WIRE World Instability

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This edition covers 20 November to 06:00 EST on 21 November. Comparisons are against the 20 Nov edition. Baseline work today: the European internal stability (EU-T2) Statement of Normalcy is refreshed below (first written 31 Oct, refreshed 12 Nov). Next in the rotation: AM-T2 (hemispheric security).

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend turns back to ↑. UKMTO logged three more tankers struck near Khasab, one on 20 Nov and two within an hour on 21 Nov, for seven attacks in seven days. The Saudi-Houthi war widened to ports and power: the coalition struck Hodeidah, the Houthis claimed hits on the Shuqaiq power station and Jizan port, and they told shipping to leave Jeddah. Three ballistic missiles were intercepted toward Riyadh on 21 Nov. The President said that if Iran builds a dirty bomb, "we're going to fight". Europe/Russia stays ↑: Poland confirms a Kh-101 cruise missile, a second missile and a jet drone came down on its soil, and the Prime Minister calls it "an intentional provocation". A PLA "joint combat readiness patrol" off Taiwan (21 sorties) resolves **IPA-04** as a hit. Two predictions 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	Hormuz strikes resume; Saudi-Houthi port war; Russian missiles on NATO soil	↑
Global: health and bio (GL-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	SitRep 188: 11,680 confirmed, 67 new	=
Middle East: widespread war (ME-T1)	PROBABLE CRISIS	EXTREME	W-2: Hodeidah struck, Jeddah threatened, 3 missiles at Riyadh; W-1: 214-, 215-, 216-26	↑
Middle East: Levant and Syria (ME-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Southern Lebanon strikes; Quneitra and Daraa incursions	=
Europe/Russia: Russian aggression (EU-T1)	POTENTIAL CRISIS	SIGNIFICANT	Kh-101 detonates in Poland; Warsaw: "intentional provocation"; no talks date	↑
Europe: internal stability (EU-T2)	POTENTIAL CRISIS	SIGNIFICANT	OAT-Bund back above 150 bp (155.4 bp, 20 Nov); budget in the Senate	↑
Americas: US election integrity (AM-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Ohio court order on state-House ballots is moot; Alaska certifies 25 Nov	=
Americas: hemispheric security (AM-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	US-Venezuela military cooperation deal; no vessel strike since 27 Oct	↓
Indo-Pacific: Taiwan Strait (IP-T1)	ENVIRONMENT FOR CRISIS	ABNORMAL	Joint combat readiness patrol: 21 sorties, 15 across the median line	↑
Indo-Pacific: Korean Peninsula (IP-T2)	ENVIRONMENT FOR CRISIS	ABNORMAL	Kim tours school factories; 17 days without a launch	=
Indo-Pacific: South China Sea (IP-T3)	ENVIRONMENT FOR CRISIS	ABNORMAL	No dated, verified water-cannon event	=
Africa: Sudan and the Horn (AF-T1)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Sudanese offensive around En Nahud and Abu Zabad; Nyala struck	=
Africa: Sahel (AF-T2)	ENVIRONMENT FOR CRISIS	SIGNIFICANT	Bamako supplied by escorted convoys; no verified 20+ event	=

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

No level changes since 20 Nov. Trend changes: GL-T1 and ME-T1 = → ↑; EU-T2 = → ↑ (spread confirmed back above 150 bp); IP-T1 = → ↑ (joint combat readiness patrol); AM-T2 = → ↓ (US-Venezuela cooperation deal). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 20 November). Within band: **W-1** SIGNIFICANT ↑ (three ATTACK products in about 15 hours; seven attacks in the seven days to 21 Nov, at the top of the 5–9 band); **W-2** EXTREME ↑ (coalition strike on Hodeidah port; Houthi claims on the Shuqaiq power station and Jizan port; Jeddah evacuation warning; three ballistic missiles toward Riyadh); **W-7** ABNORMAL ↑ (Brent settled $92.57, from $91.98); **W-8** SIGNIFICANT ↑ (Araghchi restates conditions-first terms; the President calls them unacceptable); **R-4** SIGNIFICANT ↑ (a Kh-101 detonated near Nowy Lipowiec; three impact sites; Warsaw calls it deliberate); **EI-3** SIGNIFICANT (observed 155.4 bp, no longer carried); **I-1** ROUTINE → ABNORMAL by judgment (a named joint combat readiness patrol with 15 median-line crossings; the 7-day average is still 4.3); **H-3** ABNORMAL ↓ within band (US-Venezuela cooperation agreement).

