WIRE World Instability

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This edition covers 21 November to 06:00 EST on 22 November. Comparisons are against the 21 Nov edition. Baseline work today: the hemispheric security (AM-T2) Statement of Normalcy is refreshed below (first written 30 Oct, refreshed 13 Nov). Next in the rotation: IP-T1 (Taiwan Strait).

BLUF. The Middle East stays at **PROBABLE CRISIS**, and the trend stays ↑. Iran struck Bahrain on Saturday. The Interior Ministry says a civilian industrial facility caught fire and two people were injured, one critically. The IRGC says it hit two US Patriot radars at the Riffa and Awali bases, which no US or Bahraini source confirms. CENTCOM denied a separate Iranian claim to have damaged a US F-16. The Houthis fired three ballistic missiles at Riyadh and one toward the Mecca region, all reported intercepted. A Qatari delegation held two hours of talks in Tehran, but Iran says these are not yet negotiations. The 22 Nov Taiwan report counts **24** PLA sorties, which resolves **IPA-06** as a hit. Europe/Russia eases to **=**: Poland has not invoked Article 4, and the North Atlantic Council takes up the incident on Monday. In the Americas, DOJ has asked the 9th Circuit to dismiss its Alaska case, clearing the way for certification on 25 Nov. 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**	Iran hits Bahrain (2 injured); Houthi missiles at Riyadh and Mecca region	↑
Global: health and bio (GL-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	No SitRep after 188 (11,680 confirmed)	**=**
Middle East: widespread war (ME-T1)	**PROBABLE CRISIS**	**EXTREME**	W-2: 3 missiles at Riyadh, 1 toward Mecca region; W-5/W-6: Bahrain struck	↑
Middle East: Levant and Syria (ME-T2)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	Strikes in Nabatieh, Bint Jbeil, Marjayoun; Quneitra checkpoints	**=**
Europe/Russia: Russian aggression (EU-T1)	**POTENTIAL CRISIS**	**SIGNIFICANT**	Rutte in Warsaw; NAC meets 23 Nov; no Article 4; 186 drones on 22 Nov	**=**
Europe: internal stability (EU-T2)	**POTENTIAL CRISIS**	**SIGNIFICANT**	OAT-Bund 155.4 bp (20 Nov, latest close); 49.3 "favoured"	**=**
Americas: US election integrity (AM-T1)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	DOJ asks 9th Circuit to dismiss Alaska case; certification 25 Nov	↓
Americas: hemispheric security (AM-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	26 days without an announced vessel strike; Venezuela talks extended	**=**
Indo-Pacific: Taiwan Strait (IP-T1)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	MND: 24 sorties, 17 across the median line, 11 PLAN ships	**=**
Indo-Pacific: Korean Peninsula (IP-T2)	**ENVIRONMENT FOR CRISIS**	**ABNORMAL**	18 days without a verified 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**	Ghubaysh shelter drone strike (16 killed, monitor count)	**=**
Africa: Sahel (AF-T2)	**ENVIRONMENT FOR CRISIS**	**SIGNIFICANT**	JNIM attacks military and Africa Corps posts at Niono	**=**

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

No level changes since 21 Nov. Trend changes: EU-T1 ↑ → = (alliance consultations, no new incursion); EU-T2 ↑ → = (no new close); AM-T1 = → ↓ (DOJ concedes Alaska case); AM-T2 ↓ → = ; IP-T1 ↑ → = (the patrol was already scored yesterday; today's report confirms it). Trend key: ↑ toward crisis, ↓ away, = no net change.

Moved indicators (vs 21 November). Within band: **W-5** SIGNIFICANT ↑ (IRGC says it fired missiles and drones at US positions at Riffa and Awali; the US says there were no impacts on US forces); **W-6** SIGNIFICANT ↑ (Bahrain struck with two injured; GCC and Jordan condemn; Bahrain asks the Security Council to act; Kuwait intercepts drones); **W-2** EXTREME (=, a Mecca-region alert added); **R-4** SIGNIFICANT (= after yesterday's ↑; alliance reassurance, no Article 4); **M-7** ABNORMAL ↓ within band (DOJ's 19 Nov filing concedes the Alaska case). **I-1** ABNORMAL is now observed rather than a judgment call (24 sorties in the 22 Nov report).

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 stays ↑. Justification: for the first time in this run, an Iranian strike on a Gulf host state caused confirmed injuries. Riyadh faced ballistic missiles for a third day, and a Houthi missile drew a Mecca-region alert. Diplomacy produced contact but no process. In Europe the trend eases, because Poland chose reinforcement over consultations and Moscow has made no new move.

