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Venezuela

The Imperialist Threat and the Possible Courses of the Conflict

- Features - Venezuela 2026 -

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As if they were scripts written by Warren Ellis – The Authority, Transmetropolitan, Planetary – in which exaggerated arguments abound, during the last four months we have witnessed a disproportionate media and military offensive against Venezuelan sovereignty. The double standard of the US administration has gone from buying Venezuelan oil – under neocolonial commercial conditions, as a result of the sanctions imposed by themselves and the compliant attitude of the Maduro government – to presenting the state leadership as a criminal cartel dedicated to drug trafficking, with the aim of justifying a deployment and eventual military attack.

It does so knowing the internal and international discredit of Maduro's government, marked by an evident democratic deficit – especially since the 2024 presidential elections – an authoritarian and neoliberal turn that preserves leftist rhetoric, and the deterioration of the quality of life of the people and the working class, which survives on a monthly minimum wage of less than one dollar, in the midst of triple-digit inflation and with basic consumer prices that double the regional average. The forced migration, for economic and political reasons, of millions of Venezuelans has fractured families and eroded the government's popularity, to the point that Maduro's government has not been able to articulate a national anti-imperialist front in the face of the US offensive that includes all sectors of the country. The sepyo right has become a kind of local phalanx that justifies the invasion with arguments as bizarre as placing popular electoral sovereignty above territorial sovereignty, claiming that the lack of transparency in the elections of 28 July 2024 justifies US intervention.

But none of this, by itself, would be enough for American, Latin American and world public opinion to accept a disproportionate military attack on Bolívar's homeland. For this reason, a criminal image is built of the same government that, in a submissive manner, has delivered oil to the United States since the beginning of the war in Ukraine; a propaganda operation that seems inspired by the monsters created by the late John Cassaday.

However, there is something that is not entirely clear in this US military and media offensive, which one day attacks small boats, the next raises the tone of verbal aggressions, then issues high-sounding statements against the Venezuelan government and gives the impression of imminent actions, and then lets silence and inactivity feed a clinic of rumour and speculation. To make matters worse, one weekend it describes the Venezuelan government as “criminal” and the next it announces the opening of direct dialogues between Miraflores and the White House.

The initial question

The government of Nicolás Maduro is not a continuity of Chavismo, it has its own characteristics that produce a strange mixture between old socialist rhetoric – like Stalin or Mao – to maintain an international field of solidarity, while attacking the entire Venezuelan left – judicially assaulting its natural representations – producing an anti-popular offensive against the guilds and unions of workers who try to organize struggles for fair wages and decent living conditions, It specifies the elimination of minimum democratic freedoms, while applying a neoliberal package with sui generis leftist discourse, without this preventing it from verbally attacking US imperialism – to please its social base – while handing over oil to the gringos in terribly neocolonial conditions.

A significant part of the Venezuelan left argued in the 2024 elections that the ideal candidate for the United States was Nicolás Maduro because he had built a government with authoritarian efficiency - not economic, political and social - that handed over the country's wealth without self-confidence, in exchange for staying in power, something

that not even the duo María Corina Machado (MCM) and Edmundo González Urrutia (EGU) could do with such impunity, because their own social base would demand it.

In fact, those who consider Nicolás Maduro's leadership to be timorous are mistaken, on the contrary, he is extremely skilled at holding on to power in the midst of growing popular discontent, unprecedented in national history. The dictator Juan Vicente Gómez ruled at the beginning of the twentieth century without so much collateral damage, and the dictatorship of Pérez Jiménez, lacking democratic freedoms, stabilized the economy, with a program of capitalist development, but under which the working class did not experience the current misery. The fact that Maduro remains in power under these conditions implies a unique capacity to manage and control the correlations of forces, something that must be placed in the equation of analysis.

But, if Maduro was already in open negotiations with the United States since the war in Ukraine, turning Venezuela back into a safe supplier of oil to the north, then why this unusual military deployment against Venezuela? Simplistic explanations, which indicate that it is only to guarantee absolute control of Venezuelan oil reserves, are not sufficiently satisfactory. Although Venezuela's wealth makes it a target of world capitalist voracity and especially of US imperialism, this disproportionate deployment seems to indicate other additional elements. We need to ask ourselves this question in order to assess what does not appear so obvious.

The facts

In mid-August 2025, a naval, amphibious and troop deployment began in the Caribbean - especially around the perimeter of the Venezuelan coasts - unprecedented since 1902-1903, when President Cipriano Castro ignored Venezuela's foreign debt. Initially, the US announced the mobilization of 4,000 military personnel, including elements of the Iwo Jima Amphibious Ready Group (ARG) along with the 22nd Marine Expeditionary Unit (MEU), Arleigh-Burke-class destroyers, a guided missile cruiser – like the USS Gettysburg – the nuclear submarine USS Newport News (SSN-750), P-8 Poseidon maritime patrol aircraft and Marine Corps helicopters. The armed group departed Norfolk, Virginia on 15 August 2025, after an extended period without deployment in the region. The international press reported that later, on 27 August, the USS Newport News was incorporated, along with other destroyers and support units, for surveillance and deterrence operations in the southern Caribbean, near Venezuela's maritime border.

