WIRE World Instability

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This edition covers 18–20 November. The 19 November edition was not produced, so comparisons are against the 18 Nov edition. Baseline work today: the Levant and Syria (ME-T2) Statement of Normalcy is refreshed below (first written 28 Oct, refreshed 3 and 11 Nov). Next in the rotation: EU-T2 (European internal stability).

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend eases to **=** (from ↑). Hormuz flows recovered to about 55–58% of pre-war (Kpler), so **W-1** drops a band to Significant. But UKMTO logged two more tanker strikes on 17–18 Nov (WAR-44 hits). A Houthi missile damaged Riyadh's Public Investment Fund tower, and Saudi Arabia reserved "all necessary measures". There has been no new US–Iran exchange of fire since 17–18 Nov. Iraqi forces entered Jurf al-Sakhar under a compromise with Kataib Hezbollah (WAR-47 hits). The Senate rejected the Iran war-powers resolution 48–51. The Shenzhen summit produced a "Declaration toward Peace" that does not mention Iran or Ukraine. Europe/Russia turns ↑: about 100 missiles and 400 drones overnight, Kyiv's bridges hit, and a possible missile into Poland. Six predictions resolve (three hits, three misses), 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	Shenzhen declaration silent on wars; Riyadh tower hit; ~500-weapon raid on Ukraine	=
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	SitRep 187: 11,613 confirmed, 109 new in a day	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	W-2: Houthi strike damages PIF tower; W-1 down a band on flows	=
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	SoN refreshed; IDF strikes Bekaa site; incursions in Quneitra and Daraa	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	84 cruise, up to 20 ballistic, 404 drones; Kyiv bridges; Poland airspace	↑
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	No new national count since 17 Nov	=
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	No new federal-race certification challenge; Alaska certifies 25 Nov	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No verified vessel strike since 27 Oct	=
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	1 and 8 sorties; Russian bombers off the east coast; 4 balloons	=
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	No Trump–Kim meeting; President leaves China	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	No verified water-cannon event	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Drone strike on a Ghabish school shelter kills 16 (local monitor)	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	No verified 20+ event; Bamako supplied by convoy	=

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

No level changes since 18 Nov. Trend changes: GL-T1 and ME-T1 ↑ → =; EU-T1 = → ↑; EU-T2 ↓ → = (no new data). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 18 November). Band change: **W-1** EXTREME → **SIGNIFICANT** (Kpler 7-day clearance 9,376–10,014 kbd, about 55–58% of pre-war; four UKMTO attacks in 16–18 Nov, inside the 5–9 a week band). Within band: **W-2** EXTREME ↑ (Riyadh's PIF tower damaged; Saudi foreign ministry reserves "all necessary measures"); **W-7** ABNORMAL ↓ (Brent settled $91.98, down from $93.14); **W-9** (Iraq) ABNORMAL ↓ (state forces enter Jurf al-Sakhar by agreement); **R-3** SIGNIFICANT ↑ (about 500 weapons in one night); **R-4** SIGNIFICANT ↑ (a possible missile crossing and an object down in eastern Poland); **I-2** ABNORMAL (=; a second Russian bomber flight off Taiwan's east coast).

Correction (18 Nov edition). We tied ADNOC L&S's "one missing, 11 injured" statement to the LPG tanker *Tara Gas*. JMIC Update 115 instead links ADNOC's statement to UKMTO **211-26**, the product tanker **NAVIG8 MESSI**, struck 13 nm north of Khasab on 17 Nov. *Tara Gas* is UKMTO **208-26**: it was struck on 16 Nov and again on 17 Nov, and India's foreign ministry reports one crew member unaccounted for and two injured (JMIC Update 115, 19 Nov). So two seafarers are missing from two ships: an Indian national from *Tara Gas* and a Jordanian national from the ADNOC vessel (The National, 19 Nov).

I. GLOBAL ROLL-UP (GL-T1) | PROBABLE CRISIS

The family level stays at the Middle East's **PROBABLE CRISIS**, now set by **W-2** at Extreme with five Significant indicators beside it. The trend eases to **=**. Justification: the Gulf moved both ways. Flows improved, Iraq de-escalated, oil fell and no new US–Iran fire was reported, while Houthi damage in Riyadh and Russia's large raid pushed the other way. Neither moves the global level.

Shenzhen. The first US–China–Russia leaders' meeting ran for more than an hour on Thursday. The "Declaration toward Peace" covers four areas: UN reform, more refined-petroleum supply for all countries, upholding the immunity of state officials in international courts, and dialogue on reducing nuclear risks and preventing proliferation. It restates that "a nuclear war cannot be won and must not be fought". It does not mention Ukraine or Iran, and it sets no arms-control talks, targets or timetable (Reuters, 19 Nov; AP; Axios). Putin acknowledged the text "did not set ambitious goals" (Reuters). **RUS-12 resolves as a hit:** Trump and Putin met in person on 19 Nov. **GLB-02** (an agreement to open formal arms-control talks) falls to **remote (about 5%)**. A dialogue clause is not an agreement to negotiate. The President left China without meeting Kim Jong Un (see V).