Washington. In a Fox News phone interview on Saturday, the President said he wants a "permanent" deal so that "if we have an incompetent president in four years or 15 years or 20 years" Iran cannot get a nuclear weapon. He said Iranian officials are "very, very difficult" and that "we make a deal and then they break the deal the next day" (CBS News live updates, 21 Nov). CBS separately reported on 20 Nov, citing unnamed sources, that Israel and the US are "considering launching a new assault on Iran in the short term". The sources say Israel's concern is how fast Iran is rebuilding ballistic-missile production and moving sites underground. They also say a new operation could be mounted within two to four days of an order, and that it is unclear whether the President wants one. CENTCOM commander Brad Cooper met Israel's chief of the general staff and the Mossad director at the defence ministry on 18 Nov for a "joint, comprehensive situational assessment" (CBS News, 20 Nov). Treasury Secretary Bessent said on Newsmax that Iran's rulers are "wounded cornered animals" who will "turn on each other" (Iran International, 21 Nov). On Capitol Hill, Senate Democrats are drafting amendments to the **11 Dec** stopgap that would block money for offensive operations against Iran without congressional authorisation (Politico, 20 Nov).

GL-T2 (Health and Bio) stays **ENVIRONMENT FOR CRISIS (=)**. We found no SitRep after 188 (data to 18 Nov: **11,680** confirmed, **5,715** deaths). The ministry page still shows 187, and WHO has published no outcome from the 17 Nov Emergency Committee (CESNET dashboard, as checked 20 Nov; sante.gouv.cd). Kenya's 42-day countdown to declaring its outbreak over began on 12 Nov (CESNET). **GLB-01** (12,000 by 30 Nov) needs 320 more and stays **likely (about 80%)**. **GLB-03** (12,500) stays **about 35%**.

Analyst Comment. Two public signals now point in opposite directions. The President speaks of a durable deal and of not rushing. Unnamed sources describe short-notice strike options, and the CENTCOM–Mossad meeting is on the record. The plain reading is that both are true: coercive diplomacy backed by a ready option. The Bahrain injuries matter because they lower the bar for a US "self-defence" response, as happened at Qeshm on 17 Nov. Unless the 2–4 day option is used, the next scheduled pressure points are Eisenkot's 6 Dec deadline and the 11 Dec funding vote.

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

Bahrain. On Saturday, Bahrain's Interior Ministry said "Iranian aggression" had targeted a civilian industrial facility, causing a fire and material damage. It did not name the site (Al Jazeera, 21 Nov). Residents told AFP that smoke rose over Sitra Island, home to several industrial sites including the Bapco refinery (RTÉ / AFP, 22 Nov). In a statement on Sunday, the ministry said two people were injured in the previous day's attacks: a Pakistani resident in critical condition and a Bahraini citizen in stable condition. The Bahrain Defence Force said air defences intercepted "a number of Iranian aerial attacks" and that shrapnel caused material damage but no casualties (Reuters, 21–22 Nov). The IRGC, via IRNA, said it fired missiles and drones at "US military positions at the Al-Riffa and Awali bases" and struck "two radars" of US Patriot air-defence systems. It called the operation a response to US MQ-1 and MQ-9 flights over Iran and an attack on a radar site on Hengam Island (Al Jazeera). A US official told CBS that there were no impacts on US forces or military assets. CBS counts this as the fourth attempted Iranian attack on Bahrain in about a week (CBS live updates). Bahrain's Foreign Ministry asked the Security Council to compel Iran to implement Resolution 2817. The GCC Secretary-General and Jordan condemned the attack (Al Jazeera). Kuwait's military said it destroyed hostile drones in its airspace early on 21 Nov, with no casualties or damage (Sahefat Alasar, citing the Kuwaiti defence ministry). The injuries are at a civilian site, and nothing official confirms damage at a base, so **WAR-48** is not met. It rises to **about 25%**. See new call **WAR-51**.

US-Iran direct fire. CENTCOM said: "Iran did not attack a US F-16 fighter aircraft yesterday — at all." It said all US fighters in the region are safe and accounted for, rejecting Iranian state media's claim that a missile forced an F-16 to land (Reuters, 21 Nov). The IRGC aired a new underground launcher that it says fires two liquid-fuelled missiles at once (CBS live updates). The 17 Nov US strike on a Qeshm missile site is still sourced to an unnamed "US military official" (RTÉ / AFP). That falls short of WAR-36's "on the record" test, so **WAR-36** stays **about 60%**.

