A COMMANDELEVEN INTELLIGENCE PUBLICATION

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CONVERGENCE

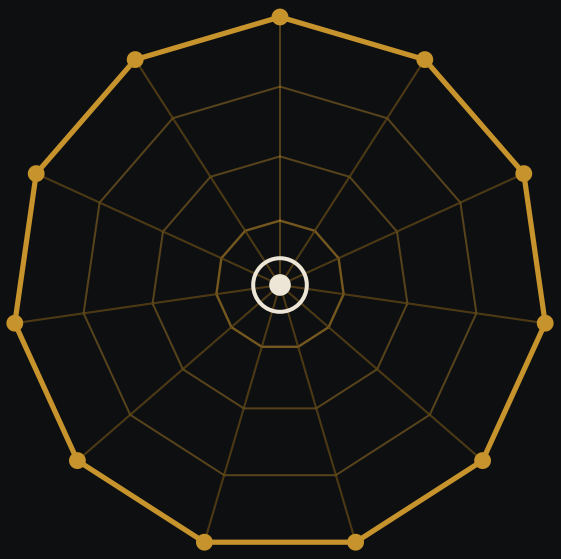
COUNTER-TERRORISM · GEOPOLITICAL RISK · FORESIGHT

COVER STORY

The Makkah Pact's First Test

Operation Yemen Dawn, Riyadh's airport war, a Saudi army that has never carried a hard ground war, and where Pakistan sits on Netanyahu's new map.

FROM THE FOUR-PART COMMANDELEVEN INTELLIGENCE SERIES



THE GARRISON STATE
How the IRGC filled the vacuum at the top of Iran's wartime government

THE AFGHAN FRACTURE
The Moscow Format collapses and the Pakistan-Afghanistan border goes to open war

THE FORESIGHT RECORD
124 calls scored against what happened, misses included

IRAN: "QUITE UNLIKELY"?
Trump's statement set against the force posture, the Qeshm strikes and a shaken Washington

ALSO RAF Fairford: the U.S. case · Hezbollah: The Path to 2027 · The Taliban at Five · Global Food Security

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Indicators and the audits coming due, through the December Year-in-Review.

Let’s go backwards.

The rebrand, the Makkah test, and the gap between what is said and what can be seen.

In May we informally launched the CommandEleven Intelligence name with an essay on the institutional maturity of what we had become, From Commentary to Capability. The rebrand started there. Six months on, this issue is the work behind that name: dated calls, scored against the record, misses included.

In October we asked what the Makkah Pact would be worth the first time Saudi Arabia called on Pakistan. By the end of the month the answer was Operation Yemen Dawn, a Saudi army that has never carried a hard ground war, and a Pakistan weighing a Gulf commitment against an Iranian border and an Afghan one. The Garrison State series followed the same logic inside Iran, where the IRGC filled the vacuum at the top of a wartime government.

November has been about the gap between what governments say and what can be seen. On November 9 President Trump said new strikes on Iran were "quite unlikely." Three days earlier he had confirmed strikes on Qeshm. We set the statement beside the force posture and let the reader weigh both. A U.S. indictment in the RAF Fairford case named the HAYI network, which our Gig Terrorism dossier had flagged as a facilitator before the charges. And at five years of Taliban rule, the IISS says one thing while the public record says another.

That is why the Foresight Record runs in every issue, and live on our website every day. We have now scored 124 calls: 43 confirmed, 31 partly confirmed, 23 missed and 27 still open. Three of the misses are recent, all on Iran, and we scored them the day the evidence came in. We did not edit the originals and we did not adjust the score in our favor.

A forecast that cannot be checked is not intelligence. It is opinion with a letterhead.

Syed Khalid Muhammad
EXECUTIVE DIRECTOR AND FOUNDER

COVER STORY

The Makkah Pact's First Test

Operation Yemen Dawn, Riyadh's airport war, a Saudi army that has never carried a hard ground war, and where Pakistan sits on Netanyahu's new map.

