WIRE World Instability

UNCLASSIFIED // OPEN SOURCE | Wednesday, 18 November 2026 | Vol. 2026-322 | As of 180600 EST NOV 26

Baseline work today: the Sahel (AF-T2) Statement of Normalcy is refreshed below (first written 26 Oct, refreshed 2 and 10 Nov). Next in the rotation: ME-T2 (Levant and Syria). Comparisons are against the 17 Nov edition.

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend stays up (↑). US jets struck an IRGC missile launch site on Iran's Qeshm Island on Tuesday, which a US military official called "self-defence". Iran then widened its fire: its regular military says drones hit US systems at Ali Al Salem Air Base in Kuwait, and Bahrain intercepted a fourth wave. Kuwait and Bahrain report interceptions, and no damage is confirmed. ADNOC says one of its tankers was struck in Hormuz on Tuesday, leaving one crew member missing and 11 injured. A blast shook Riyadh as the coalition downed two Houthi cruise missiles. Kahana was elected Knesset speaker, and the repeal of the judicial overhaul has begun. Europe/Russia eases to **=**: 141 drones overnight, and the Kerch road deck stays shut. Shenzhen is tomorrow. Four predictions resolve (three hits, one miss), and 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	US strike on Qeshm; Iran fires at Kuwait; Shenzhen trilateral tomorrow	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	SitRep 185: 11,432 confirmed, 56 new in a day	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	US–Iran direct exchange; ADNOC tanker hit (1 missing, 11 injured)	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	IDF demolitions at Mount Dov; no Dahiyeh strike	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	306-drone night confirmed (RUS-22 hit); 141 drones last night; Kerch road shut	=
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	146,000 marched (ministry), down from 575,000 on 5 Nov	↓
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Alaska count final: Peltola 50.12%, no tabulation; federal probes	=
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	9 sorties; Russian aircraft cross Taiwan's eastern ADIZ	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	Trump "eyeing" Kim at Shenzhen; Rubio: nothing scheduled	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	No verified water cannon in window; ASEAN closes	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Sudanese forces sweep north and east of En Nahud	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	SoN refreshed; 840-tanker convoy reaches Bamako	=

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

No level changes since 17 Nov. Trend changes: EU-T1 ↑ → = and EU-T2 = → ↓. Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 17 November). No band changes. Within band: **W-5** SIGNIFICANT ↑ (a second US strike on Qeshm this month, by an unnamed official's account, and a new Iranian target state); **W-6** SIGNIFICANT ↑ (Kuwait attacked and calls it a "dangerous escalation"; an

explosion in Riyadh); **W-7** ABNORMAL ↑ (Brent settled $93.14, up 70 cents); **R-3** SIGNIFICANT ↓ (141 drones overnight, against 306 the night before); **EI-1** SIGNIFICANT ↓ (146,000; the 575,000 of 5 Nov still sets the 30-day score); **K-3** ABNORMAL (=; the same Russian flight also crossed Taiwan's ADIZ).

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 ↑. For the second time this month (after the 2 Nov strikes on Qeshm and Hengam), Washington has answered Iranian fire with a strike on Iranian soil. Again it has acknowledged the strike only through an unnamed official. Iran answered within hours by adding Kuwait to its targets. No tripwire is met. W-5 needs ten or more US deaths in one event or US ground operations in Iran. W-6 needs a GCC state striking Iran or formally joining the coalition. Neither has happened.

Great-power track. Xi and Putin met in Shenzhen on Wednesday on the APEC sidelines, their fifth meeting this year. Putin called Western sanctions a failure and said he expects the trilateral to be "highly useful". The President landed in China after the ASEAN and Quad meetings in Manila and said he is eyeing one-on-one talks with Putin and with Kim Jong Un (AFP, 18 Nov). Shenzhen has stepped up security around Kylin Villa, the likely venue, with citywide drone limits (Lianhe Zaobao). Washington lists the Iran war, Ukraine and nuclear arms limits as agenda items. Beijing maintains that the US and Russia should cut their arsenals first (AFP). Hours before the Manila stop, the US issued new licence rules for advanced AI chips shipped to Singapore, Malaysia, Thailand and Indonesia (AFP; detail in the Business and Technology WIREs).

Washington. After CNN reported Iranian contingency plans that could involve a radiological device, the President said in Manila that Iran would "pay a price the likes of which no country has ever paid before" if such a plan existed. Rubio said he sees no imminent threat to the capital (CNBC, 18 Nov). Tehran calls the reports "fabricated" (France 24 live, 18 Nov).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. INSP SitRep 185, with data to 15 Nov, reports **11,432** confirmed Bundibugyo cases and **5,593** confirmed deaths (CFR 48.9%). It counts 56 new confirmed cases in 24 hours (Nord-Kivu 29, Ituri 23, Haut-Uélé 3, Tshopo 1) and 68 of 178 health zones affected (DRC Ministry of Health, SitRep 185). The ministry flags an inconsistency in the Lubunga table.

