CEAFE
Centro de Estudios y Análisis sobre el Futuro de Europa

CONFLICTS

Monday, 16 November 2026 · 20:30

- **Section:** Conflicts / Conflictos
- **Window covered:** 16 November 2026, 12:00 to 18:54 Europe/Madrid (2026-11-16T11:00Z to 17:54Z), continuing from the 13:30 edition
- **Compiled from:** the CEAFE Conflicts section brief, the shared logs and @F_CEAFE posts.

> **EARLY WARNING**
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> **Observed / officially reported** - **Black Sea (Bulgaria/Romania):** The Somali-flagged cargo ship BETUL 8 (IMO 8817198), carrying 3,000 tonnes of wheat from Romania to Egypt, capsized off Bulgaria on 16 November. All 12 crew (eight Turkish, four Azerbaijani nationals) were rescued by Bulgarian, Romanian and Turkish forces; crew members say sea drones struck the vessel (AP/Reuters via @FaytuksNetwork). Romania's Maritime Hydrographic Directorate issued a navigation-danger warning for a large area off the Danube Delta, and Romanian Navy EOD divers were sent to two drones found drifting off Mangalia and Sfântu Gheorghe, first spotted on 15 November by a French Navy Atlantique 2 deployed to Romania (via @InsiderGeo). - **Black Sea ISR:** @ItaMilRadar tracked a USAF RC-135U alongside a NATO AWACS on a surveillance mission over the Black Sea, the first time "in a long while" that US manned intelligence aircraft operated deep over the Black Sea after several months of absence. - **Strait of Hormuz:** Iran's Navy (via IRNA, Iranian state media) says a third "violating" tanker struck a naval mine east of the strait within 24 hours. Only the 05:58 UTC incident (UKMTO 207-26, covered at 13:30) is independently confirmed so far. - **Iran / Iraq:** Air defences were activated over Isfahan (Mehr, semi-official, via @FaytuksNetwork). Iraqi PM Ali al-Zaidi ordered the army into Jurf al-Sakhar, the Kataib Hezbollah stronghold south of Baghdad, with a withdrawal deadline of 20:00 on Friday. Jordan and Iraq blocked Telegram.
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> **Unverified OSINT leads / claims** - Iran's Army says it shot down a US Army MQ-1 drone over the Strait of Hormuz and IRIB aired footage (via @MenchOsint); no US comment found. This comes on top of this morning's IRGC claim of an MQM-170 capture. - @IranObserver0, citing Fox News, says senior Trump administration officials (Hegseth, Rubio, Bessent and others) have been moved with their families to military bases, after Iran's General Staff threatened to target "the homes of American and Israeli officials and politicians in the region". Neither has been checked against the primary source. - Pro-Houthi accounts claim the Houthis hold the whole Bab al-Mandab coast and part of the Gulf of Aden coastline, about 145 km from the US base in Djibouti. These are claims.

> **Interpretation:** The return of a US RC-135U over the Black Sea on the same day a grain ship was sunk off Bulgaria suggests closer allied watching of the Russian sea-drone campaign against shipping near NATO coasts. That is an assessment; absence of tracking data proves nothing, because many military aircraft fly without transponders.
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> **Counter-space:** No new rendezvous or proximity operation was found in this window. The Kosmos 2612 / ICEYE watch continues. Launch note: a United Launch Alliance Vulcan suffered an in-flight anomaly and lost Amazon Leo satellites (CGTN, Chinese state media; to be confirmed by ULA).

Update: Russian sea drones sink a grain ship off Bulgaria as the Black Sea campaign reaches NATO waters

The Somali-flagged bulk carrier BETUL 8 capsized off Bulgaria on 16 November after, according to its crew, being hit by two naval drones.

It was carrying 3,000 tonnes of wheat from Romania to Egypt. All 12 crew members were rescued by Bulgarian, Romanian and Turkish units (AP/Reuters, via @FaytuksNetwork; first photographs by Maritime bg). Ship-tracking analysts note that the vessel appears to have been hit by the same unidentified naval drone type that struck the container ship CONTSHIP JET on 28 October, assessed by maritime security firm Ambrey as a variant of the Russian Murena-300S. The OSINT account @Schizointel now counts four commercial ships hit by drones in Romanian territorial waters and one sunk in Bulgaria's exclusive economic zone since 13 November. Romania has issued a navigation-danger warning off the Danube Delta and sent Navy EOD divers to two drifting drones spotted by a French Atlantique 2 patrol aircraft.

