


**UNCLASSIFIED // OPEN SOURCE // DEFENSIVE**

**TREADSTONE 71 · PROJECT INSURRECT · COMPREHENSIVE COMPENDIUM**

# MANAGED EROSION

The full defensive open-source assessment of AI-scaled influence laundering against United States electoral integrity, 2026 to 2028. Ten threat vectors, four foreign actors, the seam, the money, the methods shown at work, and the first real evidence from a captured channel set. Paper defends the count. Nothing defends belief.

| 63 | 10 | 8 | 3 / 3 |
|---|---|---|---|
| Threat index / 100 · elevated | Threat vectors catalogued | Key judgments, graded | Backtest hits, recalibrated |

**READING KEY**

Likelihood uses Sherman Kent half-open bands. Confidence follows ICD 203 and 206 and stands separately from likelihood. Sourced material carries a NATO Admiralty grade, source reliability A to F and information credibility 1 to 6, never averaged. FACT marks a filing, court record, or first-party disclosure. CLAIM marks an assertion by an interested party. The Electoral Integrity Threat Index runs 0 to 100, higher is more adverse. The assessment treats actors as capability and incentive nodes, never as one coordinated plan.

**HOW TO READ THIS COMPENDIUM**

Part I is the estimate. Part II is the threat surface, ten vectors, the actors, the seam, the money, and the physical variable. Part III shows the analytic methods working, not merely named. Part IV is foresight. Part V is the evidence and the collection that produced it. Part VI closes on a single decision and the limits open sources cannot cross.

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| | | |
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# PART I

SUMMARY

## TL;DR

A defensive, open-source read of AI-scaled influence laundering against United States elections, 2026 into 2028. In one sentence: paper defends the count and nothing defends belief.

- The Electoral Integrity Threat Index, a 0-to-100 composite built in Part III from five weighted components (legitimacy, defense, capability, force, count), sits at **63 of 100**, elevated, driven by a documented collapse of federal election defense rather than by any proven manipulation of the vote.
- The compendium catalogues and grades ten vectors. The two carrying the most weight have already happened, the defensive-capacity collapse and the state-force variable, not a foreign hack.
- Open sources prove a laundering machine and heavy reposting. They prove foreign control of a domestic voice only once, for the paid Tenet Media case. Everywhere else the evidence is behavioral and stops short of proof.
- The best controlled study on record found no measurable vote change from foreign exposure, and exposure concentrates among partisans who already agree. Presence is not persuasion.
- A rational foreign actor's highest-value move is patience. The forecasting model, tested against three real cycles, calls all three correctly after one honest correction and never cries Infrastructure Shock, which matches the record.
- **Held through 17 October.** Nine further weeks of record moved no scenario band. The courts ran the Justice Department's voter-roll record to twenty-six dismissals plus an appellate affirmance and twice checked the mail-ballot order, no state has disclosed an intrusion, no 2026 certification has failed, and the new federal presence around the vote is enforcement, not restored defense.

BOTTOM LINE UP FRONT

## BLUF

**Who this serves.** A state or county election principal, a secretary-of-state office or a county registrar, deciding where the last security dollar goes in the 17 days before 3 November, and the counsel who advises that office on federal officers at polling places. Readers outside election administration can use it as a graded map of what is proven, what is claimed, and what is not.

**Judgment.** The dominant 2026 scenario is **Managed Erosion**, likely (55 to <85 percent), ICD confidence moderate. Trust erodes along partisan lines and the system holds the count. A disclosed outcome-altering breach is highly unlikely (5 to <15 percent).

**Driver.** The administration cut, across 2025, the federal posture that kept 2020, 2022, and 2024 inside Managed Erosion. The attorney general disbanded the Foreign Influence Task Force in February 2025. Funding for the election-security information-sharing centers lapsed by late 2025. 2026 is the first national cycle since 2018 without that backstop.

**Move.** Spend the security dollar left after federal support ended on tabulation and canvass-venue security and on a first-seen-origin watch, a log of where each narrative about the count first appears so a line that surfaces in the captured channels carries a timestamp and an origin. Do not spend it on broad content takedown. The state-force and certification flashpoints are the likeliest 2026 failure path.

**Status at 17 October.** The judgment holds with 17 days to the vote. The Justice Department plans about one thousand election monitors and has published no jurisdiction list, the Homeland Security secretary floated immigration officers at polling places before a department official walked it back, the Insurrection Act sits uninvoked but pointedly not ruled out, and early voting opened on schedule.

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ESTIMATIVE CORE

# The eight key judgments

| Judgment | Assessment | Likelihood · confidence |
|---|---|---|
| **KJ-1 Defense** | Federal election-defense capacity contracted verifiably. The administration defunded the information-sharing centers, disbanded the task force, and cut the cyber agency from about 3,300 staff in January 2025 to about 2,400 by December, roughly 27 percent. | **Almost certain, 95 to 99% · HIGH** |
| **KJ-2 State force** | The dominant physical-security variable is federal force, not private militias. Several 2025 deployments occurred, courts ruled two of them unlawful, and enforcement-at-polls signaling followed for the fall of 2026. The attorney general, confirmed 50 to 49 on 8 August 2026, has declined to rule out federal agents at polling places. | **Highly likely, 85 to <95% · MODERATE** |
| **KJ-3 Count** | A systemic, outcome-altering breach of the count is unlikely. The paper and audit backstop is broad and no open source documents a successful swing-state intrusion. | **Unlikely, 15 to <45% · MODERATE** |
| **KJ-4 Presence vs effect** | Synthetic influence content is present at scale and its measured persuasive effect on voting is small. The best controlled study found no measurable vote change. | **Likely, 55 to <85% · MODERATE** |
| **KJ-5 The seam** | A foreign principal directs at least one organic United States amplifier beyond the paid Tenet case. Domestic voices launder foreign content as a documented pattern, and no open source shows a single controlling hand, so the judgment sits at even odds on thin evidence. | **Roughly even chance, 45 to <55% · LOW** |
| **KJ-6 AI capability** | AI deception is cheap and weakly deterred. Clones cost about one dollar, detectors run 45 to 50 percent below lab accuracy in the wild, a jury acquitted the flagship criminal case, and the federal rule stalled. | **Likely, 55 to <85% · MODERATE** |
| **KJ-7 Certification** | Certification friction recurs. Board refusals appear across cycles and chief-official turnover is at a 25-year high, while courts uniformly hold certification ministerial. No 2026 primary certification failed, and officials in two counties have signaled possible refusals for the fall. | **Likely, 55 to <85% · MODERATE** |
| **KJ-8 Trust** | Confidence in an accurate count stays depressed and partisan-asymmetric. It fell from 77 to 60 percent in just over a year, per the UC San Diego election-trust survey published in February 2026. By October 2026 Gallup put confidence in election honesty at 49 percent, Democrats at 63 and Republicans at 37, an asymmetry that persists but no longer cleanly tracks the party in power. | **Highly likely, 85 to <95% · HIGH** |

**So what.** The two judgments carried at high confidence are both structural and already realized, defense and trust. The judgment a hostile actor would most want, a proven foreign hand on a domestic voice, is the one held lowest, at roughly even and low confidence. The estimate anchors where the evidence is strong and stays honest where it is thin.