COMMANDELEVEN INTELLIGENCE · MIDDLE EAST AND PAKISTAN DESKS
CONDENSED FROM THE MULTI-PART MAKKAH PACT SERIES

PART 1

The First Test: Operation Yemen Dawn, Pakistan's Role and Iran's Shrinking Map

On October 5 the pact's members turned a signed text into a deployed alliance, and the same day the coalition launched Operation Yemen Dawn against the Houthis. Pakistan's role is large and deliberately understated: between 30,000 and 40,000 Pakistani troops are in the Kingdom. CONFIRMED

Islamabad has not advertised a combat role, and we assess that is intentional. The campaign closely mirrors Pakistan's own Operation Ghazb lil-Haq: convergence through the advisory channel, not proven authorship. ASSESSED

The larger stake is Iran's. Its maritime strategy rests on two chokepoints, Hormuz and Bab el-Mandeb. If the coalition's gains hold, Iran loses its second lever, and each side's cheapest weapon lands on the other's most fragile region. That mutual-hostage structure is the likeliest brake on escalation. ASSESSED

PART 2

The First Test, Tested: Riyadh's Airport War

The Houthi airport campaign began the day after Yemen Dawn and is a deliberate answer to the pact. Saudi air defenses were beaten by sequencing: drones fired first to clear the way for cruise and ballistic missiles, with no early warning, per initial Saudi findings. ASSESSED

Pakistan drew a hard line: its forces are in the Kingdom but, in its Foreign Office's words, "would not be crossing the borders" to attack the Houthis. With Riyadh's airport shut, Brent above $106 and carriers suspending service, the Houthis impose costs on Vision 2030 at very low cost to themselves. ASSESSED

Washington has given intelligence, targeting and planning support but no strikes. The coalition's coastal claims, Mokha and Bab el-Mandeb retaken on October 5, rest on government and coalition figures that are not independently confirmed. ASSESSED

~20 dead

370+ WOUNDED · OCTOBER 6–12 · HOUTHI ATTACKS ON SAUDI AIRPORTS

The October 10 strike on Riyadh's terminals alone killed 13 and wounded more than 300. Riyadh's airport reopened partially on October 26, after about two weeks. CONFIRMED

PART 3

Strong in the Air, Weak on the Ground: Why Riyadh Needs the Makkah Pact

The Royal Saudi Air Force is capable and combat-tested, from the 1984 shoot-down of an Iranian F-4 to a decade of strikes over Yemen. CONFIRMED

Saudi ground forces are built for regime security and desert defense, not offensive war in mountains. Splitting the land forces between the army and the National Guard protects the monarchy and costs battlefield initiative. ASSESSED

The pattern is consistent. In 2009, 2015 and 2026 alike, the hard ground fighting in Yemen has been done mostly by non-Saudi forces. And air superiority over Yemen has not delivered air defense over Saudi Arabia. CONFIRMED

That is why the pact matters. The Kingdom could no longer afford a ground weakness on its southern flank, and Pakistan supplies mass and credibility, on the condition that it defends Saudi territory and does not cross into Yemen. ASSESSED

PART 4

Diamond vs. Hexagon: Where Pakistan Sits on Netanyahu's Map

On October 18, nine days before Israel's election, Netanyahu presented a doctrine with a map that groups Türkiye, Saudi Arabia, Egypt and **Pakistan** as a "Sunni Diamond," Israel and the UAE as a "Hexagon," and Iran's network as the "Axis of Resistance." CONFIRMED

Most coverage left Pakistan out. The map does not. Neither bloc is a formal alliance, and Netanyahu did not call the Diamond's members adversaries. The map's real value is where the camps already compete: Sudan, the Horn of Africa and Yemen. ASSESSED

Pakistan's position is more crowded than the colors suggest. It sits in the Diamond, but it borders Iran, and its largest Gulf economic partner outside Saudi Arabia is the UAE. We read the Diamond as three layers: a treaty core, a diplomatic quartet and an unrealized alliance. ASSESSED

Scored January 31: whether either bloc formalizes, and whether Egypt or Türkiye joins the Saudi-Pakistan pact.

WHERE THE BLOCS COMPETE

Sudan
The army-led state is shaded Diamond-friendly, the RSF Hexagon-friendly.

Horn of Africa
Somaliland and Puntland shaded Hexagon-friendly, Somalia Diamond-friendly.

Yemen
The government is Diamond-friendly, the Houthis are in the Axis.

PART 5

The Coalition Forms: Typhoons, Syrian Troops and Egypt's Vote

Riyadh's coalition is almost all air defense, built of separate announcements with no single command. Status as of October 27: **CONFIRMED**

Three weeks in, Part 3's four indicators read: no sign of Saudi ground units fighting in Yemen; foreign recruitment for the Yemeni front moving, through the unconfirmed Syria request; air defense partly met, by foreign forces instead of purchases; and no change in Pakistan's position. **ASSESSED**

UK. Typhoons on defensive missions; "will not conduct offensive strikes."

