

Geopolitical Bulletin

Solidariogb | Edition | 20–27 October 2026

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Analysis — Ten interpretive keys and five cross-cutting axes

1. Trump prepares a new offensive against Iran a week before the midterm elections

Preparing the third major attack: The New York Times reported on 26 October that senior US officials say privately that Trump is leaning towards "another round of major strikes inside Iran", which would be the third major US offensive in 16 months of war. Trump publicly renewed threats to "annihilate" Iran, although on 8 October he ruled out attacking before the legislative elections on 3 November and kept the naval blockade of Iranian ports "in full force and effect". The US ambassador to the UN, Mike Waltz, told the Financial Times (22 October) that the war "could last another year". Netanyahu said toppling the Iranian government remains Israel's "main objective".

Tehran's reading: A senior Iranian official told Drop Site News that a new Tehran intelligence assessment considers it "highly likely" that the US and Israel will launch a large-scale bombing campaign before Israel's elections this Tuesday, 27 October. Iran's rejection of the US response of 30 September stands: Mohsen Rezaei called the offer transmitted via Qatar (11 October) insufficient and

said the Strait of Hormuz will remain closed until conditions are met. A third aircraft carrier, the USS Theodore Roosevelt, is due to reach the Arabian Sea between late October and late November.

Markets: Brent remains above \$104 a barrel following Iranian attacks on two ships in Hormuz (14 October) and the Houthi offensive against Saudi Arabia. The G7 agreed to release 100 million barrels of reserves through the International Energy Agency. The diesel shortage is worsening: US distillate stocks are at their lowest for a September since 1982, and Russia has extended its diesel export ban until 31 October.

2. Russia and Ukraine: infrastructure war, the Starlink dispute and the first local truce

Exchange of blows: According to Zelensky, Russia launched some 1,600 guided aerial bombs, 48 missiles and nearly 2,300 drones against Ukraine over the past week. The 25 October attacks on Dnipro left 4 dead and 22 injured (including an 11-year-old girl); Vinnytsia and Kharkiv were also hit, with a "cynical double strike" on emergency services in the latter. Ukraine responded with one of its largest drone attacks of the war on St Petersburg and the Leningrad region (18 October; 1,015 drones intercepted across 15 Russian regions, 1 dead and 5 injured).

The Starlink dispute: Elon Musk accused Ukraine of violating Starlink's terms of use and of using it to "kill people", amid a service cut that Kyiv denounced as extortion. Zelensky announced on 25 October that the connection had been restored and that "speeds are where they should be", crucial for front-line logistics and defence against jet-powered Shaheds.

Oleshky truce: Russia and Ukraine confirmed a local and temporary ceasefire in Oleshky, an occupied town in the Kherson region. The truce, mediated by Melania Trump, came into force this 27 October at 03:00 local time, according to both sides. It will allow humanitarian aid to enter and the voluntary evacuation of the population. Zelensky also announced that a trilateral meeting between Ukraine, Russia and the US will take place in November.

3. Israel votes today with Netanyahu's continuity at stake

This Tuesday, 27 October, Israel holds its first parliamentary elections since 7 October 2023 and since the start of the Gaza war. More than 7.3 million voters are choosing the 120 seats of the 26th Knesset. Netanyahu, with more than eighteen years accumulated at the head of government, faces an opposition in which Gadi Eizenkot (Yashar party) is the leading figure, alongside the "Together" alliance (Naftali Bennett and Yair Lapid), centred on the 7 October investigation, the cost of living and Haredi conscription. Results are expected in the coming hours.

Context: the campaign is taking place with the Gaza war ongoing despite the formal ceasefire, with daily hostilities, and with Israel involved in open wars against Iran and in Lebanon. The "yellow line" dividing Gaza has consolidated as a de facto border: Israel now controls around 65% of the Strip (it has ordered this extended towards 70%) and has built 32 military posts and a 17 km land barrier. The total

number of Palestinians killed since October 2023 exceeds 72,000, with more than 1,400 killed by Israeli fire since the ceasefire was announced in October 2025. The UN warns that, for lack of funds, hot meals and food deliveries to the population have been reduced since October.

4. Yemen: Houthis strike airports and Saudi Arabia; UN counts 260,000 displaced

The Houthis attacked Mukalla airport for the fourth time and fired a missile at Aden airport (21 October), in what the internationally recognised Yemeni government describes as an offensive to isolate Yemen by cutting air connections. An attack on Dammam airport in eastern Saudi Arabia left one dead and eight injured. The UN reports almost 260,000 people displaced since the beginning of August.