Hormuz: attacks. We found no UKMTO product after **216-26** (21 Nov, 05:50 UTC); there is no 217-26 on the UKMTO server as of 06:00 EST. The Greek risk firm Marisks has now named the three ships hit on 20–21 Nov: the Marshall Islands-flagged chemical/oil tanker **Captain Leon** (bow hit, fire, crew safe), and the Hong Kong-flagged **Torkel** (stern hit, fire) and **Arina** (engine room). It says all three had AIS switched off, and it judges Iranian involvement likely (CNN Arabic, citing Marisks, 22 Nov). Iran's navy said a tanker caught fire after hitting a mine in a "restricted area" east of the strait, after ignoring warnings with its identification systems off. Reuters could not verify that account (CNBC / Reuters, 21 Nov). The US military says it has cleared mines from the main routes (RTÉ / AFP). The JMIC rating stays **SEVERE** in Update 115 (19 Nov), and no later update was found (JMIC 115). No crew deaths were reported, so **WAR-46** stays **about 40%**. **WAR-49** (two or more UKMTO attacks dated 24–30 Nov) stays **about 80%**.

Hormuz: flows. No Kpler briefing after 20 Nov was found. That briefing (data to 18 Nov) still governs: about **55%** of pre-war clearance and 9 tanker crossings a day against 50 before the war (Kpler, 20 Nov). **W-1 SIGNIFICANT (=).**

Prices. Markets were closed for the weekend. Brent's last settlement was **$92.57** on 20 Nov (EnergyNow, cited 21 Nov). **W-7 ABNORMAL (=). WAR-25** is about 1%.

Yemen and Saudi Arabia. Coalition spokesman Turki al-Maliki said air defences destroyed **three ballistic missiles launched toward Riyadh** early on 21 Nov. Civil Defence issued an "aerial threat" alert at 01:53, two explosions were heard, and the alert was then lifted (QNA, 21 Nov; Arab News). It was the third straight day of alerts in Riyadh, after a 19 Nov Houthi strike damaged the Public Investment Fund tower. Civil Defence issued eight alerts in the 24 hours from 07:30 on 20 Nov (Al Jazeera, 21 Nov). Early on Sunday the coalition said it destroyed a ballistic missile fired toward **western Saudi Arabia**, and Civil Defence issued an alert for the **Mecca region** (Anadolu, 22 Nov). The coalition reports no damage from either day. On the ground, government forces say Aden is secure and that they repelled advances in Lahj, Al-Dhale and Abyan (Arab News, 21 Nov, report on 816 government operations). Houthi forces are reported to be dug in around Bab al-Mandeb (The New Arab). **WAR-50** (Saudi-confirmed damage at a power, water or port site) stays **about 35%**. **WAR-34** stays **about 25%**. **WAR-42** (a southern Red Sea or Gulf of Aden ship attack) stays **about 30%**.

Diplomacy. Deputy Foreign Minister Gharibabadi said a Qatari delegation held two hours of talks in Tehran on Friday night. He said the exchanges "have not yet become formal negotiations", that the enriched uranium must not leave Iran, and that Iran regards the US blockade as "an act of war" and will "take any action necessary" to break it (Al Jazeera, 21 Nov). Foreign Minister Araghchi said: "as long as Iran's demands are not met, the discussion on the Strait of Hormuz and its opening is pointless." He also said reopening is "not difficult" if Washington accepts "reasonable conditions" (Al Jazeera; Business Recorder / AFP). President Pezeshkian told a capital-markets conference that Iran faces "a silent" economic war "much harder" than missile strikes, and warned of gas and power shortfalls this winter (Iran International). **WAR-45** (a dated US-Iran round by 30 Nov) stays **about 8%**.

Israel. Yashar invited Likud to "marathon" coalition talks starting Sunday, promising to "leave no stone unturned" (Times of Israel, 21 Nov). Likud's published terms include: an end to "boycotts and incitement" against Netanyahu; no Arab parties; rejection of a Palestinian state; keeping the "security zones" in Syria, Lebanon and Gaza; and a negotiated arrangement on Haredi conscription (Jerusalem Post, 21 Nov; ABC News (Australia) / Reuters). Bennett says his party will not join Netanyahu "under any circumstances" (ABC/Reuters). Eisenkot said he would bring "a new and strong government headed by me" to the Knesset "at the right time" (Euronews, 22 Nov). **WAR-33** stays **about 30%**. **WAR-39** (an acknowledged Israeli strike on Iran by 6 Dec) rises to **about 12%** on the CBS report.

Iraq. Security forces have completed their deployment in Jurf al-Sakhar (Al Jazeera Net, 21 Nov). A new group calling itself Asaib al-Jihad announced itself under the "Islamic Resistance Front" with a video showing an explosive-laden drone. Its capabilities are unverified (BasNews).