Washington. The President told Fox News in Shenzhen that there are indications Iran is "looking at gases, looking at bio, because we've shut them out with the nuclear". He gave no evidence. Iran's foreign ministry spokesman Baqaei compared the claim to the 2003 Iraq WMD case (CBS News live, 19 Nov). Returning from China, the President told Israel's Channel 12: "I'm not rushing to make any decisions on Iran. We'll see what happens after the new year starts" (CBS, citing Keshet 12). A Pentagon official told senators that the war's cost reached **$48.3 billion** as of 13 Nov (The Hill, 19 Nov).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. INSP SitRep 187, with data to 17 Nov, counts **11,613** confirmed Bundibugyo cases and **5,678** confirmed deaths (CFR 48.9%). That includes **109** new confirmed cases in one day, with Nord-Kivu at 71 and Ituri at 35, and 68 of 178 health zones affected (DRC Ministry of Health, SitRep 187). **GLB-01** (12,000 by 30 Nov) is now **very likely (about 90%)**: 387 cases are needed, and the pace is about 90–110 a day. See new call **GLB-03**.

Analyst Comment. Shenzhen was a spectacle without commitments. The three capitals chose to leave both live wars out of the text, which keeps each free to keep its current course. For the Gulf, the more useful signal is the President's "after the new year" line. Read with Rubio's view that sanctions are working, it points to blockade-plus-deterrence through the lame duck rather than a new campaign. That posture is still compatible with small self-defence strikes like Qeshm. The chemical and biological weapons claim matters for warning work: a new WMD narrative without stated evidence is exactly what a later decision could be built on. We log it and do not score it.

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

Hormuz: attacks. Since the 18 Nov edition, UKMTO has published two more ATTACK products. **211-26**: a tanker was struck by an unknown projectile 13 nm north of Khasab on 17 Nov. A fire was put out, and one crew member is unaccounted for (UKMTO 211-26). JMIC identifies the ship as **NAVIG8 MESSI**, the vessel in ADNOC L&S's statement, and reports it under tow (ADNOC L&S, 18 Nov; JMIC 115). **212-26**: at 16:45 UTC on 18 Nov, a tanker was struck in the engine room 6 nm north of Khasab while outbound. The crew are safe (UKMTO 212-26; Anadolu, 19 Nov). Clearwater Dynamics names the 212-26 ship as the Kuwait-flagged crude tanker **BAHRA** (Clearwater). JMIC counts **four attacks in the strait in 96 hours** (207-, 208-, 211- and 212-26) against none in the previous period. It keeps the strait at **SEVERE**, with "deliberate attacks considered highly likely", and notes repeat strikes on ships already disabled (JMIC 115). **WAR-44 resolves as a hit**: 211-26 and 212-26 are two distinct attacks dated 17–23 Nov. Iran's navy now claims that two more tankers struck mines east of the strait and caught fire (IRNA). No ship is named, and the claim is not corroborated (CBS). Neither missing seafarer has been confirmed dead. Jordan's foreign ministry says the search for its national continues (The National). **WAR-46** stays **roughly even (about 45%)**.

Hormuz: flows. Kpler's 19 Nov briefing puts 7-day Total Hormuz Clearance at **10,014 kbd** to 17 Nov, "just under 60%" of the pre-war 17,148 kbd. The 20 Nov briefing reads **9,376 kbd** to 18 Nov (about 55%), with strait transits at 7,185 kbd and tanker crossings at 9 a day against 50

before the war. Kpler says the latest days are preliminary and "have typically settled 1.5 to 2 times higher" (Kpler, 19 Nov; Kpler, 20 Nov). Flows are now about 42–45% below normal, and the attack count is inside the 5–9 a week band. Iranian mine claims are unverified. So **W-1 scores SIGNIFICANT**, at the upper edge.

Prices. Front-month Brent **settled at $91.98** on Thursday, up 3 cents (Morningstar / Dow Jones Data Talk; Newsquawk). It traded near $92.8 in Asia on Friday after the Riyadh strike (CNBC, 20 Nov). **WAR-31** (a settle above $105 between 6 and 20 Nov) **resolves as a miss**. No settle came close, and Friday's session would need a jump of more than 14%. **WAR-25** (above $120 by 30 Nov) is about 1%.

Gulf states. Kuwait's military command and Bahrain's Defence Force reported further Iranian drone interceptions on 18 Nov. Neither reported damage, and CENTCOM said drones aimed at a US radar in Bahrain were intercepted without damage or injury (Al Arabiya, 18 Nov; NBC News). Kuwait's foreign ministry condemned the attacks on Bahrain and on the UAE tanker (KUNA via Kuwait Times, 19 Nov). A later tally of 2 ballistic missiles and 13 drones intercepted by Kuwait is single-sourced (GAPS). We found no new US strike on Iran since 17 Nov. **WAR-48** (confirmed damage or casualties at a US-hosting base, 18–30 Nov) falls to **about 15%**. **WAR-40** is about 2%.