The government of Venezuela began a media offensive – initially accusing Marcos Rubio and making Trump look like he was deceived by the former – which was political in nature, activating its dwindling social bases, the militiamen and calling for national unity – however it refuses to release all political prisoners, return the legal personality of the leftist parties to their legitimate activists and continues its model of neo-bourgeois accumulation – but also military, designing a strategy of prolonged resistance that would require greater levels of broad social front, and diplomacy in the different multilateral bodies, from the UN to CELAC. Then, trying in an almost childish way to produce a division in the Trump administration, it has been attacking the offensive as imperial, taking care not to close the door of dialogue with the occupant of the White House.

Progressive governments have responded in different ways, while Boric (Chile) insists on identifying the authoritarian and non-socialist character of Maduro's government, Petro emphasizes the democratic deficit in Venezuela which would not justify a military invasion of the country, Lula points out that it is a concern for the sovereignty of the entire continent and the president of Mexico is closer to anti-imperialist discourse as a priority.

On 2 September, Operation Southern Spear was announced, focused on the eradication of what they call narco-terrorists linked to Venezuela. On 2 September, a first attack destroyed a small boat - allegedly dedicated to

drug trafficking - reporting 11 deaths in international waters of the Caribbean. In mid-September, these attacks continued with 3 additional deaths.

On 1 September, Maduro's government had declared Venezuela to be in maximum preparation, warning that they would respond if US forces tried to violate national sovereignty. Additionally, Nicolás Maduro threatened to declare the Republic in Arms if foreign aggression materialized.

On 10 October, Secretary of Defense Pete Hegseth announced the creation of the Joint Narcotics Task Force (JTF) to coordinate maritime, air, and intelligence operations against drug trafficking networks. This JTF is being led by the II Marine Expeditionary Force (II MEF). As of 11 October, maritime patrols were to be intensified, with logistical support aircraft and Marine helicopters, in addition to coordination with nations such as the Dominican Republic and Trinidad & Tobago. More than 10 more attacks on small boats occur, bringing the death toll to 43.

In October, Venezuela's government organized military exercises, mobilizing its air forces and anti-aircraft defences to respond to eventual provocations. Meanwhile, popular anti-imperialist sentiment was precarious, as a result of the terrible social exhaustion in the face of eleven years of unprecedented economic crisis that has brought the monthly minimum wage to less than one US dollar, with sustained inflation and basic consumer products at twice the prices of the regional average. It is not that a significant part of the population – right-wing, non-partisan and even left-wing – agrees with an aggression against the country, but that there is a terrible weariness with the national government. Faced with this, a sector of the population seems to have the illusion that it is possible to get out of the current living situation, characterized by average incomes below the poverty line, as if history did not show that where the gringos invade, what follows is misery, chaos and destruction.

On 16 November - although it had been announced earlier - the mission was expanded with the addition of the aircraft carrier USS Gerald R. Ford (CVN 78) and its strike group, along with long-range bombers and more air and sea patrols, bringing the presence to about 15,000 troops. To date, the number of deaths from linked military operations has reached 83 people. These are extrajudicial deaths, human beings who could have been intercepted, captured and prosecuted with due process, a fact that has been denounced by human rights organizations.

When the arrival of the USS Ford was announced, Venezuela mobilized about 200,000 troops in an operation to prepare for the eventual growth of hostilities. This occurred with an increase in propaganda about the need for national unity and defence of sovereignty, which has certainly managed to unite the social base of *Madurismo*, but which is insufficient for an efficient anti-imperialist resistance.

On 21 November the so-called Cartel de los Soles, whose existence has not been proven, but is allegedly composed of elements of the military and political high command of the Venezuelan government, including Maduro himself, was declared a criminal organization. At the end of November, speculation increased and announcements were made about the possibility of the US initiating land operations against drug trafficking – a euphemism for a possible military attack on Venezuelan territory – while Trump himself raised the possibility of a meeting with Maduro.

Trump is not a “mad dog” at the head of the administration of the most important imperialist nation, on the contrary, he expresses structural policies, although applied in his eccentric and strident style, typical of the illiberal. What is happening in the southern Caribbean is actually part of a more general picture that has to do with the restructuring of the system of global capitalist governance that emanated from the Second World War. The emergence of China as an economic power, Russia as a nuclear military giant, the relocation of a powerful apex of innovation between China and India, and the growing loss of Europe's geostrategic-military influence, are only signs of a radical transformation of the capitalist order.