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FRAMING

## Who, what, so what, why now

**WHO**
Capability and incentive nodes, not one directed campaign. Foreign state nodes carry the highest assessed nexus, Russia at 82, Iran at 71, China at 58, and North Korea at 30 on the internal 0-to-100 nexus scale, which weights documented capability, demonstrated intent, and Admiralty-rated activity against United States elections. A commercial market of disinformation-for-hire firms sells method. Domestic movement channels, the captured Telegram set among them, supply reach. State actors whose deployment and certification behavior create flashpoints round out the set.

**WHAT**
Influence laundering scaled by cheap generative media, then cross-platform reposting that relaunders provenance until origin is hard to recover. Layered on top is state-force signaling near election operations, and recurring certification friction. The spine of the assessment is presence against persuasion, one measurable and one not.

**SO WHAT**
Paper and audit defend the count, so the realistic 2026 risk is to belief and to procedure. The threat lands on certification venues, on the perception of a fair result, and on the trust of the losing side. A machine does not need to change a vote to move a country toward contested legitimacy.

**WHY NOW**
Three conditions arrive together. The administration cut federal election defense across 2025. Synthetic media is cheap and a jury acquitted the flagship enforcement case, so deterrence is weak. And 2026 is the first national test of the degraded posture, with 2028 the higher-stakes sequel. The pre-positioning window has now closed: the earliest states have mailed ballots, early voting opened on schedule, and the vote sits 17 days out.

OBSERVED TO DATE

## Impacts so far

The record through mid-2026 shows erosion without a break. Public confidence in an accurate count fell from 77 to 60 percent in just over a year on the UC San Diego survey published in February 2026, and the decline is partisan-asymmetric, 17 points among Republicans, 13 among Democrats, 16 among independents. The 2024 New Hampshire AI robocall drew a federal enforcement action and a state criminal case, and the criminal case ended in acquittal in June 2025. Certification refusals recurred and resolved under court order, in Otero County and Cochise County, so the pattern is friction the system absorbs. Federal agencies attributed fabricated videos referencing voting to Russia in late 2024. Across three cycles no disclosed successful, outcome-relevant intrusion of a swing-state system appeared, and the 2016 Illinois registration breach remains the reference case. Across 2025 and 2026 the Justice Department turned enforcement pressure toward state election administration itself, and the courts absorbed that pressure the way they absorbed certification refusals, handing the department twenty consecutive district-court losses plus one appellate loss on its voter-roll demands through early August 2026. The autumn extended the arc rather than bending it: twenty-six dismissals by mid-October across suits against thirty states and the District, the Sixth Circuit affirmance, one settlement in Oklahoma, a 9 October federal judgment vacating the department's list-maintenance project outright, and the

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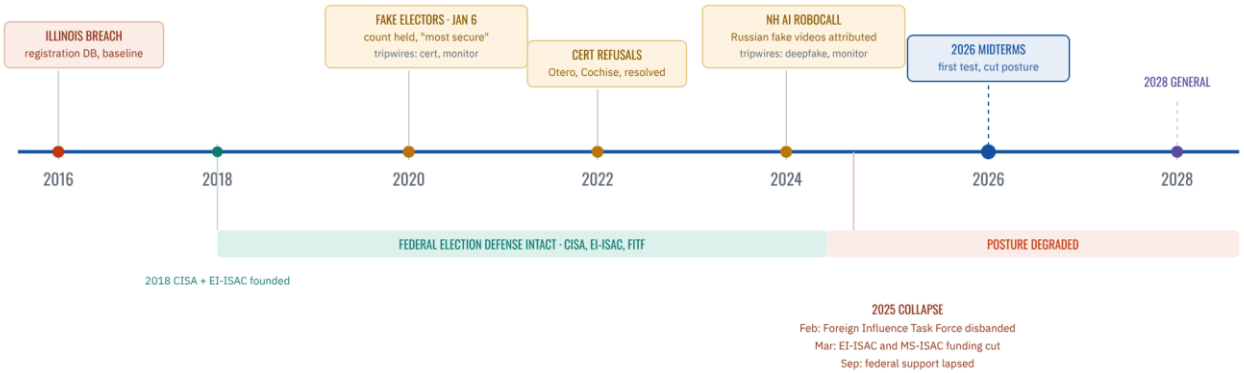
Supreme Court checking the mail-ballot order twice while allowing voluntary state use of the rebuilt SAVE citizenship database. Gallup's October read put confidence in election honesty at 49 percent. In Nebraska, the Lancaster County petition-fraud case grew to seven arrested circulators across at least eight petitions and five campaigns, and the verification wall that caught it held.

> **So what.** Every realized harm to date landed on belief and procedure, not on the count. The 2026 posture should defend against that pattern.

# PART II

CHRONOLOGY

## How we got here, 2016 to 2028




Shaping events above the line, defensive posture below. The three cycles that stayed inside Managed Erosion all ran while federal election defense was intact.

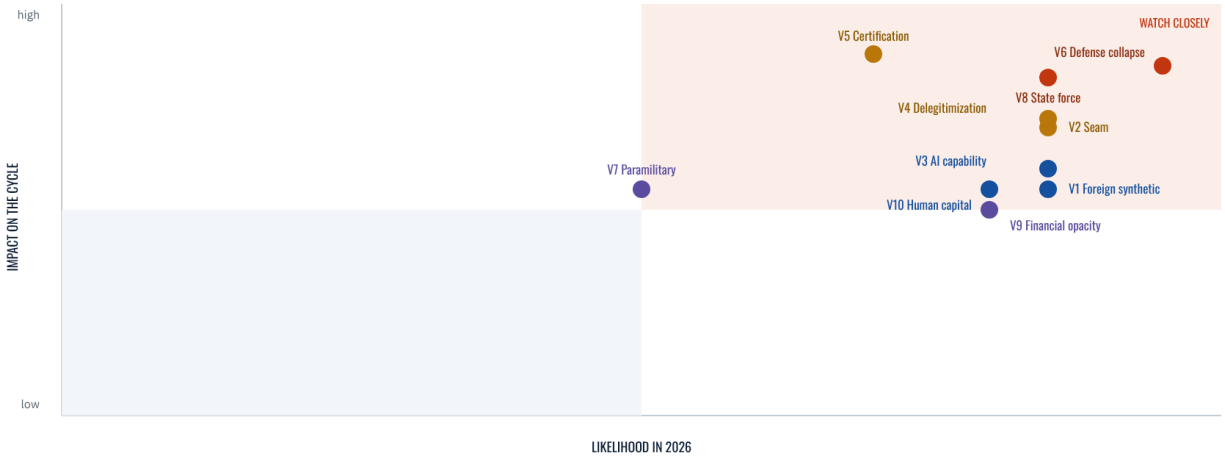
THREAT SURFACE

## The ten vectors

Each vector carries a FACT or MIXED grade and an Admiralty grade and reads for its own so-what. Two have already happened. Most are present with unproven effect, which is the honest center of the whole picture.