Analyst Comment. In the 24 hours before Shenzhen, the US and Iran have each signalled that the summit will not freeze the Gulf. Washington chose a small strike on a launch site, acknowledged only through an unnamed official. That is the narrowest possible answer to repeated drone fire, and it fits a "blockade plus deterrence" posture rather than a new campaign. Tehran's answer, opening a second basing state, is aimed at Gulf hosts' politics. A trilateral readout that mentions Iran would be the first sign that Beijing or Moscow will lean on Tehran. **GLB-02** (an agreement to open arms-control talks, 18–30 Nov) falls to **unlikely (about 20%)**, because China has restated its precondition. **GLB-01** (12,000 cases by 30 Nov) is **likely (about 70%)**: the case count needs about 570 more, and recent days run at about 55–60 a day, so the threshold falls near 26–27 Nov.

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

US strike on Qeshm. A US military official said US fighter jets "used precision munitions to strike an Islamic Revolutionary Guard Corps (IRGC) missile launch site on Qeshm Island", in "self-defence" and "in response to IRGC aggression targeting US personnel and assets". The official added: "US Central Command remains highly vigilant and fully postured to protect Americans across the region" (The National, 17 Nov; Iran International; AFP via France 24). Iranian provincial official Ahmad Nafisi said there was no damage to residential, commercial or vital infrastructure. Iranian media said an air-defence missile launcher in the Nariman area was hit, and IRNA said there was no serious damage (Iran International; France 24). CENTCOM's own post on X said that "multiple Iranian one-way attack drones launched by the IRGC today towards Bahrain were intercepted without any damage to US equipment or injury to American personnel" (Iran International). It did not mention the strike. **WAR-36** requires a statement from CENTCOM, the Department or the White House, or US officials on the record. An unnamed official does not meet that bar. The 2 Nov strikes on Qeshm and Hengam never got an on-record acknowledgment either. So the call stays **open** at **likely (about 60%)**, with twelve days left for a named official or a formal statement.

Iran widens the target set. Kuwait's military command said on Tuesday evening that its air defences were countering "hostile drone attacks". Iran's regular military then said its drones "struck Patriot air defense systems and US military drone and missile launch platforms at Ali Al Salem Air Base in Kuwait" (CNBC). Kuwait's foreign ministry condemned a "dangerous escalation" and "repeated, criminal Iranian attacks" (France 24). Early on Wednesday, the Bahrain Defence Force said its air defences intercepted several Iranian aerial attacks. It accused Tehran of a "systematic hostile approach", and the interior ministry issued two shelter alerts (France 24; Anadolu, 18 Nov). That is the fourth launch at Bahrain in six days. Iran's military chief Amir Hatami warned that any new attack would bring a response "even more devastating" that "will know no geographical boundaries" (Fars via France 24). No damage to any host-state or US installation has been confirmed. **WAR-40** (damage from the 12–13 Nov strikes) stays **remote (about 3%)**. See new call **WAR-48**.

Hormuz: ADNOC tanker hit. ADNOC L&S says one of its vessels was attacked in the Strait of Hormuz on Tuesday: one crew member is missing, 11 are injured, and the rest were evacuated. Oman's emergency authorities say they rescued 24 crew from the Panama-flagged LPG tanker **Tara Gas** and were still fighting the fire. Maritime security sources told Reuters the crew abandoned ship after a projectile hit (Reuters via Straits Times, 18 Nov). Indian authorities say the missing seafarer is Indian (DD News). UKMTO's 17 Nov update on the 208-26 tanker north of Khasab (a second strike, crew unaccounted for) fits this ship, but no source we found states that they are the same vessel (GAPS). UKMTO also issued **209-26**, a time-late report of a tanker struck by an unknown projectile in the Gulf on **13 Nov** (UKMTO 209-26). By one industry count, UKMTO has reported seven attacks in or near Hormuz since 10 Nov (World Ports Organization). Iran's navy claims another tanker hit a mine east of the strait (IRIB via ABP/IANS; link omitted); that claim is unverified. **WAR-46** (a confirmed crew death) rises to **roughly even (about 50%)**. Missing does not count. **WAR-44** (two UKMTO-reported attacks dated 17–23 Nov) is **likely (about 75%)**. We have no UKMTO product yet dated to the Tara Gas strike.