France. Troops and air defenses at Yanbu.

Pakistan. "Already there"; will not cross into Yemen.

Türkiye. Signed August 7. Not ratified.

Egypt. Parliament authorized "necessary measures" on October 26.

Syria. Asked for 10,000–20,000 troops; Damascus denies. Unconfirmed.

US. Refused to strike; 100+ advisers.

PART 6

The Pact Goes to Tehran: Talks, a Phantom Peace Deal and Egypt's Vote

On October 26 Prince Khalid bin Salman, Field Marshal Munir and Türkiye's Ibrahim Kalın met Iran's leadership in Tehran. They agreed only to keep talking: no ceasefire, no timetable, no mechanism. **CONFIRMED**

A "Sana'a-Riyadh Agreement" that spread online the next day is not real on the evidence. No party announced it, and the Houthi leadership was still demanding a Saudi withdrawal. **ASSESSED**

The airport war goes on. Riyadh's airport reopened partially on October 26, and a ballistic missile aimed at the city was intercepted the same day. Washington ordered non-emergency staff out of Saudi Arabia on October 21 and updated its advisories for 13 countries on October 24. **CONFIRMED**

Scoring Part 5's Egypt call: parliament voted, but the mandate is broader than we called. **Partially confirmed.**

CALLS ON THE RECORD

Nov 30
No Saudi-Houthi ceasefire announced. Egyptian air defense confirmed in the Kingdom.

Dec 31
Türkiye ratifies. No announced Syrian combat role. No British strikes. A second Tehran meeting.

Jan 31
Whether either bloc formalizes.

FEATURE

One State, Three Fronts

The Pakistan-Taliban talks, an Afghan opposition that is growing, and the Baloch insurgency, read together.

COMMANDELEVEN INTELLIGENCE · SOUTH ASIA DESK · CONDENSED FROM TWO SERIES

PART 1

The Talks: Pakistan, the Taliban and the Kandahar Session

Outside mediation has produced pauses, not settlements. Ceasefires were agreed in October 2025 and again in March 2026, and each collapsed or lapsed. The dispute over the TTP was never resolved in any round. CONFIRMED

Our field reporting describes an October 22 session in Kandahar: a five-member Pakistani team, five demands, Taliban counter-conditions and a 30-day deadline. We found no public report of it, so every detail rests on one source. REPORTED

Fighting continued while the talks were held, with clashes along the Paktika border on October 19.

PART 2

The Taliban Losing Control? Where the Evidence Shows It

Armed opposition activity has risen sharply in 2026. The UN counted 88 claimed attacks in 21 provinces from May 1 to July 31 and verified 55, more than double the weekly rate of the earlier period. CONFIRMED

The northeast is the center: ACLED logged 22 anti-Taliban armed events in Badakhshan from January to July, against four in the prior half-year. On July 17 a new group, the Homeland Soldiers Front, overran the Yaftal-e Sufla district center, the first district center to fall since 2021. The Taliban confirmed it. CONFIRMED

PART 3

Balochistan's Hybrid Insurgency: Sanctuary, Attribution and the Narrative

The US designated the BLA a Foreign Terrorist Organization on August 11, 2025, after the Jaffar Express hijacking. CONFIRMED

A UN Monitoring Team report says the BLA shares logistics networks with ISIL-K and trained alongside the TTP. It draws on member-state information, not UN verification. REPORTED

Pakistan says senior BLA leaders operate from Afghanistan. That claim is contested. DISPUTED

CALLS ON THE RECORD

Nov 30
No public handover of senior TTP leaders by the Taliban to Pakistan.

Nov 30
Neither Torkham nor Chaman-Spin Boldak reopened for regular commercial trade.

Dec 31
No jointly agreed border monitoring or verification mechanism announced.

FEATURE

The Garrison State: Who Rules Iran Now

Succession, the coup that isn't, and the Gulf flashpoint that turned out not to be Fujairah.