| # | Vector | Grade | Adm. | Evidence, in brief |
|---|---|---|---|---|
| V1 | **Foreign synthetic content** | FACT | A2/B2 | CopyCop across 300-plus fake sites, Doppelganger and Pravda at scale. Present. Effect unproven. |
| V2 | **Narrative laundering, the seam** | MIXED | A1 paid / B2 organic | Verbatim reposting documented. Control proven only for Tenet. |
| V3 | **AI deception capability** | FACT | A1/A2 | One-dollar clones, detectors fail 45 to 50 percent in the wild, flagship case acquitted. |
| V4 | **Delegitimization infrastructure** | FACT | B2 | 1,265 pink-slime outlets, only 47 percent of rumor narratives ever fact-checked. |
| V5 | **Certification subversion** | FACT | A2/B2 | Board refusals, 41 percent official turnover. Courts hold certification ministerial. |
| V6 | **Defensive-capacity collapse** | FACT | A1 | EI-ISAC, MS-ISAC, FITF, and CISA cuts. Already realized. |
| V7 | **Paramilitary intimidation** | MIXED | A1/B2 | Maricopa template, facility attacks. Private groups weaker after clemency. |
| V8 | **State-force vector** | MIXED | A1 | 2025 deployments, two ruled unlawful, agents-at-polls signaling now voiced by the confirmed attorney general. Dominant new variable. |
| V9 | **Financial opacity** | MIXED | B2 | Record 1.9 billion dollars in dark money, vendor ownership opaque. Lancaster County paid-circulator fraud: seven arrested, eight petitions, five campaigns, caught by verification. |
| V10 | **Human-capital erosion** | FACT | A1/B2 | Experience loss, thin training, voter AI-detection near chance, news deserts. |

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Vector risk matrix, likelihood against impact. The two red vectors, defense collapse and state force, sit at the top of both axes and have already happened. Most foreign-content vectors sit high on likelihood and lower on impact, the presence-without-proven-effect pattern.

> **So what.** Defensive resources should track the top-right of this matrix, force and certification, not the crowded high-likelihood, moderate-impact band of foreign content, where presence is high but measured effect is low.

THREAT SURFACE

## Foreign actors and anchor cases

Four state nexuses carry the assessed foreign weight. The anchor cases below are the documented operations behind them, graded, and the table marks the one case where the open record fully closes control of a United States outlet.

| 82 | 71 | 58 | 30 |
|---|---|---|---|
| Russia nexus | Iran nexus | China nexus | North Korea nexus |

| Case | Attributed to | What is established | Adm. |
|---|---|---|---|
| **Tenet Media** | Russia, via RT | The one closed case. The Justice Department alleges RT wired about 9.7 million dollars, nearly ninety percent of the company's bank deposits, through shell companies to a Tennessee firm matching Tenet. A filing proves control. | A1 |
| **CopyCop / Storm-1516** | Russia, Center for Geopolitical Expertise | Articles carry verbatim language-model residue that ties them to a self-hosted pipeline. French services document the seed-to-site-to-influencer chain, with a laundering stage through foreign media, across 77 Storm-1516 operations catalogued to March 2025. | A2 |
| **Doppelganger** | Russia, SDA and Structura and ANO Dialog | Cloned Western news sites. Treasury and Justice actions connect the operators to the Russian state. | A1 |
| **Storm-2035** | Iran | Language-model accounts generated articles and short comments on United States candidates on both sides. Rated low impact by the vendor that disclosed it. | B2 |
| **Spamouflage** | China | Cross-platform network documented by platform takedowns and independent researchers. Reach far exceeds measured effect. | B2 |

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**So what.** The foreign machine is real and, at the infrastructure level, well attributed. The gap is always the last link, from a foreign operator to an organic United States voice, and the record closes it exactly once. That single exception is the shape of the whole problem.

THREAT SURFACE

## The seam, and the wall behind it

The seam is the join between the foreign production layer and the domestic voice. Open-source forensics can move it from blank to a partial, documented picture, and no further. Foreign-to-foreign infrastructure links are strong and documented. Open sources document the foreign-to-United-States laundering mechanism and observe the reposting. The specific coupling of a named United States amplifier to a foreign operator, absent a filing, is inference beyond open evidence. Near-simultaneous reposting is on the record, one item echoed about twenty minutes after a foreign-origin post, which shows the mechanism operating without naming a controller.

**THE SEAM ATTRIBUTION WALL**
No open source proves that a large organic United States amplifier, as distinct from a paid contractor like Tenet, is technically or financially controlled by a foreign principal. This product states that as a firm limit, not a soft one. The behavioral evidence, reposting and timing and narrative migration, is real and stops short of proof. This product does not assert a single controlling coordinator across networks, because no open source supports one.

**So what.** Any brief that claims proven foreign direction of a domestic movement channel has crossed the wall and traded credibility for a headline. The defensible claim is presence and pattern, and it is enough to act on.

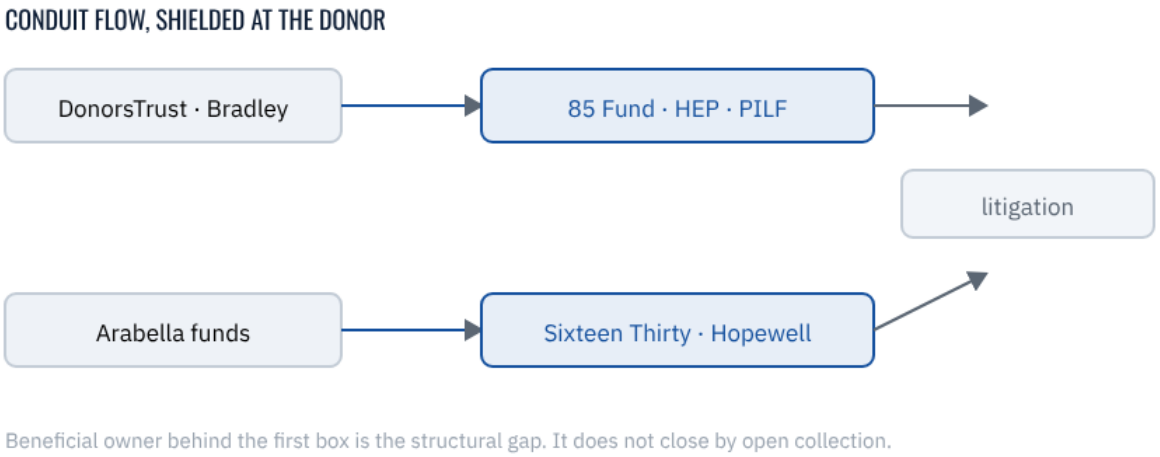
THREAT SURFACE · SIR-4.6 AND SIR-7.1

## The money, and the reach that does not persuade

Two strands often confused with proof of effect. The first is the money behind election litigation and integrity work. The second is the reach of synthetic content, which is not the same as its effect.

