

INFER Issue Report

Iran's Influence on Violent Non-State Actors

December 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.

Decreasing Influence

Status Quo

Increasing Influence

Drivers	Signals	INFER Probability Forecast	
		30 Nov	31 Dec
Iranian Stability	Anti-government protest takes place in Iran with 10,000 or more participants lasting at least a week	19%	14%
Threats to Iranian Allies	Houthi rebels execute an attack against an Israeli civil or military vessel in the next six months	56%	25%
	Houthi rebels launch a missile that strikes within Israel in the next six months	55%	26%
	Houthis and Yemen reach a ceasefire that is in effect on 31 December 2024 and lasts at least six months	25%	25%
Direct Threats to Iran	Iran launches missiles or conducts an airstrike against U.S. forces in the next six months	2%	4%
	Iran launch missiles targeting Israel or conduct an airstrike in Israel in the next six months	2%	2%
	Israel and Saudi Arabia resume normalization process in the next six months	3%	2%

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?

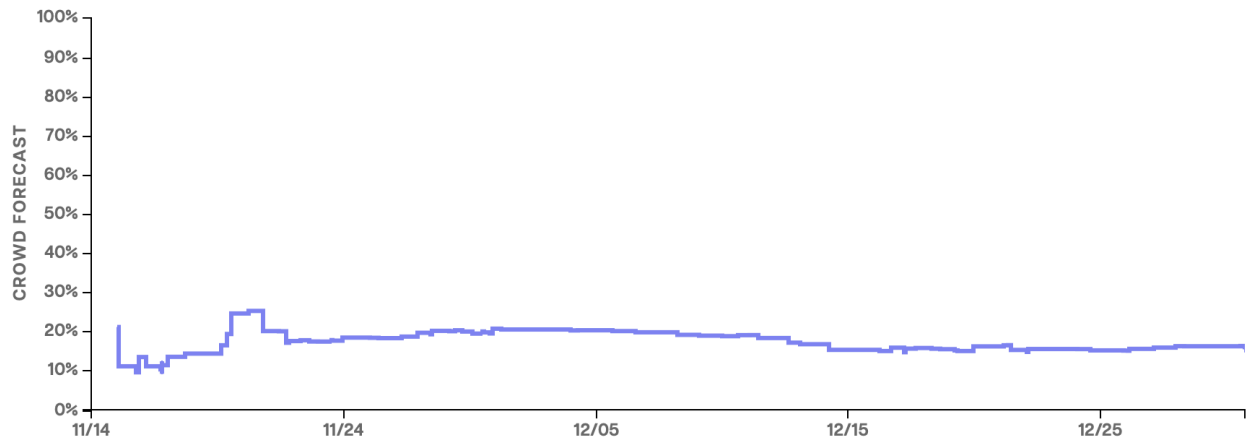
Crowd Forecast: 14% chance

AI Summarization of Rationales: Iran remains volatile with the potential for large protests, but recent crackdowns have dampened momentum. While economic and social grievances persist, new trigger events would likely be required to reignite major protests in the near-term.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> ● Iran's Poor Economy: Economic conditions remain poor in Iran with high inflation, a weak currency, and high unemployment. ● Unfair Elections: Upcoming legislative elections in March 2024 are unlikely to be free or fair and could spark protests. ● Regional Conflicts Threaten Stability: Ongoing conflicts in the region like Israel-Hamas could negatively impact Iran's economy or involve them militarily. ● Women's Rights: The regime's treatment of women remains a major grievance that could ignite protests if new incidents occur. ● Drought: Drought conditions might lead to food and water shortages, providing impetus for protests. ● Possible Backlash From Crackdowns: Iran's government has brutally cracked down on recent protests, executing protesters, and arresting thousands. This could further fuel discontent and protests. 	<ul style="list-style-type: none"> ● Dissent Suppression Stifling Protests: The regime has aggressively suppressed dissent and protests after the Mahsa Amini protests, making large-scale organizing difficult. ● Economic Gains: Some economic conditions have improved slightly with engagement with China and Saudi Arabia. ● Palestinian Cause Unifying Iranians: The Palestinian cause unites Iranians across factions, decreasing domestic protests. ● Lack of Recent Protests: No major protests have occurred in Iran recently. ● Elections Could Increase Stability: Upcoming elections could increase regime stability if turnout is decent. ● Limited Regional Involvement: Iran isn't directly involved in the Israel-Hamas conflict yet, reducing pressure.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	50	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	17 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	1	Number of Forecasts	92		
		Average for questions in their first 3 months: 98			