Flows. Kpler's 17 Nov briefing puts the 7-day Total Hormuz Clearance at **8,644 kbd** to 15 Nov, "about half the pre-war level of 17,148 kbd". Of that, 6,393 kbd were strait transits, and tanker crossings averaged 9 a day against 50 before the war (Kpler, 17 Nov). The 18 Nov briefing reads **8,553 kbd** to 16 Nov, about 50%, with crossings at 10 a day (Kpler, 18 Nov). The 17 Nov reading clears the 8,574 kbd bar, so **WAR-38 resolves as a hit**. JMIC recorded 83 US-facilitated transits from 12 to 14 Nov (gCaptain).

Prices. Front-month Brent **settled at $93.14** on Tuesday, up 70 cents (FinancialJuice; Newsquawk). It traded just under $93 in Asia on Wednesday, as the IEA's surplus call capped the risk premium (Economic Times). **WAR-31** (above $105 by 20 Nov) is **remote (about 2%)**. **WAR-25** (above $120 by 30 Nov) is about 1%.

Yemen and Saudi Arabia. A powerful explosion shook Riyadh without a phone alert, and residents saw smoke near the airport. The coalition says it intercepted two Houthi cruise missiles aimed at the Riyadh area. Civil Defence issued alerts, later lifted, for Jazan, Najran and Khamis Mushait (AFP via France 24; Arab News). AP reports Saudi-backed forces reinforcing defences near Aden (AP, 17 Nov). The 60 km (France 24) versus 100 km (Reuters) gap on the Houthi line is unresolved. **UKMTO 210-26** reports an attempted boarding 50 nm southwest of Al Mukalla at 12:50 UTC on 17 Nov. A skiff carrying weapons and ladders approached a cargo ship, and the embarked security team fired a warning shot, forcing it back to a mothership (UKMTO 210-26). That is a piracy signature, not a Houthi strike. We do not count a repelled approach as an "attack" for **WAR-42**, which stays open at **about 35%** (flagged in GAPS). **WAR-34** (a Saudi energy-site shutdown) is about 25%.

Israel. The Knesset elected **Matan Kahana** (Yashar) speaker on Tuesday evening by **66 to 52** over Likud's Ofir Katz. The Eisenkot bloc and the Arab parties backed him, and Shas and UTJ backed Katz (Jerusalem Post; Ynet; AP). **WAR-43 resolves as a hit.** On Wednesday the plenum passed, by 63 to 47, a preliminary reading to repeal the Judicial Selection Committee law. The Arrangements Committee waived waiting periods, and a bill restoring the attorney general's powers followed. Justice Minister Levin called the move "corruption" (Ynet, 18 Nov). Times of Israel reports Yashar–Likud unity talks with no breakthrough (headline-level; GAPS). **WAR-33** (an Eisenkot government by 6 Dec) stays about 30%. **WAR-39** (an Israeli strike on Iran) stays about 15%.

Diplomacy. Qatar's foreign ministry spokesman confirmed a meeting with the Iranian side on Tuesday on "the proposals currently under consideration". He warned that the Gulf escalation is "a grave threat" to navigation and to an agreement (Qatar MOFA, 17 Nov). President Pezeshkian speaks of "dignified diplomacy" (Iran International). Speaker Ghalibaf says Iran will not remain in "neither war nor peace" and lists conditions for talks (Mehr). No dated US–Iran round has been announced. **WAR-45** stays about 15%.

Iraq. Quds Force commander Esmail Qaani is in Baghdad. An Iraqi official says he met Prime Minister al-Zaidi and Coordination Framework leaders to find a solution at Jurf al-Sakhar (Jurf al-Nasr). At least three Framework leaders oppose any entry by federal forces before a political understanding. A Kataib Hezbollah commander told AFP that withdrawal "will not come true, not even over our dead bodies" (Al Jazeera / AFP, 18 Nov). The deadline is **20:00 on Friday 20 Nov**. **WAR-47** falls to **roughly even (about 40%)**. **WAR-35** (Khor Mor) is about 3%.

Indicators. W-1 EXTREME (=; a crewed LPG carrier struck, 11 injured and 1 missing; clearance about 50%). W-2 EXTREME (=; cruise missiles at Riyadh, Aden under pressure). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (↑ within band; a second US strike on Iranian territory this month, unnamed-official account; no US casualties). W-6 SIGNIFICANT (↑ within band; Kuwait joins Bahrain as a target, explosion in Riyadh). W-7 ABNORMAL (↑ within band; $93.14). W-8 SIGNIFICANT (=; the Qatar channel is active, no dated round). Roll-up: 2 Extreme + 4 Significant + 2 Abnormal = **PROBABLE**. Tripwires not met. Trend ↑.