Egypt enters the picture: President al-Sisi clarified that Egyptian intervention "aims to defend Saudi territory and does not contemplate an attack against Yemen", stressing that it would act at the request of "any other Arab country". The UN special envoy, Hans Grundberg, toured London and Berlin seeking international support for a negotiated solution.

Regional context: the Yemeni front is part of the wider war that the US and Israel launched against Iran on 28 February 2026, and adds to the effective closure of Hormuz as pressure on the energy corridors of the Gulf and the Red Sea.

5. Ecuador: the detention of Luisa González and the governability crisis running through prisons and courts

Detention and pre-trial custody: In the early hours of 22 October, Ecuador's National Police detained Luisa González, former presidential candidate for Revolución Ciudadana (RC) in 2023 and 2025, at her home in Canuto (Chone canton, Manabí), under the "Laberinto" case for alleged money laundering. The Prosecutor's Office is investigating the channelling of approximately \$500,000 through a network of legal entities to finance electoral advertising between May and August 2023, with funds allegedly from the illegal oil trade. On 23 October, a judge ordered pre-trial detention for González and two others; she was transferred to a prison in Chimborazo province.

The official reading: President Daniel Noboa said in an interview with Radio Sucre that there are "indications" against González and claimed the irregular financing involved "drug trafficking and organised crime money" to fund the opposition. The government linked the investigation to the mayor of Guayaquil, Aquiles Álvarez, also of RC and prosecuted in other cases. Noboa dismissed criticism of the place of detention with a phrase that reveals the tone of the state response: "Why don't we send her to La Roca?"

The opposition's reading and the gaps in the process: RC called the detention "arbitrary and unconstitutional" and denounced that González was held incommunicado for hours, without access to

her defence or to human rights observers. Party president Gabriela Rivadeneira said the case originates in "a process already judged" at the Electoral Disputes Tribunal that was resolved with a fine of just over \$6,000, and that the criminal case seeks to magnify an "administrative discrepancy" in order to proscribe the opposition. RC announced it would seek precautionary measures from the Inter-American Commission on Human Rights (IACHR).

Human Rights Watch: HRW Americas director Juanita Goebertus expressed "concern" over the case and demanded that "all defence and due process guarantees" be ensured, in an electoral context "marked by the change of date and the cancellation and suspension of parties". The detail is relevant: RC was banned for nine months this year following a fiscal investigation, and González herself was rejected in September as a candidate for the Manabí prefecture after an objection from the ruling party and the right.

The coincidence the government turned into an accusation: On that same 22 October, two simultaneous prison riots in Cotopaxi and Pichincha left eight inmates dead. Interior Minister John Reimberg suggested, without evidence, a link between the riots and González's detention: "Coincidence? Let everyone draw their own conclusions." The statement turns a temporal coincidence into a political accusation, without any judicial record to support it. Ecuadorian prisons hold some 38,200 people, almost 7,000 above official capacity, and since 2021 more than 500 inmates have died in massacres linked to disputes between drug-trafficking gangs operating from inside the centres. Noboa's government declared an "internal armed conflict" against those gangs in January 2024 and militarised the prisons, but the violence has not been reversed.

Deeper reading: The González case condenses the two faces of Ecuador's crisis. On the one hand, the **judicialisation of politics:** a money-laundering case that the Prosecutor's Office sustains with a figure of \$500,000 and that the defence reduces to an administrative discrepancy of \$6,100, in a country where the electoral courts have already resolved the matter with a fine. The difference in scale between the two readings is not a technical detail: it defines whether the case is a criminal investigation or an instrument of political exclusion. On the other, **militarisation without sovereignty:** a state that cannot impose order in its prisons resorts to repressive spectacle — detentions, riots attributed to the adversary, presidential remarks about "La Roca" — to manage the appearance of control. Democratic governability is not threatened by "links to drug trafficking", as Reimberg suggests, but by a state that has replaced social transformation with the production of internal enemies.

