

INFER Issue Report

How will Iranian Influence on Violent Non-State Actors Develop in the Near Future?

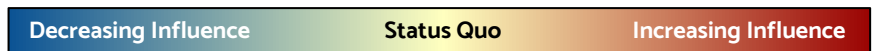
November 2023



This report is a summation of crowdsourced predictions. It should not be viewed as an analytic product.

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Iran's Influence on Violent Non-State Actors

Iran's influence on violent non-state actors (VNSAs) like Hamas, Hezbollah, and the Houthis has long been a source of instability in the Middle East. This heatmap analyzes crowd forecasts from the signals below to show whether INFER's forecasts indicate that Iran's influence on VNSAs will increase, decrease, or stay the same.



Drivers	Signals	INFER Forecast As of Nov 30th, 2023
Iranian Stability	Anti-government protest takes place in Iran with 10,000 or more participants lasting at least a week	 21% chance
Threats to Iranian Allies	Houthi rebels execute an attack against an Israeli civil or military vessel in the next six months	 54%
	Houthi rebels launch a missile that strikes within Israel in the next six months	 55%
	Houthis and Yemen reach a ceasefire that is in effect on 31 December 2024 and lasts at least six months	 25%
Direct Threats to Iran	Iran launches missiles or conducts an airstrike against U.S. forces in the next six months	 2%
	Iran launch missiles targeting Israel or conduct an airstrike in Israel in the next six months	 2%
	Israel and Saudi Arabia resume normalization process in the next six months	 3%

Appendix

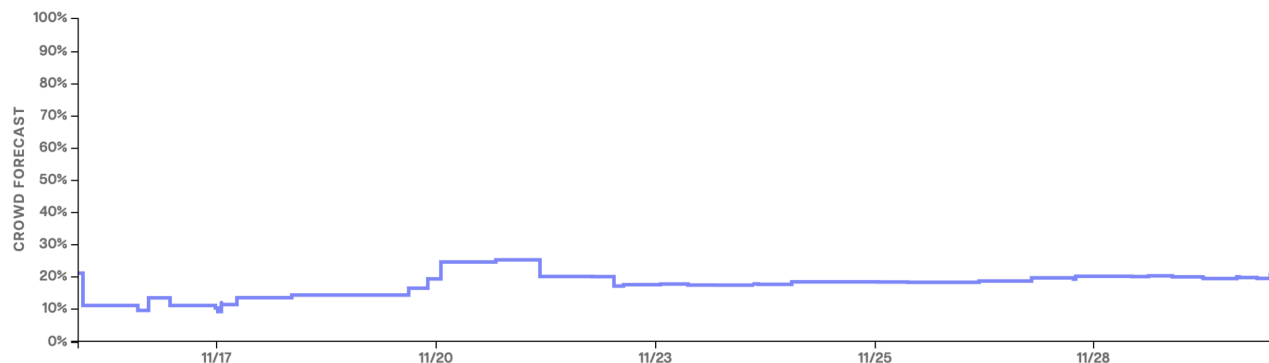
Detailed Outputs Including Trend Charts and Rationale Summaries

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A. Forecast Trend Charts and Rationale Summaries

In the next six months, will the Global Protest Tracker record an anti-government protest in Iran with 10,000 or more participants lasting at least a week?

Crowd Forecast: 21% chance



Higher probability forecasts discuss...

- **Iranian "Powder Keg":** Ongoing issues like inflation, unemployment, women's rights violations, political repression and human rights abuses remain unresolved. Iranian society is seen as a "powder keg" that could ignite into protests with a single spark.
- **Base Rate:** There is a history of large protests in Iran, with four protests meeting the resolution criteria since 2017. The base rate suggests a roughly 30% chance.
- **Upcoming Elections:** Upcoming legislative elections unlikely to be viewed as free or fair could spark protests around the voting process.

Lower probability forecasts discuss...

- **Government Crackdowns:** The Iranian regime has shown willingness and ability to aggressively crack down on dissent and protests when they occur. Intimidation is working to suppress protests for now.
- **Outward Focus:** The Israel-Hamas conflict has shifted focus. Rallying behind the Palestinian cause unifies Iranians against a common threat.
- **Improving Relationships with Other Countries:** Iran normalizing relations with Saudi Arabia and building economic ties with China has softened some economic issues recently.