COMMANDELEVEN INTELLIGENCE · IRAN DESK · CONDENSED FROM THE GARRISON STATE SERIES

PART 1

How the IRGC Filled the Vacuum at the Top

Ali Khamenei was killed in the opening strikes of the war. IRGC commander Mohammad Pakpour and Supreme National Security Council secretary Ali Larijani were also killed in the first weeks. CONFIRMED

The Assembly of Experts named Mojtaba Khamenei Supreme Leader on March 8, about a week later. CONFIRMED

An informal five-member wartime leadership formed around President Pezeshkian and speaker Ghalibaf, a former IRGC brigadier general. Multiple analysts assess the Guards as the dominant voice. ASSESSED

Reports that Mojtaba is incapacitated are unverified. UNVERIFIED

PART 2

Succession and the Coup That Isn't

No coup occurred. Khamenei was killed by external strikes, not displaced, and the constitutional succession was followed. CONFIRMED

Before the war, the strongest forecasts expected an IRGC insider coup as the likeliest route to regime change. What followed matches their predicted outcome, formal continuity with real authority concentrated in the Guards, but not their mechanism. ASSESSED

Historian Arash Azizi summed it up: "This is not the era of Mojtaba. It is the era of the IRGC in Iranian politics."

PART 3

The Gulf Flashpoint That Wasn't: Fujairah

The UAE's Habshan-Fujairah pipeline moves up to 1.5 million barrels a day to the Gulf of Oman, bypassing Hormuz. It is the one real release valve on Iran's chokepoint leverage. CONFIRMED

That gives Tehran a strategic motive to want it neutralized. It is not evidence that an operation against Fujairah occurred, and no outlet we can verify reports a strike or intrusion. ASSESSED

WHAT WE DROPPED

The original Garrison State dossiers described a specific IRGC cyber-sabotage campaign against Fujairah, with named techniques and a market-window schedule. None of it is independently sourced. **We removed it in full** and rebuilt the series on what the public record supports.

IRAN

“Quite Unlikely”: The Statement vs. the Indicators

We set the President’s statement beside what the force posture, the talks and the calendar show.

COMMANDELEVEN INTELLIGENCE · IRAN DESK · STATUS AS OF NOVEMBER 11, 2026

THE STATEMENT

What Trump said on November 9

After meeting Qatar’s Prime Minister at the White House, President Trump said the Iran war is “militarily effectively over,” that new US strikes are “quite unlikely,” and that the United States remains “locked and loaded.” He tied the restraint to Gulf allies who “would prefer the status quo.” REPORTED

We do not call the statement false: “unlikely today” can coexist with forces held ready. But intent is the weakest evidence in this war, and it sits beside Qeshm strikes on November 2 and a second round on November 6 that Trump confirmed. CONFIRMED

There is still no US-Iran text. The Qatari Prime Minister spoke of “ways to progress”; Iran’s Mohsen Rezaei called the talks “imaginary” and told Washington to accept Iran’s seven conditions. CONFIRMED

THE READING

Readiness, not a launch signal

No new fighter or bomber arrivals were reported November 1 to 7. What stands out is the support layer: about 200 tankers, at least 16 C-17s into Ovda, and an estimated 7 to 9 Patriot batteries. That fits a force kept ready for limited action, not one being wound down. ASSESSED

The USS Theodore Roosevelt is due in CENTCOM mid-November; reinforcement or relief is unknown. REPORTED

The political calendar has shifted too: a new chief of staff, a House vote on November 10 (211 to 204) referring the Hegseth impeachment articles to committee, and a Democratic House in January. We draw no causal line to Iran decisions. SPECULATIVE

THE CALL WE WILL SCORE

IR-ST-01: the “quite unlikely” statement will not hold.

The US government acknowledges at least one new strike on Iranian territory after November 9. Resolves **December 15**.

WHAT COUNTS

CENTCOM, or an on-record US official or the President. Unattributed reports and Iranian claims alone do not count. Confirmed scores 1, with no adjustments in our favor, and a miss is published.

EUROPE

RAF Fairford: The US Case Names the Network

A second government alleges an Iran-backed hand behind the plot. All prosecution claims are allegations.