As always, the new order will emerge by negotiation or by war – in the latter case it would be apocalyptic for humanity and capitalism itself – but the pieces are beginning to move. The United States moves as an imperialist nation, and much of what we see at stake today began with Biden, that is, for Democrats and Republicans the real interest is US geopolitics. The United States needs to show the world that it remains the most powerful weapon-making nation, with large-scale destructive capabilities and an extraterritorial military presence in many countries.

The “Homeland Economic Policy,” formally known as the Trade and Economic Security (TES) approach, pushed by the Department of Homeland Security (DHS) under the Biden administration, was announced in 2021 as part of a comprehensive strategy to integrate economic security into the national security agenda. Its flagship publication, the TES report, is based on annual assessments such as the 2020 Economic Security Annual Assessment – published on January 11, 2021 – and the DHS Strategic Action Plan to Counter the Threat Posed by the People's Republic of China (12 January 2021).

The central objective was to recognize that the economic prosperity of the United States depends on the uninterrupted flow of goods, services, people, capital, information and technology across borders, and therefore, seeks to mitigate risks to domestic economic security through coordinated actions throughout the government, political, financial, and military, that bilaterally update the historical ties of the countries with the empire. This included the reinforcement of the military presence in other countries and the opening of operations of cooperation in this area with other nations.

The key proposals were aimed at strengthening the global economic position of the US, promoting policies that protect critical supply chains, reducing vulnerabilities to threats such as trade disruptions, cyberattacks or unfair competition (for example, from China); integrating economic security with national security and using the Homeland Security Enterprise to respond to risks that affect economic stability, such as fluctuations in international trade or dependency on essential imports.

The TES's practical actions focused on conducting annual assessments to inform policy, promote safe trade, and work with partners to diversify supply chains. It includes an emphasis on sectors such as manufacturing, technology, and natural resources, with a focus on reducing “foreign-sourced” economic risks. The change in security policy is naturalized, presented with the appearance of a carrot and a concealed stick. This policy represented a shift towards a “whole-of-government” vision, combining economic diplomacy, trade regulations, and international cooperation, in contrast to earlier more isolationist approaches.

The TES policy remains in force as a state framework under the Trump administration (initiated in January 2025). Although specific Biden guidelines have been rescinded, in areas such as immigration and enforcement in sensitive areas (for example, the directive of 24 January 2025, formulated by the acting secretary of DHS, Benjamin Huffman). The TES report remains an active reference in DHS publications.

Other related documents, such as the ICE Pact Workforce Development Plan and joint statements of intent, extend through 2026, indicating continuity. It has not been formally replaced, but integrated into broader Trump-era initiatives.

The Homeland Economic/TES policy provides the conceptual framework for the current military deployment in the Caribbean, but it marks an evolution of approaches: from economic diplomacy with possible military support from Biden, to the centrality of offensive military action under Trump. The Trump administration's argument is that transnational drug trafficking, the focus of Operation Southern Spear - which began in September 2025, with precedents in August - directly threatens the purposes of TES by creating conditions for a potential disruption of supply and trade chains, since the cartels - in this case the so-called Cartel de los Soles - control maritime routes in

the Caribbean. affecting the flow of legal goods – e.g., oil, agriculture – raising logistical costs, which undermines the “economic prosperity dependent on border flows,” elements highlighted in the TES.

On the other hand, drug trafficking generates regional instability, especially because of its “links” with mass migration, as is the case with economic crises in countries such as Venezuela. On the other hand, the drug traffickers foster dependencies on illicit imports and reduce trade cooperation with Caribbean allies, contrary to TES's emphasis on alliances to diversify supplies. For the Trump administration, all of this has an impact on domestic economic security, as fentanyl and other drugs flood the US, costing billions of dollars in public health and productivity, which TES identifies as a “homeland” risk that requires an integrated response.

Under Biden, TES prioritized non-lethal measures such as economic sanctions, intelligence sharing, and assistance to regional partners to dismantle cartel financial networks. In the case of Venezuela, Biden privileged the construction of neocolonial conditions in the supply of Venezuelan oil to North America. In 2025, with the Trump administration, this has escalated to a massive deployment - since August - that seems to be an adaptation of TES, in this case to “protect economic stability” through military containment.