**DARK MONEY AND LITIGATION FUNDING**
Both partisan networks fund election litigation through 501(c) intermediaries and donor-advised funds that legally shield the original donor, so open sources cannot resolve most beneficial owners. Federal dark money reached a record 1.9 billion dollars in 2024, up from about 1 billion in 2020. Of the traceable share, about 1.2 billion favored Democrats and about 664 million favored Republicans, and more than 1.3 billion flowed through super PACs. On the right the conduit chain runs from DonorsTrust and the Bradley Foundation into The 85 Fund, the Honest Elections Project, and the Public Interest Legal Foundation. On the left it runs from the Arabella-managed funds into Elias-linked litigation vehicles. DonorsTrust reported only three gifts in 2021, one of 427 million dollars, one of about 426 million in closely held stock, and one of about 77 million, entered 2022 with roughly 1.5 billion in assets, and granted 17.1 million to The 85 Fund. The Sixteen Thirty Fund raised nearly 191 million in 2021 and spent 196 million in 2022.

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**REACH IS NOT PERSUASION**

The strongest empirical finding in the whole effort is that raw reach did not translate into measured attitude or vote change. The best controlled study, Eady and colleagues in Nature Communications in 2023, found no measurable change in attitudes, polarization, or voting behavior from exposure to the Russian Twitter campaign, and exposure concentrated, with one percent of users seeing seventy percent of exposures. Verified 2024 political deepfakes reached from the New Hampshire robocall, about 5,000 recipients by the consultant's own count and 3,978 by the carrier's consent decree, to the Harris parody video Musk reposted, about 123 million platform-displayed views by AP's count, but those are impressions on a platform, not unique people and not evidence of a changed mind. Correction lags virality. Only 47 percent of 2022 midterm misinformation narratives were ever fact-checked, and 74 percent of accurate 2024 election community notes were never shown to users.

> **Impression is not effect.** Treat every platform-reported reach number as a lower-reliability figure than a filing or an audited count and never let an impression count stand in for a measured effect.

> **So what.** Money and reach both look alarming and both resist proof of effect. The defensible use of each is as an indicator of capacity and intent, not as evidence that a vote moved.

THREAT SURFACE

# Paramilitary and state force

The physical picture inverted since 2024. Non-state groups are organizationally weaker and ideologically emboldened, and a larger state-actor variable moved to the center. The January 2025 clemency removed the deterrent of prosecution. Federal prosecutors had charged about 1,583 January 6 defendants; the 20 January 2025 proclamation pardoned all but 14 and commuted the sentences of those 14, Proud Boys and Oath Keepers members. The Justice Department moved in April 2026 to vacate the remaining seditious-conspiracy convictions, and two judges dismissed them with prejudice, the Proud Boys case on 10 July and the Oath Keepers case on 4 August, which also lifted the firearms bar. Oath Keepers signaled a relaunch in November 2025, and five Proud Boys leaders filed suit seeking 100 million dollars. The groups are fractured and financially encumbered, so a nationally coordinated election-site operation in 2026 is unlikely (15 to <45 percent), while localized chapter-level appearances near election-adjacent protests are likely (55 to <85 percent).

Against that, the dominant physical-security wildcard is federal force. Several 2025 deployments of federalized Guard and armed federal personnel to cities occurred, and courts found several unlawful. It is highly likely (85 to <95 percent) that the disposition of federal forces, not private militias, is the dominant physical variable around 2026 election sites. The 2024 Pacific Northwest drop-box arson case remains unsolved, and whether it inspired successors is an open collection gap.

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### The named principal, August 2026

The federal-force variable acquired a named principal days before this cutoff. The Senate confirmed Todd Blanche as Attorney General 50 to 49 on 8 August 2026, with two Republicans joining every Democrat in opposition, graded A1 on the roll call. At a March 2026 conference Blanche asked why anyone objects to sending immigration officers to polling places, and at his 15 July 2026 confirmation hearing he declined to rule out federal agents at polls, both on the record, A2. Federal law at 18 U.S.C. 592 bars stationing armed federal personnel at polling places. In a 17 May 2026 broadcast interview Blanche asserted that substantial evidence shows the 2020 election was rigged. That assertion is a claim by an interested official. No audit or court record on file supports it, and it contradicts his own Senate testimony acknowledging the 2020 result.

### The pressure campaign, and the courts that absorbed it

Open sources document the department's 2025 to 2026 campaign against state election administration end to end. On 7 July 2026, the Civil Rights Division sent letters to all fifty states and the District of Columbia warning that officials who knowingly retain noncitizens on voter rolls could face criminal liability, with five days to respond, A1 on the letters themselves. Thirty states and the District refused earlier demands for unredacted voter rolls, the department sued, and it lost in twenty district courts and one federal appeals court, including eleven rulings by Republican-appointed judges and dismissals with prejudice in Illinois and Colorado, A1 on the dockets. A district judge appointed by the sitting president quashed a grand-jury subpoena for the identities of Fulton County 2020 election workers and called its breadth staggering. The department deployed election monitors to fifteen jurisdictions in six states for the 2026 primaries, and observers at the August Michigan primary described those monitors as unobtrusive, B2. Pushback is bipartisan on the record, from the Republican lieutenant governor of Utah calling the letters bizarre to Democratic secretaries of state calling them intimidation. The pattern matches the model, pressure recurs and the institutions absorb it, and the twenty-one straight rulings are the strongest current evidence that the judicial backstop holds.

> **So what.** Plan venue security for the state-force scenario first and the militia scenario second. The clemency removed the deterrent that once policed the second, and the first now has a confirmed principal who declines to rule out agents at polls. The working backstop is the courts, now twenty-six dismissals and an appellate affirmance deep on the voter-roll demands alone, which is where a defender's escalation tripwires should sit.

**THREAT SURFACE · UPDATE TO 17 OCTOBER 2026**

## The October record

Nine weeks of verified record, 9 August to 17 October. Three findings organize it: the judicial backstop kept absorbing, the federal presence around the vote shifted from defense to enforcement, and a pre-midterm foreign-policy pivot arrived 25 days before the vote without touching an election-administration instrument. No scenario band moves.