COMMANDELEVEN INTELLIGENCE · EUROPE DESK · REAR-AREA WAR SERIES · STATUS AS OF NOVEMBER 11, 2026

THE ALLEGATION

What the DOJ alleges

On November 10 the US Department of Justice unsealed an eight-count indictment against three men it calls Iran-backed operatives: Mohsen Mohajeri, Mohammad Ali al-Hassani and Mohammad Baqer Saad Dawood al-Saadi. It says they planned attacks across Europe, the latest at RAF Fairford. Iran's embassy in London rejects the link. ALLEGED

It is the first US charge to tie Fairford to a named network, HAYI, across 18 attacks. The FBI Director names the IRGC and Kataib Hezbollah. None of it is tested in court; the defendants are presumed innocent. ALLEGED

The US account describes preparation, not a device: no explosives were found in the vans. CONFIRMED

THE FIT

Where we saw this first

Our Gig Economy of Terror dossier, published October 1, described HAYI as a front brand behind the spring wave of arsons and bombings across Europe. The indictment names HAYI as the brand the accused ran. ASSESSED

That does not make it true. It does mean our framework is now the prosecution's.

Unknown: whether "Ali" and al-Hassani are the same person, and whether any defendant will be extradited. DATA DEFICIT

THE TWO CASES, SIDE BY SIDE

	UK PROSECUTION · OCT 27	US INDICTMENT · NOV 10
Director	A handler abroad known as "Ali"	Mohammad Ali al-Hassani
Vans	Drivers told to park and walk away	Three vans tasked Sept 26
Behind it	A handler acting for Iran	Iran-backed operatives; IRGC and Kataib Hezbollah

Watch: the Old Bailey hearing on **November 20**; any US arraignment or extradition request; any UK charge that cites HAYI by name.

The Foresight Record

Every call we have scored against the record, misses included.

COMMANDELEVEN INTELLIGENCE DESK

124
CALLS SCORED
AS OF NOVEMBER 2026



43	31	23	27
CONFIRMED	PARTIAL	MISSED	OPEN

An intelligence product is only as good as its track record, and most track records are never published. Since April, CommandEleven Intelligence has gone back through its own forecasts, from the 2026 Global Counter-Terrorism Assessment to our dossiers and on-air calls, and scored each one against what actually happened.

The method is deliberately unforgiving. A call is confirmed only when the public record supports it. One that landed in substance but missed on timing, geography or trigger is scored partial. A call the record contradicts is a miss, and it stays on the page.

Calls whose window has not yet closed remain open, each with a date for its next review on the public Audit Calendar. That is the point: a forecast that cannot be checked is not intelligence. It is opinion with a letterhead.

The misses matter as much as the hits. Our April assessment was right that the Tehreek-e-Taliban Pakistan's Afghan sanctuary would survive Pakistan's war, but it got the provinces, the trigger and Wana wrong. Our November 2023 Afghanistan paper, scored three years on, landed six calls and missed three.

In November events contradicted two of our Iran calls before their windows closed. We scored both as misses the day the evidence arrived. This section runs in every issue of Convergence.

“A forecast that cannot be checked is not intelligence. It is opinion with a letterhead.”

AUDITS CLOSED IN OCTOBER AND NOVEMBER

RAF Fairford through October 27	3 confirmed · 3 partial · 2 not confirmed · 6 open
France through October 31	5 confirmed · 1 partial · 1 not confirmed
Iran Foresight Audit, July 2026 series	3 confirmed · 2 partial · 1 not confirmed · 2 open
Iran war, early calls (Status Brief, Task Force Iron Gate)	2 not confirmed
Qeshm and the Post-Midterm Window: QS-02	Confirmed: a U.S. strike acknowledged
Regional Insecurity from Afghan Soil (2023)	6 confirmed · 3 not confirmed · 1 open
Our China-Iran war calls	4 confirmed · 1 partial · 1 not confirmed · 4 open
GCTA Foresight Audit, Parts 1–11	41 forecasts: 8 confirmed · 18 partial · 4 missed · 11 open

NEXT ON THE CALENDAR

Nov 20 Old Bailey decision, RAF Fairford
Nov 21 Iran War Status Brief dated calls close
Dec 10–31 Iron Gate calls; IR-ST-01 on Dec 15
December Year-in-Review issue

READ EVERY SCORED CALL

commandeleven.com/about-commandeleven/foresight-record

HOW EVERY CALL IS SCORED

Confirmed
Evidence published after the call shows it materialized as stated.

Partially confirmed
The core of the call held, but a material element was wrong or is unverified.

Not confirmed
The evidence points the other way. The miss is scored, explained and kept on the page.

Not yet resolved
Not enough evidence either way, or the window has not closed. Never counted as a hit.

SPECIAL REPORT

The Global Food Security Crisis

For the first time in modern memory, four shocks are hitting the world's food system at once.