Qeshm acknowledgment. Axios's Barak Ravid quoted a "Pentagon spokesperson" on X: "Today, US fighter jets struck an IRGC missile launch site on Qeshm Island with precision munitions in self-defense" (APA, citing Axios). CBS and AFP still attribute the same words to an unnamed "US military official" (CBS). This is closer to a Department statement, but it is not yet a published release or a named official. **WAR-36** stays **open at likely (about 65%)**, up from 60%.

Yemen and Saudi Arabia. On Thursday, Saudi Civil Defence said a Houthi attack hit one of the towers of the King Abdullah Financial District, causing "material damage to several floors" and to nearby buildings, with no injuries. State media images identify it as the **Public Investment Fund tower** (Al Jazeera / Reuters, 19 Nov; SPA). The foreign ministry said the kingdom "affirms its full and legitimate right to take all necessary measures to defend its sovereignty". Coalition spokesman Turki al-Maliki reported four ballistic missiles intercepted over the south and a launch pad destroyed (Al Jazeera). Yemeni government forces report about 715 air strikes on Houthi positions on Thursday (Al Jazeera). On Friday the coalition reported two drones and a ballistic missile intercepted toward the south. Houthi health officials say a Saudi strike on a boat carrying displaced people killed 19; that is a party claim (CBS / AFP). UNICEF counts more than 330,000 people displaced by the renewed fighting, and WHO counts 2,260 killed since August (Al Jazeera). The damage is to an office tower, not an energy site, so **WAR-34** (an energy-site shutdown) stays **about 25%**. We found no new UKMTO attack in the southern Red Sea or Gulf of Aden since 210-26. **WAR-42** is about 30%.

Iraq. Under a compromise brokered by senior Shia leaders late on Thursday, state forces began entering **Jurf al-Sakhar** (Jurf al-Nasr) on Friday. Government spokesman Sabah al-Numan said: "The deployment of forces and the handover of areas of responsibility are taking place starting today. The command headquarters has been granted full powers by Prime Minister Ali Al Zaidi" (The National, 20 Nov). AFP images show troops inside the area. The new joint command combines a regular brigade, a Federal Police brigade, an Energy Police regiment and two PMF brigades, and the PMF said its units would begin replacing those on station (Al Jazeera, 19 Nov). Security Media Cell head Saad Maan told Reuters that Kataib forces would move to other areas (Reuters, 19 Nov). Kataib Hezbollah thanked the PMF and the security forces for preventing an escalation that would serve "the enemies" (Al Jazeera). **WAR-47 resolves as a hit.** In Kurdistan, Dana Gas says Khor Mor still cannot produce gas, and it has given no restart date (Kurdistan24; Shafaq). **WAR-35 resolves as a miss.**

Washington: war powers. At 2:42 PM on Thursday the Senate rejected **H.Con.Res.93** by **48 to 51**. Senators Collins, Murkowski and Paul voted aye; Senator Fetterman voted no; Senator Murphy did not vote (Senate Daily Press, 19 Nov; Washington Post). Senator Tillis, who voted for a September version, voted no, calling it "just a statement from Congress" (The Hill). **WAR-37 resolves as a miss.** The next congressional lever is the **11 Dec** funding deadline. Democrats have drafted language that would bar offensive operations without an authorisation (Politico, 20 Nov).

Diplomacy. Foreign Minister Araghchi was in Muscat, where Oman's foreign ministry recorded a meeting with him (Oman MFA). Iran International reports that he said the talks focused on averting a renewed US–Iran war (Iran International, 18 Nov). President Pezeshkian said the late Supreme Leader had insisted on US compensation before any deal, and that the Supreme National Security Council later voted 12 in favour of proceeding (Iran International, 19 Nov). Iran's envoy in Vienna said Iran will review IAEA requests "case-by-case" and will not accept "unconditional and unlimited cooperation" while under attack (ISNA via CBS). No dated US–Iran round has been announced. **WAR-45** falls to **about 10%**.

Israel. Ynet reports that Eisenkot intends to put a "national emergency government" to a Knesset vote even if talks with Likud or the Haredi parties fail, relying on outside support from Ra'am. Liberman says he would vote against such a government, and Bennett says it is not a good option (Ynet, 19 Nov). Likud says unity talks with Yashar continue on Sunday (Jerusalem Post). **WAR-33** (an Eisenkot government by 6 Dec) stays **about 30%**. **WAR-39** (an Israeli strike on Iran) is **about 10%**.