### The courts kept absorbing, at a higher tempo

The voter-roll campaign ran its string out. By mid-October the department had sued thirty states and the District and lost twenty-six of those cases to dismissal, the Sixth Circuit affirmed the Michigan ruling and the full court declined rehearing, and Oklahoma settled, the department's one negotiated exit, all A1 on the dockets. On 25 September, the Supreme Court handed the department its one lane, a 6 to 3 emergency order allowing states voluntary use of the rebuilt SAVE citizenship database, three justices dissenting. On 9 October a federal judge went further than any prior ruling and vacated the department's list-maintenance project itself, finding it violated voter privacy and state election authority and had removed United States citizens from rolls; reporting indicates the department had demanded data from forty-nine states and the District over the year and about a dozen complied. Within a week the department sent California a 48-hour demand with a drive of roughly twenty thousand names, sued to stop counties from counting those ballots pending citizenship checks, and appealed the vacatur, with voting groups telling the court the new suit may violate the vacatur itself. On 16 October the acting deputy attorney general, Trent McCotter, wrote to the Los Angeles County counsel that workers who knowingly count ballots of federally identified noncitizens risk prosecution as aiders and abettors, and the president reposted the letter that evening saying the officials "will all go to jail," AP-originated and B2 on the relays read. The mail-ballot executive order ran a parallel arc: the Supreme Court lifted one

injunction as premature in August, then in September declined to stay the replacement injunctions and wrote that the government is unlikely to succeed on the merits. The postal rules are not in effect for 3 November.

> **So what.** The backstop holds and the tempo rose. A department that loses twenty-six times and refiles against a new state inside a week shows no deterrence, it is probing, and the California suit is the live test of whether a vacatur binds the next filing. The gate to watch is no longer whether courts rule against the demands but whether the department ignores a ruling.

## Enforcement presence up, protective presence still down

The department announced plans for approximately one thousand election monitors for November, which would be the largest such deployment on record against roughly three hundred in 2022 and about seven hundred in 2024, and published no jurisdiction list as of this cutoff, B2 on the announcement. The Homeland Security secretary said on 1 September that immigration officers could enter polling places for threats or warrants, the FBI director declined on 18 September to rule out agents at voting sites, nine civil-society groups sued over the statements, and in mid-October a Homeland Security official told state officials on a coordination call that immigration officers will not be at polls, B2 and anonymously sourced on the walk-back. Federal law at 18 U.S.C. 592 bars armed federal personnel at polling places and stands unamended. One single-source video showed Guard troops beside a ballot drop box at the Foggy Bottom Metro station in Washington on 8 to 9 October, and the District's Board of Elections said it was responding to complaints, C3 and unconfirmed. The protective side moved the other way: reporting describes the election-threats task force as dormant with no new threat prosecutions since the window opened, the cyber agency's late-September election plan restores services officials call too late, the Election Assistance Commission still has zero commissioners, and the president extended the capital's Guard deployment to 2029, with an appeals panel hearing argument on its lawfulness on 14 October. The president has not invoked the Insurrection Act; asked on 28 September about using it before the midterms, the president said he could and declined to rule anything out, A2 on the transcript.

> **So what.** The inversion is the finding. The federal instruments that protected election workers and systems are idle or unstaffed while the instruments that police voters and officials grow, and the gap between a secretary saying officers could enter polls and an official privately saying they will not is exactly the ambiguity a laundering machine amplifies for free. Venue plans should assume the statute holds and the signaling continues.

## The pre-midterm pivot, and what it does and does not touch




The pre-midterm window. 9 October carries both tracks at once: the Russian-diesel general license on the foreign side and the voter-roll vacatur on the domestic side. Dates from primary documents and dockets.

On 9 October a Treasury general license authorized Russian-origin diesel imports hours after a presidential call with Moscow, and on 16 October an executive order implementing the new Russia sanctions act waived its duties and most sanctions sections 28 days after he signed the act, both A1 on the instruments. A companion Treadstone 71 assessment, The Bought Premise, carries that record in full and judges the proximate trigger to be fuel prices before the vote, likely (55 to <85). What belongs in this compendium is narrower. First, the timing: a visible-relief announcement 25 days before the midterms sits inside the window where this assessment expects influence on belief rather than on votes, and the announced volumes are small against consumption, which argues an announcement motive. Second, the instrument pattern: one signature suspended a statute passed 86 to 11 and 262 to 159, which converts an assumption this product rests on, that statutes and courts bind election administration, from a given into a monitored one; the distinction that holds for now is that Article II latitude in sanctions does not transfer to state-run elections, and twenty-six dismissals say the courts know it. Third, the narrative channel: the Kremlin spokesman

publicly adopted the president's framing of the Ukrainian president on 16 October, the mirror of a transfer pattern this assessment tracks in the other direction, so the warning table below now carries a narrative-transfer gate fired by the first-seen-origin watch. The pivot used no election-administration instrument, and this compendium draws no electoral-manipulation conclusion from it.

> **So what.** Read the pivot as environment, not as an election operation. It confirms the adversary model, patience harvesting concessions on the bilateral track while the election stays untouched, and it puts one assumption on watch without moving a band.

# PART III

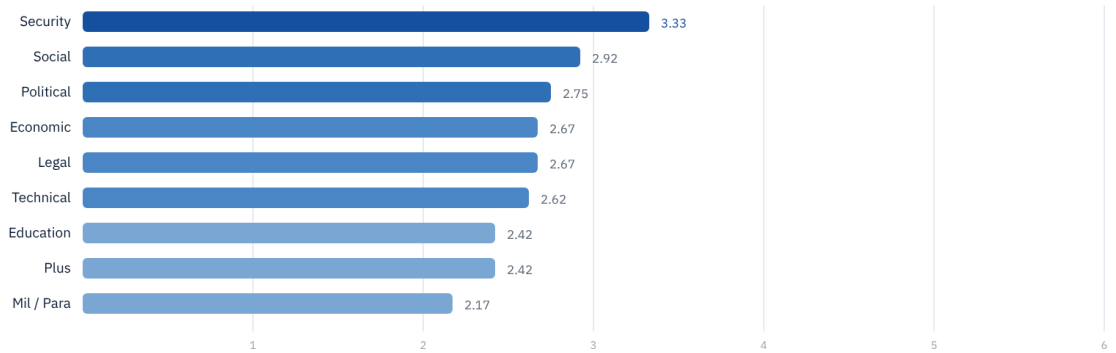
THE ANALYTIC APPARATUS

## Method and apparatus

The assessment runs on the Treadstone 71 tradecraft stack. STEMPLES Plus scans the environment. The Cultural Nexus Framework supplies the human context. The ASA Evidence Standard grades every artifact and keeps fact separate from claim. A suite of structured techniques turns the scan into estimates, and this section shows those techniques working rather than only naming them.

### STEMPLES Plus, the environmental scan

Nine dimensions and a set of Plus factors, each read for its Indicators of Change and its strategic relevance. Scored 0 to 6 for observed stress. Security reads highest because the defensive collapse is the best-evidenced condition of the cycle.