COMMANDELEVEN INTELLIGENCE · GLOBAL DESK · CONDENSED FROM THE NINE-PART REGIONAL SERIES

SHOCK 1

2.9°C

A record El Niño

The September anomaly in the key Niño 3.4 region beat 2015 and 1877. On October 5 sea temperature there passed 30°C for the first time on record. Forecasters expect a peak near 3.7°C in December, with effects into 2027. CONFIRMED

SHOCK 2

34%

A fertilizer shock from Hormuz

The strait normally carries about a third of the world's seaborne fertilizer, including 34% of traded urea. Urea prices doubled within weeks of the February closure. CONFIRMED

SHOCK 3

$220

A diesel shortage

Wholesale diesel hit about $220 a barrel in September, and the IEA expects the shortage to last into 2027. Diesel runs the tractors, irrigation pumps and trucks that move food. CONFIRMED

SHOCK 4

27%

A closed Black Sea

Attacks on ports on both sides have cut Russian and Ukrainian grain exports, normally about 27% of world wheat trade, to a fraction of normal. The FAO Food Price Index reached 136.0 in September, its highest since November 2022. CONFIRMED

KEY JUDGMENTS

A stacked crisis
Each driver would be serious alone. Together they hit cost, supply and logistics at the same time.

The worst is ahead
FEWS NET places the El Niño hunger peak between February and September 2027, and into early 2028 for Southern Africa.

Aid will not close it
Funding for food assistance, emergency agriculture and nutrition fell about 59% from 2022 to 2025, before this crisis began.

Region by Region

One analysis track for every region, so they compare directly. Ratings are our assessments of exposure to the four shocks.

PART 1

North America

OVERALL MODERATE

For Canada this is a cost shock, not a supply shock. Mexico's corn dependence is its single biggest vulnerability.

PART 2

Central America and the Caribbean

OVERALL HIGH

El Niño is the primary driver of hunger, with the worst outcomes expected March to August 2027. Haiti's crisis is man-made first.

PART 3

South America

OVERALL MODERATE

The risk is mainly to the world: a weak crop would tighten global supply more than it would cause local hunger. Fertilizer is Brazil's Achilles' heel.

PART 4

Europe

OVERALL MODERATE

The shock lands on farmers first and consumers later. Unprocessed food inflation rose from 2.7% to 4.0% in a month.

PART 5

The Middle East and Arab World

OVERALL HIGH

A logistics problem, not a money problem. Hunger is concentrated in war zones, and Egypt is the largest latent risk.

PART 6

Africa

OVERALL SEVERE

Sudan is heading into a second famine year. El Niño arrives in three waves, but conflict, not weather, is the decisive variable.

PART 7

East and Southeast Asia

OVERALL HIGH

The risk window runs through March 2027. The Philippines is the most exposed major economy; rice export restrictions are the contagion risk.

PART 8

The Indian Subcontinent

OVERALL HIGH

The rabi season is the decisive test. Pakistan faces the sharpest consumer price shock, with inflation near 12%.

PART 9

Australia and the Pacific

AUSTRALIA MODERATE · PACIFIC HIGH

Australia faces a farm-income shock, not a shortage, but a smaller crop is a global problem. The Pacific islands are the most vulnerable.

THE FINDING THAT RUNS THROUGH ALL NINE

Almost every government is reacting to the crisis. Very few have a plan for the next twelve months.

Four shocks. Nine regions. No plan.

El Niño, Hormuz fertilizer, diesel and a closed Black Sea are hitting the world's food system at once.