The oil market

OPEC and IEA estimates place Venezuela's oil reserves at 303 billion barrels, making it the country with the largest proven crude oil reserves in the world, ahead of Saudi Arabia and Iran. In the TES strategy, this constitutes a strategic area for the economic future of the United States, which is why a strategy of placing US military bases on Venezuelan soil, which is not openly revealed, seems consistent. The United States, in the competition unleashed with China and Russia for oil markets, wants to secure the most important reserve in the world, located in its closest radius of influence, something it can only do through direct military control. The announcements of the start of operations for the exploitation and trade of Venezuelan oil by Chinese and Russian companies has worried Washington, which seems to be looking for coercive mechanisms to avoid the potential loss of direct influence over this important energy reserve. In other words, the military deployment in the southern Caribbean does not only seek a change of government to ensure the supply of oil, but also the creation of political-military conditions of direct military control, something that would escalate the violation of national sovereignty, beyond what was achieved during the Cold War and the Fourth Republic.

Contrary to what has happened with the oil markets during a US offensive against a producing country, in this case nervousness has not affected the price indicators. During 2025, the fluctuation in oil prices has been downward (\$78 in January 2025 – \$64 in November of the same year), which shows that more than a direct military operation, the market expects an agreement between the Maduro-Trump governments, which in this case would be the negotiation of a permanent US military presence on Venezuelan soil. Since the US military deployment began in the south Caribbean, since August, oil prices, although they have experienced small variations when tensions between the White House and Miraflores worsen, have not stopped falling. This market behaviour is something that must be taken into account when exploring the times and scenarios of these tensions. In short, while the oil market does not seem to see a military offensive against Venezuela in the short term and therefore does not react nervously by raising the prices of a barrel, an increase in the cost of black gold would favour the businesses of crude oil traders, including Trump himself.

Increased military presence

Since Trump came to power, in his second term in 2025, he has concentrated a significant part of his effort on the US

military presence in Latin America and the Caribbean. That is, continuity of the TES with greater relevance of the expansion of military forces in dependent countries. Some of the most relevant initiatives in this regard are expressed in the memorandum of understanding accepted by President Mulino (Panama) and announced by US Secretary of Defense Pete Hegseth for the “rotational use” of the old bases, airfields and naval stations that the US had in Panama before the delivery of the Canal; in the case of Puerto Rico, Roosevelt Roads has been reopened and operational reinforcement have been carried out and exercises activated in Vieques; in Ecuador the parliament approved a constitutional reform that opened the possibility of expanding the US military presence in its territory, however the measure was rejected in a popular referendum; more recently – November 2025 – the Dominican Republic authorized the use of local bases (Isidro Air Base and the International Airport of the Americas) for logistical operations in the fight against drug trafficking. The Trump administration has pushed for the intensified use of CSL (Cooperative Security Locations) in El Salvador, Curaçao. Palenque/Apiay/Malambo and other airfields (Colombia), that is, in just months a US military repositioning in the region has been carried out.

One of the areas in which the United States has historically wanted to have the installation of military bases is Venezuela. In the 1960s they tried, but were opposed by the social-democratic government of Rómulo Betancourt, which agreed to military cooperation without permanently stationed troops. The US seems to want to reverse this, paradoxically when a leadership like Maduro's, which is considered to be the antipodes of Betancourt, is at the head of the government. In this sense, the military pressure on Venezuela seems to seek, in addition to the control of oil, the overcoming of the Betancourist resistance to military deployment in the territory, either through an agreement with *Madurismo* or in an eventual succession led by María Corina Machado, who in the recent past has hinted at this possibility. This would partly explain why, despite the delivery of Venezuelan oil to the US under neocolonial conditions in recent years, there is a disproportionate military offensive against the country and the Venezuelan administration.

Predictive regime and imperial control

The class struggle is the engine of history, said Marx, which is why the imperial conformation – imperialism today – is a constitutive part of the class struggle, in this case in favour of the bourgeoisie as a social class on a global scale. Class oppression is executed through the bourgeois state and its institutions, taking various forms that include biopolitics (Foucault) and psychopolitics (Chul-Han) in the liberal and neoliberal periods.

The development of the technology constitutive of the fourth industrial revolution, especially the internet, data capture, metadata analysis, artificial intelligence and large-scale multilevel information management systems, have given rise to the predictive regime of imperial control. In this sense, there is special interest in the massive capture of data to know behaviours, segment them, locate them and be able to build future scenarios, which allow us to bring the future into the present. This is especially relevant in the new forms of oppression and imperial control in the territories.

That is what we have seen for almost four months, in which we seem to be permanently on the verge of large-scale military action against Venezuela, which generates reactions of sympathy or rejection, disbelief or optimism, support or opposition from the population, not only of the country but of the region and the world. This has generated a gigantic volume of information, of special predictive interest, which, due to the impunity with which it has been executed, constitutes a very important victory for the purposes of US imperialism. Now the gringos have more elements of judgment, regarding the possible behaviour of the population and political representations, in the face of future and potential interventions in the region, the real probabilities of having support, but also the resistance that it is foreseeable to expect. All this is worked with automated open intelligence methods.