Indicators. W-1 SIGNIFICANT (↓ from Extreme; flows about 55–58%, four attacks in 96 hours, upper edge). W-2 EXTREME (↑ within band; PIF tower damaged, Saudi warning, about 715 government air strikes). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (=; no new US strike, interceptions only). W-6 SIGNIFICANT (=). W-7 ABNORMAL (↓ within band; $91.98). W-8 SIGNIFICANT (=; Muscat and

Doha channels, no dated round). W-9 ABNORMAL (↓ within band; Jurf al-Sakhar handover). Roll-up: 1 Extreme + 5 Significant + 3 Abnormal. We hold **PROBABLE**. Justification (a hold against a mechanical one-level drop): W-1 sits at the top of Significant on preliminary data, JMIC rates the strait SEVERE, and US–Iran direct fire is 72 hours old. Tripwires not met. Trend **=** (from ↑).

Analyst Comment. The past 48 hours removed two near-term flashpoints. Iraq avoided an intra-Shia clash, and the Senate vote is done. They also showed that the US and Iran are both content to fight below the threshold. Iran keeps striking ships and launching at Gulf hosts in ways that can be intercepted, and Washington answers only when its own forces are targeted. The Houthi front is now the most volatile. Hitting the kingdom's sovereign-wealth headquarters is a symbolic escalation, and the Saudi "all necessary measures" language is how Riyadh prepares domestic and Gulf opinion for deeper strikes in Yemen. We judge W-2 the indicator most likely to drive the next level change, not Hormuz. Iran's claims of mine strikes east of the strait, all unverified, may be a bid to deter traffic now that flows are recovering. See new call **WAR-49**.

ME-T2 (Levant), brief. The IDF says its aircraft struck the entrances of an underground former Hezbollah missile-production and storage site near Janta in the Bekaa, after operatives returned to it. No casualties were reported (Times of Israel; Anadolu). Israeli forces again entered western Daraa and Quneitra on 16–17 Nov, raiding homes in Maariya, and UNDOF went to Koya to document the incursion (Arab News). There was no strike in Dahiyeh (**LEV-02**, about 15%) and no Jordanian strike in Syria (**LEV-01**, about 10%). See the SoN below. **ENVIRONMENT FOR CRISIS (=).**

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

The 19–20 Nov night. From 18:00 on 19 Nov, Russia launched **84** Kh-101, Kalibr and Iskander-K cruise missiles, an unstated number of Iskander-M/S-400 ballistic and Zircon missiles, and **404** attack and decoy drones (123 jet-powered). By 10:30, air defences had downed or suppressed 79 cruise missiles, 3 ballistic/Zircon missiles and 380 drones. Hits were recorded at **23 locations**, and the attack was still under way (Ukrinform, citing the Air Force; Interfax-Ukraine). Air Force spokesman Ihnat put it at "80 cruise, up to 20 ballistic, so a hundred missiles of various types and about 400 drones". He said cruise missiles mostly targeted energy in the west, and ballistic missiles mostly hit Kyiv and its bridges (Ukrainska Pravda, 20 Nov). Prime Minister Koretskyi reports **8 killed and 28 injured**, including 6 killed in Kyiv. The Podilsko-Voskresenskyi, Darnytskyi and South bridges were damaged, two people were killed at Lviv's Sknyliv station, and emergency power cuts hit the Lviv, Zakarpattia and Ivano-Frankivsk regions (Kyiv Post, 20 Nov). The raid followed Putin's vow of "far more painful" strikes over the Kerch bridge (Kyiv Post). **RUS-18** (30+ ballistic missiles in one night) is not met at "up to 20", and it stays open at **about 20%** with five nights left. See new call **RUS-24**.

Poland. Poland's Operational Command said unidentified objects may have violated Polish airspace around 06:30. It activated air defences and sent a search team. One burning object was found near Nowy Lipowiec in Biłgoraj county, with no injuries (Interfax-Ukraine; AP; Kyiv Independent). Prime Minister Tusk convened ministers and security chiefs (TVP Info). The object has not been identified, and no Article 4 request has been reported. **RUS-04** is **about 12%**.

Berlin and Shenzhen. At the Coalition of the Willing meeting in Berlin on 19 Nov, the leaders of Germany, France, the UK and Ukraine set out a post-ceasefire package. It includes a US-led ceasefire monitoring mechanism, a European-led multinational force "supported by" Washington, and a legally binding commitment to act if Russia attacks again (Joint Statement, Bundeskanzler). Kushner said Washington had made Moscow "comfortable" with an Article 5-like guarantee. Deputy Foreign Minister Ryabkov answered on 20 Nov that any "quasi-membership" formula is "unacceptable" (RFE/RL, 20 Nov). Zelensky says the next round will be four-way, with Europe. Kushner says Russia agreed to a multilateral format, and Putin says Moscow has invited Europeans to clarify their position (Kyiv Post). Merz suggested the UAE as a venue, but no date has been set (RFE/RL). **RUS-17** (a dated follow-on meeting, by 25 Nov) is **not met** and falls to **about 35%**. **RUS-21** (an in-person round with Europe at the table, by 15 Dec) rises to **about 45%**. **RUS-20** is about 30%. **RUS-23** (Kerch road reopening) is about 10%.