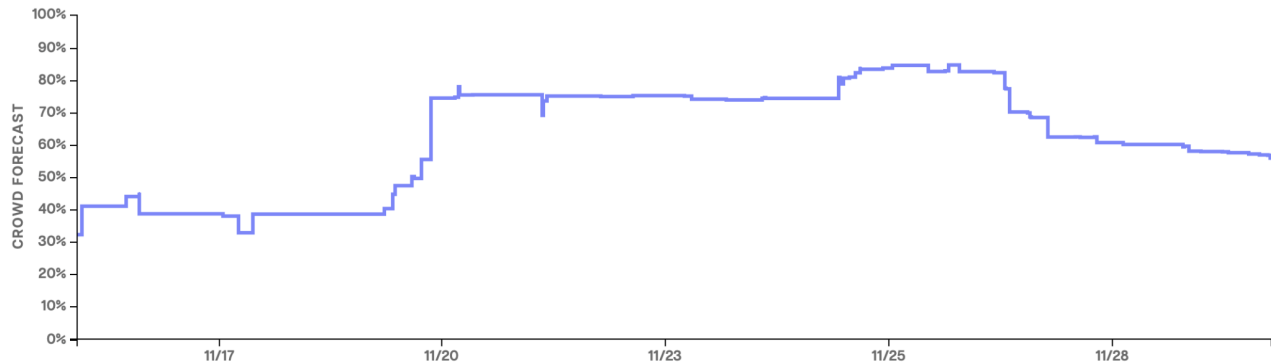
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	16 days	Number of Forecasters	33	Participants in this question vs. all forecasters	better than average ①
Average forecast age	6 days	Average for questions in their first 4 weeks: 34			
Forecasts in the last 24 hours	6	Number of Forecasts	43		
		Average for questions in their first 4 weeks: 45			

Will Houthi rebels execute an attack against an Israeli civil or military vessel in the next six months?

Crowd Forecast: 54% chance



Higher probability forecasts discuss...

- **Iranian Interests:** Houthis are backed by Iran, which wants to use them as a proxy against Israel. Iran has incentive to escalate tensions and prod the Houthis to attack.
- **Palestinian Cause:** Houthis have declared solidarity with Palestinians and vowed to keep attacking Israel in retaliation for strikes on Gaza. They see it as a religious and ideological duty.
- **Previous Attacks:** Houthis have hijacked or attacked several ships they deem "Israeli-linked," showing they are targeting such ships aggressively.

Lower probability forecasts discuss...

- **Israeli Vessels Avoiding Houthi Areas:** Very few Israeli flagged ships actually travel through the Red Sea. Most potential targets avoid the region.
- **Israeli Defense Mechanisms:** Israel and allies like the U.S. have a strong naval presence to intercept attacks. Previous Houthi attacks on Israel itself have failed or been intercepted. Chances of a ship attack succeeding seem even lower.
- **Civil War in Yemen:** Houthis remain focused on their own war in Yemen. Attacking faraway Israel may not be a priority.

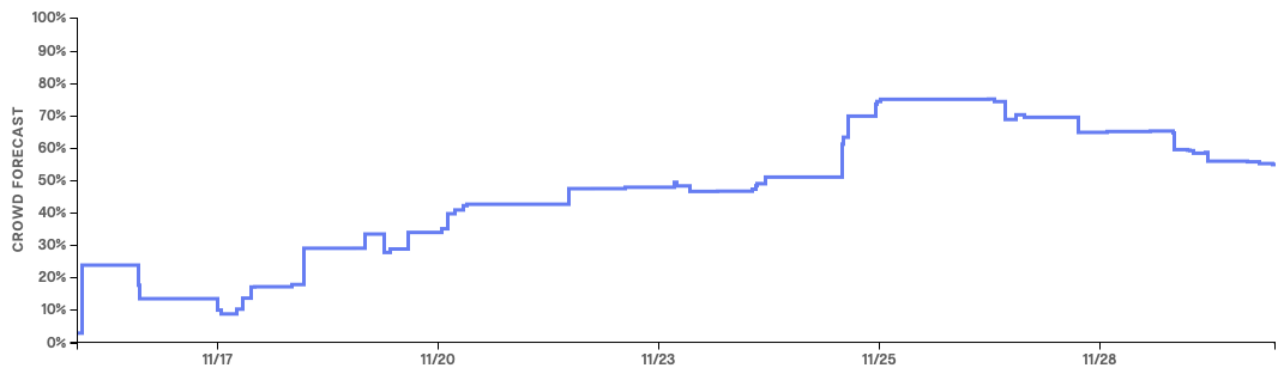
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	16 days	Number of Forecasters	46	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	4 days	Average for questions in their first 4 weeks: 34			
Forecasts in the last 24 hours	16	Number of Forecasts	80		
		Average for questions in their first 4 weeks: 45			

Will Houthi rebels launch a missile that strikes within Israel in the next six months?