Why it matters for Europe. Russian drones are now sinking civilian ships inside or next to the waters of two EU and NATO members. Bulgaria and Romania depend on allied patrol aircraft (here French) to see the threat, which shows both the value of European pooling and how thin the Union's own maritime surveillance in the Black Sea is. The NATO and EU ministers meeting in Brussels on 17–18 November will have to answer it.

What to watch. Bucharest's and Sofia's requests at the Brussels ministerials; whether Russia's MoD claims the strike (it claimed a ship bound for Chornomorsk this morning).

Sources

- @FaytuksNetwork, AP/Reuters
- @Schizointel quoting @InsiderGeo, Maritime bg images
- Romanian navigation warning, via @InsiderGeo
- Romanian Navy EOD, French Atlantique 2
- rone type, Ambre
- @Schizointel tall

Update: Iran claims a third tanker hit and a US drone downed, and threatens US and Israeli officials' homes

Iran's Navy said on 16 November that a third "rogue" oil tanker, sailing an unauthorised route east of the Strait of Hormuz with its navigation systems off, had caught fire after striking a naval mine, the third in 24 hours (IRNA, Iranian state media).

Iran's Army separately said it shot down a US Army MQ-1 drone over the strait, and state broadcaster IRIB aired footage (via @MenchOsint). Air defences were activated over Isfahan, according to the semi-official Mehr agency. Iran's General Staff warned Trump and Netanyahu that, because civilian residential areas had been targeted, Iran would "begin bombing the homes of American and Israeli officials and politicians in the region" (quoted via the list; primary text not yet located). In Washington, Trump answered a 60 Minutes report on Iranian strikes on US bases by saying, as quoted on X, that of about 9,000 Iranian drones only two got through, and of 2,000 ballistic missiles only one (video clip; transcript not checked). Diplomatically, Lavrov and Araghchi spoke by phone (Russian MFA and IRNA), while Araghchi attended the ECO ministerial in Islamabad and met Pakistan's army chief, Field Marshal Asim Munir.

Why it matters for Europe. Every claimed mine strike raises Gulf shipping and insurance costs for Europe's energy imports, and Europe has no seat in the US–Iran escalation or in the Pakistan channel. Only one of the three tanker strikes is independently confirmed (UKMTO 207-26), so Iranian claims must be read as claims.

What to watch. UKMTO confirmation of the second and third tankers; any US statement on the MQ-1; whether the General Staff threat is followed by action.

Sources

- posts 42303, 42300, 42307; Iranian state medi
- @MenchOsint, MQ-1 claim with IRIB video
- @FaytuksNetwork, Isfahan air defences, Mehr
- General Staff warning, quote
- Trump responds to 60 Minutes
- Trump drone/missile figures, critical framing by @MenchOsint
- @IranObserver0 citing Fox News; unverifie
- Russian MFA readout of Lavrov–Araghchi call

Update: Saudi king replaces the Yemen war commander after losses near Bab al-Mandab

A royal order published on 16 November moved Lt Gen Fahd bin Hamad al-Salman, commander of the Saudi-led Joint Forces in Yemen since late August 2024, to adviser to the defence minister, and tasked the Chief of General Staff, Gen Fayyad bin Hamed al-Ruwaili, with commanding the Joint Forces in addition to his post (Saudi royal order, quoted via @MenchOsint).

The change follows days of Houthi gains in Lahj and around the Bab al-Mandab strait. Tasnim (Iranian state-affiliated) claims Houthi-held areas have grown to 15,000 km² and speaks of a 90-kilometre buffer zone around Bab al-Mandab; pro-Houthi accounts claim the whole strait coast and a stretch of the Gulf of Aden coast. These figures are not independently confirmed.

Why it matters for Europe. Riyadh is putting its top officer in charge because the Bab al-Mandab, the southern gate of the Suez route to European ports, is at stake. A Houthi-held strait coast would make the EU's Aspides mission's task much harder.