6. Chile: the PCAP launches a campaign for a recall referendum on Kast

The Chilean Communist Party (Proletarian Action), PCAP, is promoting the "¡Fuera Kast!" campaign at national level, demanding a recall referendum against President José Antonio Kast, who took office in December 2025. The campaign's digital platform is fuerajosekast.cl. PCAP leader and former presidential candidate Eduardo Artés issued the public call on 7 October under the slogan "Recall referendum: Out with Kast!", calling on workers, students and social organisations to mobilise.

The campaign's arguments: The PCAP denounces a "profound regression in social rights" under the Kast administration, including the elimination of computers for primary school children, the end of funding under the Ricarte Soto Law for terminal illnesses, and proposed cuts of more than 793 billion pesos across 220 social programmes affecting education, health, housing, pensions, sport, art and culture. The campaign also questions the signing of the "Shield of the Americas", a treaty which, according to the call, subjects Chile to US interests and undermines national sovereignty over natural resources.

The constitutional obstacle: Chile's current constitution does not provide for a recall referendum allowing the president to be removed directly by popular vote. The 2022 Constitutional Convention discussed such a proposal, but it was rejected by the plenary for failing to reach the necessary votes. The PCAP campaign therefore seeks to install the political and social debate rather than a legally available mechanism. Artés has argued that any early exit of Kast should be accompanied by a new presidential election and by conditions for convening a constituent assembly.

Scope and projection: According to reports from mid-October, the signature campaign had registered less than 1% of the target set by its promoters, although its organisers insist the aim is not only to accumulate support but to transform discontent into organisation and popular mobilisation from territories, unions, student centres and social spaces. The initiative is part of a broader mobilisation context, with organisations such as Confech and the CUT calling protest days against the Kast government's austerity policies.

Editor's note: Regarding the European dimension of the campaign, this editorial house has information according to which **Eduardo Salgado**, Solidariogb's coordinator, would play a coordinating role in Europe, and that the platform used would be **afuerajosekast.cl**. These details could not be confirmed through the sources consulted in this verification and remain pending documentary contrast for the next edition.

Deeper reading: The "¡Fuera Kast!" campaign raises a question that runs through the bulletin: what does a revolutionary left force do when it lacks institutional representation and faces a radical-right government with an austerity agenda? The PCAP opts to build an extra-parliamentary movement combining the democratic demand for a recall with the perspective of a constituent assembly. The constitutional obstacle is not a detail: it reveals that the institutional framework inherited from Chile's transition blocks the mechanisms of direct democracy that the campaign invokes. The materialist question is whether social mobilisation can force an institutional opening without a parliamentary correlation of forces, or whether the campaign functions mainly as a tool of political accumulation and mass pedagogy in a cycle where the Chilean left has still not regained the electoral initiative.

7. Latin America: Lula wins Brazil's runoff; Machado returns to Venezuela; US troops land in Colombia

Brazil: Luiz Inácio Lula da Silva won the presidential runoff on 25 October with 51.79% of the vote against 48.21% for Flávio Bolsonaro, according to the Superior Electoral Tribunal. At 80, Lula begins his fourth term, but with a complex outlook for governing and a tense relationship with Washington (in

September he sent the US proposal for priority access to critical minerals to the "dead archive"). The Latin American left celebrated: according to the regional count, progressive governments represent some 414 million people.

Venezuela: Opposition leader and Nobel Peace Prize laureate María Corina Machado reappeared in Venezuela on 25 October after ten months in exile, entering from Panama. Her return — defying interim President Delcy Rodríguez, in power since US forces captured Nicolás Maduro in January — was celebrated by thousands of supporters in Barquisimeto and Caracas. Trump said he knew nothing about the matter and expressed hope that she "is safe". Rubio attributed it to "US-backed reconciliation talks". Edmundo González, exiled in Spain, announced he will soon join Machado.

Colombia: More than 300 US military personnel begin arriving this 27 October at the Tolemaida Military Fort (Cundinamarca) for the multinational exercise "Vanguardia del Sur 2026", which will run until 11 November alongside more than 400 Colombian soldiers. It is the fourth edition of the exercise, officially focused on drug trafficking, illegal mining, drones and medical evacuations.

8. Cuba: the power system gives no respite and poverty reaches 66% of the population

Cuba's electricity service remains in permanent emergency: after the national blackout of 17 October (the second that week), the Electric Union reported on 25 October a deficit of 1,760 MW at peak demand, with generation affected 24 hours a day. That same day there was a partial disconnection of the system in Santiago de Cuba and Guantánamo, restored hours later. Meanwhile, an independent study by the Christian Centre for Reflection and Dialogue cited by AFP estimated that some 6.45 million Cubans — 66% of the population — lack sufficient income for a basic food basket, compared with 45% estimated in mid-2025. The Cuban government attributes the energy crisis to Washington's oil blockade and the ageing of infrastructure.

