks with Witkoff, Kushner and European representatives on Monday, and Kushner said progress had been made (Guardian). There is still no date for an in-person round or the agreed large exchange. **RUS-12** (in-person Trump–Putin by 20 Nov) stays **almost certain (about 95%)**. **RUS-17** is about 45%, **RUS-20** about 35%, and **RUS-21** about 35%.

Indicators. R-3 SIGNIFICANT (↑ within band; ballistic strikes on Kyiv's bridges, 2 dead in Kyiv, regional outages; no citywide Kyiv outage). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; online talks, agenda split). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend ↑ (from =), justification: Moscow loses its flagship Crimea link two days before Shenzhen, making a large retaliatory raid more likely in the next week.

Analyst Comment. The bridge has military weight: it cuts the shortest supply route to Crimea and blocks Azov shipping. It has more political weight. It hands Putin a humiliation going into a summit where he wants to look like the stronger party, and it gives Kyiv proof of strike reach to bring to any deal. Moscow's usual answer to bridge attacks (October 2022, July 2023) has been a large missile raid within days. Two constraints pull against an immediate one: Putin is travelling to Shenzhen, and the host would not welcome a record raid on summit day. We raise **RUS-22** (300 or more drones and missiles in one night, 17–25 Nov) to **roughly even (about 45%)**. **RUS-18** (30 or more ballistic missiles in one night by 25 Nov) is about 30%.

EU-T2 (European internal stability). France's interprofessional strike day is today. A police source cited by La Dépêche expects **220,000–300,000** demonstrators nationwide (La Dépêche, 17 Nov). Ouest-France reports more than 180 marches, with 40,000–80,000 expected in Paris (Ouest-France). Franceinfo reports disrupted regional trains and closed Paris metro stations (franceinfo). EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE. **POTENTIAL CRISIS (=). EUR-04** (500,000 or more per the Interior Ministry) falls to **remote (about 5%)**: the police-sourced expectation is below half the threshold. The ministry figure is due tonight. **EUR-01** stays about 10%.

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

Alaska. After nearly 2,000 more ballots were counted on Monday, Peltola had **49.98%** of first-choice votes to Sullivan's **45.93%**, with just over 285,000 counted. If she passes 50% by Wednesday, the last counting day, there will be no ranked-choice tabulation. Preliminary ballot data indicate she would win a tabulation in any case. Sullivan's campaign says it will let the process "run its course until every legal vote is counted and certified" (certification is expected **25 Nov**). The President posted a clip saying the "Democratic Party in Alaska cheated"; the Anchorage Daily News calls that claim baseless (ADN, 16 Nov). Alaska is the last uncalled Senate race (ADN).

Process. We verified no refusal to certify and no suit to halt certification of a called race (**MID-03**, **MID-09** open). Public delegitimisation of a count by the head of state is an M-2 input, but it does not move the band without an official act. The Senate must vote on **H.Con.Res.93** (Iran war powers) by **Friday 20 Nov** (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 (↑ within band; presidential fraud claim on Alaska). 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). We found no SOUTHCOM, Department or White House announcement of a lethal vessel strike dated 14–17 Nov. Search results again surfaced November **2025** strikes, which are excluded (Just Security timeline). H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-02** (one strike dated 14–30 Nov) falls to about **30%**. **AMR-01** is about 5%.

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

Taiwan. In the 24 hours to 06:00 on 17 Nov, Taiwan's defence ministry detected **5 PLA aircraft sorties**, all of which crossed the median line into the southwestern and eastern ADIZ, plus **6 PLAN ships** and **2 official ships** (MND, 17 Nov). The seven reports for 11–17 Nov read 4, 7, 30, 10, 1, 4 and 5, a **7-day average of 8.7**. 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**. With seven report days left, **IPA-06** is about **50%**. **IPA-04** is about 45%, and **IPA-05** about 20%.

Korea. South Korea's Joint Chiefs of Staff say several Russian military aircraft entered the KADIZ over the East Sea early Tuesday without notice and left without violating Korean airspace. Fighters were scrambled (Korea Herald, 17 Nov; Yonhap). The last such entries were on 25 Aug and on 27 Jun (a joint China–Russia flight). We found no North Korean launch since 4 Nov, now 13 days (Yonhap, 4 Nov). The President said Kim "may come" to China (Straits Times). K-1 ABNORMAL (↓ within band), K-2 ROUTINE, K-3 ABNORMAL (↑ within band). **ENVIRONMENT (=).**

South China Sea. The President is in Manila for ASEAN, the Quad and a meeting with Marcos (NBC). We found no PCG-confirmed water-cannon event since the 16 Nov SoN refresh. SC-1 ROUTINE, SC-2 ABNORMAL, SC-3 ROUTINE. **ENVIRONMENT (=)**, under the +1 override that lapses on 30 Nov. **IPA-02** is about 30%.