STEMPLES Plus baseline, mean observed stress by dimension, 0 to 6. Plus factors enter through the Cultural Nexus Framework, not as a raw average.

### Cultural Nexus Framework

The Plus factors resolve through the Cultural Nexus Framework, which reads the socio-cultural environment using Hofstede principles such as power distance and the balance of individual against collective priorities. It measures repeatable indicators of change in that terrain, the shifts that make a population more open to a given line. For this subject it explains why a machine can move belief without touching a ballot, because the target is identity and grievance and the resonance of a narrative depends on the ground it lands on.

### ASA Evidence Standard

Every artifact carries a grade. Source reliability runs A to F and information credibility 1 to 6, on separate axes that are never averaged. Above the grid sits the tri-score, which records truth, deception, and forecast value as three distinct readings, so a well-sourced item that carries a deception signal never launders into false confidence. Verified fact and adversary claim stay in separate sentences, which is the same discipline in prose.

METHODS AT WORK

## Analysis of competing hypotheses

Three hypotheses explain the reposting evidence. The matrix scores each item of evidence as consistent, neutral, or inconsistent with each. The chosen hypothesis is the one with the fewest inconsistencies, not the most confirmations.

| Evidence | H1 Directed foreign campaign | H2 Independent nodes, shared audience | H3 Mostly domestic, foreign marginal |
|---|---|---|---|
| Verbatim reposting of foreign content by U.S. channels | C | C | I |
| Tenet paid contracting proven by filing | C | N | I |

| Evidence | H1 Directed foreign campaign | H2 Independent nodes, shared audience | H3 Mostly domestic, foreign marginal |
|---|---|---|---|
| Best controlled study finds no vote change | I | C | C |
| No proven control link for any organic channel | I | C | C |
| Real corpus shows writer-to-mirror chains, register not shared authorship | I | C | N |
| Patient-adversary utility, doing nothing scores highest | I | C | C |
| **Inconsistencies** | 4 | 0 | 2 |

**So what.** H2 survives with no inconsistencies and serves as the working model. The evidence refutes H1 as a general claim; it holds only where a filing exists, which is Tenet. H3 understates the documented foreign presence. The estimate rests on H2, presence and pattern without a proven single hand.

METHODS AT WORK

## Key-assumptions check

| Assumption | Status | What would break it |
|---|---|---|
| Paper records and audits stay broad and available | holds | A state rolls back paper ballots or post-election audits before 2026 |
| No non-public evidence exists that would prove organic foreign control | unknowable | A filing or leak surfaces, as happened once with Tenet |
| AI deterrence stays weak | holds | A conviction or an enforced federal rule restores deterrence |
| Federal monitoring stays degraded through 2026 | holds | Congress restores the information-sharing centers before the cycle; the late September cyber-agency plan restores services officials call too late, so the status stands |
| Statutes and courts continue to bind election administration | holds, monitored | The executive defies or waives around a federal ruling on election administration; the 16 October sanctions waiver shows the executive instrument exists in foreign policy, where Article II latitude is wide, and twenty-six dismissals show it has not transferred |
| The captured channel set is representative of the structure | partial | More channels reveal a different topology than four suggest |
| The adversary stays cost and attribution sensitive | assumed | A state accepts attribution to buy a specific outcome |

**So what.** Two assumptions do the heavy lifting and both are watchable, the paper backstop and the degraded monitoring. If either flips, the central judgment moves, and the tripwires in Part IV exist to catch that.

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METHODS AT WORK

# Red-team pass

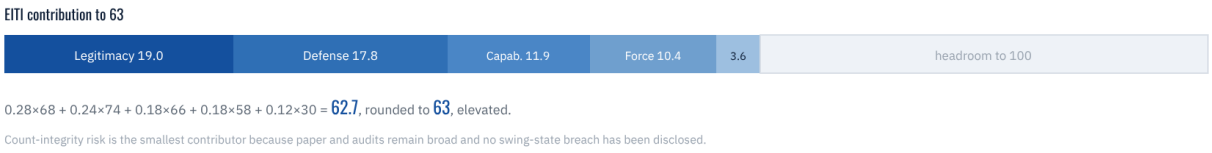
| Judgment | Challenge | Survives |
|---|---|---|
| KJ-1 Defense degraded | States and paid services could partly backfill the cuts, softening the gap. | **Yes.** The record documents direction and magnitude; backfill is partial and lagged. |
| KJ-2 State force dominant | Courts blocked deployments, so the deterrent may hold and demote this below certification. | **Partly.** Signaling persists and the physical variable stays larger than the private-group one. |
| KJ-4 Presence vs effect | One study may not generalize to the generative-AI era. | **Yes.** It is the best available and carries that label, not an overstatement. |
| KJ-5 The seam | Absence of proof is not proof of absence of foreign control. | **Yes.** Held at roughly even and low confidence precisely for that reason. |
| KJ-8 Trust depressed | Confidence may rebound after a quiet cycle. | **Yes.** The one-year fall and the partisan asymmetry are both documented. |

> **So what.** The judgments survive challenge, and the one that only partly survives, state force, carries a flag so a consumer can weight it down if the courts hold the line.

## Emergence theory

The assessment reads the actors as capability and incentive nodes, never as one master plan. The adverse outcome, if it comes, emerges from independent nodes under shared incentives, through feedback loops that amplify small shocks, a refusal that draws amplification, a clip that draws a correction that draws attention, a force signal that hardens each side. The lens explains coordination-like behavior without asserting coordination, which is exactly the line open sources can and cannot cross.

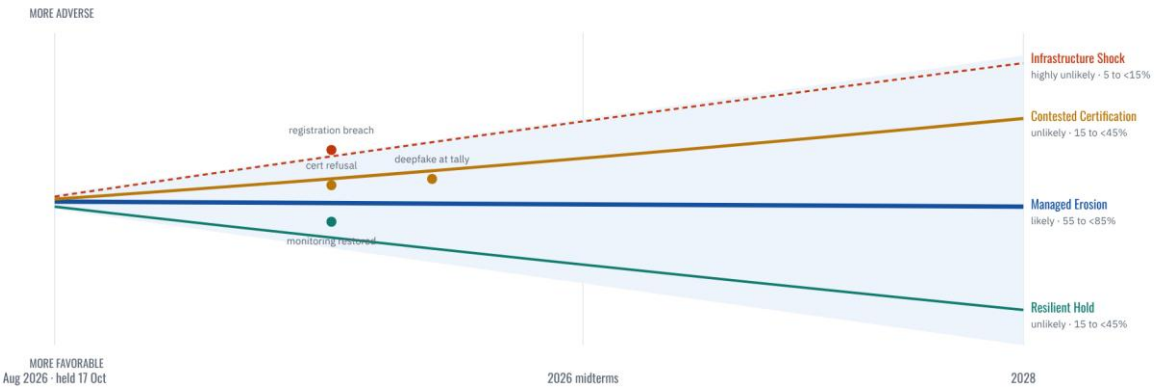
## The composite index



# PART IV

STRATEGIC FORESIGHT

## Cones of plausibility

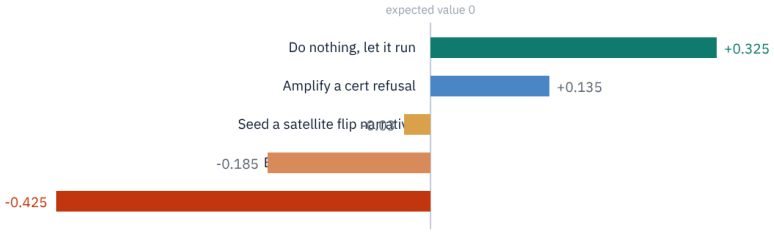



Cone of plausibility. Bands are Sherman Kent half-open intervals. The spine is the assessed dominant outcome; the gates are the tripwires that bend the path.