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

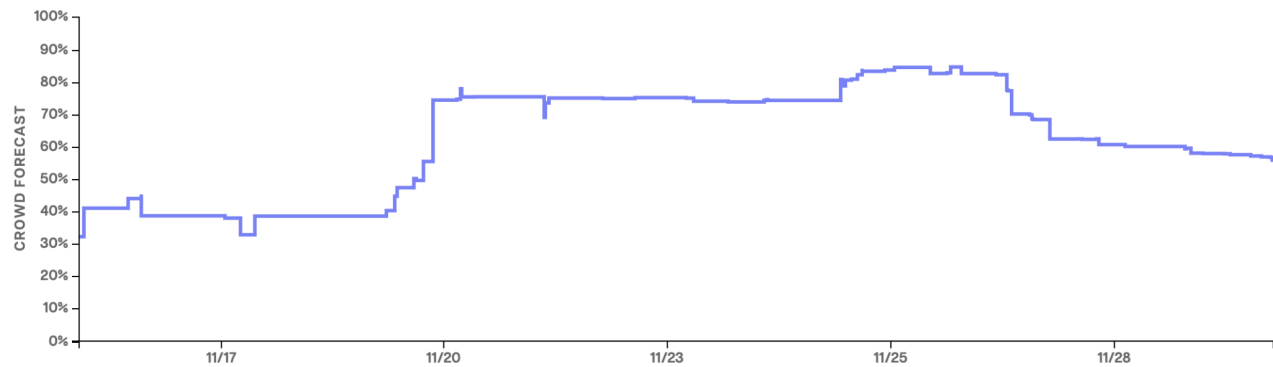
Crowd Forecast: 25% chance

AI Summarization of Rationales: There are reasonable arguments on both sides, but the Houthis' demonstrated willingness and geographic access suggest a higher likelihood, even if their capabilities are limited. However, naval forces in the region complicate their success chances. Overall there is no consensus, with forecasts ranging from 1% to 100% likelihood.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Houthi Solidarity with Palestinians: The Houthis have declared solidarity with Palestinians and Hamas and vowed to continue attacks on Israel to support Gaza. They have already launched several rounds of attacks on Israel using missiles and drones. • Iran Backing Houthis as Proxy Against Israel: The Houthis are backed and supplied with weapons by Iran, who wants to use them as a proxy against Israel. Iran has increased involvement with the Houthis in recent years. • Houthis Threaten Shipping Vessels Linked to Israel: The Houthis have demonstrated their ability and willingness to attack shipping vessels linked to Israel in the Red Sea and Gulf of Aden, through missiles, drones, speedboats, and others. They have hijacked ships and declared Israeli-affiliated vessels as legitimate targets. • Houthis Located Near Key Shipping Lanes: The Houthis are situated geographically close to key shipping lanes like the Bab-el-Mandeb Strait, giving them proximal access to potential Israeli vessel targets. • Houthis Prioritize Aggressive Attacks: The Houthis appear to prioritize aggressive attacks for their propaganda value, increasing the likelihood of attempting attacks. 	<ul style="list-style-type: none"> • Houthis' Limited Attack Capabilities: The Houthis' capabilities to successfully strike Israeli vessels may be limited. Their weapons often get intercepted and they lack sophisticated intelligence. • Naval Forces Make Houthi Attacks Difficult: Israel and its allies have naval forces patrolling the Red Sea and Gulf of Aden, which make Houthi attacks more difficult. • Few Israeli Civilian Ships to Target: There are few Israeli-flagged civilian ships that transit the Red Sea, reducing potential targets. Israeli Navy ships are likely out of the Houthis' reach. • Ships Avoiding Red Sea Route: As attacks continue, shipping companies are avoiding the Red Sea route, further limiting potential Israeli targets. International naval coalitions are also being formed to counter Houthis. • Houthis Preoccupied in Yemen: The Houthis are preoccupied fighting the Saudi-led coalition in Yemen, limiting their ability to focus on Israel. Their rhetoric may be more for show. • Global Powers Could Deter Attacks: Global powers want to avoid escalation in the region, and may intervene more if attacks persist, deterring the Houthis.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	66	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	17 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	2	Number of Forecasts	186		
		Average for questions in their first 3 months: 98			