2.9°C
Record El Niño anomaly, September

34%
Of traded urea moves through Hormuz

$220
Wholesale diesel, per barrel, September

27%
Of wheat trade: Russia and Ukraine, now cut

FAO FOOD PRICE INDEX: 136.0 · HIGHEST SINCE NOV 2022

EXPOSURE BY REGION

REGION	EL NIÑO	FERTILIZER	DIESEL	BLACK SEA	OVERALL	PEAK RISK
United States (baseline)	MOD	MOD	HIGH	LOW	MOD	Winter 2026–27
North America	MOD	LOW	HIGH	LOW	MOD	Winter 2026–27
Central America & Caribbean	SEVERE	MOD	HIGH	LOW	HIGH	Feb–Aug 2027
South America	MOD	HIGH	MOD	LOW	MOD	Dec 2026–Mar 2027
Europe	MOD	HIGH	HIGH	HIGH	MOD	2027 harvest
Middle East & Arab World	MOD	MOD	HIGH	HIGH	HIGH	Now through 2027
Africa	SEVERE	HIGH	HIGH	HIGH	SEVERE	Mar 2027–Mar 2028
East & Southeast Asia	HIGH	MOD	HIGH	LOW	HIGH	Oct 2026–Mar 2027
Indian Subcontinent	HIGH	HIGH	HIGH	MOD	HIGH	Jan–Mar 2027
Australia & the Pacific	HIGH	HIGH	HIGH	LOW	AUS MOD / PAC HIGH	Summer 2026–27

SCALE: LOW · MOD · HIGH · SEVERE — ASSESSED

HEAVIEST EXPOSURE
Africa is the only region exposed to all four drivers at a high level, and it holds the world's worst crisis, in Sudan.

AID WILL NOT CLOSE THE GAP
Funding for food assistance, emergency agriculture and nutrition fell about 59% from 2022 to 2025.

Almost every government is reacting. Very few have a plan for the next twelve months.

Sources: FAO, WMO, FEWS NET, IEA, IPC. Ratings are CommandEleven Intelligence assessments.

FEATURE

Hezbollah: The Path to 2027

Money, the network abroad, the war of narrative, and what comes next.

COMMANDELEVEN INTELLIGENCE · MIDDLE EAST DESK · CONDENSED FROM THE HEZBOLLAH SERIES

PART 4

Following the Money: How Sanctions Pushed Hezbollah Out of the Banks

Hezbollah has been pushed out of Lebanon's regulated financial system. The central bank's July 2025 circular and US secondary-sanctions risk mean no licensed institution can knowingly deal with it. CONFIRMED

Its money now moves mostly as cash. Treasury's designations trace Iranian funds through money exchangers and couriers on commercial flights. REPORTED

PART 5

Hezbollah Abroad: The Network Beyond Lebanon

Hezbollah's external operations survived the loss of its senior command. The 2026 plots in the Gulf, Syria and the United States came after Israel had killed most of that command. CONFIRMED

The Gulf is now a front line. The UAE and Kuwait announced Hezbollah-linked networks in March, and six Arab states warned of "sleeper cells loyal to Iran." CONFIRMED

PART 6

The Information Front: Hezbollah's War of Narratives

Hezbollah has lost its most effective voice. No leader since Nasrallah has matched his reach. ASSESSED

Israel struck Al-Manar and Al-Nour in March 2026. Both stations kept broadcasting. CONFIRMED

Its messaging has turned inward, toward its own Shiite base, with themes of resilience rather than victory. ASSESSED

PART 7

What Comes Next: Hezbollah's Path to 2027

Hezbollah will not disarm voluntarily. Naim Qassem has said its weapons are "not part of negotiations." CONFIRMED

Iran remains the deciding factor. Hezbollah went to war in March 2026 after the strike on Iran, and its next war would be decided the same way. ASSESSED

Its reach abroad will outlast its strength at home. ASSESSED

THE SCORECARD, OCTOBER 2026

Leadership
Qassem is secretary-general; military chief unnamed. Weaker.

Arsenal
Up to ~25,000 rockets and missiles, an Israeli estimate. Rebuilding.

Disarmament
Phase one only; Israel holds the south. Stalled.

Dec 31
UNIFIL's mandate ends, leaving the Lebanese army, Israel and a US-backed group.

ANALYSIS

Radicalization in the AI Era

Identity fusion, deepfakes, algorithms, and what the evidence says about counter-messaging.

COMMANDELEVEN INTELLIGENCE · COUNTERTERRORISM DESK · CONDENSED FROM THE INFORMATION WARFARE SERIES

PART 1

Narratives and Strategic Influence: How Story Shapes Mobilization

States and non-state actors alike now treat the information environment as a contested operational domain, a framing NATO formalized in its Cognitive Warfare concept. CONFIRMED

The mechanism linking narrative to mobilization is not argument but identity fusion: repeated exposure collapses the line between self and group. ASSESSED

PART 2

The Tooling: Encrypted Platforms, Deepfakes and the AI Arms Race

Extremist organizations have moved from experimenting with generative AI to using it operationally for propaganda. CONFIRMED

Telegram remains the most significant platform for extremist distribution. Takedowns changed how threat actors operate there more than whether they stay. CONFIRMED