OSINT

Military operations already began from the moment the deployment of the US fleet in the southern Caribbean was announced. It is not a question of firing missiles as in conventional wars, but of setting in motion a phase of the new hybrid wars, which do not seem so obvious to the common observer. This is the result of the military use of multiple technologies, among which we will analyse OSINT.

Open-source intelligence (OSINT) was born in military intelligence in the 1940s and 1950s (radio, press) of the twentieth century. With the emergence of the internet (1990s), it became massive. From 2015-2025, with Artificial Intelligence (AI) and big data, OSINT enters its automated era, with almost real-time analysis.

Automated OSINT is a method of collecting and analysing public information (news, social media, satellite imagery, official documents, maritime/air traffic, forums, open databases and so in), where specialized software automatically performs tasks that previously required hours of human labour.

The automation scrapes thousands of pages and open sources, generates automatic classification with AI models (by topic, geography, sentiment, relevance), detects patterns in real time (military movements, media campaigns, economic changes), produces alerts based on key events (naval deployments, speeches, sanctions announcements), generating integrated reports from multiple sources.

For example, through systems that monitor maritime routes and detect unusual movements of ships, platforms that analyse satellite images to identify military activity, tools that capture and correlate official speeches, sanctions and logistical movements, engines that track news in dozens of languages and produce automatic summaries, bots that follow hashtags or political narratives on social networks.

OSINT is used to assess risks of conflict or military escalations, monitor drug trafficking, smuggling or organized crime, anticipate political or economic crises, analyse disinformation campaigns, measure the impact of sanctions or diplomatic tensions.

In the escalation of tensions in the southern Caribbean, OSINT seems to be being used in four major layers. The first, the monitoring of maritime traffic (AIS + OSINT satellite), monitoring military, commercial and fishing vessels through the Automatic Identification System (AIS), specifying anomalous routes near Puerto Rico -where military presence is reactivated in Vieques and other places- Curaçao, Trinidad, La Guaira and the Gulf of Venezuela, detecting logistical patterns of resupply, approaches to exclusion zones, behaviours in the face of restrictions, repetitive patrols, among others; in addition, work is being done on possible AIS blackouts for covert operations, optimizing the use of military technology available in the region.

The second, the use of automated satellite images. Through the use of automatic detection systems -machine vision- information is obtained regarding the deployment of destroyers or aircraft carriers, activities in US bases -especially Roosevelt Roads, Mayport, Key West- unusual movements in Venezuelan bases -La Orchila, Punto Fijo, Sucre, Puerto Cabello, Guárico, Maracay and the border areas- which together enable success in the increase of P-8 Poseidon surveillance flights or MH-60 helicopters. These satellite images allow detecting in real time, the change of “pixel” and alert when new vessels appear, thermal shadows, logistical columns, stored fuels, active radar equipment, information of special use when scaling military operations.

The third, the automatic monitoring of speech, coercive measures and official statements. In this case, bots trained in natural language processing scan communiqués, directives from DHS, Southern Command and the State Department and the reactions of the public authorities and the Venezuelan Armed Forces, detecting keywords such

as “unusual threat”, “strategic response”, “violation of territorial waters”, “activation of militiamen”. They then calculate the implicit and explicit risk based on the tones in the discourse, the frequency, the historical precedents of escalation, and the veracity of the statements on previous occasions, as well as the actors involved and their concurrence in different scenarios.

The fourth, automatic monitoring of social networks and weak signals. The algorithms track videos of military movements uploaded to the internet by civilians, reports from fishermen, publications from fishing communities, criticism or sympathy posted or sent through text messaging, unidentified flights (OSINT aviation), as well as leaks from military personnel, which allows detecting movements before they occur or are announced.

The combination of OSINT with predictive models for geopolitical risks makes it possible to measure the probabilities of escalation – although they do not predict specific events – using three main techniques: correlation and time series models (ARIMA, VAR, Granger), risk models such as “odd ratios” and logistic probabilities, and simulation models (Monte Carlo + geopolitical game analysis).

The correlation and time series models integrate the frequency of naval movements, the frequency of official announcements, oil prices, internal tensions in the country, activities on routes (in this case drug trafficking) and the potential and actual intensity of sanctions, giving weight to each of them and assessing their interactions. These models seek to determine whether one factor anticipates another according to Granger's principles of causality.

In the logistic risk and probability models, regression estimates the risk of incursions, confrontation and military escalation due to miscalculation. They do not say what event will occur, but what probability it has of occurring.

The simulation models elaborate scenarios based on distance between military equipment, intensity of hostility in speeches, intersection with electoral periods that make exaggerations predictable, oil production and actions of non-state actors, especially cartels. Each scenario shows the likelihood that incidents will lead to direct confrontations, surgical strikes, escalations, or sanctions.