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

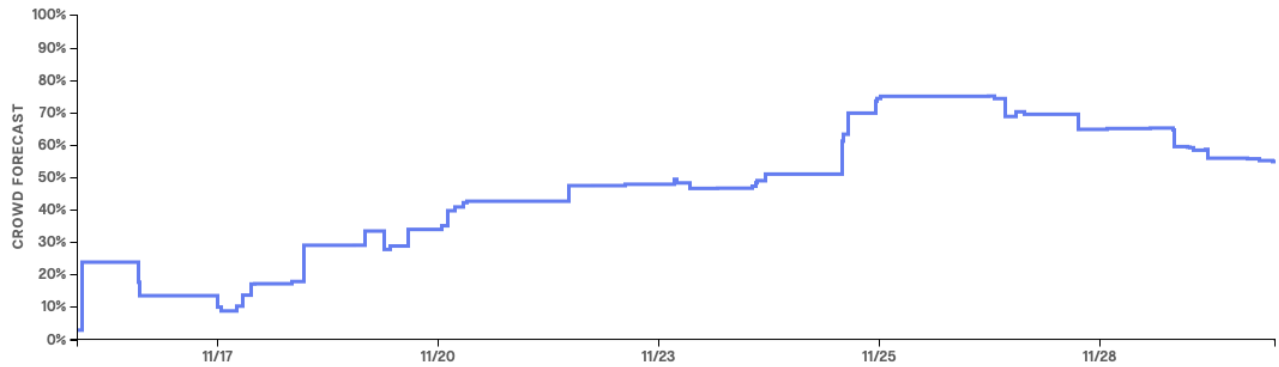
Crowd Forecast: 26% chance

AI Summarization of Rationales: While the Houthis have demonstrated intent and capability to strike Israel, the sophisticated Israeli air defenses coupled with deterrent factors make it unlikely the Houthis will be able to successfully hit Israeli territory in the next 6 months. However, some see a persistent risk if missile launches continue.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Iron Dome Limitations: Israel's Iron Dome anti-missile system has limitations and sometimes allows rockets to land in open areas. This raises the possibility that a Houthi missile could strike unpopulated territory, especially if a large number of rockets are fired. • Houthi Mindset: The Houthis have a "nothing to lose" mindset and may not be deterred by backlash. Striking Israel boosts their credentials among constituencies. 	<ul style="list-style-type: none"> • Distance Between Yemen and Israel: The long distance from Yemen makes it difficult for Houthi missiles to reach Israel. Many have fallen short or been intercepted. • Sophisticated Israeli Air Defenses: Israel's multi-layered missile defense systems, like the Iron Dome and Arrow, have successfully intercepted Houthi missiles so far. • Houthi Capabilities: Houthi missile capabilities are limited. They likely only have a small number of missiles capable of reaching Israel. Focusing on closer targets like ships is more effective. • Potential Backlash: Striking civilian targets risks international backlash and retaliation against the Houthis, which could hurt their goals. • Saudi Threats: The Houthis may be distracted by threats from Saudi Arabia rather than Israel. • U.S. Naval Presence: The presence of the U.S. Navy in the Red Sea makes it even harder for missiles to get through layered defenses in the Red Sea first.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	50	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	16 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	7	Number of Forecasts	131		
		Average for questions in their first 3 months: 98			