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

The family level stays at the Middle East's **PROBABLE CRISIS**, set by **W-2** at Extreme with five Significant indicators beside it. The trend turns back to ↑. Justification: within 24 hours, three Gulf-region pressure points moved the wrong way at once. Hormuz strikes resumed after a two-day pause, the Saudi-Houthi war spread to ports and power plants, and Russian missiles came down on NATO soil, which Warsaw calls deliberate. Nothing moved toward settlement. The US-Iran channel through Qatar produced no reported progress (Times of Israel, 20 Nov), and Moscow says no new Ukraine round is agreed (Vedomosti, citing Ryabkov to TASS, 20 Nov).

Washington. At a White House news conference on Friday, the President said of reports that Iran is planning a radiological attack on Washington: "There is a rumor that they are building a dirty bomb. If they do, we're going to fight." He added: "We know a lot about what's happening in Iran ... We will not allow that" (Anadolu, 20 Nov). The remark follows a CNN report citing seven US officials on Iranian contingency planning. On 17 Nov the White House said there were "no credible threats" to the homeland (The Guardian, 17 Nov). The President also said Iran wants a deal, "but they don't want to make a deal that's acceptable to me" (Al Arabiya, 21 Nov). Treasury designated four Iranians it calls "oil trustees" who collect revenue from sanctioned oil sales (Treasury, 20 Nov; OFAC recent actions). On Capitol Hill, Congress has until **11 Dec** to pass a stopgap. Senate Democrats are divided on whether to tie it to Iran-war limits, and Senator Ron Johnson opposes doing so (NPR, 20 Nov).

Vienna. At the IAEA Board (18–20 Nov), the Director General reported that Iran has given no information or access except at Bushehr. The Agency therefore cannot verify that no nuclear material has been diverted, and he urged gradual technical steps toward the inspectors' return (UN Unifeed; EU statement on item 3(f)).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. SitRep 188, with data to 18 Nov, counts **11,680** confirmed Bundibugyo cases and **5,715** deaths, 67 more cases than SitRep 187 (CESNET dashboard, citing INSP SitRep 188). The ministry's own page still shows SitRep 187 (sante.gouv.cd). WHO's Emergency Committee met for the third time on 17 Nov, and no new recommendations have been published. **GLB-01** (12,000 by 30 Nov) needs 320 more and stays **likely (about 80%)**. **GLB-03** (12,500) falls to **unlikely (about 35%)**: the daily pace slowed from 109 to 67.

Analyst Comment. "If they do, we're going to fight" is the clearest public conditional the President has given for a renewed campaign. It is tied to a rumor he did not substantiate, after his own White House said there was no credible threat. Read with "after the new year" (19 Nov), the plain reading is still deterrent signalling, not a decision. But a public casus belli that is not anchored in evidence is exactly the kind of signal warning work must log. We log it and do not score it as a strike indicator.

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

Hormuz: attacks. UKMTO published three more ATTACK products. **214-26**: at 15:00 UTC on 20 Nov, an outbound tanker was struck on the port bow by an unknown projectile 8 nm north of Khasab. The company security officer reported a fire on board and no casualties (UKMTO 214-26). **215-26**: at 05:00 UTC on 21 Nov, an outbound tanker was hit on the stern 11 nm north of Khasab, with no reported casualties (UKMTO 215-26). **216-26**: at 05:50 UTC on 21 Nov, an outbound tanker was hit in the engine room 17 nm east of Khasab, again with no reported casualties (UKMTO 216-26). "Military authorities" are the source for both 21 Nov reports, and the environmental impact is unconfirmed. Iran's Revolutionary Guards said the 20 Nov tanker "hit a mine" near Khasab, and Iranian media reported a missile strike on Qeshm Island (Arab News / Reuters, 20 Nov). UKMTO describes each case as an unknown projectile, not a mine. Counting from 15 Nov, UKMTO has now published seven Hormuz ATTACK products in seven days (207-, 208-, 211-, 212-, 214-, 215- and 216-26). All three new ships were outbound, and none has been named. **WAR-49** (two or more UKMTO attacks dated 24–30 Nov) rises to **likely (about 80%)**. No crew deaths were reported in the new strikes. The two seafarers missing since 16–17 Nov have still not been confirmed dead, so **WAR-46** stays at **about 40%**.

UKMTO **213-26** (20 Nov, 11:02 UTC) was a different kind of event. In the Gulf of Aden, 95 nm southwest of Al Mukalla, six armed men in a skiff fired four shots at an eastbound bulk carrier, and its security team returned warning shots. UKMTO classes it as SUSPICIOUS ACTIVITY

(UKMTO 213-26). It does not meet **WAR-42**, which excludes approaches without an attack and stays **about 30%**.

Hormuz: flows. We found no Kpler briefing dated 21 Nov. The 20 Nov briefing (data to 18 Nov) still governs: total Hormuz clearance of **9,376 kbd**, about 55% of pre-war, and tanker crossings at 9 a day against 50 before the war (Kpler, 20 Nov). **W-1 scores SIGNIFICANT, at the upper edge (↑ within band).** Seven attacks in seven days is inside the 5–9 band, and flows are about 45% below normal. Iranian mine claims are not corroborated, so the "new mining" Extreme criterion is not met.