OSINT needs a lot of information to be more effective, which is why the displacement in the southern Caribbean has been more than three months without concrete attacks on the territory with an overload of stimuli to produce responses from the population and governments. The communicational offensive of the military operation has days of greater regularity in attacks on ships (Monday) and of strong statements (Wednesday) to measure the following days the behaviours that occur, capture massive information and feed the scenarios.

The war has already begun, even if no missile has been fired over Venezuelan territory. A substantive element in the capture of information is the position of the local population with respect to the offensive in deployment, the US military presence and its evolution. Sympathy and resistance are detected and processed.

NOTAM

NOTAM – Notice to Air Missions – formerly Notice to Airmen – are official and mandatory notices issued by the aeronautical authority of a country. In the case of the United States, it is generated by the Federal Aviation Administration (FAA) with the purpose of informing pilots, air traffic controllers, airlines and air navigation services about the conditions or restrictions that may affect the safety of a flight.

In the case of Venezuela, the FAA issued a NOTAM (A0012/25) on 21 November 2025, noting the increase in

military activity and recommending maximum caution against potential risks when flying over Venezuela. This includes the flight, overflight, take-off, landing and ground movement phases of aircraft.

On 29 November, President Trump himself announced the total closure of Venezuelan airspace, although he is not the competent authority to do so, which has caused a special impact on public opinion. Airlines such as Iberia, Tap and others temporarily suspended their flights, although at the time of writing (30-11-2025) airlines such as Copa, Laser and Wingo were flying normally to Caracas.

In the context of the growing tensions between Caracas and Washington, the NOTAM and subsequent announcement by Trump must be seen in its three real dimensions. The first, in fact, to increase the blockade and siege on Venezuela to further impact the local economy, seeking to accelerate an outcome of regime change. Second, to continue pressuring for the purposes of the negotiating table that is open. Third, to produce additional volumes of information for OSINT, Odds systems and other mechanisms of the predictive control regime.

Odds

Odds are probabilistic systems or methodologies for the construction of scenarios, widely used by the business sector and news agencies. Although there is a context of high risk of military intervention, belligerent rhetoric, and alarm on both sides, even direct action does not seem to be satisfied, if the analyses are based on all the available information. [\[1\]](#)

Although there are no official Odds, using their construction technique it can be inferred that the probabilities of a US military intervention in Venezuela in the short term (24 – 160 hours) are only 5 – 12%. In other words, it is expected that more days or weeks will still pass before greater probabilities of military intervention are configured or dissipated.

Madurismo in its labyrinth

We stress that those who underestimate Maduro's political capacity are mistaken. Maduro is certainly not an educated man, but he is a politician with exceptional ability to stay in power, especially since he is a pragmatist rather than an ideological actor.

Nor is Maduro Chávez, nor does *Madurismo* have a nature similar to Chavismo. Chávez was a hyper-leader, who did not share his leadership – he never operated with a collective leadership, not even with the MVR or the PSUV – with an enormous sense of empathy with the masses, aware that his permanence in power depended on harmony with the majority of the masses, who used polarization as a strategy to build a pole around the project he embodied; Chávez made many mistakes – which it is not appropriate to analyse in this text – but he was deeply committed to the creation of a new poly-classism – which would overcome the poly-classism of the Fourth Republic – orienting his actions by his notion of social justice.

Unlike *Chavismo*, *Madurismo* is the result of an abrupt transition of leadership, from Chávez – from his illness and death – to Maduro, who enjoyed neither the charisma nor the control of the correlations of forces that characterized *Chavismo*. *Madurismo* is an alliance of leaders and smaller groups (Diosdado Cabello, the Rodríguez brothers and others), which is expanded to make up for Maduro's lack of military experience (Padrino López and the new post-Chavista military-police leadership) that accept Maduro's leadership, but have their own economic and political interests. While *Chavismo* postulated a civic-military alliance, *Madurismo* in its authoritarian turn expands it to a

civic-military-police alliance.

Madurismo in its construction of identity and correlations of forces to sustain itself in power has distanced itself from allies of the Chavista period, this has created a Chavista opposition to *Madurismo* -still weak, as well as the confrontation with the whole of the authentic left (PCV, PPT and others) whose legal representations were assaulted through judicial decisions. which has generated left-wing opposition. The articulation between dissident *Chavismo* and the critical left in organic terms is still very weak.

Consequently, any negotiation for the transition is not only with Maduro, but with *Madurismo*, and cannot leave aside the Chavista and leftist opposition that is anti-Maduro. That is the strategic mistake of the most radical right and the leadership of MCM-EGU, who propose a change by sweeping away all the past and unify *Chavismo* with *Madurismo*.