Indicators. W-1 SIGNIFICANT (=). W-2 EXTREME (=; Riyadh and a Mecca-region alert, all intercepted). W-3 SIGNIFICANT (=). W-4 ABNORMAL (=). W-5 SIGNIFICANT (↑ within band; IRGC strike claims on US Patriot radars, not confirmed; F-16 claim denied). W-6 SIGNIFICANT (↑ within band; Bahrain struck with injuries; Kuwait intercepts). W-7 ABNORMAL (=; no trading). W-8 SIGNIFICANT (=; Qatari contact, no formal talks). W-9 ABNORMAL (=). Roll-up: 1 Extreme + 5 Significant + 3 Abnormal. We hold **PROBABLE**. Justification (a hold against a mechanical one-level drop): Iranian fire on a Gulf host state now causes injuries, W-2 has reached the Mecca region, and a short-notice US-Israeli strike option is reported. Tripwires not met: no GCC state has struck Iran, and there is no confirmed damage at a US base. Trend ↑ (still).

Analyst Comment. The pattern of the past week is Iranian pressure on Bahrain, the Fifth Fleet host, paired with deniable shipping strikes ("mines") and showcase claims (Patriot radars, an F-16) that the US rebuts. Iran appears to be calibrating. It is hurting a small host state while avoiding confirmed US casualties, which would most likely trigger a US response. A critically injured foreign worker shows how thin that margin is. We judge a fatality from an Iranian strike on a GCC state, dated 21 Nov–6 Dec and confirmed by that state, **roughly even, leaning unlikely (about 40%)** (new **WAR-51**).

ME-T2 (Levant), brief. On 21 Nov, Israeli strikes hit the Nabatieh, Bint Jbeil and Marjayoun districts, including Kfar Tebnit and the outskirts of Baraachit. Israeli forces carried out three demolitions in Wadi al-Khiam, according to Lebanon's NNA (Al Jazeera, 21 Nov). On the eve of

Independence Day, President Aoun demanded that Israel "withdraw from every inch of Lebanese territory". He also told armed groups taking orders from "some influential parties in the Iranian regime" that "you must hand over your weapons" (Al Jazeera). Al Jazeera cites cumulative figures of at least **4,386** killed in southern Lebanon since 2 March. In Syria, Israeli forces entered Ruwayhina, Bariqa and Bir Ajam in Quneitra and set up temporary checkpoints (Shafaq News; Al Jazeera Net, 22 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. In Warsaw on Saturday, Secretary General Rutte said "all allies stand in full solidarity with Poland". He called the incursion "dangerous" and "unacceptable" (Anadolu, citing TVP, 21 Nov) and said: "I can guarantee that NATO will defend every inch of Polish territory." The Supreme Allied Commander Europe will identify any threats to defence and deterrence capabilities and adjust as needed (Reuters, citing PAP, 21 Nov). An alliance official said the **North Atlantic Council will take up the incident on 23 Nov** as part of regular consultations, with Poland represented by Deputy Defence Minister Zalewski (The Thursday Times, 22 Nov). Poland has asked for more air-defence and surveillance support under Eastern Sentry and has **not** invoked Article 4 (Anadolu; Al Jazeera explainer). We found no specific Kremlin comment. Russian state media are carrying a claim that a Polish minister "admits" Warsaw lacks proof the objects were Russian (RIA Novosti, 21 Nov), which contradicts the Polish government's 20 Nov statement. **RUS-04** (an Article 4 request by 31 Dec) eases to **about 15%**. See new call **RUS-25**.

The 21–22 Nov night. Russia launched **186** drones (72 jet-powered), plus Gerbera and Parodiya decoys, from eight directions. By 08:00, **161** had been downed or suppressed, with hits at 18 locations (RBC-Ukraine, citing the Air Force, 22 Nov). A five-storey residential building in the Vyshhorod district of Kyiv region was hit, with two people injured and people possibly trapped (RBC-Ukraine). The night is in the Abnormal band, so **R-3 stays SIGNIFICANT** on the 19–20 Nov raid. **RUS-18** (30+ ballistic missiles by 25 Nov) is **about 5%**. **RUS-24** (500+ in one night, 21 Nov–5 Dec) stays **about 40%**.