Prices. Front-month Brent **settled at $92.57** on Friday, up 59 cents, but down 3.4% on the week, its third straight weekly fall (EnergyNow, citing Reuters settlements; Euronext / Reuters). **W-7 ABNORMAL** (↑ within band). **WAR-25** (above $120 by 30 Nov) is about 1%.

Yemen and Saudi Arabia. On Friday, the Saudi-led coalition struck **Hodeidah port**. It said it destroyed capabilities used to smuggle weapons and ballistic missiles, after first warning civilians to leave. It also reported operations in Sanaa against missile and drone capabilities and ongoing operations in Saada and Taiz (Reuters, 20 Nov; The National). Houthi spokesman Yahya Saree told workers to "evacuate immediately" from Saudi Red Sea ports and urged shipping companies to remove their ships. He also told airlines to avoid Saudi airspace, except near Mecca and Medina (Reuters; SABA; HOCC notice). The Houthis then claimed "accurate and direct" strikes on the **Shuqaiq power station** and **Jizan port** (Middle East Eye, 20 Nov). The coalition says it intercepted two ballistic missiles toward Jazan, with shrapnel falling in the Shuqaiq area, and it has not confirmed any damage (Reuters). On Saturday, coalition spokesman Turki al-Maliki said air defences intercepted **three ballistic missiles launched toward Riyadh**. Civil Defence issued an alert and then an all-clear, and no injuries were reported (SPA, 21 Nov; Al Jazeera). The Houthis say coalition strikes killed 41 people in 24 hours, which is a party claim (Middle East Eye). The UN warned that strikes on Hodeidah could disrupt humanitarian supply (The National). On the ground, Houthi forces are reported about 80 km north of Aden and 110 km to its west, after government forces pulled back to defend the city (Al-Monitor; The National, 18 Nov). Shuqaiq is a power and water site, not an oil or gas facility, so even confirmed damage there would not meet **WAR-34**, which stays **about 25%**. See new call **WAR-50**.

US-Iran. Iran denies that a US-Israeli missile hit Qeshm on 20 Nov. Officials say the explosions came from controlled disposal of unexploded munitions from earlier attacks (Anadolu; Iran International). We found no US statement about a new strike. The IRGC says a new air-defence system shot down a US MQ-9 over the strait on Saturday, which it calls the 58th. The US has not confirmed it (Tasnim, 21 Nov; Al Jazeera). **WAR-36** stays **open at about 60%**. The 17 Nov Qeshm strike is still attributed only to unnamed US officials, which falls short of the criterion's "on the record" requirement. **WAR-48** (damage at a US-hosting base) is **about 15%**, and **WAR-40** about 2%.

Diplomacy. Witkoff and Kushner met Qatar's Prime Minister and envoy in Berlin on 19 Nov on reviving the ceasefire and nuclear talks (Axios, 20 Nov), with no reported progress (Times of Israel). Foreign Minister Araghchi told state media that Iran's two-day plan still stands. Under it, Washington would lift sanctions on day one, and Iran would reopen the strait and begin talks on day two. He said the seven conditions "must be implemented", but their timetable is flexible. He ruled out shipping the 60% stockpile abroad and named Qatar and Pakistan as the active channels (Xinhua, 21 Nov; Al Jazeera). **WAR-45** (a dated US-Iran round by 30 Nov) is **about 8%**.

Israel. Eisenkot says he will put a government to a Knesset vote before his mandate expires on 6 Dec: a unity government, a deal with the Haredi parties, or a minority "national emergency government" with outside support from Ra'am and the Joint List. Liberman says he would vote against the minority option (Jerusalem Post, 20 Nov; Ynet, 20 Nov). Netanyahu called the moment "a historic crossroads" and said he had briefed Eisenkot, Bennett and Liberman on "the challenging security situation". Likud and Yashar negotiators meet again on Sunday (Ynet). **WAR-33** stays **about 30%**, and **WAR-39** (an Israeli strike on Iran) **about 10%**.

Iraq. The Jurf al-Sakhar handover continues without reported clashes. A joint headquarters is overseeing the deployment (Reuters, 20 Nov; Al Jazeera).

Indicators. W-1 SIGNIFICANT (↑ within band; 7 attacks in 7 days, upper edge). W-2 EXTREME (↑ within band; Hodeidah struck, power plant and port claimed, Jeddah threatened, three missiles toward Riyadh). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (=; Qeshm blasts denied as a strike; MQ-9 claim unverified). W-6 SIGNIFICANT (=; Saudi strikes in Yemen). W-7 ABNORMAL (↑ within band; $92.57). W-8 SIGNIFICANT (↑ within band; conditions-first on both sides, no progress in Berlin). W-9 ABNORMAL (=). Roll-up: 1 Extreme + 5 Significant + 3 Abnormal. We hold **PROBABLE**. Justification (a hold against a mechanical one-level drop): W-1 is back at the top of its band after renewed strikes, JMIC rates the strait SEVERE, and W-2 is expanding to new target sets. Tripwires not met. Trend ↑ (from =).