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

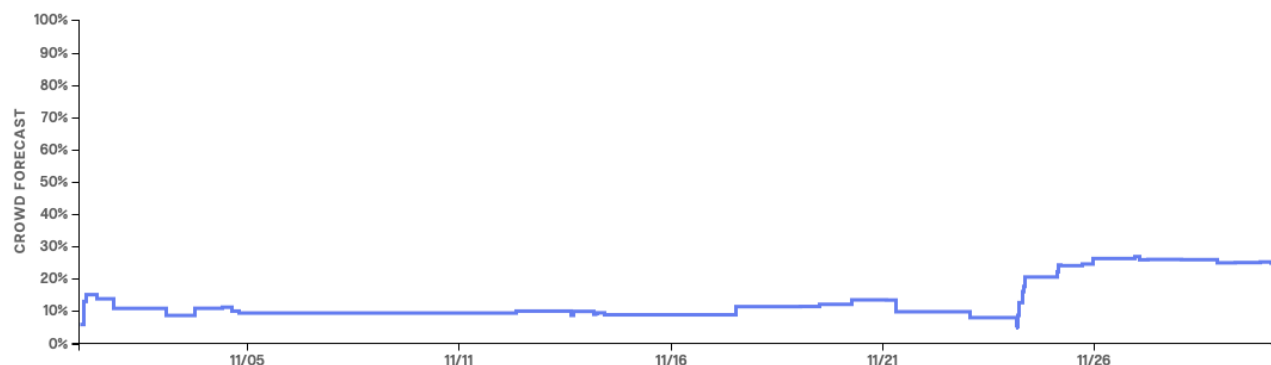
Crowd Forecast: 25% chance

AI Summarization of Rationales: While there are some factors favoring an agreement, the impact of the Israel-Hamas conflict and ongoing attacks make a 6-month ceasefire challenging to achieve within the specified timeframe.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Previous Ceasefire: There was a previous ceasefire from April to October 2022, indicating a willingness by both sides to engage in diplomatic solutions. The UN and U.S. envoy are actively involved in facilitating negotiations. • Saudi Exit Proposals: Saudi Arabia is eager to exit the conflict and has presented roadmaps and proposals to the Houthis that would provide economic incentives like transferring funds and paying salaries. • Exhaustion on Both Sides: Both sides seem exhausted by the prolonged civil war and recognize the need for stability. There is international pressure to find a political settlement. 	<ul style="list-style-type: none"> • Unresolved Differences: Major differences remain between the two sides on key issues like routing finances and withdrawal of troops. Previous ceasefires have collapsed. • Houthis' Relationship with Iran and Hamas: The Israel-Hamas war has aligned the Houthis more closely with Iran and Hamas, complicating relations with Saudi Arabia. Houthi attacks on Israel may jeopardize Saudi peace efforts. • Ongoing Houthi Attacks: Houthi attacks on Saudi interests and threats to commercial shipping undermine negotiations. The U.S. may redesignate Houthis as a terrorist organization, which would threaten a potential deal.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	35	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	15 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	2	Number of Forecasts	102		
		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?