### The four scenarios

| Scenario | What it looks like | 2026 likelihood | Key tripwire |
|---|---|---|---|
| **Managed Erosion** | Intimidation, synthetic media, and certification friction all appear, the count holds, trust erodes. | **Likely · 55 to <85%** | None decisive; baseline |
| **Contested Certification** | One or more certifications escalate into a real procedural crisis before resolving. | **Unlikely · 15 to <45%** | Certification refusal at the general |
| **Resilient Hold** | A clean cycle, disputes minimal, trust stable or recovering. | **Unlikely · 15 to <45%** | Federal monitoring restored |
| **Infrastructure Shock** | A disclosed, outcome-relevant breach of registration or tabulation. | **Highly unlikely · 5 to <15%** | Swing-state intrusion disclosed |

### The adversary's rational play




Adversary expected-utility ranking. Patience dominates. Loud operations score negative once the actor prices in attribution risk. October supplied the harvest variant: concessions relied on the bilateral track, sanctions relief and a statutory waiver, while election administration went untouched, which is the top-ranked play paying out without an operation.

### Indicators of change, the warning gates

| Indicator | Current read | Moves toward |
|---|---|---|
| Armed force at polls | DHS secretary said officers could enter polls 1 Sep; FBI director declined to rule it out 18 Sep; a DHS official privately said they will not, mid-Oct; 18 U.S.C. 592 bars it; none stationed | Contested Certification |
| Viral deepfake at the tally | Deepfake ads growing in midterm campaigns; one state investigation open under a disclosure law; FBI scam advisory issued; FEC inactive | Contested Certification |

| Indicator | Current read | Moves toward |
|---|---|---|
| Certification refusal | None in the 2026 primaries; officials in two counties signal possible fall refusals; courts hold the duty ministerial | Contested Certification |
| Swing-state intrusion disclosed | Checked affirmatively 17 Oct: none disclosed; 2016 remains the baseline | Infrastructure Shock |
| Federal monitoring | Defensive apparatus still degraded; about one thousand DOJ enforcement monitors planned for November with no jurisdiction list published | Resilient Hold if restored |
| Court ruling defied on election administration | Not observed; the live test is whether the California suit respects the 9 October vacatur | Contested Certification |
| Insurrection Act invoked around the vote | Not invoked; asked 28 September, the president said he could and ruled nothing out | Contested Certification |
| Narrative transfer, Kremlin line echoed in presidential language within 72 hours | One mirror on record 16 October, the spokesman adopting the president's framing; fired by the first-seen-origin watch | Deeper Managed Erosion |

**So what.** The gates are the instrument. Wire an alert to each, and the estimate updates itself the moment one fires rather than waiting for the next report.

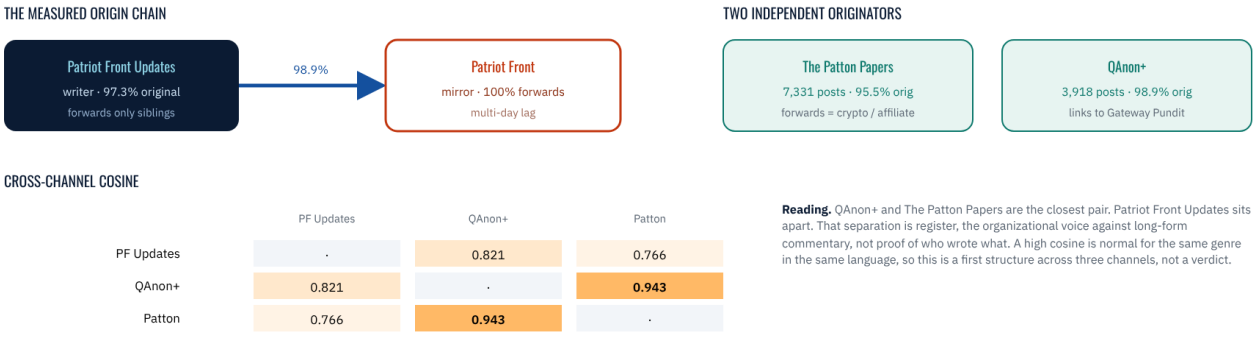
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# PART V

UNIQUE EVIDENCE · PROJECT INSURRECT

## What the captured channels show

Public reporting could supply most of this compendium. It could not supply this part. It rests on a captured Telegram set, ingested at post level, and it is the piece only this shop can produce. The parser reads structure only, timing, forwards, cadence, domains, and function-word statistics, and never stores or reproduces message content. Four channels are in, and they overturn the lazy picture of a coordinated swarm.




Real, post-level structure. The parser measures the writer-to-mirror chain end to end, and the two producers point their audiences different ways, one to monetization, one to narrative distribution.

> **So what.** The unique data confirms the emergence model at post level. It shows writer-and-mirror relationships and shared register, not a central hand, which is exactly the claim the seam wall permits.

VALIDATION

## The model, tested against three cycles

An estimate that no one can grade is a draft. Treadstone 71 ran the scenario model backward on 2020, 2022, and 2024 using the documented record. As first tuned it over-called a certification crisis, because a resolved county refusal fired the same strong signal as a systemic scheme. Cutting that likelihood ratio from 3.0 to 1.8 and adding a severity gate corrects it, and the recalibrated model calls all three cycles correctly while keeping Contested Certification appropriately elevated for 2020.

| 1 / 3 | 3 / 3 | .52 to .37 | 0 |
|---|---|---|---|
| Hits, original tuning | Hits, recalibrated | Brier, before to after | False Shock calls |

| Cycle | Tripwires fired | Recalibrated call | Actual | Result |
|---|---|---|---|---|
| 2020 | Certification refusal, monitoring intact | `Managed Erosion` | `Managed Erosion` | hit |
| 2022 | Certification refusal, monitoring intact | `Managed Erosion` | `Managed Erosion` | hit |
| 2024 | Deepfake, monitoring intact | `Managed Erosion` | `Managed Erosion` | hit |

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> **So what.** The model earns its numbers. It kept Infrastructure Shock near zero every cycle, which matches reality, and its one real failure produced a specific, carried-forward correction.