Analyst Comment. The 48-hour lull we noted on 20 Nov is over. Three outbound tankers were hit within 15 hours, two of them within an hour, which points to a deliberate tempo rather than chance. Iran's "mine" framing of the 20 Nov ship fits a pattern of claiming effects while denying the act. W-2 is now the faster-moving front. The coalition's Hodeidah strike and the Houthi answer against a power plant and a port mean both sides are targeting each other's economic infrastructure, and Jeddah is now a named target. We judge damage at a named Saudi power, water or port facility, confirmed by Saudi sources by 5 Dec, **unlikely to roughly even (about 35%)** (new **WAR-50**).

ME-T2 (Levant), brief. Israeli strikes hit four districts of southern Lebanon on 20 Nov, and drones were reported over Beirut and Sidon (Anadolu, 20 Nov). Lebanese outlets report artillery fire and drone explosions in southern towns overnight into 21 Nov (LBN News). In Syria, Israeli forces again entered the Quneitra and Daraa countryside, and mines were detonated near the "Sufa 53" line (Al Jazeera Net, 20 Nov).

There was no strike in Dahiyeh (**LEV-02**, about 15%) and no Jordanian strike in Syria (**LEV-01**, about 8%). LV-1 not scored (no ACLED pull), LV-2 ROUTINE, LV-3 ABNORMAL, LV-4 SIGNIFICANT. **ENVIRONMENT FOR CRISIS (=).**

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

Poland. Prime Minister Tusk said: "we know for certain that what fell on Polish soil is from Russia." The government's statement lists a **Kh-101 cruise missile** that came down near Nowy Lipowiec (Biłgoraj county), a second object in forest near Rudnik nad Sanem (Nisko county), and, on preliminary findings, pieces of a jet-powered drone spread across farmland at Mołodycz (Jarosław county). There was no damage and no casualties. Tusk said the incident "does not look like an accident" in his own and partners' assessment, and that "we are dealing with an intentional provocation by Russia." One object fell near where Coalition of the Willing exercises were under way. The government calls a link to the exercises "a hypothesis at this stage" (Chancellery of the Prime Minister, 20 Nov). Defence Minister Kosiniak-Kamysz said the presence of defence ministers and eight chiefs of staff at the drills "suggest[s] that the convergence of these events is no accident" (Reuters, "Poland condemns Russian 'provocation' after three airspace violations", 20 Nov). A local mayor said the roughly 7-metre object fell at 05:40 GMT, and air traffic controllers at Rzeszów were evacuated (Reuters). The Lublin regional prosecutor's military affairs department has opened an investigation with the Military Police and military counter-intelligence (Lublin Regional Prosecutor, 20 Nov). Secretary General Rutte called the violations "clearly dangerous", said NATO jets were scrambled, and visits Warsaw today (Dziennik.pl, citing Rutte on X). Poland says it will ask NATO for more eastern-flank support (Reuters). As of 08:00 CET on 21 Nov, no formal Article 4 request had been made (GSC risk update, 21 Nov). We found no Kremlin comment. **RUS-04** (an Article 4 request by 31 Dec) rises to **about 20%**.

The 20–21 Nov night. From 18:00 on 20 Nov, Russia launched **3 ballistic missiles** (Iskander-M/KN-23/S-400) and **148 drones** (87 jet-powered). By 08:00, 117 drones had been downed or suppressed, with hits at 19 locations and the attack still under way (Interfax-Ukraine, citing the Air Force; Ukrainska Pravda). Missile and drone strikes on central **Kryvyi Rih** on the evening of 20 Nov and overnight killed a 20-year-old paramedic and a seven-year-old boy and injured 58 (Ukrainska Pravda). A morning missile attack on Kyiv set homes on fire in the Podilskyi district (Kyiv Post). At about 150 weapons, this night is in the Abnormal band, so **R-3 stays SIGNIFICANT** on the 19–20 Nov raid. **RUS-18** (30+ ballistic missiles in one night by 25 Nov) falls to **about 10%**. **RUS-24** (500+ in one night, 21 Nov–5 Dec) stays **about 40%**.