Indicators. R-3 SIGNIFICANT (↑ within band; about 500 weapons, three Kyiv bridges, western power cuts; below the 800 Extreme bar). R-4 SIGNIFICANT (↑ within band; possible missile crossing into Poland, object down). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; Berlin package, Russian rejection, no date). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend ↑ (from =). The promised retaliation for Kerch has arrived at scale, and a NATO state reports a possible airspace violation.

Analyst Comment. Moscow waited until the day after Shenzhen, as we expected, and then answered Kerch with a combined raid aimed at Kyiv's bridges, a mirror of the Kerch strike. The Polish incident is the bigger warning issue. Under the framework, an object that detonates on NATO soil keeps R-4 at Significant. A casualty, or a formal Article 4 request, would be the tripwire. We judge another raid of 500 or more weapons before 5 Dec **unlikely to roughly even (about 40%)**. Russia has now used the size of its raids to signal two times in five days.

EU-T2 (European internal stability). We found no new national protest count since the 17 Nov Interior Ministry figure of 146,000. EI-1 SIGNIFICANT (the 5 Nov count governs until 5 Dec), EI-2 ABNORMAL, EI-3 SIGNIFICANT (carried), EI-4 ROUTINE. **POTENTIAL CRISIS**, trend **=** (from ↓; no new data). **EUR-01** is about 10%.

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

Certification. Alaska is expected to certify its Senate result on **25 Nov** (MID-10, about 85%). A Lancaster County judge ordered a recount in Pennsylvania's **41st state House** district, where the margin is 28 votes. The recount starts on Monday and may delay that race's certification (FOX43). In Ohio's **House District 44** (state legislature), Republican candidate Edward Schimmel asked the Ohio Supreme Court to set aside provisional ballots cast at polling places by voters who moved within the state. The county board says the claim is moot because the ballots are already counted (Democracy Docket, 19 Nov). Both are state-legislative races. We read MID-09 as covering US House and Senate races, so neither counts. **MID-09** stays open at **about 15%**, and **MID-03** at about 15%. This desk scores process risk only and takes no position on any party's programme.

Indicators. M-1 ABNORMAL (=). M-2 ABNORMAL (=). 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 14–20 Nov. The latest SOUTHCOM release is for 27 Oct (SOUTHCOM; Just Security timeline). H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL, H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (=). AMR-02** is about **20%**, and **AMR-01** about 2%.

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

Taiwan. Taiwan's defence ministry reported **1** PLA aircraft sortie for the 24 hours to 06:00 on 19 Nov (it crossed the median line), with 7 PLAN ships, and **8** for the 24 hours to 06:00 on 20 Nov (6 crossed into the northern and southwestern ADIZ). The second report also counted 7 PLAN ships, 2 official ships and **4 balloons** (MND, 19 Nov; MND, 20 Nov). In a separate release, the ministry said **two Russian Tu-95 bombers** entered from the south, flew along the east coast and left northeast of Keelung, shadowed by Taiwanese F-16s (MND press release; Taiwan News). That is the second Russian transit in three days. The seven reports for 14–20 Nov read 10, 1, 4, 5, 9, 1 and 8, a **7-day average of 5.4**. I-1 ROUTINE (=), I-2 ABNORMAL (Russian bombers, balloons over the island), I-3 and I-4 ROUTINE. The topic stays at **ENVIRONMENT** under the 14 Nov override, which lapses on **24 Nov**. **IPA-06** (a report of 20 or more sorties, 16–24 Nov) falls to **unlikely (about 20%)** with four report days left. **IPA-04** is about 40%, and **IPA-05** about 10%.

Korea. The President left China without meeting Kim Jong Un. He blamed his schedule and said the relationship is good, and North Korea did not respond publicly to his overtures (Euronews, 19 Nov; France 24 / AFP, 20 Nov). We found no North Korean launch since 4 Nov, now 16 days (Yonhap). K-1 ABNORMAL, K-2 ROUTINE, K-3 ABNORMAL. **ENVIRONMENT (=). IPA-07** (an in-person meeting by 30 Nov) falls to **remote (about 3%)**.

South China Sea. We found no Philippine report of water cannon use dated 18–20 Nov. The search results were July incidents. SC-1 ROUTINE, SC-2 ABNORMAL, SC-3 ROUTINE. **ENVIRONMENT (=)**, under the +1 override that lapses on 30 Nov. **IPA-02** is about 20%.