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

Sudan and the Horn (AF-T1). See the Statement of Normalcy below.

Sahel (AF-T2). We found no official or wire report of 20 or more security personnel killed in one attack in Mali, Burkina Faso or Niger dated after 27 Oct. A search result reporting "50 Malian soldiers" killed is from **July 2026** (Anefis) and is excluded (Daily Trust, 20 Jul). A weekly secondary brief puts the 12 Nov Téra (Niger) attack at 37 civilians and self-defence members, not soldiers (Vigil Consilium, 15 Nov; secondary, GAPS). SA-1 ROUTINE, SA-2 SIGNIFICANT (Bamako fuel blockade), SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** is about 20%. **AFR-03** (Algerian basing in Niger) is about 10%.

Baseline work: Statement of Normalcy, AF-T1 Sudan and the Horn (refresh; first written 1 Nov, refreshed 9 Nov)

`SUBJECT: Sudan and the Horn / Red Sea coast QUESTION: could the SAF-RSF war produce a mass-atrocity, famine or regional-war shock beyond its 2023-26 norm? (Internal Stability + Regional Conflict; PMESII-PT: Military, Social, Infra) Normal 2024-mid 2026 (a war-time norm, not peace): roughly 1,000-2,500 recorded deaths a month; famine (IPC Phase 5) in pockets of Darfur/Kordofan; 12-14M displaced; foreign arms and drone supply alleged; no state openly fighting on Sudanese soil; nationwide long-range drone campaign on power and fuel (part of the norm since 9 Nov refresh). AF-1 Lethality R: below 8-week mean | A: within +25% | S: > +25%, a UN-reported single event of 50+ killed, or UN/SG language of "hundreds" killed by one weapon type in weeks | E: UN- reported massacre of 200+, or a city of 500k+ changing hands AF-2 Famine R: no Phase 5 | A: IPC famine-risk alert | S: new Phase 5 classification | E: Phase 5 across multiple states AF-3 Cross-border flows R: < 10k/week | A: 10-30k | S: > 30k/week or a new receiving state opens camps | E: > 100k/week AF-4 Foreign-state involvement R: partisan allegations only | A: formal state accusation of a named state (UNSC/AU complaint, envoy expulsions) | S: verified launch from or strike on a neighbour's territory, a foreign base deal activated, or a neighbour-to-neighbour war opening on Sudan's border | E: a neighbouring state's forces in open combat in Sudan Refresh note (17 Nov): thresholds unchanged. Clarifications: (1) a defection or a town changing hands scores AF-1 only if it is a city of 500k+ (En Nahud is not; El Fasher would be a judgment call, flagged in advance as Significant, not Extreme); (2) partisan aggregator summaries (single-source, pro-SAF or pro-RSF) are GAPS until a second outlet or an official statement carries them. Baseline sources: ACLED/HDX, OHCHR, UN News and SG statements, IPC, UNHCR data portal, OCHA; Sudan Tribune / Radio Dabanga / Sudan Times (local, named as such). Period reviewed: 9 Nov - 17 Nov 2026.` **Current reading.** *AF-1:* Sudanese forces took Al-Khuwai on 13 Nov and are advancing on **En Nahud**, West Kordofan's second city and a gold-mining hub. ACLED's Sudan analyst told The New Arab

the RSF "has lost its ability to conduct defensive manoeuvres that were previously successful". The RSF commander for Saraf Omra (North Darfur), Ahmed Hasab Al-Rasoul, announced his defection on 15 Nov (The New Arab, 16 Nov; link omitted). Local outlets report heavy fighting on the En Nahud perimeter along three axes (SudaNews / Sudafax; pro-SAF framing per its own bias note). A 15 Nov El Obeid incident (1 dead, 45+ injured from celebratory gunfire) was logged on 16 Nov. We found no UN-reported single event of 50 or more killed since 26 Oct. SIGNIFICANT (carried on the UN Secretary-General's early-November "hundreds" language; ↓ within band). *AF-2:* The IPC's October alert stands: famine risk is rising across Greater Darfur and Greater Kordofan, and child acute malnutrition in two camps exceeds famine thresholds, with no new Phase 5 (IPC Alert, Oct 2026). WFP's chief calls aid the "only hope" amid funding cuts (UN News, Nov). ABNORMAL. *AF-3:* UNHCR and IOM report 8.6 million internally displaced, 4.6 million refugees abroad and 5.2 million returnees, and warn that shelter funding is running out (UNHCR). We found no weekly cross-border figure above 30,000. ABNORMAL (carried). *AF-4:* AP reports Sudan and Ethiopia trading accusations of backing armed groups. Ethiopia accuses Eritrea and Sudan of backing Tigrayan forces, while Sudan accuses Ethiopia of enabling RSF drone launches (AP). Al-Monitor assesses that both sides are seeking to avoid direct conflict (Al-Monitor). We found no neutral verification of a launch from Ethiopian territory and no Ethiopia–Eritrea fighting. ABNORMAL (=).