Talks. Deputy Foreign Minister Ryabkov told TASS on 20 Nov that there are no "agreements or understanding" on a new round in the trilateral format used in Abu Dhabi (Vedomosti). Axios reports that the US envoys, Zelensky and European national security advisers met in Berlin to prepare for a next round "possibly next week". Putin said publicly that it is "pointless" to discuss European security without the Europeans (Axios, 19 Nov). **RUS-17** (a dated follow-on meeting announced by 25 Nov) falls to **about 15%**. **RUS-21** (an in-person round with Europe by 15 Dec) is **about 40%**.

Indicators. R-3 SIGNIFICANT (=; the 19–20 Nov raid governs; 21 Nov about 150 weapons). R-4 SIGNIFICANT (↑ within band; a missile detonated on NATO soil at three sites, which the host government calls deliberate. That is below the Extreme bar, which needs casualties or an Article 4 or 5 invocation). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; no date). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend ↑ (=; still ↑).

Analyst Comment. This is the most serious NATO-soil incident in the period we track. It is not a stray drone. It involves a cruise missile, a second missile and a jet drone, and the host government publicly calls it intentional. The plain explanation is a route flown for the western Ukraine energy strikes that clipped Polish airspace. The competing explanation, which Warsaw now favours, is signalling aimed at the Coalition of the Willing exercises. Either way, the Article 4 tripwire is one decision away. We judge an Article 4 request by 31 Dec **unlikely (about 20%)**, because Warsaw is choosing to ask for "more support" rather than consultations.

EU-T2 (European internal stability). See the Statement of Normalcy refresh below. **POTENTIAL CRISIS (↑). EUR-01** (OAT-Bund above 175 bp by 30 Nov) is **about 10%**. See new call **EUR-06**.

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

Certification. On 20 Nov, the Ohio Supreme Court ordered Lucas County to keep sealed any still-unopened provisional ballots from voters who had moved between counties, pending its decision in *Schimmel v. Lucas County Board of Elections* (Ohio Supreme Court, 2026-Ohio-4598; Democracy Docket). The county board says it had already opened and counted the relevant ballots, so none remain subject to the order (WTOL). The race is Ohio House District 44, a state-legislative race, so it is outside **MID-09** (federal races), which stays **about 10%**. The FL-27 machine recount finished on 10 Nov with the incumbent ahead by 1,086 votes (Miami-Dade County). Alaska's Senate certification is expected on **25 Nov** (**MID-10**, about 85%). The DOJ suit to block certification of any Alaska Senate result "impacted by voter confusion" (*United States v. Alaska*, filed 22 Oct) was dismissed on 1 Nov, and DOJ appealed the same day. The Division of Elections filed a response at the 9th Circuit on 20 Nov (Democracy Docket case page). Both filings predate the MID-09 window (6–30 Nov), so they do not count toward it, but an appellate order before 25 Nov would bear on **MID-10**. **MID-03** stays about 12%. 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). On 18 Nov in Caracas, Venezuela's interim government and Defense Secretary Hegseth signed a military cooperation agreement covering training, equipment and joint action against drug-trafficking groups under the "Americas Counter Cartel Coalition". Military cooperation between the two countries had been cut off since 2005 (BBC). We found no SOUTHCOM announcement of a lethal vessel strike after 27 Oct (SOUTHCOM press releases). H-1 ABNORMAL, H-2 ROUTINE, H-3 ABNORMAL (↓ within band), H-4 ROUTINE. **ENVIRONMENT FOR CRISIS (↓). AMR-02** (a lethal strike dated 14–30 Nov) falls to **about 15%**, and **AMR-01** is **about 1%**.

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

Taiwan. At 12:10 Taipei time on 21 Nov, Taiwan's defence ministry said that from 08:46 it had detected **21** PLA aircraft, including J-10, J-16, Su-30, H-6K, KJ-500 and YY-20 types. Fifteen crossed the median line and its extension into Taiwan's central and southwestern airspace, working with PLA ships "under the name of a so-called 'joint combat readiness patrol'" (MND press release 88314). The daily report for the 24 hours to 06:00 on 21 Nov counted only **2** sorties, 6 PLAN ships, 1 official ship and 4 balloons (MND 88313). **IPA-04 resolves as a hit.** The patrol falls inside the period of the 22 Nov daily report, so **IPA-06** (a 20+ sortie report dated 16–24 Nov) rises to **very likely (about 90%)**. Its resolution waits for that report. The 7-day average of daily reports (15–21 Nov) is 4.3. I-1 is scored **ABNORMAL** as a judgment call: a named readiness patrol with 15 median-line crossings is above the norm, even though the average is under 20. I-2 ABNORMAL, I-3 and I-4 ROUTINE. **ENVIRONMENT (↑).** The +1 override that was due to lapse on 24 Nov is extended to **1 Dec**. Justification: the readiness patrol renews the observed coercive signal. **IPA-05** (45+ in one report) is about 10%.