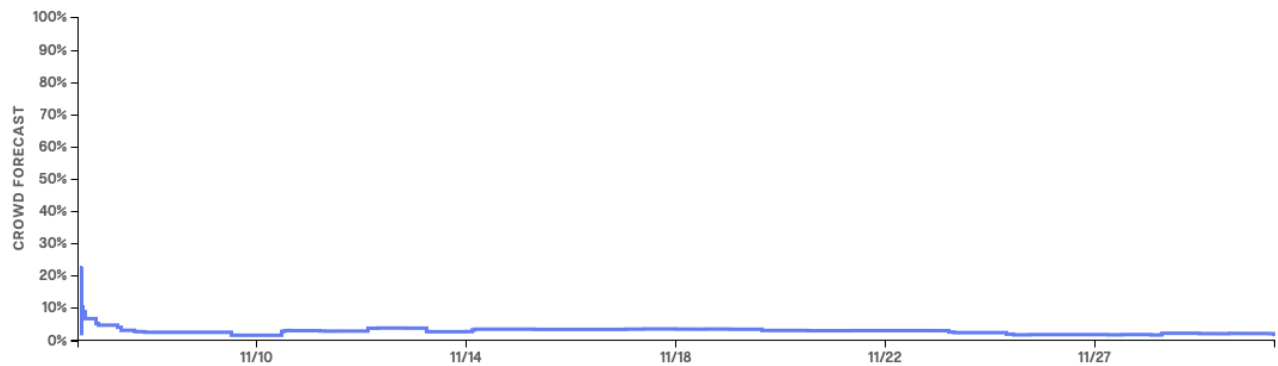
Crowd Forecast: 4% chance

AI Summarization of Rationales: The crowd believes the arguments against direct confrontation from Iran are stronger, with most probability estimates below 10%. However, some see rising tensions as making a direct attack more likely.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Proxy Attacks on U.S. Forces: Militias linked to Iran have continued attacking U.S. forces, causing injuries. Iran may escalate to more direct confrontation. • Tensions High After U.S. Retaliation: Tensions are high after recent U.S. drone strikes retaliated against Iran-backed militias. Further escalation is possible. 	<ul style="list-style-type: none"> • Iran's Preference for Using Proxies: Direct confrontation between Iran and the U.S. rarely occurs. Iran prefers to act through proxies. • U.S. Elections: With U.S. elections coming, a direct attack could be risky for Iran. • Saudi Ties: Iran's ties with Saudi Arabia, a key U.S. ally, have improved recently. Direct conflict with the U.S. could jeopardize this. • U.S. and Israeli Readiness: The U.S. and Israel have shown ability to handle regional threats. This discourages Iran from escalating. • Biden Avoiding Middle East Conflicts: The Biden administration wants to avoid Middle East conflicts and is unlikely to provoke Iran. • Potential for Severe Consequences: Consequences of a direct attack on U.S. forces would be severe for Iran.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	70	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	22 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	1	Number of Forecasts	138		
		Average for questions in their first 3 months: 98			

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

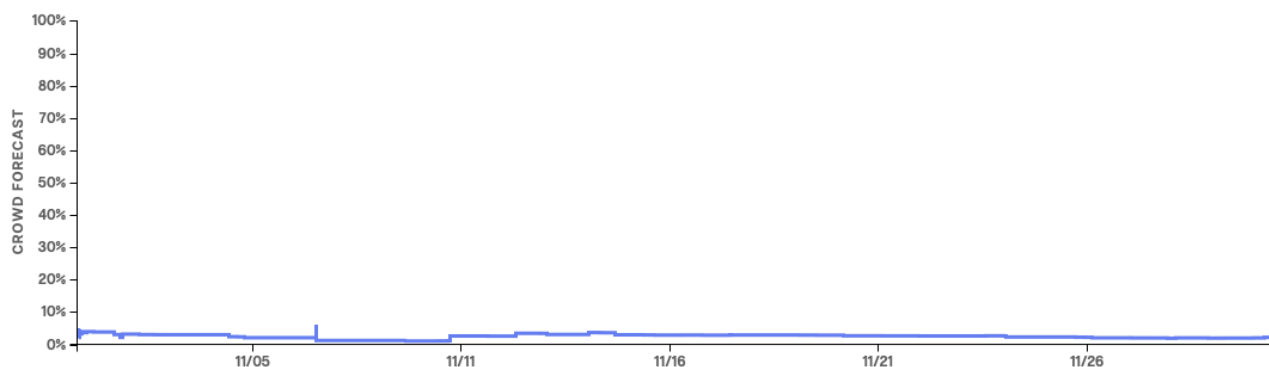
Crowd Forecast: 2% chance

AI Summarization of Rationales: Most forecasts see direct strikes as unlikely, arguing that Iran has too much to lose and prefers to use proxies to avoid all-out war. But some see non-zero risk of miscalculation given high tensions.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Tension between Iran and Israel: The ongoing conflict between Israel and Hamas in Gaza and the killing of Iranian commanders in Syria (that Iran has attributed to Israel) have raised tensions between Israel and Iran. • Iran's Ties with Allies: Iran's relationship with Russia and China and domestic stability may put it in a stronger military position than in the past. • Possible Response if Iran Is Attacked: Iran may feel compelled to respond directly if Israel or the U.S. conducts strikes on Iranian territory or kills a large number of Islamic Revolutionary Guard Corps forces. • Iran's Upgraded Arsenal: Iran recently upgraded its arsenal with long-range hypersonic missiles capable of evading Israeli defenses. 	<ul style="list-style-type: none"> • Iran Utilizing Proxies for Plausible Deniability: Iran typically utilizes proxy groups like Hezbollah, Hamas, and the Houthis to attack Israeli interests rather than engage directly. This provides deniability and avoids direct confrontation with Israel and the U.S. • Iran's Reluctance Towards Severe Escalation: A direct attack would be a significant escalation for Iran, on par with Iraq's SCUD missile attacks in the Gulf War. Iran's leadership prioritizes regime survival and is unlikely to take this risk. • Strong Israeli and U.S. Military Capabilities: Israel and the U.S. have strong military capabilities in the region (e.g., advanced aircraft and missile defense systems) that could intercept and retaliate against direct Iranian attacks.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	65	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	24 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	0	Number of Forecasts	138		
		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?