COLLECTION ARCHITECTURE

## F3EAD, the requirements, and the gaps

The assessment sits on a collection plan run through Find, Fix, Finish, Exploit, Analyze, Disseminate. Priority Intelligence Requirements decompose into Specific Intelligence Requirements, each mapped to a coverage level from 0 to 5. PIR-9 is the attribution question, whether any organic United States amplifier is foreign-directed, and it is the requirement the seam wall keeps at partial forever.




### THE FIVE STRUCTURAL GAPS THAT WILL NOT CLOSE BY OPEN COLLECTION

- The interior of closed private surfaces such as Signal, WhatsApp, and invite-only groups. The interior is dark and the only proxy is public spillover.
- Unique reach per person on any surface. Platforms publish impressions and subscribers, not distinct people.
- Durable persuasion and behavior change. Measurable only through commissioned panel work, and the best study to date found no measurable vote change.
- Beneficial ownership behind funding conduits. The law shields the donors.
- Organic-channel foreign control. Proven only for the paid Tenet case; organic direction needs non-public evidence.

> **So what.** The plan marks these five and monitors them by proxy; it does not chase them. Naming them as inherent limits is what keeps the rest of the product honest.

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# PART VI

ASSESSMENT

## Analytic writing

The 2026 cycle inherits a paradox. The mechanics of the vote are in better shape than the public believes, and the belief is in worse shape than the mechanics deserve. Paper records and audits are broad, and the open record shows no adversary altering a count in a swing state. Confidence has fallen to roughly sixty percent and split hard along partisan lines, so the same result now reads as clean or stolen depending on who answers the poll. An influence operation does not need to touch a ballot to profit from that gap. It needs only to widen it.

The capture that follows the money and the timestamps tells a quieter story than the headlines. The reposting long inferred from network graphs turns out, at post level, to be a set of ordinary writer and mirror relationships. One channel writes and another repeats it on a lag of days. Two large producers work in parallel, and their few forwards reveal their real business, one selling crypto tokens and supplements, the other pushing readers toward a hyper-partisan outlet and video platforms. This is capability and incentive, not a war room. The emergence lens fits it better than any conspiracy because coordination-like behavior falls out of independent nodes sharing an audience and a grievance.

What changed for 2026 is not the adversary. It is the defense. The administration dismantled across 2025 the federal apparatus that shadowed 2020, 2022, and 2024, and the model that graded those cycles says the count held each time in part because that apparatus was there. The new variable is physical. State-force signaling near election operations, some already ruled unlawful, introduces a flashpoint the machine can amplify at almost no cost. The rational foreign move is not a spectacular hack, which prices out once the actor counts attribution, but patience. The cheapest win is to let domestic friction run and add a little heat at the certification seams.

The honest boundary of this product is its most important line. The machine is visible and its direction is not. Analysts can measure presence, reposting, cadence, and register, and this effort did. Open sources cannot establish persuasion, durable behavior change, or organic foreign control, and pretending otherwise would trade the one asset an open shop has, its credibility, for a sharper headline. The judgment rests where the evidence rests. Managed Erosion is the likely outcome, the count is the wrong thing to defend hardest, and belief and procedure are the right ones.

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# Wrap-up

**THE ONE DECISION THIS PRODUCT SERVES**

**Customer.** A state or county election principal, a secretary-of-state office or a county registrar.

**Decision.** Where to place the scarce post-support security dollar for the 2026 cycle, before printers run the general-election ballots, target 1 September 2026.

**Recommendation.** Put the marginal dollar on tabulation and canvass-venue security and on a first-seen-origin watch of the captured channels. Do not put it on broad content takedown. The state-force and certification flashpoints, not a foreign hack, are the likeliest 2026 failure path.

**Flip condition.** A single fact reverses this. A disclosed successful swing-state registration intrusion moves the dollar back to registration hardening at once. Checked affirmatively on 17 October: not met.

**Status.** The 1 September decision date passed with the recommendation unchanged. The residual pre-vote window is canvass and certification venue security, clarity with county counsel on 18 U.S.C. 592 and on federal officers at polls, and the first-seen-origin watch running through certification.

## Falsifiable forecasts on the record

| # | Forecast | Likelihood | Resolves | Status, 17 Oct |
|---|---|---|---|---|
| F-1 | An AI voice or video referencing voting circulates widely enough to warrant a public correction | Likely | 2026-11-03 | On track; one state deepfake investigation open, federal scam advisory issued |
| F-2 | A board disputes at least one certification past its first deadline, then completes it under legal order | Likely | 2027-01-31 | Pending; refusal signals from two county officials |
| F-3 | No armed federal force lawfully stationed inside a polling place on Election Day | Highly likely | 2026-11-03 | On track; DHS official now says officers will not be at polls |
| F-4 | No named organic U.S. amplifier shown by open sources to be foreign-directed | Likely | 2027-01-31 | Holding; no new control case |
| F-6 | No disclosed successful swing-state voter-registration intrusion | Likely | 2026-11-03 | Holding; checked 17 Oct, none |

The identifiers skip F-5, a numbering gap carried from the original engine output. The text states the gap rather than renumbering because these identifiers are already on the record and renumbering would break the audit trail.

**CHANGE RECORD, VERSION 1.0 TO 1.1**

17 October 2026. Every probability normalized to the Sherman Kent half-open table; the two 80-to-95 judgments restated highly likely (85 to <95), direction unchanged everywhere. Cutoff advanced nine weeks with the verified autumn record: the voter-roll litigation arc to twenty-six dismissals plus the appellate affirmance, the 9 October vacatur and the California suit, the mail-ballot injunctions the Supreme Court left standing, the monitor plans, the agents-at-polls statements and walk-back, the uninvoked Insurrection Act, the Lancaster expansion to seven arrests, and the October Gallup read. This edition adds the October record section, three new warning gates, one new monitored assumption, the forecast status column, and the pre-midterm pivot scoped as environment. A second verification pass against primary documents corrected the cyber-agency headcount, the trust-survey attribution, the Storm-1516 laundering claim, the Sixteen Thirty figures, the deepfake reach figures and the sedition-case disposition, and added the 16 October Los Angeles letter and the Foggy Bottom drop-box report. No scenario band moved.

The value of this compendium is not a prediction that the sky falls. It is a graded set of judgments, ten catalogued vectors, the money and the reach separated from proof of effect, the methods shown at work, a validated model, and a measured piece of the private machine, all bound to one decision and one flip condition. The final line is the one that should travel. Paper defends the count, nothing defends belief, and the cheapest

way for an adversary to win in 2026 is to do very little and let the seams do the work. At 17 October that remains the cheapest play on the board, with twenty-six dismissals holding the line and 17 days left on the clock.

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