Crowd Forecast: 55% chance



Higher probability forecasts discuss...

- **Stated Intention of Further Attack:** The Houthis have continuously launched missile and drone attacks towards Israel since the war between Hamas and Israel began on 7 October, demonstrating some capability to strike at long range. They have stated they intend to continue these attacks.
- **Landing Site:** Israel may choose not to intercept some missiles if they are projected to land in uninhabited areas.
- **Iranian Support:** With support from Iran, the Houthis could potentially acquire more advanced missiles that might overwhelm Israeli defense systems if launched in large enough quantities.
- **Houthi Mindset:** The Houthis are "fearless" and have a "nothing to lose" mindset that makes them likely to keep attacking.

Lower probability forecasts discuss...

- **Israeli Defense Systems:** Israeli missile defense systems like Iron Dome and Arrow are highly advanced and have successfully intercepted Houthi missiles up to this point. The great distance the missiles have to travel from Yemen makes successful interception even more likely.
- **Strategy:** Focusing on closer shipping targets may be more achievable and impactful for the Houthis than long-distance missile strikes on Israeli territory.
- **International Backlash:** Houthis may face backlash and loss of international support if they persist in targeting Israel.
- **Limited Supplies:** The Houthis don't seem to have large stockpiles of missiles to launch coordinated barrages that could overwhelm defenses. Missile supplies from Iran could be limited.

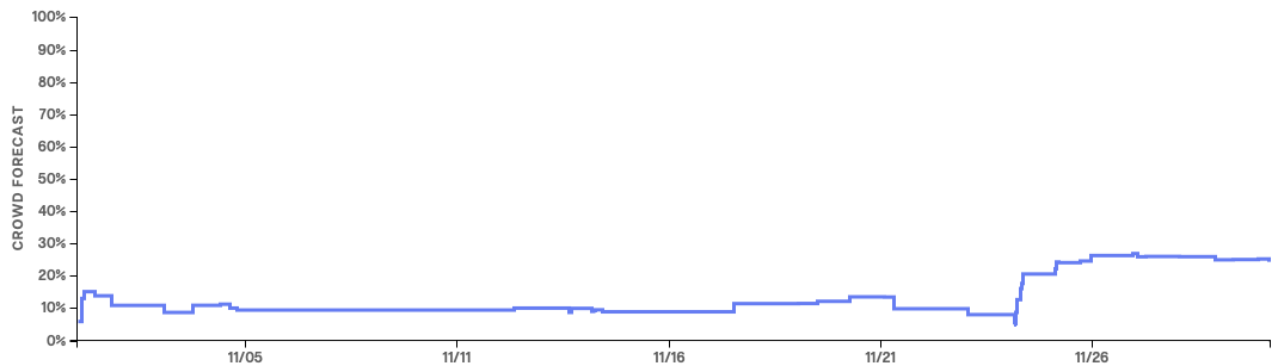
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	16 days	Number of Forecasters	34	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	5 days	Average for questions in their first 4 weeks: 34			
Forecasts in the last 24 hours	5	Number of Forecasts	65		
		Average for questions in their first 4 weeks: 45			

Will the Houthi movement and Yemen reach a ceasefire that is in effect on 31 December 2024 and lasts at least six months?

Crowd Forecast: 25% chance



Higher probability forecasts discuss...

- **Saudi Proposals for Peace:** Saudi Arabia, leader of the coalition supporting the Yemeni government, seems eager to exit the conflict in Yemen and has presented proposals for a ceasefire and transition plan. This includes paying government salaries in Houthi areas.
- **Ceasefire Precedent:** The Houthis and Yemen managed a six month ceasefire in 2022, showing that it is possible.
- **Yemen Internal Crisis:** Yemen faces an immense humanitarian crisis due to the war, so there are incentives to reach a compromise to cease fighting.
- **Iran-Saudi Relations:** Recent Iran-Saudi talks and detente make Iranian-backed Houthis possibly more willing to reach a deal.

