

The Fateful Consequences of Forced Regime Change in Venezuela



by Riccardo Alcaro

- Washington's stated rationale for Nicolás Maduro's arrest is unconvincing; the operation appears driven by oil access, curbing China's influence and managing migration, not narcotrafficking or democracy promotion.
- It retrospectively legitimises Russian imperialism and potentially pre-legitimises Chinese action on Taiwan, weakening norms against the use of force and reinforcing power-politics logics.
- Europe's response – largely silence or hedged statements, with few exceptions – reinforces perceptions of hypocrisy, weakens credibility in the Global South, and leaves Europeans exposed as US power-politics could extend to Greenland.

After months of explicit threats, unprecedented military deployments in the Caribbean and a series of operations against vessels described by Washington as being involved in drug trafficking (which resulted in more than one hundred deaths under circumstances amounting to extrajudicial killings), the United States has now followed through on its warnings. In what was described as an “exemplary” military action, US forces captured and forcibly extracted Venezuelan president Nicolás Maduro and his wife, transferring them to the United States. A few hours later, Donald Trump declared that the United States “will run Venezuela”, making it clear that Washington intends to govern the country through what is presumably a local government expected to follow US instructions.



The reasons behind regime change

The official justifications for the intervention put forward by Washington do not withstand close scrutiny. In reality, three reasons appear to be central to the operation.

The first concerns resources, particularly oil. Trump has explicitly stated that the intervention is intended to recover assets expropriated from US companies and, above all, to secure full and direct access for the United States to Venezuela's

The Trump administration does not prioritise Venezuela's democratic transition.

oil reserves, the largest in the world. This is an openly business-driven justification, evocative of colonial extractive practices rather than arguments related to security or the promotion of democracy.

The second is geopolitical: the goal of reducing, and possibly eliminating, China's presence in Latin America. In recent years, Venezuela has been one of Beijing's main regional partners, both financially and energetically. Regime change offers Washington an opportunity to strike at a key pillar of China's projection in the Western Hemisphere.

The third concerns migration. Under Maduro, around eight million Venezuelans have left the country, many of whom have reached the United States. Direct or indirect control over Venezuela would allow Washington to facilitate returns, an argument that can be politically marketed to the MAGA base, which had not been promised an interventionist foreign policy.

By contrast, the narcotrafficking rationale does not appear credible. Venezuela does not produce fentanyl, and most of the cocaine transiting through the country is destined for European

markets. Further undermining this justification is Trump's decision to grant a pardon to a former Honduran president convicted in the United States on drug-trafficking charges.

Consequences for Venezuela

The prospects for a democratic transition appear uncertain. Trump summarily dismissed opposition leader María Corina Machado, recently awarded the Nobel Peace Prize, and did not even mention the candidate who, according to the United States itself, would have won last year's presidential election before the Maduro regime manipulated it. This makes clear that the Trump administration does not prioritise Venezuela's democratic transition.

More plausible is the scenario of a "Maduro regime without Maduro", but aligned with the United States. Statements by Trump and Secretary of State Marco Rubio point to specific expectations regarding Delcy Rodríguez, the regime's vice president and now apparently the central figure in the new power arrangement, particularly on oil policy and distancing the country from China.

Finally, the risk of destabilisation remains. If the new government fails to build an internal base of consensus, it could be overwhelmed by centrifugal dynamics: rivalries among factions of the old regime, paramilitary organisations to which parts of security control had been outsourced, and opposition forces eager to exploit the vacuum of authority.

Consequences for the United States

In foreign policy terms, the intervention consolidates an approach that combines deal-making and coercion, with features reminiscent of a colonial logic. The moral standing of the United States suffers a further collapse, not least because the operation was conducted without any authorisation from Congress, accentuating an internal pseudo-authoritarian drift.



At the same time, the intervention risks generating tensions within the MAGA movement, which is hostile to overseas military intervention. The promise of a non-interventionist foreign policy thus comes into direct contradiction with practice.

Consequences for Latin America

The action in Venezuela strengthens a coercive version of the Monroe Doctrine, or “Donroe” in Trump’s formulation. Cuba, Colombia and Mexico come under increasing pressure, while alignment with openly pro-US right-wing governments – such as those in Honduras, El Salvador, Ecuador and Argentina – is reinforced, often at the expense of domestic stability.