What to watch. Whether the new command brings a Saudi counter-offensive or talks; any attack on shipping in the strait.

Sources

- @MenchOsint with royal order text
- @IranObserver0
- posts 47447, 47451; Iranian state-affiliate
- pro-Houthi map claim; unverifie

Europe's place at the Ukraine talks: EU money for EU-made weapons, Kallas sidelined, Moscow sets conditions

The European Commission has transferred €1.76 billion to Ukraine to buy missiles and drones, and none of it may be spent on US Patriot interceptors because all weapons in this tranche must be produced in the EU or Ukraine (Commission spokesperson Balazs Ujvari, via TASS).

Politico reports that High Representative Kaja Kallas has been left out of the EU negotiating team, as talks are being run by national security advisers rather than foreign ministers (relayed on the list). Kremlin aide Yury Ushakov said the Russia–US–Ukraine talks will continue in Abu Dhabi with no date set, that widening the format "has not been agreed with Russia", and that EU participation will arise only once Moscow gets "constructive proposals" from Europe (TASS, Russian state media). US NATO ambassador Matthew Whitaker said envoys Witkoff and Kushner are working on terms both sides could accept, and Trump told reporters Putin "could be a lot tougher" on Ukraine. Trump said denuclearisation, Iran, Ukraine and trade will be on the agenda of the Trump–Xi–Putin meeting in Shenzhen.

Why it matters for Europe. The "buy European" condition on the €1.76 billion is exactly the kind of choice that builds Europe's own industry and avoids dependence on US approval. At the same time, Europe is still negotiating for a seat at a table set by Washington, Moscow and Beijing.

What to watch. Shenzhen summit on 19 November; the EU team's composition.

Sources

- posts 98826, 98828, 98829, 98831, 98840, 98843; Russian state medi
- Politico report on Kallas, relaye
- @FaytuksNetwork, Trump on Shenzhen agenda, video

US embassies across Europe issue terror warning for holiday season

US embassies in Europe warned American citizens that terrorists, including lone actors, may attack holiday markets, transport hubs and places of worship "with little or no warning" (relayed on the list and by Tasnim).

The alert does not name a specific threat. Separately, Lithuania has submitted a proposal package to the US for a permanent US military base, and its defence minister said talks would be lengthy (Tasnim; to be confirmed with Lithuanian sources).

Why it matters for Europe. A US-wide alert across Europe, issued during a war with Iran that has threatened retaliation against US officials, concerns European security services directly; European governments have issued no matching alert in the material read.

What to watch. Any national alerts in EU states; Vilnius' official statement on the base request.

Sources

- lert, quote
- posts 47448, 47450; Iranian state-affiliate

Asia-Pacific movements: Chinese naval presence near Japan, US HIMARS in the Pacific, US–Russia oppose autonomous-weapons talks

Defense News reports that a large Chinese flotilla mixing coast-guard vessels and navy warships may have been aimed at Japan, and that China has normalised its naval presence near Japan since the 2025 political spat.

Japan's Joint Staff reported a PLA Y-9 intelligence aircraft flying out-and-back over the East China Sea on 16 November, and the Maritime Self-Defense Force spotted the Type 052D destroyer Qiqihar (121) and a Type 903 replenishment ship heading north about 60 km west of Kume Island (via @TaiwanMonitor). The US Army's 25th Infantry Division fired HIMARS rockets at Kwajalein Atoll on 13 November (DVIDS). Military Times reports that the US and Russia look set to oppose launching negotiations on binding rules for autonomous weapons at a global meeting.

Why it matters for Europe. US attention and assets are pulled toward the Pacific while Europe faces Russia alone in the Black Sea. The US–Russia stance on autonomous weapons leaves the EU to lead any rule-making alone.

What to watch. Trump's Asia trip (Philippines 17 November, China 19 November).

Sources

- defensenews.com
- @TaiwanMonitor (1)
- @TaiwanMonitor (2)
- @TaiwanMonitor, HIMARS, DVIDS
- militarytimes.com

See also

- EU pays €1.71bn more for Ukraine’s drones, ammunition and air defence — see Defence Industry.
- US and Russia set to oppose binding rules on autonomous weapons in Geneva — see Defence Industry.