Analyst Comment. After two weeks of Iranian harassment met with US restraint, the war is back to a direct, if small, exchange of fire, as on 2–3 Nov. Each side's move is calibrated. The US hit a launch site, not leadership or energy targets. Iran aims at air-defence and drone systems that Gulf states can intercept. The danger is that both sides now treat a response as routine. The gap between Significant and Extreme on W-5 and W-6 is a single drone getting through and killing personnel. We judge it **unlikely (about 20%)** that a strike causing confirmed damage or casualties at a US-hosting Gulf base occurs by 30 Nov; see new call **WAR-48**. The Riyadh explosion with no alert matters too. If Houthi cruise missiles are getting inside Saudi warning coverage, W-2 and W-6 can converge.

ME-T2 (Levant), brief. The IDF says it destroyed Hezbollah underground infrastructure, including living quarters and command rooms, in the Mount Dov area (Times of Israel liveblog). Qatar's spokesman cited continuing Israeli strikes on south Lebanese villages (Qatar MOFA). A search result reporting 11 killed in Ansar and Deir ez-Zahrani is an **August** story re-dated by its publisher and is excluded (GAPS). There was no strike in Dahiyeh (**LEV-02**, about 15%) and no Jordanian strike in Syria (**LEV-01**, about 10%). LV-2 ROUTINE, LV-3 ABNORMAL, LV-4 SIGNIFICANT (LV-1 unscored). **ENVIRONMENT FOR CRISIS (=).**

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

The 16–17 Nov night, now tallied. From 18:00 on 16 Nov, Russia launched **306 Shahed-type attack drones** (92 jet-powered), plus Gerbera, Banderol and decoy drones. It also fired Iskander-M, Zircon and S-400 ballistic missiles, Iskander-K cruise missiles and Kh-59/Kh-69 guided missiles. By noon, 211 targets were downed or suppressed, and hits were recorded at **44 locations**. The Air Force gave no missile launch count (Ukrainska Pravda, citing the Air Force; RBC-Ukraine). President Zelensky says seven ballistic missiles struck Kyiv's bridges, four on the South Bridge and three on the North (Kyiv Post). **RUS-22** (300 or more combined, attack dated 17–25 Nov) **resolves as a hit**. In the Air Force's dating, the night of 18:00 on the 16th to the morning of the 17th is "the night of 17 November", and the call was made on 16 Nov, before the launch. **RUS-18** (30 or more ballistic missiles in one night) cannot be scored without a launch count and stays open at about 25%.

Last night. On the night of 17–18 Nov, Russia launched **141 drones** (73 jet-powered). Of these, 126 were downed or jammed, and hits were recorded at seven locations (Ukrainska Pravda, 18 Nov). Local authorities report 5 killed and 15 injured over the past day. Energy sites were hit in Kyiv, Mykolaiv and Rivne oblasts, and 80 settlements in Rivne lost power (Kyiv Independent). RBC-Ukraine reports that Britain will supply more than 1,000 short-range air-defence missiles (RBC-Ukraine).

Kerch. Rail traffic runs on one track, and road traffic remains closed. Russia's Investigative Committee has opened a terrorism case and says the structure is damaged. Deputy prime minister Andrei Nikitin says alternative road routes are being organised and that Russia can restore the bridge "in a short time". The Kerch ferry will be used weather permitting (RIA Novosti Krym, 18 Nov). Ukrainian estimates put the arch replacement at more than a year (NV / Defense Express). **RUS-23** (road traffic resumes by 15 Dec) falls to **remote (about 10%)**.

Talks. Axios, citing a US official, reports that Witkoff and Kushner will meet Ukrainian and European officials in **Berlin on Thursday** on security guarantees and recovery, on the same day as Shenzhen. Ushakov says no agreement on a European seat at the table has been reached (Axios, 16 Nov). The source is unnamed, so **RUS-17** (a dated follow-on meeting announced by an official or a named negotiator) is **not met** and stays open at **about 50%**. **RUS-12** (an in-person Trump–Putin meeting by 20 Nov) is **almost certain (about 97%)**. **RUS-21** is about 35%, and **RUS-20** about 30%.

Indicators. R-3 SIGNIFICANT (↓ within band; 141 drones, regional outages). R-4 SIGNIFICANT (=). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; Berlin track, summit tomorrow). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=** (from ↑). Justification: the large raid we expected after Kerch had in fact already happened on 16–17 Nov. Last night's raid was mid-sized, and nothing new moved toward crisis.

Analyst Comment. Moscow's answer to Kerch so far is administrative (a terror case, rerouting, a ferry) rather than a record raid. Putin's priority this week is to look like the stronger party in Shenzhen, and a record strike on summit day would embarrass his host. The window for a large retaliatory raid reopens after 20 Nov. **RUS-18** stays at about 25%.