Korea. State media show Kim Jong Un touring school-equipment factories, with no reference to US dialogue (KCNA; Chosun Biz, 21 Nov). We found no launch since 4 Nov, now 17 days (Yonhap). K-1 ABNORMAL, K-2 ROUTINE, K-3 ABNORMAL. **ENVIRONMENT (=). IPA-07** is about 2%.

South China Sea. A Manila Times item dated 21 Nov says the Philippine Coast Guard reported Chinese water-cannon use against government ships delivering fuel near Scarborough Shoal. It gives no incident date, and we could not find a PCG statement. The last dated incident we can confirm was in July (Manila Times; see GAPS). SC-1 ROUTINE, SC-2 ABNORMAL, SC-3 ROUTINE. **ENVIRONMENT (=)**, under the 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). On 20 Nov, Sudan's Special Operations Forces spokesman Mohamed Didan said that government forces, the Joint Force and allied formations had dismantled RSF positions in 10 areas around **En Nahud** and **Abu Zabad** in West Kordofan, after about a week of offensive operations (SaharaWire; Anadolu carried the same statement). Government air strikes hit RSF headquarters in **Nyala** (Sudan Tribune). Local reporting cites more than 2,500 people displaced near Abu Zabad (Sudan Truth evening bulletin, 20 Nov). We found no UN-reported single event of 50 or more killed. AF-1 SIGNIFICANT, AF-2 ABNORMAL, AF-3 ABNORMAL, AF-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-01** is about 12%.

Sahel (AF-T2). Escorted convoys continue into Bamako: 840 tankers arrived on 16 Nov, bringing the month's total to 1,505 (APAnews). A secondary report says at least 15 soldiers and three civilians were killed in three coordinated attacks in Mali, without a date or official source (New World TV; GAPS). We found no official report of 20 or more security personnel killed in one attack. SA-1 ROUTINE, SA-2 SIGNIFICANT, SA-3 ROUTINE, SA-4 ABNORMAL. **ENVIRONMENT FOR CRISIS (=). AFR-02** is about 10%, and **AFR-03** about 10%.

Baseline work: Statement of Normalcy, EU-T2 European internal stability (refresh; first written 31 Oct, refreshed 12 Nov)

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SUBJECT: European internal stability QUESTION: could a government collapse, mass unrest or a sovereign-
debt shock destabilize a core EU state? (Internal Stability; PMESII-PT: Political, Economic, Social)
Normal 2024-mid 2026: frequent minority governments and confidence votes without collapse; strikes and
marches below 250k nationally; OAT-Bund 70-85 bp, BTP-Bund 100-150 bp; populist gains inside existing
coalitions. EI-1 Protest scale (police figures) R: < 50k nationally | A: 50-250k S: > 250k, or a
declared emergency/curfew E: multi-day violent unrest in 3+ cities EI-2 Government stability (parliament
sites) R: routine votes | A: a government or top court in open standoff, or a confidence vote pending |
S: a government falls in a core state (FR, DE, IT, ES, PL, NL) | E: no functioning government plus a
budget or debt crisis EI-3 OAT-Bund or BTP-Bund 10y spread R: < 100 bp | A: 100-150 | S: 150-250 E: >
250 or ECB TPI activation EI-4 Electoral breakthrough (official results) R: none | A: populist first
place in a regional vote | S: populist first place nationally | E: populist majority government Refresh
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note (21 Nov): thresholds unchanged. Clarifications: (1) EI-1 keeps the 30-day rule (largest national interior-ministry count in the last 30 days), so the 5 Nov count governs until 5 Dec; (2) EI-3 scores the latest official close and is marked "carried" when no close newer than 5 trading days is found; (3) under EI-2, a 49.3 engagement is ABNORMAL (a censure vote pending); a successful censure is SIGNIFICANT; (4) Russian munitions on NATO soil are scored under EU-T1 R-4, not here, unless they trigger domestic unrest or a government crisis. Baseline sources / period reviewed: French interior ministry (via AFP, franceinfo), Senate and Assembly records, Banque de France and Bundesbank yields (via ideal-investisseur), ANSA/Teleborsa/Borsa Italiana closes, Polish government releases. Period: 12-20 Nov 2026

Current reading. *EI-1:* the 5 Nov national day (575,000, interior ministry) still governs. The 17 Nov public-sector day drew 146,000. *EI-2:* after the Assembly rejected the 2027 budget at first reading, the Senate began examining it on 20 Nov, and the government is again considering Article 49.3 (CNews, 20 Nov). Socialist leader Faure says a budget passed by ordinance would "necessarily" bring a censure motion (BFMTV). In Poland, the President signed off the delayed cabinet appointments on 20 Nov, which eases one standoff (Chancellery release, above). *EI-3:* the **OAT-Bund spread was 155.4 bp on 20 Nov** (OAT 4.87%, Bund 3.32%) (ideal-investisseur, BdF and Bundesbank data). The **BTP-Bund spread closed at 109.9 bp** (ANSA, 20 Nov; Borsa Italiana / Radiocor). *EI-4:* no national vote in a core state.