Lower probability forecasts discuss...

- **Unresolved Differences:** Major differences remain between the Houthis and the Saudi-backed Yemeni government in proposed deals, like payment mechanisms. Bridging these gaps will be difficult.
- **Failed Past Negotiations:** Past negotiation attempts have failed to lead to a lasting agreement acceptable to both sides.
- **Israel-Hamas War:** Houthi attacks on Israel, in solidarity with Hamas, complicate the conflict and relations with Saudi Arabia. This makes a ceasefire less likely.
- **Houthi Preference for the Status Quo:** The Houthis seem emboldened by seizing ships and building strength. They may prefer the status quo over compromising in a ceasefire.

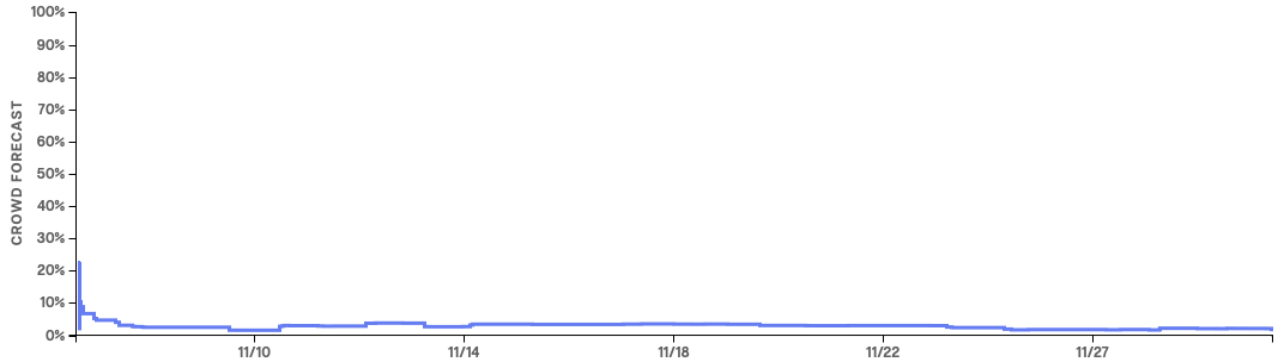
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	30 days	Number of Forecasters	29	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	11 days	Average for questions in their first 3 months: 47			
Forecasts in the last 24 hours	3	Number of Forecasts	47		
		Average for questions in their first 3 months: 98			

Will Iran launch missiles or conduct an airstrike against U.S. forces in the next six months?

Crowd Forecast: 2% chance



Higher probability forecasts discuss...

- **U.S. Attack:** If the U.S. were to attack Iran first or cross a "red line", Iran may feel compelled to retaliate directly, although it is unlikely the U.S. would do this unprovoked.
- **Attacks by Iranian Proxies:** Ongoing attacks by Iranian-backed militias against U.S. troops could reach a boiling point, and lead to an exchange of attacks between Iran and the U.S. directly.
- **2024 Election:** Pressure on the Biden administration ahead of the 2024 U.S. elections could lead to U.S. action that provokes response.

Lower probability forecasts discuss...

- **Iranian Proxies:** Using non-state actors and proxies better serves Iran's interests than provoking direct conflict with the U.S.
- **Fear of Retaliation:** Iran wants to avoid overt aggression that could trigger retaliation from the far more powerful U.S. military. Iran does not have the capabilities to confront the U.S. directly.
- **No Desire for Conflict From Either Side:** There are no indications that Iran's stance has changed to become more aggressive towards the U.S. They still seem deterred by potential consequences. The U.S. also wants to avoid inflaming tensions or provoking a regional conflict.