EU-T2 (European internal stability). The Interior Ministry counted **146,000** demonstrators nationwide on 17 Nov, 28,000 of them in Paris. Unions claimed more than 500,000. That is down from 575,000 on 5 Nov (RFI, 18 Nov; AFP; franceinfo). State civil-service strike participation was under 3%, against about 10% on 5 Nov (France 24 / AFP). **EUR-04 resolves as a miss.** EI-1 SIGNIFICANT (↓ within band; the 5 Nov count governs the 30-day score until 5 Dec), EI-2 ABNORMAL, EI-3 SIGNIFICANT (carried; no new official close), EI-4 ROUTINE. **POTENTIAL CRISIS**, trend ↓ (from =): the street movement is fading. **EUR-01** stays about 10%.

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

Alaska. The official count is complete. Peltola has **144,302** votes (**50.12%**) to Sullivan's **131,844**, so no ranked-choice tabulation is needed. The result gives a 56–44 Democratic Senate in the new Congress (AFP via France 24, 18 Nov). The President had called for votes cast for another Republican candidate to be "immediately given" to Sullivan. AFP notes that even merging all such votes would not have changed the result. A pre-election administration bid to block certification was dismissed by a federal judge. The US Attorney says federal criminal and civil probes into the race are under way (AFP). Certification is expected on **25 Nov** (ADN). See new call **MID-10**.

Process. We verified no refusal to certify and no new suit to halt certification of a called race filed since 6 Nov. **MID-09** stays open at **about 20%**, and **MID-03** at about 15%. The Senate floor on Wednesday is on H.R. 2347, with votes at about 11:45 AM. **H.Con.Res.93** (Iran war powers) must still be voted on by **Friday 20 Nov** under the discharge order (Senate Daily Press, 17 Nov). **WAR-37** stays about 45%.

Tuesday's strike on Qeshm puts US hostilities with Iran squarely in front of that vote. This desk scores process risk only and takes no position on any party's programme.

Indicators. M-1 ABNORMAL (=). M-2 ABNORMAL (=; a presidential call to transfer votes and federal probes, with no official act against the count). M-3 to M-6 ROUTINE. M-7 ABNORMAL (=). M-8, 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 14–18 Nov. The latest documented strikes are dated 4 Oct and 27 Oct (Just Security timeline). Ecuadorian fishermen have sued the administration over a drone strike (Al Jazeera, 18 Nov). H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-02** falls to about **25%**, and **AMR-01** to about 3%.

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

Taiwan. In the 24 hours to 06:00 on 18 Nov, Taiwan's defence ministry detected **9 PLA aircraft sorties**. Eight of them crossed the median line into the central, southwestern and eastern ADIZ. It also detected 6 PLAN ships and 2 official ships (MND, 18 Nov). Separately, the ministry says **two Russian military aircraft** entered Taiwan's ADIZ from the northeast early on 17 Nov, transited the eastern airspace and left southeast of Taitung (MND press release, 17 Nov). This appears to be the same flight that entered the KADIZ. The seven reports for 12–18 Nov read 7, 30, 10, 1, 4, 5 and 9, a **7-day average of 9.4**. I-1 ROUTINE (=), I-2 ABNORMAL (Russian transit), I-3 and I-4 ROUTINE. The topic stays at **ENVIRONMENT** under the 14 Nov override, which lapses on **24 Nov** without a spike of 20 or more. **IPA-06** is about **45%** with six report days left. **IPA-04** is about 40%, and **IPA-05** about 15%.

Korea. The President said Kim "would like" to meet in China, and he is eyeing talks at Shenzhen. Rubio stopped short of confirming: "If we have a problem with North Korea, the only way we're ever going to solve it is if we engage with them" (AFP). Korean media quote him as saying no summit is scheduled (Aju Press, 18 Nov). China's foreign ministry says it has no information on a meeting (Euronews, 17 Nov). We found no North Korean launch since 4 Nov, now 14 days. K-1 ABNORMAL, K-2 ROUTINE, K-3 ABNORMAL. **ENVIRONMENT (=).** See new call **IPA-07**.

South China Sea. The PCG spokesperson clashed with a Chinese academic over Second Thomas Shoal at the Manila Dialogue and rejected claims that water cannon use was justified (ABS-CBN, 16 Nov). A Manila Times item on water cannon at Scarborough carries no incident date, and its image is from an earlier year, so it is excluded (GAPS). SC-1 ROUTINE, SC-2 ABNORMAL, SC-3 ROUTINE. **ENVIRONMENT (=)**, under the +1 override that lapses on 30 Nov. **IPA-02** is about 25%.