Indicators. EI-1 SIGNIFICANT (575k on 5 Nov). EI-2 ABNORMAL (French budget route open; 49.3 back on the table). EI-3 **SIGNIFICANT** (observed, 155.4 bp; no longer carried). EI-4 ROUTINE. Roll-up: 2 Significant + 1 Abnormal = **POTENTIAL CRISIS**, trend ↑ (from =). No override.

Analyst Comment. The French spread is widening again as the budget nears its decision point. A 49.3 engagement in the next two weeks would open a censure vote, and the Socialists are signalling no forbearance. We judge a close at or above 160 bp between 23 Nov and 4 Dec **roughly even, leaning unlikely (about 40%)** (new **EUR-06**). A close above 175 bp by 30 Nov (**EUR-01**) is about 10%.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-2 Houthis / Saudi Arabia	Hodeidah struck; Shuqaiq and Jizan claimed; Jeddah evacuation warning; 3 missiles at Riyadh	Saudi-confirmed damage at a power, water or port site (WAR-50); energy-site shutdown (WAR-34); mass-casualty strike on a Gulf capital
SIGNIFICANT	EWC	W-1 Hormuz attacks / flows	7 UKMTO attacks in 7 days; 3 in 15 hours; flows about 55%	Crew death confirmed (WAR-46); 2+ attacks 24–30 Nov (WAR-49); 10+ a week = Extreme
SIGNIFICANT	EWP	W-5 US-Iran direct fire	Qeshm blasts (Iran: munitions disposal); MQ-9 claim; "we're going to fight" over a dirty bomb	On-the-record US strike acknowledgment (WAR-36); base damage or casualties (WAR-48)
SIGNIFICANT	EWC	W-6 Gulf states	Saudi strikes across Yemen; Gulf air defences active	A GCC state strikes Iran = Extreme (tripwire)
SIGNIFICANT	EWC	W-8 Decision window	Berlin meeting with Qatar, no progress; terms rejected	Dated round (WAR-45); Israeli strike (WAR-39); 11 Dec funding fight
SIGNIFICANT	EWC	R-4 NATO spillover	Kh-101 detonated in Poland; Warsaw: "intentional provocation"	Article 4 request (RUS-04); a casualty on NATO soil = Extreme
SIGNIFICANT	EWC	R-3 Strikes on Ukraine	About 500 weapons on 19–20 Nov; Kryvyi Rih strike (2 killed, 58 injured)	500+ again (RUS-24); 800+ = Extreme
SIGNIFICANT	EWC	EI-3 French spread	155.4 bp; budget in the Senate; 49.3 possible	160+ (EUR-06); 175+ (EUR-01); successful censure
SIGNIFICANT	EWC	AF-1 Sudan lethality	Offensive in West Kordofan; Nyala struck	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	Southern Lebanon strikes; Quneitra and Daraa incursions	Dahiyeh strike (LEV-02); Jordanian strike (LEV-01)
ABNORMAL	EWC	I-1 Taiwan	Joint combat readiness patrol: 21 sorties, 15 across the line	22 Nov daily report (IPA-06); 45+ (IPA-05); a named exercise = Significant
ABNORMAL	EWC	K-1/K-3 Korea	No launch in 17 days; Kim focused at home	Launch; summit offer

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
ABNORMAL	EWC	M-1/M-2/M-7 US count	Ohio order moot; no federal-race suit found	Alaska certification 25 Nov (MID-10); a federal-race suit (MID-09)
ABNORMAL	EWC	HB-1 Health	11,680 confirmed; pace slowing	12,000 (GLB-01); 12,500 (GLB-03)

VIII. PREDICTIONS

Resolved today (1): - **IPA-04 HIT.** Taiwan's defence ministry press release of 21 Nov (12:10 Taipei time) describes a PLA "joint combat readiness patrol" (聯合戰備警巡) of 21 aircraft, 15 of them across the median line (MND 88314). Logged at 75%; Brier 0.0625.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 28 Nov). - **IPA-06** (a 20+ sortie MND daily report dated 16–24 Nov, 60%): the 21-aircraft patrol from 08:46 on 21 Nov falls inside the 22 Nov report period. *Open; about 90%. Resolve on the 22 Nov report.* - **RUS-17** (a dated follow-on meeting announced 11–25 Nov, 45%): Ryabkov says no round is agreed; Axios says "possibly next week". *Open; about 15%.* - **RUS-18** (30+ ballistic missiles in one night by 25 Nov, 30%): 3 on 20–21 Nov. *Open; about 10%.* - **WAR-40** (damage from the 12–13 Nov strikes confirmed by 27 Nov, 30%): none. *Open; about 2%.*

Other open: WAR-01/02/04/25/33/34/36/39/42/45/46/48/49, RUS-01/04/20/21/23/24, LEV-01/02, EUR-01, IPA-02/05/07, AFR-01/02/03, AMR-01/02, MID-03/09/10, GLB-01/02/03. Notable moves: **WAR-49** up to about 80% (three attacks in 15 hours). **RUS-04** up to about 20% (Warsaw calls the incursion deliberate). **GLB-03** down to about 35% (the daily case pace slowed). **AMR-02** down to about 15%.