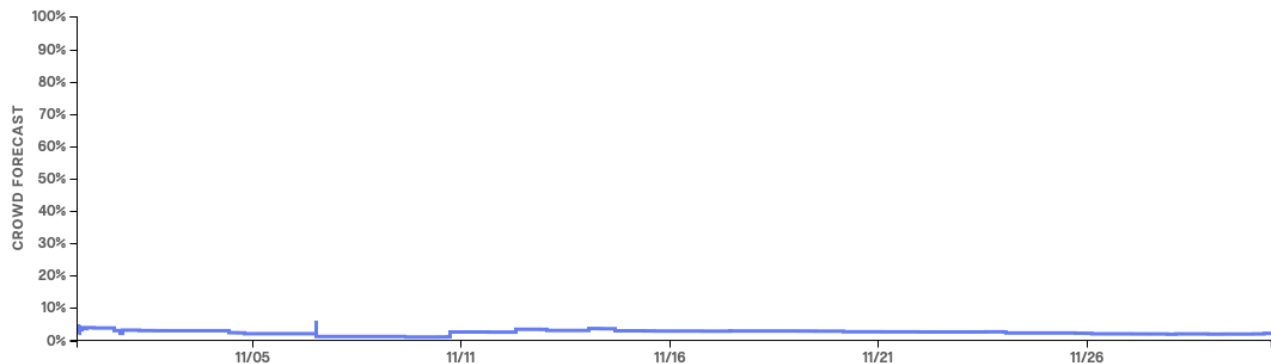
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	25 days	Number of Forecasters	59	Participants in this question	better than
Average forecast age	12 days	Average for questions in their first 4 weeks:	34	vs. all forecasters	average 1
Forecasts in the last 24 hours	6	Number of Forecasts	73		
		Average for questions in their first 4 weeks:	45		

Will Iran launch missiles targeting Israel or conduct an airstrike in Israel in the next six months?

Crowd Forecast: 2% chance



Higher probability forecasts discuss...

- **Israeli Attack:** If Israel escalates attacks on Iran's proxy groups (e.g., Hamas, Hezbollah, Houthis, Shia militias) or directly strikes Iran, Iran may feel compelled to retaliate to save face.
- **Israel-Hamas War:** The conflict between Israel and Hamas provides motivation and opportunity for escalation if Iran determines its proxies need more support, despite the risk of retaliation.
- **Miscalculation:** While unlikely, mistakes and miscalculations could spiral tensions out of control. The risks of escalation should not be ignored even if an attack seems illogical or accidental.

Lower probability forecasts discuss...

- **Iranian Proxies:** Iran typically operates through proxies like Hamas, Hezbollah, Houthis, and Shia militias to attack Israeli or Israeli-linked targets. This gives them some deniability and avoids direct conflict. Many forecasters argue Iran will continue using this approach rather than openly attack on its own.
- **Fear of Retaliation:** A direct attack by Iran would be seen as a major escalation and could provoke severe retaliation from Israel and the U.S., threatening Iran's regime.
- **No Signs of Military Build-Up:** There are no signs Iran is preparing for or willing to provoke a major regional war. Its leadership appears motivated primarily by regime stability.

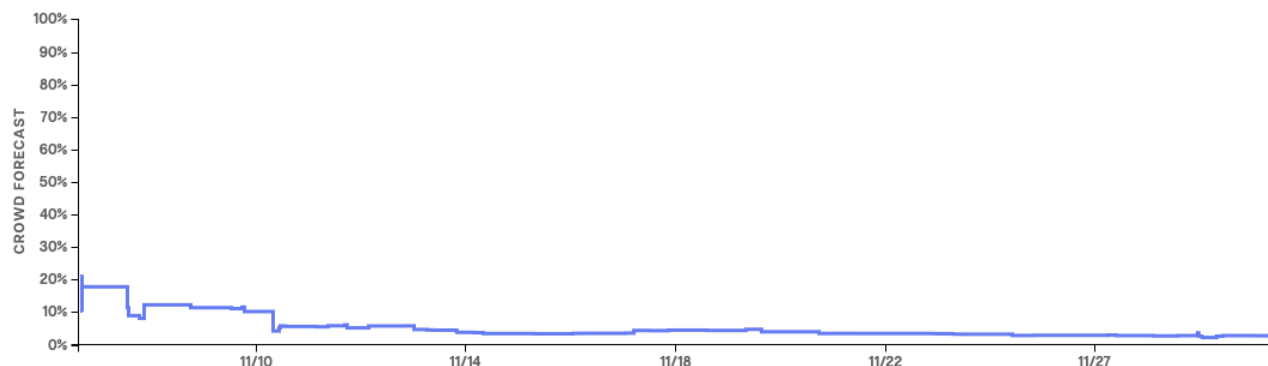
[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	30 days	Number of Forecasters	57	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	14 days	Average for questions in their first 3 months: 47			
Forecasts in the last 24 hours	7	Number of Forecasts	74		
		Average for questions in their first 3 months: 98			

Will Israel and Saudi Arabia publicly acknowledge that they are resuming the normalization process in the next six months?