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

Sudan and the Horn (AF-T1). Military sources told Anadolu that Sudanese forces and allies advanced in three districts of West Kordofan on Tuesday, sweeping villages north and east of En Nahud and Abu Zabad as the RSF pulled back. A local relief committee says eight administrative areas of Al-Khuwai were retaken and asked for food and medicine. Sudan Tribune reports SAF drone strikes on RSF positions across West Kordofan, including En Nahud, and thousands of civilians fleeing west toward North Darfur (Sudan Tribune, 15 Nov). En Nahud itself remains under RSF control. We found no UN-reported single event of 50 or more killed. AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL (a westward flight inside Sudan, not cross-border), AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-01** is about 15%.

Baseline work: Statement of Normalcy, AF-T2 Sahel (refresh; first written 26 Oct, refreshed 2 and 10 Nov)

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SUBJECT: Central Sahel (Mali, Burkina Faso, Niger) QUESTION: is a junta, a capital or the regional order about to break beyond the 2023-26 norm? (Internal Stability + Strategic Competition; PMESII-PT: Political, Military, Infrastructure) Normal 2024-26 (a war-time norm): AES juntas in power and backed by Russia's Africa Corps; JNIM and IS Sahel hold much of the countryside; recurrent mass-casualty raids on posts; Bamako under a declared JNIM fuel blockade with supply by escorted convoy; coups plotted and foiled at intervals. SA-1 Regime stability (L) R: juntas in place, no attempt in 60 days | A: officially reported plot or officer arrests | S: failed coup or mutiny within 60 days | E: a successful coup SA-2 Pressure on capitals (L) R: rural posts and roads | A: declared blockade of a regional town or corridor | S: declared blockade of a capital with escorted supply only, or an attack inside a capital | E: a capital's fuel cut 14+ days, or a capital stormed/encircled SA-3 Lethality vs state forces (Lg) R: events under 20 killed | A: one event of 20-49 in 45 days | S: one event of 50+, or 50+ in one day | E: 100+ in one event, or a regional capital overrun SA-4 Foreign forces (L) R: Africa Corps and Turkish drone support as now | A: announced entry or exit of a foreign contingent | S: foreign forces in direct large-scale combat | E: foreign intervention to defend or topple a government Refresh note (18 Nov): thresholds unchanged. Clarifications: (1) jihadist -on-jihadist battles (JNIM vs IS Sahel) do not score
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SA-3, which counts state and allied forces only; they are logged as context; (2) SA-3 tolls need an official statement or a wire citing officials; group claims and secondary weekly briefs are GAPS until corroborated; (3) a convoy of 500+ tankers reaching Bamako is part of the norm; SA-2 moves down only if the blockade is lifted, and up only on a destroyed convoy, an attack in a capital, or a 14+ day fuel cut. Baseline sources: RFI/AFP, Reuters, APA, official communiques, ACLED, ISS Africa, Vigil Consilium (named as secondary). Period: 10 Nov-18 Nov 2026. **Current reading.** *SA-1:* We found no officially reported plot, mutiny or officer arrests since the late-August Air Base 101 mutiny in Niamey, which is now outside the 60-day window. ROUTINE. *SA-2:* APA reports that **1,505 fuel tankers** have reached Bamako since early November under FAMa escort. That includes a new convoy of **840**, leaving 996 tankers waiting for dispatch; nearly 4,000 arrived in October. APA says attacks on convoys continue to disrupt supply (APA, 17 Nov). SIGNIFICANT (escorted supply only; the blockade is not lifted). *SA-3:* We found no official or wire report of 20 or more security personnel killed in one attack dated after 27 Oct. Al Jazeera reports escalating JNIM–IS Sahel battles on the Burkina–Mali border, with claimed tolls of hundreds of fighters that are not verified (Al Jazeera, 13 Nov). Those are context, not SA-3 events. ROUTINE. *SA-4:* The Algerian unit in northern Niger has been confirmed by Algeria's chief of staff since 9 Nov. No named fixed site has been confirmed, and we found no combat role reported. ABNORMAL (=).