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

Sudan and the Horn (AF-T1). The Kordofan Observatory, a local monitor, says a Sudanese military drone struck a school sheltering displaced people in **Ghabish**, West Kordofan, at about 20:00 on 17 Nov. It reports at least 16 killed and about 10 injured, calls the figures preliminary, and says the town hosts about 80,000 displaced people (Darfur24, 18 Nov). On 18 Nov the Joint Force said it repelled an RSF assault on **Kornoi** near the Chad border, while an RSF field commander claimed the town. Neither account is independently confirmed (DefenceMENA, citing Sudan Tribune, Al Jazeera Net and Anadolu). Sudanese forces say they are within about 60 km of En Nahud. We found no UN-reported single event of 50 or more killed. AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL (IOM records small cross-border flight into Chad from Um Baru), AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-01** is about 15%.

Sahel (AF-T2). We found no official or wire report of 20 or more security personnel killed in one attack since 27 Oct. Weekly secondary briefs cite JNIM claims in Mopti and at Mantou (Burkina Faso), which are not corroborated (GAPS). SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** is about 12%, and **AFR-03** about 10%.

Baseline work: Statement of Normalcy, ME-T2 Levant and Syria (refresh; first written 28 Oct, refreshed 3 and 11 Nov)

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SUBJECT: Levant and Syria internal stability (focus: Syria, Lebanon, Jordan border) Normal for this
theatre since the 2024-25 transition in Damascus is a weak but recognised central government, localised
clashes (Suwayda, the coast, the north-east), a heavily armed southern Lebanon under a contested
ceasefire and a US-sponsored framework (26 Jun 2026), and periodic foreign strikes. LV-1 Violence volume
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(Security; L): ACLED weekly events vs 8-week mean. ROUTINE <= +25%; ABNORMAL +25-75%; SIGNIFICANT +75-150%; EXTREME > +150% LV-2 Displacement (Social; Lg): UNHCR/IOM new displacement per week. ROUTINE < 10k; ABNORMAL 10-50k; SIGNIFICANT 50-200k; EXTREME > 200k LV-3 Central control (Political/Security; L): ROUTINE no loss of a provincial capital; ABNORMAL a provincial road cut or a governorate in armed standoff with the centre; SIGNIFICANT loss of a provincial capital; EXTREME loss of Damascus or Beirut security LV-4 Foreign-force incursions (Military; L): ROUTINE isolated cross-border fire; ABNORMAL repeated foreign strikes in one country; SIGNIFICANT foreign strikes in two countries in one week, or foreign forces holding ground; EXTREME a foreign ground offensive toward a capital Refresh note (20 Nov): thresholds unchanged. Clarifications: (1) Israeli raids and home searches in Quneitra and western Daraa are part of the LV-4 norm while forces hold ground there; they move LV-4 only if they reach a provincial capital or cause 10+ deaths in one event; (2) strikes deep in the Bekaa on dormant sites are part of the norm; a strike in Beirut proper or Dahiyeh stays the upper edge of SIGNIFICANT (LEV-02); (3) with no ACLED pull, LV-1 stays unscored rather than estimated from press counts; (4) the Suwayda line of contact (exchanges of fire between internal security forces and the Druze National Guard) keeps LV-3 at ABNORMAL; a lost town or a cut Damascus-Suwayda road moves it up. Baseline sources / period reviewed: Lebanese Health Ministry and NNA, L'Orient Today, UNIFIL and UNDOF statements, SANA and Syrian monitors (named as secondary), Jordanian and Syrian statements (Mar-Nov 2026; this refresh 11-20 Nov) **Current reading.** *Lebanon:* the Health Ministry's most recent cumulative table we can retrieve is still the one for 5 Nov: **4,390 killed and 12,429 injured since 2 March** (MoPH, 5 Nov). The IDF reports a strike on the Janta site in the Bekaa (19 Nov) and demolitions at Mount Dov (17–18 Nov), as above. *Syria:* on 11 Nov, internal security forces and the Druze National Guard exchanged fire west of Suwayda near Tal Hadid, and one Guard member was wounded (Enab Baladi). Israeli forces raided Maariya and fired toward Koya in western Daraa on 16–17 Nov (Arab News). Kuwait's foreign ministry condemned the incursions (KUNA via Kuwait Times). *Jordan border:* we found no new Jordanian strike.

Indicators. LV-1 not scored (no ACLED pull). LV-2 ROUTINE. LV-3 ABNORMAL (the Suwayda standoff persists). LV-4 SIGNIFICANT (Israeli forces hold ground in two countries and are active in both this week). Roll-up: 1 Significant + 1 Abnormal = **ENVIRONMENT FOR CRISIS (=)**. No override.