9. Asia-Pacific: Kim Jong-un reappears in China to inaugurate a bridge; typhoon hits Taiwan

North Korean leader Kim Jong-un visited China on 24 October and inaugurated a new bridge connecting the two countries, in his most prominent public reappearance since the ballistic missile tests of 12 October. In Taiwan, Super Typhoon Champi left at least one dead, more than 520 injured and 288,000 households without power on 24 October, before moving towards the strait.

10. Other dynamics

- **Greenland:** US company Greenland Energy, in partnership with Britain's 80 Mile, announced it plans to drill its first well in 2027 in the Jameson Land basin (eastern Greenland), following

Trump's announcement of "massive exploration" for oil, gas and minerals. An engineering report estimates up to 13 billion potential barrels. The Greenlandic government recalls that drilling requires approved environmental impact assessments, and that no new hydrocarbon permits have been granted since 2021.

- **Argentina:** The ruling party agreed to narrow the prohibitions and reformulate the disinformation offence in the Malvinas bill in order to secure votes. The text establishes sanctions against companies exploiting resources on the islands without Argentine authorisation and creates a Bicameral Monitoring Commission (26 October).
 - **Assange v. the Nobel:** Julian Assange sued the Nobel Foundation for awarding María Corina Machado, and publicly thanked Lula da Silva for his support after his release (24 October), amid claims that WikiLeaks is suffering an "arbitrary and illegal blockade".
 - **US:** Trump announced energy deals to "lower the price of petrol" (25 October) and offered a \$1 million reward for information on alleged electoral fraud, in the final stretch of the campaign for the 3 November legislative elections.
 - **Middle East:** Iran attacked two ships in Hormuz (14 October) and the Houthis claimed the attack on Riyadh airport, with at least twelve dead, in the escalation of the second front of the Gulf corridor.
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Analysis

An interpretive exercise, not a position.

1. Iran–Hormuz: war as a function of the US electoral calendar

The central paradox of the week is that the most important war decision of the year appears to depend on an electoral date: Trump ruled out attacking before 3 November, but is preparing the "third major attack" for afterwards. In materialist terms, the military apparatus of the hegemonic bloc **manages escalation according to its internal legitimization cycles**: the war against Iran is at once a geopolitical operation (encircling a competitor in the energy corridor) and an instrument of domestic politics (fuel prices, a narrative of strength before the electorate). The naval blockade — an economic war for control of Hormuz — has already had its effect: Brent above \$104, structural diesel shortage, record freight rates. The materialist question is not "will there be war?" but **who pays the cost of the risk premium**: economies dependent on energy imports and the Iranian population under financial asphyxiation.

2. Ukraine: private infrastructure as sovereign territory and the diplomacy of attrition

The Starlink dispute is perhaps the most revealing fact: the operational capacity of a state army depends on the unilateral decision of a private magnate, who conditions the service on the "correct use" of the network. Military communications infrastructure is revealed as **contingent property**. Meanwhile, the

Oleshky truce — local, temporary, mediated by the US First Lady — and the announcement of a trilateral meeting show a characteristic form of diplomacy: **limited humanitarian gestures as a negotiating laboratory**, while the war on energy infrastructure continues.

3. Gaza and Israel: "peace" as a form of gradual annexation

The yellow line is the clearest case study of this edition: what was presented as a temporary demarcation of a peace plan has become, through concrete blocks, military posts and lethal fire orders, **a de facto border devouring 65–70% of the territory**. A materialist methodology would read here an annexation by territorial engineering: the taking of land is not announced, it is built. Today's elections are being held with the Palestinian question practically absent from the debate between the blocs — a superstructural fact that reveals the **naturalisation of the permanent state of exception**.

4. Ecuador: the prison as disputed territory and governability as fiction

The riots of 22 October and the detention of Luisa González that same day are not separate events: they are two manifestations of the same phenomenon. The prisons have been under military control since January 2024, and yet the gangs continue to order killings and extortion from inside; Noboa's state **does not control the territory it formally administers**. Militarisation did not recover sovereignty: it displaced it. The detention of the main opposition figure, presented as a blow against "organised crime", functions as a **device of legitimation and political discipline** in a context where RC has already been banned and González herself rejected as a candidate. The difference in scale between the prosecutor's case (\$500,000) and the electoral ruling (\$6,100) is the detail that reveals the nature of the case.