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

Analyst Comment. The Sahel is quiet against its own norm in deaths among state forces, and the convoy system is keeping Bamako supplied. The jihadist civil war on the Burkina–Mali border may explain the lull: ACLED's analyst says it diverts JNIM fighters from government targets (Al Jazeera). A lull like this can end abruptly. **AFR-02** (20 or more security personnel killed in one attack by 30 Nov) falls to **unlikely (about 15%)**. **AFR-03** (an Algerian presence at a named site) is about 10%.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-1 Hormuz attacks / flows	Tara Gas hit: 1 missing, 11 injured; clearance about 50% (Kpler)	Crew death confirmed (WAR-46); 2+ UKMTO attacks 17–23 Nov (WAR-44)
EXTREME	EWC	W-2 Houthis / Riyadh / Aden	Cruise missiles at Riyadh, explosion with no alert; Houthis 60–100 km from Aden	Damage at a Saudi energy site (WAR-34); fighting at Aden
SIGNIFICANT	EWP	W-5 US–Iran direct fire	US strike on Qeshm; Iranian fire at Kuwait and Bahrain bases	Formal US acknowledgment (WAR-36); damage or casualties at a base (WAR-48) = tripwire watch
SIGNIFICANT	EWC	W-6 Gulf states	Kuwait: "dangerous escalation"; Bahrain: "systematic hostile approach"	A GCC state strikes Iran = Extreme (tripwire)
SIGNIFICANT	EWC	W-8 / W-4 Decision window	Qatar–Iran meeting; Shenzhen 19 Nov; Senate vote by 20 Nov	Iran in the trilateral readout; WAR-37; Israeli strike (WAR-39)
SIGNIFICANT	EWC	Iraq: Jurf al-Sakhar	Qaani in Baghdad; deadline 20:00 Fri	Government forces enter (WAR-47); clashes
SIGNIFICANT	EWC	R-3 Strikes on Ukraine	306 drones on 16–17 Nov; 141 last night	30+ ballistic in a night (RUS-18); post-summit raid
SIGNIFICANT	EWP	Kerch bridge / R-10	Road deck shut; terror case opened	Road reopening (RUS-23); Berlin and Shenzhen outcomes (RUS-17)
SIGNIFICANT	EWC	AF-1 Sudan lethality	Sweeps around En Nahud; flight toward Darfur	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako	Escorted supply only	Destroyed convoy; attack in a capital
ABNORMAL	EWC	IP-T1 override	7-day average 9.4; Russian aircraft in the ADIZ	20+ spike by 24 Nov (IPA-06)
ABNORMAL	EWC	K-1/K-3 Korea	A possible Kim meeting	In-person meeting (IPA-07); launch
ABNORMAL	EWC	M-1/M-2/M-7 US count	Alaska final; federal probes	Certification 25 Nov (MID-10); new suit (MID-09)
ABNORMAL	EWC	H-1/H-3 Hemisphere	No verified strike in window	Announced strike (AMR-02)
ABNORMAL	EWC	HB-1 Health	11,432 confirmed	12,000 (GLB-01)

VIII. PREDICTIONS

Resolved today (4): - **WAR-43 HIT.** Kahana was elected Knesset speaker by 66 to 52 on 17 Nov (Ynet). Logged at 70%; Brier 0.0900. - **WAR-38 HIT.** Kpler's 17 Nov briefing gives a 7-day Total Hormuz Clearance of 8,644 kbd, above the 8,574 kbd (50%) bar (Kpler). Logged at 45%; Brier 0.3025. The 18 Nov reading of 8,553 kbd sits just under the bar, but the call needed only one qualifying briefing. - **RUS-22 HIT.** The Air Force reports 306 attack drones plus ballistic, cruise and guided missiles on the night dated 17 Nov (Ukrainska Pravda). Logged at 35%; Brier 0.4225. - **EUR-04 MISS.** The Interior Ministry counted 146,000 on 17 Nov, against a bar of 500,000 (RFI). Logged at 35%; Brier 0.1225.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 25 Nov). - **RUS-12** (in-person Trump–Putin by 20 Nov, 30%): trilateral in Shenzhen tomorrow. *Open; about 97%.* - **WAR-31** (Brent above $105 by 20 Nov, 40%): settle $93.14. *Open; about 2%.* - **WAR-35** (Khor Mor restart by 20 Nov, 45%): none reported. *Open; about 3%.* - **WAR-37** (Senate adopts H.Con.Res.93 by 20 Nov, 45%): vote due by Friday. *Open; about 45%.* - **IPA-06** (a 20+ sortie MND report dated 16–24 Nov, 60%): 4, 5 and 9 so far. *Open; about 45%.* - **WAR-44** (2+ UKMTO attacks dated 17–23 Nov, 65%): Tara Gas (17 Nov) per its operator; no UKMTO product dated to it yet. *Open; about 75%.* - **RUS-17** (a dated follow-on meeting announced by an official or a named negotiator, 11–25 Nov, 45%): Berlin Thursday per an unnamed US official. *Open; about 50%.* - **RUS-18** (30+ ballistic in one night by 25 Nov, 30%): no launch count. *Open; about 25%.*

Other open: WAR-01/02/04/25/33/34/36/39/40/42/45/46/47, RUS-01/04/20/21/23, LEV-01/02, EUR-01, IPA-02/04/05, AFR-01/02/03, AMR-01/02, MID-03/09, GLB-01/02. Notable: **WAR-36** (a US-acknowledged strike on Iranian land, 10–30 Nov) is about 60% and awaits an on-record statement.