Talks. Zelensky said the next meeting of the Ukraine-Europe-Russia-US teams "depends on the American side" and would follow agreement on an agenda. He said Washington wants it "as soon as possible", while Russia would try to postpone it (Ukrinform, 21 Nov). The Abu Dhabi prisoner exchange of more than 1,000 per side has still not taken place. On 19 Nov the Kremlin said it was in its "final stages" (Kyiv Post). **RUS-17** (a dated follow-on meeting announced by 25 Nov) falls to **about 10%**. **RUS-20** (exchanges releasing 1,000+ per side by 30 Nov) is **about 40%**. **RUS-21** (an in-person round with Europe by 15 Dec) is **about 40%**.

Indicators. R-3 SIGNIFICANT (=). R-4 SIGNIFICANT (=; alliance reassurance and the NAC on 23 Nov; no Article 4). R-5 SIGNIFICANT (=). R-6 / R-8 ABNORMAL (=). R-10 ABNORMAL (=; no date). R-1 ROUTINE. Roll-up: 3 Significant = **POTENTIAL**. Trend **=** (from ↑): no new incursion, and Warsaw has chosen reinforcement over consultations.

Analyst Comment. NATO is treating the incursion as a capability gap to close, not a political crisis to escalate. That fits Warsaw's choice and lowers the odds of an Article 4 request. The likely visible output is more allied air-defence or surveillance assets in Poland. We judge an announcement of named additional assets for Poland by 6 Dec **likely (about 60%)** (new **RUS-25**). The Kremlin's silence, together with RIA's "no proof" framing, is the familiar deniability pattern.

EU-T2 (European internal stability). No trading on the weekend. The latest close is **155.4 bp** on 20 Nov (ideal-investisseur, BdF and Bundesbank data). Les Echos reports that the government increasingly favours Article 49.3 when the budget returns to the Assembly (Les Echos). The Socialists complain of "no sign" of dialogue from the Prime Minister (Public Sénat). EI-1 SIGNIFICANT, EI-2 ABNORMAL, EI-3 SIGNIFICANT, EI-4 ROUTINE. **POTENTIAL CRISIS (=). EUR-06** (160 bp, 23 Nov–4 Dec) stays **about 40%**. **EUR-01** (175 bp by 30 Nov) is **about 8%**.

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

Alaska (correction). Our 21 Nov edition said DOJ's appeal was pending, with the State's response filed on 20 Nov. In fact, DOJ told the 9th Circuit in a **19 Nov** filing that it now agrees the case should be dismissed. It said that because the ballots for the lesser-known candidate were commingled, "there no longer exists any means" of determining voter intent, and it asked the court to direct dismissal (USA Today, 20 Nov; Washington Post, 19 Nov). With about 99% counted, the leading candidate has 50.3% of first-choice votes, a majority even if all other first choices are combined (USA Today). Certification is targeted for **25 Nov**. **MID-10** rises to **very likely (about 93%)**. **MID-09** (a new suit to halt certification of a called federal race, 6–30 Nov) is **about 8%**. **MID-03** is 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 (↓ within band; the only federal-race certification case is conceded). M-8, M-9 ROUTINE. Roll-up: 3 Abnormal = **ENVIRONMENT**. Trend ↓ (from =).

AM-T2 (hemispheric security). See the Statement of Normalcy refresh below. **ENVIRONMENT FOR CRISIS (=). AMR-02** (a lethal vessel strike dated 14–30 Nov) is **about 12%**. **AMR-01** is **about 1%**.

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

Taiwan. Taiwan's defence ministry report for 06:00 21 Nov to 06:00 22 Nov counts **24** PLA aircraft sorties, **11** PLAN ships and 1 official ship. **17** sorties crossed the median line into the central and southwestern ADIZ. Taiwan responded with CAP aircraft, ships and coastal missile systems. Two balloons were detected (MND PLA activities, 22 Nov). **IPA-06 resolves as a hit.** The 7-day average of daily reports (16–22 Nov) rises to about 7.4. I-1 ABNORMAL (now observed: a 20+ day with a named readiness patrol), I-2 ABNORMAL (11 PLAN ships), I-3 and I-4 ROUTINE. **ENVIRONMENT (=)**, under the +1 override that runs to 1 Dec. **IPA-05** (45+ in one report by 30 Nov) is about 10%.

Korea. KCNA reports Kim Jong Un inspecting school-fixture and educational-equipment factories under construction, with no reference to the US (KCNA). We found no verified launch since 4 Nov, now 18 days (Yonhap). A "17 Nov Wonsan launch" item circulating online is a re-dated 2017 wire story (see GAPS). K-1 ABNORMAL, K-2 ROUTINE, K-3 ABNORMAL. **ENVIRONMENT (=). IPA-07** (a Trump-Kim meeting by 30 Nov) is about 2%.