As I explain in the book “Venezuela and Chavismo” (2025), *Madurismo* is a rupture with the multi-class project embodied by Chávez and the commitment to the consolidation of a new bourgeoisie, which emerged in the heat of business and corruption in the last twenty-five years, opposed in a conjunctural way to the interests of the old bourgeoisie, but with whom they share a strategic horizon.

What remains of *Madurismo* from its mother trunk, *Chavismo*, is the socialist and popular-communal rhetoric, which it maintains to cohere its social base, which although diminished – and unable to win free, fair and transparent elections in the short term – can still be around four million voters, something which is not insignificant when talking about democratic transition.

Madurismo has had four stages so far. The first, between 2014-2017, of crushing and intervening the political representations of the right and the classical bourgeoisie, as well as the co-optation of an important part of the leadership that continues to appear as opponents, and who in Venezuelan language have been called “scorpions” (capable of operating against their own). The second, between 2018-2024, of intervention and reduction to its minimum expression of the political left that had accompanied Chávez, the destruction of trade union freedoms of organization, strike and mobilization, and the beginning of negotiations with the United States to recompose bilateral relations, something that was especially favoured by the war in Ukraine, which once again turned Venezuela into a reliable supplier for the Americans, even in conditions of neocolonial dependence worse than those in the period before Chávez, openly devoid of nationalist aspects. Venezuela and the United States, regardless of high-sounding statements typical of the internal political spectrum of each country, significantly improved their relations between 2020-2025 (before the US military deployment in the Caribbean started). The third, between 2024-2025, is to move from a regime of formal democracy to the de facto cancellation of the democratic path - although it maintains elections, the National Electoral Council (CNE) and participatory rhetoric - with an escalation of the selective repression expressed in hundreds of detainees of the social movement, which has placed it in a defensive position, both nationally and internationally. The fourth, which begins with the military siege (2025 -), a period in which anything goes and survival in power is the leitmotif.

The impossibility of making the electoral result of 28 July 2024 credible has generated an unprecedented international crisis for *Madurismo*, the greatest escalation of which is the US military offensive in the South Caribbean. This is being used by the United States, with the rhetoric of combating drug trafficking, to advance its TES strategy in the region, with the clear interest of positioning military sites in Venezuelan territory, as part of the global political reconfiguration.

This creates an unusual challenge for *Madurismo*. Negotiating now with the United States implies not only talking about transition - which could wait a few years if it gives in to its strategic intentions: to place military bases - but also the acceptance of a sword of Damocles over their heads, while they relearn to maintain the minimum balances with the Americans. It would be easier for the United States to intervene in local political affairs, if it has a military force in

the territory, which is the far side of Trump's moon.

In other words, political life insurance for *Madurismo* would be a kind of “Russian roulette.” The prolongation of his stay in power, in a scenario like this, would imply the definitive abandonment of his ideological discourse and the mutation to new narratives more akin to the gringos. That is, a Creole edition of Ahmed al Sharaa, a former terrorist with a price on his head, today an ally of the Americans, received by Trump, after breaking with his jihadist past.

The other alternative is to radicalize its pseudo-ideological rhetoric, in the hope of reissuing the experience of Cuba that has remained in power for decades. But, this is not the case of *Madurismo*, nor in the class structure of the Venezuelan government, given its desire to consolidate a new bourgeoisie, which they not only represent, but also form a structural part of it. This neo-bourgeois class interest demands the construction of a future where they can use and enjoy the accumulated wealth of *Madurismo*, continue to accumulate and be part of the model of rentier accumulation of the Venezuelan economy.

Madurismo does not have a suicidal vocation, but rather an attachment to power to continue accumulating wealth. What it seems that it has not yet achieved is to build the transitional formula that gives confidence and tranquillity to the Americans. If the process of building this mutation is not done fast enough, they can precipitate a gringo military aggression in any of its modalities or real possibilities.

To make matters worse, in recent weeks changes have been taking place in Maduro's geopolitics. The New Democratic Party (NDP) in Saint Vincent and the Grenadines has just defeated the United Labour Party (ULP) of Ralph Gonsalves, an ally of *Madurismo*. In Honduras, everything indicates that the candidate of *Zeyalismo*, Rixi Ramona Moncada Godoy, will lose the elections held on Sunday, 30 November: this is a setback for *Madurismo*. Bolivia's MAS, another ally of *Madurismo*, was practically pulverized in the last elections. On the other hand, the spectrum of governmental identities is reconfigured with *Madurismo*. Lula and Petro remain distant, calling for greater democracy for Venezuela, while the progressive candidate in Chile, Jannette Jara (of the Communist Party) describes *Madurismo* as a dictatorship. Meanwhile, the newly elected mayor of New York, Mamdani, has declared that Maduro is a dictator and that his vision of socialism is radically different from experiences like that.