PART 3

Digital Recruitment Ecosystems and Algorithmic Amplification

Engagement-optimized ranking systematically favors extreme, emotionally activating content over moderate content, independent of any platform's extremism policy. CONFIRMED

Gaming-adjacent platforms, chiefly Roblox, Discord and Minecraft, are a documented recruitment and grooming environment for jihadist and nihilistic violent extremist networks targeting minors. CONFIRMED

PART 4

Counter-Messaging: What Works, What Doesn't and What Remains Unproven

Most public counter-messaging campaigns have been evaluated poorly or not at all, so confident claims of "what works" outrun the evidence. CONFIRMED

Google Jigsaw's Redirect Method, which intercepts people searching extremist-adjacent terms, is the most rigorously and independently evaluated large-scale intervention. RAND's assessment: modest and mechanism-specific results, not a universal fix. ASSESSED

THE BOTTOM LINE

The tools to produce and spread persuasion at scale have arrived faster than the evidence on how to counter it. The mechanism, identity fusion, is documented. The cure is not.

Regional Watch

Eight dossiers from seven theaters, each with its own tagged judgment.

COMMANDELEVEN INTELLIGENCE · REGIONAL DESKS · STATUS AS OF NOVEMBER 11, 2026

SAHEL

The Siege That Held: Mali Six Months After the April Offensive

The junta broke the fuel squeeze with a 900-tanker convoy on September 14, but Kidal has been under FLA control since April. JNIM's aim is to exhaust Bamako, not take it. ASSESSED

IRAQ

After the Last Convoy: ISIS and the US Exit from Iraq

ISIS calls the withdrawal a "great victory." The network is weak in attacks but intact, and 5,700 ISIS-linked detainees are the biggest single risk. ASSESSED

GULF

The Gulf Split: How Saudi Arabia and the UAE Broke

Saudi-led forces bombed a UAE shipment at Mukalla on December 30, 2025. The rift is structural, not a quarrel over Yemen. CONFIRMED

SUDAN

Sudan's Proxy War: The Pipeline to the RSF

A UN mission found "reasonable grounds to believe" a transnational network armed the RSF. The UAE denies it. CONFIRMED

EUROPE

The Muslim Brotherhood Crackdown

The European Parliament voted 381 to 167 for a strategy against "entryism." An EU-wide terrorist listing is unlikely within a year. ASSESSED

EUROPE

Who Hacked Europe's Freezers?

France's attribution is credible but unproven in public. The November wave is unattributed, and the pro-Russian claim is unverified. ASSESSED

AFGHANISTAN

The Taliban at Five, Against the IISS

On internal control, IISS is supported. "Avoided mass famine" is a framing, not a finding: WFP reports about 17 million in acute hunger. CONFIRMED

ORBIT

Cosmos 2612 and ICEYE-X36

Russia's satellite closed to about three miles of a Ukraine-linked radar satellite. The likeliest purpose is inspection or intimidation, not destruction. ASSESSED

BY THE NUMBERS

Mali
900+ tankers in the September 14 convoy.

Sudan
September 3: UN mission reports the transnational network.

Europe
October 8: 381 to 167 in Strasbourg.

Orbit
About 5 km from ICEYE-X36 on October 16.

The Watch List

What we are watching, and the audits coming due.

INDICATORS

FORCE POSTURE	The USS Theodore Roosevelt reaching CENTCOM (due within days); whether the George Washington leaves; whether bombers return to RAF Fairford.
TALKS	Any signed or jointly announced US-Iran text.
STRIKES	Any US-acknowledged or unilateral Israeli strike on Iran after November 9.
BLOCKADE	Task Force Iron Gate naming a crossing, partner or enforcement measure.
FAIRFORD	The Old Bailey decision on November 20, which opens Part 5.
WASHINGTON	Whether Hegseth impeachment moves once Democrats take the House in January.

AUDITS COMING DUE

ON HOLD	Iran Foresight Audit re-check
NOV 15	Scored: QS-01, QS-03, Dead Hand calls 1 and 2. Pakistan-Iran stays open.
NOV 21	The Iran War Status Brief's dated calls close
DEC 10, 15 AND 31	The Iron Gate calls and IR-ST-01
DECEMBER	Year-in-Review issue

Read every scored call: **commandeleven.com/about-commandeleven/foresight-record**

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