South China Sea. We found no dated, verified water-cannon incident since July. SC-1 ROUTINE, SC-2 ABNORMAL, SC-3 ROUTINE. **ENVIRONMENT (=)**, under the override that lapses on 30 Nov. **IPA-02** is about 15%.

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

Sudan and the Horn (AF-T1). A drone that a monitoring group attributes to the Sudanese armed forces hit a school sheltering displaced families in **Ghubaysh**, West Kordofan, killing **16** and injuring 10, according to that monitor (Radio Tamazuj). A rights monitor accuses RSF gunmen of killing three civilians in Abu Qalb and Al-Damira (Sudan Tribune). Amnesty International has called RSF drone strikes on civilians in El Obeid possible war crimes (Amnesty). 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 10%.

Sahel (AF-T2). On 21 Nov, JNIM attacked at least two positions of the Malian military and its Russian Africa Corps partners around **Niono** (Ségou region). An IED destroyed an Africa Corps armoured vehicle. The Malian military disputes JNIM's claimed tolls (RFI, 22 Nov). RFI cites regional security sources who say weapons from Libya are increasingly reaching Sahel jihadists. 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, AM-T2 Hemispheric security (refresh; first written 30 Oct, refreshed 13 Nov)

`SUBJECT: Hemispheric security QUESTION: does US-Venezuela, Mexico-cartel or Haiti violence reach sustained armed conflict or a mass-migration surge? (Regional Conflict / Internal Stability; PMESII-PT: Military, Social) Normal since Sep 2025: steady US maritime strikes on alleged drug boats; chronic gang violence in Haiti; cartel violence in Mexico; low border flows. H-1 US kinetic action R: no strikes for 30+ days | A: maritime strike campaign (status quo) | S: strike on land territory, or a declared named operation | E: sustained air/ground campaign against a state H-2 SW border (CBP) R: within +/-20% of 12-month mean | A: +/-20-50% S: > +50% | E: declared emergency closure H-3 Haiti/Mexico/Venezuela violence R: chronic pattern | A: new foreign force entry or city-wide blockades | S: ACLED fatalities > 2x the 8-week mean | E: state collapse or capital falls H-4 OAS / UNSC emergency session R: none | A: emergency session called S: Chapter VII action | E: collective-defence invocation Refresh note (22 Nov): thresholds unchanged. Clarifications: (1) H-1 turns ROUTINE on 26 Nov if no strike is announced (30 days after 27 Oct); (2) security-cooperation agreements (e.g., US-Venezuela, 18 Nov) and joint counter-cartel training are scored as H-1 de-escalatory context, not as kinetic action; (3) under H-3, operations by the UN-backed Gang Suppression Force and partner forces already in Haiti are the status quo (ABNORMAL); a new national contingent entering would be re-scored. Baseline sources: CBP encounters data (FY2024-Oct 2026); SOUTHCOM press releases; Just Security timeline; BBC, AP, Al Jazeera, Crisis Group, Venezuelan press. Period: 1 Sep-21 Nov 2026` **Current reading.** *H-1:* the latest officially announced strike is still SOUTHCOM's **27 Oct** strike in the eastern Pacific, so 26 days have passed without a verified new strike (SOUTHCOM press releases; Just Security timeline). The US-Venezuela military cooperation agreement of 18 Nov (BBC) is drawing domestic criticism: a former Venezuelan minister questions the acting president's authority to sign it (Economía Venezuela). The interim government and the opposition have extended their fourth dialogue round to finish technical tables on guarantees, oil and elections (Diario El Tiempo). *H-2:* October CBP Southwest border encounters were **11,443**,

within the 12-month band, and the November figures are not yet out (CBP). *H-3:* the Gang Suppression Force continues operations around Port-au-Prince. It reported one suspected gang member killed in Cité-Soleil and weapons seized near the airport (Modeste Info; De Último Minuto). Crisis Group puts the force at about 2,000, with 5,500 expected by early 2027 (Crisis Group). *H-4:* no OAS or UNSC emergency session on the hemisphere.

Indicators. H-1 ABNORMAL (26 days; ROUTINE from 26 Nov if none). H-2 ROUTINE. H-3 ABNORMAL. H-4 ROUTINE. Roll-up: 2 Abnormal = **ENVIRONMENT FOR CRISIS (=)**. No override.

Analyst Comment. The hemisphere is the quietest theatre we track. The boat-strike campaign has paused for nearly a month, and Venezuela has moved from target to partner. If the 30-day mark passes on 26 Nov, H-1 drops to Routine and AM-T2 may fall to NO CRISIS on the next roll-up, unless Haiti escalates.