Another effect concerns the so-called lithium and critical minerals triangle – Chile, Argentina and Bolivia – set to become a new arena of strategic competition. At the same time, left-wing governments, led by Brazil, seek forms of counterbalancing, likely toward China, although upcoming elections in Brasília introduce elements of uncertainty.

Pro- or anti-US alignment, or even simple non-alignment, risks becoming the main political fault line in the region, with increased US interference threatening to generate violence and to undermine domestic democratic or democratising processes.

Consequences beyond the Americas

The US intervention in Caracas, carried out without any legal justification, delivers another blow to international law and its institutions. It provides *ex post* legitimisation for Russia’s imperial policies in its neighbourhood and, potentially, *ex ante* legitimisation for future Chinese actions regarding Taiwan. Even if Moscow and Beijing did not need such precedents, the episode weakens normative arguments against the use of force and reinforces a power-politics logic that also serves as a primary source of internal legitimisation for authoritarian regimes.

As far as Europe is concerned, with the exception of Spain and, to a lesser extent, France, governmental reactions fall into the usual mix of hypocrisy and ambiguity, with no explicit condemnation of an action that is illegal under both domestic and international law. This further erodes Europe’s credibility in the Global South and its ability to build a coalition of middle powers – such as Canada, Japan, South Korea, New Zealand and Australia – interested in preserving what remains of the international order.

The US intervention in Caracas, carried out without any legal justification, delivers another blow to international law and its institutions.

Europeans hope to keep the United States engaged in supporting Ukraine, but their room for manoeuvre is shrinking. This is also because the “Donroe” Doctrine applies to a territory under the jurisdiction of a European country: Greenland, part of the Kingdom of Denmark, which Trump has once again said he wants to annex. It remains to be seen whether, behind ever more convoluted statements designed to avoid criticising Washington, European leaders are preparing countermeasures for the moment when this power-politics logic is felt directly at their own expense.

5 January 2026

The Istituto Affari Internazionali (IAI) is a private, independent non-profit think tank, founded in 1965 on the initiative of Altiero Spinelli. IAI seeks to promote awareness of international politics and to contribute to the advancement of European integration and multilateral cooperation. Its focus embraces topics of strategic relevance such as European integration, security and defence, international economics and global governance, energy, climate and Italian foreign policy; as well as the dynamics of cooperation and conflict in key geographical regions such as the Mediterranean and Middle East, Asia, Eurasia, Africa and the Americas. IAI publishes an English-language quarterly (*The International Spectator*), an online webzine (*AffarInternazionali*), two book series (*Trends and Perspectives in International Politics* and *IAI Research Studies*) and some papers' series related to IAI research projects (*Documenti IAI*, *IAI Papers*, etc.).

Via dei Montecatini, 17
I-00186 Rome, Italy
T +39 06 6976831
www.iai.it



Latest IAI Commentaries

Editor: **Leo Goretti** (l.goretti@iai.it)
ISSN 2532-6570

26|02 Riccardo Alcaro, *The Fateful Consequences of Forced Regime Change in Venezuela*

26|01 Nona Mikhelidze, *Maduro's Fall: Russia's Strategic Defeat in a World Without Rules*

25|64 Riccardo Alcaro, *The Cracks in Trump's Armour*

25|63 Rafael Ramírez, *Venezuela: What Transition Ahead?*

25|62 Riccardo Alcaro, *The Roots of US Right-Wing Hostility toward Europe*

25|61 Nona Mikhelidze, *The Kremlin Sets Its Sights on Kyiv: The Bluff behind Russia's "Peace Plan"*

25|60 Riccardo Alcaro, *The US-Russia Peace Plan: A Colonial Deal in 28 Points*

25|59 Michele Collazzo, *The African Union-European Union Partnership at a Crossroads*

25|58 Polina Sinovets, *Thinking the Unthinkable: The Consequences of Trump's Decision to Resume Nuclear Testing*

25|57 Andrew McIntosh, *For Stability, Bahrain and the Gulf Need Democratic Accountability*