Analyst Comment. The Levant remains under pressure but is not breaking. Israel is enforcing on two fronts at low casualty cost, and neither Hezbollah nor Damascus is answering by force. Two structural risks are rising beneath that surface: UNIFIL's mandate ends on 31 Dec, and the Health Ministry has published no newer table we can find. **LEV-02** and **LEV-01** stay **unlikely (about 15% and 10%)**.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-2 Houthis / Riyadh	PIF tower damaged; Saudi "all necessary measures"; about 715 air strikes in a day	Damage at a Saudi energy site (WAR-34); mass-casualty strike on a Gulf capital
SIGNIFICANT	EWC	W-1 Hormuz attacks / flows	Four attacks in 96 hours; two seafarers missing; clearance about 55–58%	Crew death confirmed (WAR-46); 2+ UKMTO attacks 24–30 Nov (WAR-49); flows back under 50%
SIGNIFICANT	EWP	W-5 US–Iran direct fire	Interceptions only since the Qeshm strike	Formal US acknowledgment (WAR-36); base damage or casualties (WAR-48) = tripwire watch
SIGNIFICANT	EWC	W-6 Gulf states	Kuwait and Bahrain intercepting; Saudi warning to the Houthis	A GCC state strikes Iran = Extreme (tripwire)
SIGNIFICANT	EWC	W-8 Decision window	Muscat and Doha channels; President "not rushing"	Dated round (WAR-45); Israeli strike (WAR-39); 11 Dec funding fight
SIGNIFICANT	EWC	R-3 Strikes on Ukraine	About 100 missiles and 400 drones; Kyiv bridges; 8 killed	30+ ballistic (RUS-18); 500+ again (RUS-24); 800+ = Extreme
SIGNIFICANT	EWC	R-4 NATO spillover	Possible missile into Poland; object down near Biłgoraj	Article 4 request (RUS-04); a casualty on NATO soil = tripwire
SIGNIFICANT	EWP	R-10 / talks	Berlin package; Ryabkov rejects; four-way format	Dated meeting (RUS-17); round with Europe (RUS-21)
SIGNIFICANT	EWC	AF-1 Sudan lethality	Ghabish school strike (16 killed, local monitor); Kornoi contested	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako	Escorted supply only	Destroyed convoy; attack in a capital
SIGNIFICANT	EWC	LV-4 Levant	Bekaa strike; Quneitra and Daraa incursions	Dahiyeh strike (LEV-02); Jordanian strike (LEV-01)

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
ABNORMAL	EWC	W-9 Iraq	Jurf al-Sakhar handover under way	Clashes with Kataib Hezbollah; attacks on US forces
ABNORMAL	EWC	IP-T1 override	7-day average 5.4; Russian bombers	20+ spike by 24 Nov (IPA-06); override lapses 24 Nov
ABNORMAL	EWC	K-1/K-3 Korea	No meeting; 16 days without a launch	Launch; summit offer
ABNORMAL	EWC	M-1/M-2/M-7 US count	Recounts in state races only	Alaska certification 25 Nov (MID-10); a federal-race suit (MID-09)
ABNORMAL	EWC	HB-1 Health	11,613 confirmed; 109 a day	12,000 (GLB-01); 12,500 (GLB-03)

VIII. PREDICTIONS

Resolved today (6): - **RUS-12 HIT.** Trump and Putin met in person at the Shenzhen trilateral on 19 Nov (Reuters). Logged at 30%; Brier 0.4900. - **WAR-44 HIT.** UKMTO 211-26 (17 Nov) and 212-26 (18 Nov) are two distinct ATTACK products on tankers struck in the Strait of Hormuz (UKMTO 211-26; UKMTO 212-26). Logged at 65%; Brier 0.1225. - **WAR-47 HIT.** Government spokesman Sabah al-Numan said on 20 Nov that the deployment of forces and the handover of areas inside Jurf al-Nasr are under way (The National). Logged at 50%; Brier 0.2500. - **WAR-37 MISS.** The Senate did not adopt H.Con.Res.93, 48–51, on 19 Nov (Senate Daily Press). Logged at 45%; Brier 0.2025. - **WAR-31 MISS.** No front-month Brent settle above $105 between 6 and 20 Nov. The 19 Nov settle was $91.98, and Friday's session would need a rise of more than 14% (Morningstar / Dow Jones). Logged at 40%; Brier 0.1600. - **WAR-35 MISS.** Dana Gas reports that Khor Mor remains unable to produce gas, and no restart has been reported through 20 Nov (Kurdistan24). Logged at 45%; Brier 0.2025.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 27 Nov). - **IPA-06** (a 20+ sortie MND report dated 16–24 Nov, 60%): 4, 5, 9, 1, 8 so far. *Open; about 20%.* - **RUS-17** (a dated follow-on meeting announced 11–25 Nov, 45%): four-way format agreed in principle, no date. *Open; about 35%.* - **RUS-18** (30+ ballistic in one night by 25 Nov, 30%): "up to 20" on 19–20 Nov. *Open; about 20%.* - **WAR-40** (damage from the 12–13 Nov strikes confirmed by 27 Nov, 30%): none. *Open; about 2%.*

Other open: WAR-01/02/04/25/33/34/36/39/42/45/46/48, RUS-01/04/20/21/23, LEV-01/02, EUR-01, IPA-02/04/05/07, AFR-01/02/03, AMR-01/02, MID-03/09/10, GLB-01/02. Notable: **WAR-36** is about 65%, because the Qeshm wording is now attributed to a Pentagon spokesperson. **WAR-46** is about 45%, with two seafarers missing.