New predictions (dated 2026-11-21): - **WAR-50:** Saudi official sources (SPA, the Ministry of Energy, Saudi Electricity Company, the Saudi Water Authority or Mawani, or Reuters/AP/AFP citing Saudi officials) confirm physical damage, a fire or a suspension of operations at a named Saudi power station, desalination plant or seaport caused by a Houthi attack or intercept debris. The event must be dated 21 Nov–5 Dec 2026. Houthi claims alone do not count. **35%, unlikely to roughly even.** Resolve by 2026-12-06. - **EUR-06:** The France-Germany 10-year spread (OAT-Bund) closes at or above 160 bp on any trading day from 23 Nov to 4 Dec 2026. The test is the Banque de France / Bundesbank benchmark closes as published by ideal-investisseur.fr, or an MF Newswires / Les Echos / Reuters close. **40%, roughly even, leaning unlikely.** Resolve by 2026-12-05.

IX. GAPS AND UNVERIFIED

- **Hormuz:** UKMTO does not name the ships in 214-, 215- or 216-26, and we found no flag-state statement. The IRGC's "mine" claim for the 20 Nov ship is not corroborated. We found no JMIC update after 115 (19 Nov) and no Kpler briefing dated 21 Nov.
- **Qeshm (20 Nov):** Iranian media first reported a missile strike, then officials called it munitions disposal. We found no US statement.
- **MQ-9:** the IRGC shootdown claim ("58th") is unconfirmed by the US.
- **Shuqaiq and Jizan:** damage is claimed by the Houthis. A regional site cites satellite imagery of a fire at Shuqaiq, which we could not verify. Saudi sources report only intercepts and shrapnel. The Houthi toll of 41 killed in coalition strikes is a party claim.
- **Aden:** distance estimates for Houthi forces differ between outlets (60–110 km).
- **Poland:** the second object at Rudnik nad Sanem is not yet typed beyond "a missile". The Mołodycz debris is a jet drone on preliminary findings. A link to the exercises is officially "a hypothesis". Reuters is cited by headline only.
- **Ukraine:** the 21 Nov raid was still under way at the 08:00 report, and final figures may change.
- **US elections:** we read the Alaska appeal docket only through Democracy Docket's listing, not the 9th Circuit filings themselves.
- **South China Sea:** the Manila Times water-cannon item has no incident date, and we found no matching PCG statement. Not scored.
- **Sudan:** the West Kordofan gains are claims by one side. The displacement figure is local reporting. Anadolu carried the same spokesman's statement.
- **Sahel:** the Mali "15 soldiers" report is undated and not officially sourced.
- **Health:** SitRep 188 is read via a university mirror. The ministry page still shows 187.
- **No ACLED pull:** LV-1 is unscored. There is no Lebanese Health Ministry cumulative table after 5 Nov.
- 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 213-26, 214-26, 215-26 and 216-26; Kpler media briefing (20 Nov); SPA (21 Nov); Yemen HOCC and SABA (Houthi statements, as party sources); US Treasury and OFAC (20 Nov); Chancellery of the Prime Minister of Poland and the Lublin Regional Prosecutor (20 Nov); Ukrainian Air Force (via Interfax-Ukraine, Ukrainska Pravda); Taiwan MND (press release 88314 and PLA activity report 88313); Ohio Supreme Court (2026-Ohio-4598); Miami-Dade County; SOUTHCOM; KCNA; INSP SitRep 188 (via CESNET) and sante.gouv.cd; ideal-investisseur (BdF/Bundesbank data); ANSA; Borsa Italiana/Radiocor. Reporting as

linked (Reuters, Al Jazeera, Al Arabiya, Anadolu, Xinhua, Tasnim, Iran International, Arab News, Axios, Times of Israel, Jerusalem Post, Ynet, The National, Middle East Eye, Al-Monitor, NPR, The Guardian, BBC, EnergyNow, Euronext, Vedomosti, Kyiv Post, Dziennik.pl, GSC, Democracy Docket, WTOL, Chosun Biz, Yonhap, Manila Times, Sudan Tribune, SaharaWire, Sudan Truth, APAnews, New World TV, CNews, BFMTV, LBN News, Al Jazeera Net, UN Unifeed, EEAS).