Crowd Forecast: 3% chance



Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Shared Interests: Israel and Saudi Arabia share some common interests, notably countering Iran's influence in the region. Normalization could help advance this. • Saudi Image: Saudi Arabia wants to portray itself as pragmatic and modernizing. Eventual normalization with Israel could help support this image. • Previous Expressions of Interest: Leaders in both Israel and Saudi Arabia have previously indicated interest in normalization, so the will is there under the right circumstances. • Low Bar for Resolution: The criteria for the resolution—a public acknowledgement—is relatively low. This acknowledgement could potentially happen even if full normalization does not. 	<ul style="list-style-type: none"> • Israel-Hamas War: The ongoing Israel-Hamas war in Gaza makes it politically difficult for Saudi Arabia to be seen aligning itself with Israel, as anti-Israel sentiments escalate in the Arab world. • The Israeli Government: Israel's current right-wing government under Benjamin Netanyahu is seen as hindering the peace process with Palestinians, making normalization with other Arab nations difficult. • Saudi Stance: Saudi Arabia strongly condemned Israeli military actions in Gaza at recent summits. Resuming normalization talks so soon would go directly against this stance. • Saudi Domestic Politics: Domestic politics and public opinion in Saudi Arabia are currently against normalization with Israel.

[See detailed rationales](#) | [See source links](#)

Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	25 days	Number of Forecasters	67	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	9 days	Average for questions in their first 4 weeks: 34			
Forecasts in the last 24 hours	10	Number of Forecasts	85		
		Average for questions in their first 4 weeks: 45			

B. Impact Assessment of Individual Signals

The following table shows INFER's interpretation of how each forecast signal **increases**, **decreases**, or **maintains** status quo conditions regarding Iran's influence on violent non-state actors (VNSA's).

Topic	Signal / Forecast Question	Possible Answer	Impact to Issue Outcome
Iranian Stability	In the next six months, will the Global Protest Tracker record an anti-government protest in Iran with 10,000 or more participants lasting at least a week?	Yes	Increases
		No	Maintains status quo
Threats to Iranian Allies	Will Houthi rebels execute an attack against an Israeli civil or military vessel in the next 6 months?	Yes	Increases
		No	Maintains status quo
	Will Houthi rebels launch a missile that strikes within Israel in the next six months?	Yes	Increases
		No	Maintains status quo
	Will the Houthi movement and Yemen reach a ceasefire that is in effect on 31 December 2024 and lasts at least six months?	Yes	Increases
		No	Maintains status quo
Direct Threats to Iran	Will Iran launch missiles or conduct an airstrike against U.S. forces in the next six months?	Yes	Increases
		No	Maintains status quo
	Will Iran launch missiles targeting Israel or conduct an airstrike in Israel in the next six months?	Yes	Increases
		No	Maintains status quo
	Will Israel and Saudi Arabia publicly acknowledge that they are resuming the normalization process in	Yes	Increases

	the next six months?	No	Maintains status quo
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C. The Forecasters

The forecasters who have participated thus far in these questions have the following profile:

- 119 forecasters made 522 total forecasts
- 63% of forecasts were made by “INFER Pros” - participants in INFER’s Pro Forecaster Program, who were selected based on their accuracy track record of at least 1 year on INFER or other similar forecasting sites or programs.

Demographics

Country	% of Forecasters
USA	45%
Canada, UK, Australia, New Zealand	6%
Europe (not UK)	18%
Latin America, Caribbean	17%
Asia	13%
Africa	1%

D. Methodology for Rationale Summaries

Rationales of INFER forecasters have been selected and summarized by Claude, an AI assistant tool created by Anthropic. To build the rationale summaries presented in this report, we provided forecasts (probabilities and narrative rationales) to Claude to summarize into bulleted lists of arguments. We then manually edited the bulleted summaries for accuracy and readability to ensure that each list item accurately represented forecasters' rationales and was assigned to the proper list.

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