VII. INDICATORS TO WATCH | EWC / EWP ASSESSMENT

SCORE	TYPE	INDICATOR	WHY IT MATTERS	NEXT TRIGGER
EXTREME	EWC	W-2 Houthis / Saudi Arabia	3 BMs at Riyadh (21 Nov); 1 toward the west, Mecca-region alert (22 Nov); PIF tower damaged 19 Nov	Saudi-confirmed damage at a power, water or port site (WAR-50); energy-site shutdown (WAR-34); a strike near the holy cities
SIGNIFICANT	EWC	W-6 Gulf states	Bahrain industrial site hit, 2 injured; GCC solidarity; Kuwait intercepts	Fatality from an Iranian strike (WAR-51); a GCC state strikes Iran = Extreme (tripwire)
SIGNIFICANT	EWP	W-5 US-Iran direct fire	IRGC claims US Patriot radar hits; F-16 claim denied; Qeshm 17 Nov still unnamed-source	Confirmed base damage or casualties (WAR-48); on-the-record US strike (WAR-36); 2–4 day strike option (CBS)
SIGNIFICANT	EWC	W-1 Hormuz attacks / flows	Captain Leon, Torkel, Arina named; flows about 55%	Crew death (WAR-46); 2+ attacks 24–30 Nov (WAR-49); 10+ a week = Extreme
SIGNIFICANT	EWC	W-8 Decision window	Qatari delegation in Tehran; "not formal negotiations"; "permanent deal"	Dated round (WAR-45); Israeli strike (WAR-39); 6 Dec mandate; 11 Dec funding
SIGNIFICANT	EWC	R-4 NATO spillover	Rutte in Warsaw; NAC 23 Nov; no Article 4	Named reinforcements (RUS-25); Article 4 (RUS-04); a casualty on NATO soil = Extreme
SIGNIFICANT	EWC	R-3 Strikes on Ukraine	186 drones on 22 Nov; Vyshhorod residential hit	500+ again (RUS-24); 800+ = Extreme
SIGNIFICANT	EWC	EI-3 French spread	155.4 bp (20 Nov); 49.3 favoured	160+ (EUR-06); 175+ (EUR-01); successful censure
SIGNIFICANT	EWC	AF-1 Sudan lethality	Ghubaysh shelter strike (16 killed)	UN-reported 50+ event (AFR-01)
SIGNIFICANT	EWC	SA-2 Bamako / central Mali	Niono attacks on the military and Africa Corps	Destroyed convoy; attack in a capital; official 20+ toll (AFR-02)
SIGNIFICANT	EWC	LV-4 Levant	Strikes in three southern districts; Quneitra checkpoints	Dahiyeh strike (LEV-02); Jordanian strike (LEV-01)
ABNORMAL	EWC	I-1 Taiwan	24 sorties, 17 across the line (22 Nov report)	45+ (IPA-05); a named exercise = Significant
ABNORMAL	EWC	K-1/K-3 Korea	18 days without a launch	Launch; summit offer
ABNORMAL	EWC	M-7 US count	DOJ concedes the Alaska case	Alaska certification 25 Nov (MID-10)
ABNORMAL	EWC	HB-1 Health	11,680 confirmed; no new SitRep	12,000 (GLB-01); 12,500 (GLB-03)

VIII. PREDICTIONS

Resolved today (1): - **IPA-06 HIT.** Taiwan MND's PLA activities report dated 22 Nov (period 06:00 21 Nov to 06:00 22 Nov) states **24** PLA aircraft sorties (MND 88317). Logged at 60%; Brier 0.16.

PREDICTION LEDGER CHECK (WI prefixes): open calls due within 7 days (by 29 Nov). - **RUS-17** (a dated follow-on meeting announced 11–25 Nov, 45%): Zelensky says timing depends on Washington agreeing an agenda. *Open; about 10%.* - **RUS-18** (30+ ballistic missiles in one night by 25 Nov, 30%): none since 8 Nov at that scale. *Open; about 5%.* - **WAR-40** (damage from the 12–13 Nov strikes confirmed by 27 Nov, 30%): none. *Open; about 2%.*

Other open: WAR-01/02/04/25/33/34/36/39/42/45/46/48/49/50, RUS-01/04/20/21/23/24, LEV-01/02, EUR-01/06, IPA-02/05/07, AFR-01/02/03, AMR-01/02, MID-03/09/10, GLB-01/02/03. Notable moves: **WAR-48** up to about 25% (Bahrain strike; nothing official confirms base damage). **WAR-39** up to about 12% (CBS short-term option report). **MID-10** up to about 93% (DOJ concedes). **RUS-04** down to about 15%. **RUS-17** down to about 10%.