New predictions (dated 2026-11-20): - **WAR-49:** UKMTO publishes at least two separate WARNING/ATTACK products for merchant vessels struck or attacked in the Strait of Hormuz, Persian Gulf or Gulf of Oman, with incident dates 24–30 Nov 2026. Suspicious approaches and Iranian claims alone do not count. **70%, likely.** Resolve by 2026-12-02. - **RUS-24:** The Ukrainian Air Force reports a single overnight Russian attack, dated 21 Nov–5 Dec 2026, in which 500 or more drones and missiles combined were launched. **40%, unlikely to roughly even.** Resolve by 2026-12-06. - **GLB-03:** An INSP situation report or WHO product dated on or before 30 Nov 2026 reports at least 12,500 confirmed Bundibugyo cases in the DRC. **60%, likely.** Resolve by 2026-11-30.

IX. GAPS AND UNVERIFIED

- **Ship identities:** NAVIG8 MESSI (211-26) is named by JMIC, citing India's shipping minister, and by Vanguard Tech. India's minister gave a different date and crew account. BAHRA (212-26) is named only by Clearwater Dynamics. UKMTO withholds both names.
- **Missing seafarers:** the Indian national from *Tara Gas* and the Jordanian national from the ADNOC vessel are both unaccounted for. No death is confirmed.
- **Iranian mine claims (19–20 Nov):** two tankers are said to be burning east of the strait (IRNA). No ship is named, and no UKMTO product matches.
- **Kuwait tally:** "2 ballistic missiles and 13 drones intercepted" appears only in a single secondary outlet. KUNA's 19 Nov item mentions drones only.
- **Qeshm wording:** the "Pentagon spokesperson" attribution comes from a reporter's X post relayed by APA. CBS and AFP say "US military official". We found no published release.
- **Yemen:** the Houthi claim of 19 killed on a boat, the reported Saudi strike in Taiz, and the government's count of "715 air strikes" are party claims.
- **Riyadh:** the PIF tower identification comes from state-media images (Al Jazeera). Civil Defence says only "one of the towers".
- **Ukraine:** the Air Force did not give a ballistic launch count. "Up to 20" is the spokesman's on-air estimate, and the raid was still under way at the 10:30 report. The Polish object is unidentified.
- **US elections:** we judge that the Ohio HD-44 and Pennsylvania HD-41 actions are state-legislative and outside MID-09. The 6 Nov FL-27 suit sought a supervisor's recusal, not a halt to certification.

- **Taiwan:** a search summary gave 9 sorties for the 19 Nov MND report. That figure is from a 2025 page. The 2026 page (88301) reads 1 sortie, and we use that.
- **Sudan:** the Ghabish toll comes from a local monitor and is preliminary. The Kornoi accounts are party claims.
- **Sahel:** JNIM claims in Mopti and Mantou are uncorroborated. Burkina Faso remains a visibility gap.
- **No ACLED pull:** LV-1 is unscored. The Lebanese Health Ministry has published no cumulative table after 5 Nov that we could find. There is no new French protest count, and no OAT-Bund close since 13 Nov, so EI-3 is carried.
- **19 Nov edition:** not produced. Events of 18–19 Nov are folded in here.
- 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 211-26 and 212-26; JMIC Advisory Update 115 (19 Nov); Kpler media briefings (19 and 20 Nov); ADNOC L&S statement (18 Nov); SPA and Saudi Civil Defence; Oman MFA; US Senate Daily Press (19 Nov); Taiwan MND PLA activity reports (19 and 20 Nov) and press release; DRC Ministry of Health / INSP SitRep 187; Lebanese MoPH; Joint Statement of Germany, France, the UK and Ukraine (19 Nov); Ukrainian Air Force (via Ukrinform, Interfax-Ukraine, Ukrainska Pravda); Polish Operational Command (via Interfax-Ukraine, AP); SOUTHCOM; Dana Gas (via Kurdistan24, Shafaq); Morningstar / Dow Jones Data Talk. Reporting as linked (Reuters, AP, AFP, Axios, CBS News, CNBC, Washington Post, The Hill, Politico, Al Jazeera, Al Arabiya, Anadolu, Arab News, The National, NBC News, Kuwait Times/KUNA, Iran International, IRNA, APA, Jerusalem Post, Ynet, Times of Israel, Kyiv Post, Kyiv Independent, RFE/RL, TVP Info, Euronews, France 24, Yonhap, Taiwan News, Darfur24, DefenceMENA, Enab Baladi, FOX43, Democracy Docket, Clearwater Dynamics, Newsquawk, Just Security).

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