New predictions (dated 2026-11-18): - **WAR-48:** CENTCOM, the Department or the White House, or a host-state government (KUNA, BNA, QNA, WAM, SPA), or a wire citing such officials on the record, confirms damage to a military installation or equipment, or casualties, at a base hosting US forces in Kuwait, Bahrain, Qatar, the UAE or Saudi Arabia from an Iranian drone or missile strike dated 18–30 Nov 2026. Iranian claims and interceptions alone do not count. **20%, unlikely.** Resolve by 2026-12-02. - **IPA-07:** The White House, KCNA or China's foreign ministry (or a wire citing officials) confirms an in-person meeting between the US President and Kim Jong Un dated 18–30 Nov 2026. **15%, unlikely.** Resolve by 2026-11-30. - **MID-10:** Alaska's Division of Elections or Lieutenant Governor certifies the 2026 US Senate result on or before 30 Nov 2026. A court-ordered delay or no certification resolves as a miss. **85%, very likely.** Resolve by 2026-11-30.

IX. GAPS AND UNVERIFIED

- **Qeshm:** the US acknowledgment comes from an unnamed "US military official" (via The National, AFP and Iran International). We found no on-record CENTCOM, Department or White House statement, so WAR-36 is held open. The 2 Nov Qeshm strikes followed the same pattern and were never acknowledged on the record. The target is described differently by the two sides: a "missile launch site" (US) versus an air-defence launcher (Iranian media).
- **Kuwait:** the claim of hits on Patriot and drone/missile platforms at Ali Al Salem comes from Iran's military. Kuwait reports interceptions only, and we found no US statement.
- **Tara Gas versus UKMTO 208-26:** no source we found states that the ADNOC L&S LPG tanker is the 208-26 vessel north of Khasab. We have not retrieved a UKMTO product dated to the 17 Nov Tara Gas strike.
- **Iranian navy mine claim (tanker east of the strait):** no ship is named, and the claim is not confirmed.
- **UKMTO 210-26 (attempted boarding off Al Mukalla):** we judge that it does not count for WAR-42, because the boarding was repelled before any attack on the ship. That is a judgment call, and the parent desk may review it.
- **Riyadh explosion:** its location and cause are unconfirmed, and the coalition did not link it to the intercepts.
- **AP 18 Nov headline** "Saudi-backed forces launch major attack on Houthis": the page timed out, and the claim is not used.
- **Israel:** the Yashar–Likud unity talks are known from a headline only (Times of Israel page blocked).
- **Ukraine:** the Air Force gave no missile launch count for the 16–17 Nov night, so RUS-18 cannot be scored. The Berlin meeting rests on an unnamed US official.
- **Lebanon:** an ILKHA item dated 18 Nov reports 11 killed in Ansar and Deir ez-Zahrani. That is an August 2026 story (Washington Times, 15 Aug) and is excluded.
- **South China Sea:** the Manila Times item on water cannon at Scarborough has no incident date and uses an image from an earlier year. It is excluded and does not count for IPA-02.
- **Sahel:** Burkina Faso remains a visibility gap. JNIM–IS Sahel tolls are group claims.
- **Ebola:** SitRep 186 was not online at write time. The ministry flags a Lubunga data inconsistency.
- **No ACLED pull:** LV-1 is unscored. There is no OAT-Bund official close since 13 Nov, so EI-3 is carried.
- 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 Warnings 209-26 and 210-26 (17 Nov); Kpler media briefings (17 and 18 Nov); Taiwan MND PLA activity report (18 Nov) and press release (17 Nov); DRC Ministry of Health / INSP SitRep 185; Qatar MOFA briefing (17 Nov); US Senate Daily Press (17 Nov); Ukrainian Air Force (via Ukrainska Pravda, RBC-Ukraine); Russian government and Investigative Committee statements (via RIA Novosti Krym); Bahrain Defence Force and interior ministry, Kuwait military command and MFA (via Anadolu, France 24, CNBC); ADNOC L&S and Omani authorities (via Reuters/Straits Times); US military official and CENTCOM X post (via The National, Iran International, AFP); French Interior Ministry (via RFI, AFP, franceinfo); Alaska official count (via AFP); APA. Reporting as linked (AFP, AP, Reuters, CNBC, France 24, Al Jazeera, Anadolu, Arab News, The National, Jerusalem Post, Ynet, Times of Israel, Iran International, Mehr, Kyiv Independent, Kyiv Post, Ukrainska Pravda, RBC-Ukraine, NV, Axios, Lianhe Zaobao, Aju Press, Euronews, ABS-CBN, Sudan Tribune, DD News, gCaptain, World Ports Organization, Economic Times, FinancialJuice, Newsquawk, Just Security, ADN).