Indicators. AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL, AF-4 ABNORMAL. Roll-up: 1 Significant + 3 Abnormal = **ENVIRONMENT FOR CRISIS (=)**. No override.

Analyst Comment. The war is turning toward Darfur. If En Nahud falls, the next objective is the road west, and ACLED's analyst warns that frontlines in North Darfur could reopen. That is where the largest atrocity risk lies, around El Fasher and the camps. A unit defecting from Saraf Omra suggests the RSF's hold on North Darfur is fraying from inside. A cornered force near civilian concentrations is the classic precursor of a mass-casualty event. We hold **AFR-01** (a UN-reported 50+ event by 30 Nov) at **unlikely (about 20%)**, mainly because the window is short and UN verification lags. AF-1 would go to Extreme only on a UN-reported massacre of 200 or more, or a change of hands in El Fasher.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz attacks / flows	UKMTO 208-26: tanker struck twice off Khasab, crew unaccounted for; 16+ Iranian attacks in November	Crew deaths confirmed (WAR-46); 2+ new UKMTO attacks 17–23 Nov (WAR-44)
EXTREME	EWC	W-2 Houthis / Bab el-Mandeb / Aden	Houthis about 60–100 km from Aden; Saudi coalition command replaced	Fighting at Aden's outskirts; a confirmed Red Sea merchant hit (WAR-42)
SIGNIFICANT	EWP	W-5 Iranian fire at US-used sites	Third launch at Bahrain in five days; "will not go unanswered"	Any drone getting through = Extreme (tripwire); CENTCOM damage statement
SIGNIFICANT	EWC	W-8 / W-4 Decision window	Muscat talks; Israeli cabinet says "when, alone or with the US"	19 Nov summit; 20 Nov Senate vote (WAR-37); Israeli strike (WAR-39)
SIGNIFICANT	EWC	R-3 Strikes on Ukraine	Kyiv's two Dnipro bridges hit; regional outages	300+ night (RUS-22); 30+ ballistic (RUS-18)
SIGNIFICANT	EWP	Kerch bridge (R-10 context)	Flagship Crimea link down two days before Shenzhen	Russian retaliation raid; road reopening (RUS-23)
SIGNIFICANT	EWC	Iraq: Jurf al-Sakhar	Government–Kataib Hezbollah standoff, 20 Nov deadline	Government forces enter (WAR-47); clashes
SIGNIFICANT	EWC	AF-1 Sudan lethality	En Nahud fighting; RSF defections	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	EI-1/EI-3 France	Strike day today	Interior Ministry count tonight (EUR-04)
ABNORMAL	EWC	IP-T1 override	7-day average 8.7	20+ spike by 24 Nov (IPA-06)
ABNORMAL	EWC	K-3 Korea	Russian aircraft in the KADIZ; possible Kim visit to China	Launch; Kim at Shenzhen
ABNORMAL	EWC	M-1/M-2/M-7 US count	Alaska final count and tabulation 18 Nov; fraud claim	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: none. No WI call reached its resolution date, and none met its criteria early on verifiable evidence.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 24 Nov). - **EUR-04** (500k or more on 17 Nov per the Interior Ministry, 35%; resolves by 19 Nov): police source expects 220–300k. *Open; about 5%.* - **RUS-12** (in-person Trump–Putin by 20 Nov, 30%): summit fixed for 19 Nov by all three capitals. *Open; almost certain (about 95%).* - **WAR-31** (Brent above $105 by 20 Nov, 40%): $91.66. *Open; about 3%.* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): no restart reported. *Open; about 5%.* - **WAR-37** (Senate adopts H.Con.Res.93 by 20 Nov, 45%): vote due by Friday. *Open; about 45%.* - **WAR-43** (Kahana elected speaker by 24 Nov, 70%): vote this evening (Israel time), 67 expected in favour. *Open; about 85%.* - **WAR-44** (2+ UKMTO attacks in Hormuz/Gulf/Gulf of Oman dated 17–23 Nov, 65%): 208-26 is dated 16 Nov; second-strike date not given. *Open; about 70%.* - **IPA-06** (a 20+ sortie MND report dated 16–24 Nov, 60%): 4 and 5 so far. *Open; about 50%.*