5. Chile: the recall as a democratic demand and the extra-parliamentary left

The PCAP campaign for a recall referendum on Kast operates on terrain that the Chilean political system itself has closed off: the constitution does not provide for the mechanism, and the proposal was rejected at the 2022 Convention. This does not invalidate the campaign; it defines its nature. It is not a legally viable short-term initiative, but an **instrument of political accumulation and mass pedagogy** in a cycle where the Chilean left lacks significant institutional representation and faces a radical-right government with an austerity agenda. The demand for a recall functions as a signifier that unifies dispersed discontent — social cuts, subordination to the US, sovereignty over resources — under an exit slogan. The materialist question: can an extra-parliamentary campaign, with limited signature support, build a sufficient correlation of forces to force an institutional opening? The answer depends less on the recall mechanism itself than on the campaign's capacity to become the articulator of a broader social bloc than the PCAP.

6. Venezuela: tutored transition and the political economy of the symbol

Machado's return is not a return, it is an **installation**: she enters from Panama with Washington's tacit blessing, while Trump appropriates the Nobel Prize as a trophy of the operation. The material key lies in the sequence: Maduro's capture (January), Delcy Rodríguez's interim presidency, the opening of Venezuelan oil capital to US capital, and now the recomposition of the opposition under tutelage.

7. Brazil and the dispute over resources in South America

Lula's re-election, by a narrow margin (3.58 points), consolidates the regional progressive bloc just as US pressure over critical minerals and control of the Amazon intensifies. Lula rejects the subordination of resources ("dead archive") but will govern with a hostile Congress and a Trump who has already demonstrated in Venezuela his readiness for regime change.

8. Yemen, the Red Sea and Egypt's entry: disputed corridor, displaced population

The fourth attack on Mukalla, the missile on Aden and the strike on Dammam confirm that the Houthis are exercising a **doctrine of access denial**: they do not seek to conquer, they seek to make the Red Sea corridor unaffordable. Al-Sisi's clarification is the diplomatic detail of the week: Egypt enters as a **military guarantor for Saudi Arabia but not as a belligerent against Yemen**. Meanwhile, 260,000 displaced since August are the countable human cost of the dispute over the 12% of world trade that passes through Bab el-Mandeb.

9. North Korea–China: the bridge as bloc infrastructure

Kim's reappearance inaugurating a cross-border bridge with China is a direct material reading: in a world of closed corridors, the physical infrastructure connecting the members of the alternative bloc becomes **both symbol and condition of reproduction** of that bloc itself.

10. Cuba and prolonged asphyxiation: from blackout to majority poverty

The CCRD figure (66% of the population without a basic food basket) marks a qualitatively new threshold: the crisis ceases to be one of services and becomes a **crisis of the reproduction of the labour force**. The US oil blockade is the external lever accelerating collapse, and the rigidity of the internal model is the internal channel. Both reinforce each other.

Cross-cutting axes of the bulletin

1. **The electoral calendar as strategic horizon**: decisions of war and peace (Iran, Israel, the Ukrainian truces, González's detention in Ecuador) are ordered around cycles of political legitimation.
2. **Closed corridors, open prices**: Hormuz, the Red Sea and the Arctic concentrate the dispute; Brent above \$104 and the diesel shortage are its global economic expression.

3. **Tutored transitions and states losing sovereignty:** Venezuela (Machado–Delcy under Washington's supervision), Gaza (administered yellow line) and Ecuador (prisons under military control but operated by gangs, judicialised opposition) show different forms of the same phenomenon.
4. **Sovereignty and infrastructure:** Starlink as a negotiable weapon, China–North Korea bridges, collapsed power grids, prisons as disputed territory: infrastructure is the new battlefield of geopolitics.
5. **Global South in dispute:** Brazil (Lula's re-election), Colombia (US military deployment), Cuba (energy asphyxiation), Ecuador (prison crisis, judicialisation of politics), Chile (extra-parliamentary recall campaign) and Yemen (260,000 displaced) as expressions of the same pattern: resources, corridors and population as battlegrounds.

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