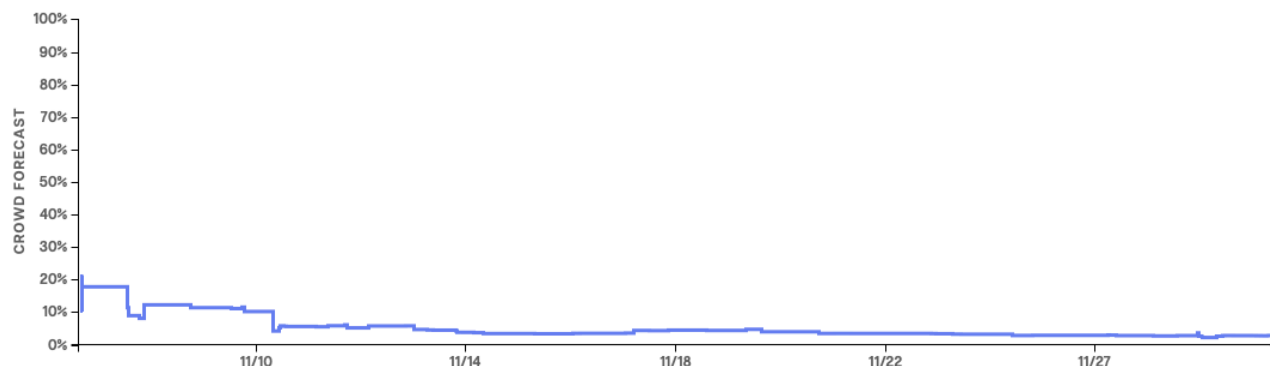
Crowd Forecast: 2% chance

AI Summarization of Rationales: Forecasters see pragmatic reasons for normalization, but outraged public opinion over Gaza makes normalization less likely. Most forecasts see the Gaza conflict as the deciding factor in the short term.

Higher probability forecasts discuss...	Lower probability forecasts discuss...
<ul style="list-style-type: none"> • Shared Interests: Israel and Saudi Arabia share some common interests like countering Iran and bolstering economic ties. Some forecasts mention these pragmatic reasons for moving forward. • Possible U.S. Pressure: The U.S. is eager for them to normalize relations and could pressure both sides to resume the normalization process. • Low Bar for Token Resumption of Talks: The bar for "publicly acknowledging" that they are resuming talks is low. Israel and Saudi Arabia could make a token announcement without seriously engaging in normalization efforts. 	<ul style="list-style-type: none"> • Public Outrage Against Israel: The recent Gaza war and civilian casualties have outraged public opinion in Saudi Arabia and the Arab world against Israel. Forecasts cite polls showing 96% of Saudis want ties cut with Israel. • Saudi Reputation Tied to Palestinian Cause: Saudi Arabia wants to maintain solidarity with Palestine and not be seen as abandoning their cause. Normalization now would damage their reputation. • Ongoing Gaza Conflict a Blockade: The Gaza conflict is ongoing and unlikely to be resolved within six months. Most forecasts see the conflict as a blockade to progress. • Israel Government Unwilling to Concede: Israel's current right-wing government is seen as unwilling to make concessions to Palestinians that could enable normalization.

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

Consensus Trend



Crowd Forecast Profile

Recency of Forecasts		Participation Level		Accuracy	
Question age	2 months	Number of Forecasters	79	Participants in this question vs. all forecasters	better than average ⓘ
Average forecast age	19 days	Average for questions in their first 3 months: 48			
Forecasts in the last 24 hours	4	Number of Forecasts	156		
		Average for questions in their first 3 months: 98			

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:

- 156 forecasters made 1076 total forecasts
- 65% 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	43%
Canada, UK, Australia, New Zealand	7%
Europe (not UK)	18%
Latin America, Caribbean	19%
Asia	12%
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 Claude with forecast probabilities and narrative rationales, which generated multi-sentence summaries and bulleted lists of arguments. We then manually edited the summaries for completeness and readability to ensure that they accurately represented forecasters' rationales.

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