Other open: WAR-01/02/04/25/33/34/36/38/39/40/42/45, RUS-01/04/17/18/20/21/22, 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 2026-11-17): - **WAR-46:** UKMTO, a flag-state government, the vessel's operator, or Reuters/AP/AFP citing one of them confirms that at least one crew member was killed in an attack on a merchant vessel in the Strait of Hormuz, the Persian Gulf or the Gulf of Oman, with the incident dated 16–30 Nov 2026 (this includes the UKMTO 208-26 tanker). **45%, roughly even.** Resolve by 2026-12-02. - **WAR-47:** The Iraqi prime minister's office, the government spokesman or the Joint Operations Command announces (or Reuters/AP/AFP report, citing Iraqi officials) that state forces, including government-ordered PMF Atabat brigades, have entered or taken over positions inside Jurf al-Sakhar, dated 17–30 Nov 2026. **50%, roughly even.** Resolve by 2026-11-30. - **RUS-23:** Russia's transport ministry, the Kremlin or Crimea's Russian-installed head announces that road traffic over the Crimean (Kerch) bridge has resumed, on any lane, dated 17 Nov–15 Dec 2026. **15%, unlikely.** Resolve by 2026-12-15.

IX. GAPS AND UNVERIFIED

- **UKMTO 208-26 update:** the second-strike time and the ship's name are not given. The update is cited via Reuters, Anadolu and Arab Times, and the update PDF was not retrieved. Whether this ship is one of the IRGC's claimed "mine" victims is unknown.
- **IRGC and Tasnim mine claims (16–17 Nov):** a supertanker, an LNG carrier and a further tanker "east of the strait". There are no names and no independent confirmation.
- **Sheikh Isa (17 Nov):** the target and the drone count are the IRGC's account. There was no CENTCOM statement at write time. Damage is unconfirmed either way.
- **Houthi distance to Aden:** 60 km (France 24, citing military sources) versus about 100 km to Khor Omairah (Reuters). Houthi casualty claims for Saudi strikes are unverified.
- **Ukrainian Air Force tally for the night of 16–17 Nov:** not published at write time. RUS-18 and RUS-22 cannot yet be scored for this night.
- **Russia's 1,441-drone and ~800-toward-Moscow claims:** Russian official claims, not confirmed by Ukraine.
- **Kerch:** the span collapse comes from photos reported by the Guardian, plus Russian official confirmation of the closure. There is no official Russian statement on structural loss.
- **Sudan:** the report that Hemedti arrived at Gubaish with a large force is single-source (Sudafax via SudaNews) and is not used.
- **Sahel:** the Téra toll is from a secondary weekly brief.
- **Kpler:** no media briefing since 13 Nov. ANZ's 49% is not a Kpler clearance figure.
- **France:** no OAT-Bund close since 13 Nov. The Interior Ministry demonstrator count is due tonight.
- **Levant:** no ACLED pull, so LV-1 is unscored.
- **AM-T2:** November 2025 strike reports keep surfacing in search and are excluded.
- 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 208-26 (16 Nov) and update (17 Nov, via Reuters/Anadolu); Taiwan MND PLA activity report (17 Nov); China MFA announcement (16 Nov); ECDC Bundibugyo update (16 Nov); South Korea JCS statement (via Korea Herald, Yonhap); Russian transport ministry and Crimea head statements (via Rossiyskaya Gazeta, RIA, Guardian); Kyiv mayor and State Emergency Service (via Kyiv Independent); Bahraini interior ministry and state TV (via Al Jazeera/AFP, Euronews); IRGC/Sepah statements (via CBS, Defence24); Oman News Agency (via CBS/AFP); State Department readout (via Jerusalem Post); Saudi royal decree (via Reuters); Alaska Division of Elections counts (via ADN); govinfo Senate Calendar; IPC alert; UNHCR/IOM release; Kpler (via Rudaw). Reporting as linked (Reuters, AP, AFP, CBS, NBC, Guardian, Al Jazeera, Euronews, Anadolu, Arab News, The National, Ynet, Globes, Times of Israel, CNA, Straits Times, CNBC, France 24, RBC-Ukraine, RIA-Pivden, 24 Kanal, UNITED24, La Dépêche, Ouest-France, franceinfo, The New Arab, SudaNews, Al-Monitor, UN News, Al Arabiya, Defence24, Arab Times, Devdiscourse, Daily Trust, Vigil Consilium, Just Security).

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