New predictions (dated 2026-11-22): - **WAR-51:** The government of Bahrain, Kuwait, Qatar, the UAE, Saudi Arabia or Oman (Interior or Defence Ministry, BNA, KUNA, QNA, WAM, SPA or ONA), or Reuters/AP/AFP citing that government, reports at least one death caused by an Iranian missile or drone attack on its territory (including interception debris). The attack must be dated 21 Nov–6 Dec 2026 and the death reported by 7 Dec. Houthi attacks and Iranian claims alone do not count. **40%, roughly even, leaning unlikely.** Resolve by 2026-12-07. - **RUS-25:** NATO (SHAPE/Allied Air Command or the Secretary General), the Polish government (Chancellery, MON, Operational Command), or another allied government announces the deployment to Poland of additional, named air-defence or air-surveillance assets (for example, fighter detachments, AEW aircraft, Patriot/SAMP-T/NASAMS batteries or counter-drone systems), explicitly linked to the 20 Nov incursion or to Eastern Sentry reinforcement. The announcement must be dated 22 Nov–6 Dec 2026. Pledges without a named asset type do not count. **60%, likely.** Resolve by 2026-12-07.

IX. GAPS AND UNVERIFIED

- **Bahrain:** the facility is unnamed officially. Sitra and Bapco come from residents speaking to AFP. The IRGC's Patriot-radar claim is unverified, and CENTCOM had not responded to Reuters on it. "Two injured" is the Interior Ministry's Sunday figure; its first statement said no injuries.
- **Hormuz:** the ship names (Captain Leon, Torkel, Arina) come from Marisks via CNN Arabic, not from UKMTO or flag states. We could not match Iran's "mine" tanker to a UKMTO product. No JMIC update after 115, and no Kpler briefing after 20 Nov.
- **CBS strike-option report:** it rests on unnamed sources. The White House and the US military declined to comment.
- **Lebanon:** an "11 killed, 19 injured" toll for 21 Nov strikes in Ansar and Deir ez-Zahrani appears only in ILKHA and is not scored. There is no Lebanese Health Ministry daily table.
- **Iraq:** the new "Asaib al-Jihad" group's capabilities are unverified.
- **Korea:** an item dated 21 Nov 2026 reporting a "17 Nov" Wonsan Scud launch is a re-dated 2017 EFE story (it references President Moon and the Taormina G7). It is not scored.
- **Poland:** RIA Novosti's "no proof" claim is a Russian state-media framing, and we did not locate the minister's original words. NAC timing comes from one outlet citing an alliance official.
- **Sudan:** the Ghubaysh toll and attribution come from a monitoring group via Radio Tamazuj. There is no UN figure.
- **Sahel:** JNIM tolls at Niono are disputed by the Malian military. There is no official figure.
- **Health:** no SitRep after 188. The ministry page still shows 187.
- **No ACLED pull:** LV-1 is unscored.
- Rates and mortgage detail are in the owner-only note (cross-ref Economics WIRE). Cable-news framing is covered by the Media WIRE.

Sources

All sources are linked inline. Primary and data sources: Taiwan MND (PLA activities report 88317); Bahrain Interior Ministry and Bahrain Defence Force (via Reuters, Al Jazeera, AFP); US Central Command (via Reuters); Coalition to Support Legitimacy in Yemen (via QNA, Arab News, Anadolu); Kuwaiti defence ministry (via Sahefat Alasar); JMIC Update 115; Kpler media briefing (20 Nov); Ukrainian Air Force (via RBC-Ukraine); Ukrainian Presidency (via Ukrinform); NATO Secretary General (via PAP/Reuters, TVP/Anadolu); KCNA; Lebanese Presidency and NNA (via Al Jazeera); SOUTHCOM; CBP; INSP SitRep 188 (via CESNET) and sante.gouv.cd; ideal-investisseur (BdF/Bundesbank data). Reporting as linked (Reuters, CBS News, AFP/RTÉ, Al Jazeera, Al Jazeera Net, CNN Arabic, CNBC, Anadolu, Iran International, Business Recorder, Arab News, The New Arab, Times of Israel, Jerusalem Post, Euronews, ABC News (Australia), Politico, USA Today, Washington Post, The Thursday Times, RIA Novosti (Russian state media), Kyiv Post, Les Echos, Public Sénat, Shafaq News, BasNews, BBC, Economía Venezuela, Diario El Tiempo, Modeste Info, De Último Minuto, Crisis Group, Radio Tamazuj, Sudan Tribune, Amnesty International, RFI, Yonhap, Just Security).