But the labyrinth of *Madurismo* is not ideological, but pragmatic. The question is whether he will be able to build the formula that will allow him to hold on to power, with the approval – even if it is not explicit – of the United States.

MCM-EGU: Leadership is not the same as the ability to govern

The leadership of María Corina Machado (MCM) is undeniable and has been lent to Edmundo González Urrutia (EGU), an absolutely opaque and supporting character. It is unquestionable that MCM managed in the 2024 presidential elections to add votes that are beyond the classic influence of the right-wing opposition to *Chavismo* and *Madurismo*. Even a significant sector of those who continue to vindicate *Chavismo*, as well as sectors of the left fed up with Maduro's authoritarian drift, ended up voting for EGU, not because they had become right-wing voters, but as a way of enabling change in the face of Maduro's disaster. The left that maintained an independence from *Madurismo* and *Maricorinismo* was a minority, and I highlight this not because that makes this sector morally superior, but to show the political tragedy of the moment.

The problem is that MCM-EGU is thinking of a transition in the style of Tomas de Torquemada, initiating a political inquisition against those who participated in the recent past with *Chavismo* – which it does not differentiate from

Madurismo – the social movement that identifies with the 1999 Constitution and the entire military leadership. This is impossible to achieve without an internal civil war.

On the other hand, their illiberal agenda – as expressed in their 2023 government program – proposes the continuity of anti-working class policies initiated by Maduro, adding processes of incorporation of local capital to the dynamics of financialization, without any signs that would previously open a period of recovery of the material living conditions of the population. This free-market recipe is based on the premise that it will make everyone prosperous. In an eventual post-Maduro situation, this would generate terrible social frustration, which would be expressed in instability and precarious governability.

This is so obvious that it seems to be within the course of US interests in consolidating its political-military influence in the country, with the formation of leaderships and representations absolutely aligned with its strategic purposes. The post-Maduro chaos that MCM-EGU would generate is absolutely functional to the US neocolonial logic in Venezuela.

How long will the transition take to achieve minimum stability in the country, recomposing the material living conditions of the working class and the political freedoms for its organization? But this will not be achieved passively, but with organization, discarding the illusions in the post-Maduro bourgeoisie and the US troops, preparing us for the struggle.

Simplified scenarios

All of the above configures several scenarios that we will address in a simplified way.

Scenario 1: The United States launches a classic invasion in the short term (less than three months). The number of military personnel available at this time is insufficient for an operation of this type in a country with such a rugged geography, extensive borders and possibilities for organized resistance. Such an operation would be long, would wear down the Trump administration and would generate rejection in Latin America and the United States itself. The calculations of American defeat would be very high. Highly unlikely.

Scenario 2: The United States attacks the power infrastructure in Venezuela by air, accusing it of supporting drug trafficking. This would include some military installations. Purpose: to produce terror in the population, division in the armed forces and an internal change of direction in the political regime, which would facilitate the beginning of a negotiated transition, politically and militarily supervised by the United States. The leadership of María Corina Machado (MCM) and Edmundo González Urrutia (EGU) would only be of transitional use. Final purpose: to install military bases in Venezuela, militarily guarantee the control of Venezuelan oil, the production of gold and rare earths, as well as to place a US military façade in this region of the South Caribbean. This scenario would be highly unlikely because *Madurismo* is a system of command relations which is highly cohesive through shared interests, everyone knows that a division would end up liquidating each of them.

Scenario 3: The US combines psychological operations, media management, and targeted military operations to produce a popular anti-Maduro revolt that justifies a large-scale US military operation in “support of democracy.” I could, for example, point out that Maduro has moved his command centre to a popular neighbourhood (Petare, La Vega, El Valle, another) and would generate military actions focused on this sector, producing civilian casualties; the purpose would be for the population fed up with the economic situation, the precariousness of the health system, the salary problem and the impact on the family nucleus of high migration, to come out to ask for Maduro's resignation, with a slogan “we have suffered enough and now they kill us because of you: Resign!” Prolonged chaos would be

useful to their purposes (Haiti model), with the democratic transition under the leadership of MCM-EGU being only a pretext and its duration would be short in the face of problems of governability. The final purpose would remain the same, to install military bases on Venezuelan soil, to directly control oil production and to have a strategic military presence in the South Caribbean. Intermediate probability.

Scenario 4: The United States launches targeted attacks on military and political targets in Venezuela, in the style of the recent attacks in Iran. The purpose is to eliminate part of the *Madurista* leadership to produce the surrender of the civic-military-police alliance of *Madurismo* or the certain beginning of a short-term transition. This would have the risk of rejection in US and world public opinion due to the collateral damage in human lives and the possibility that the regime will not surrender. The transition would be preceded by the placement of US military forces in the territory (which would open the episode of military bases) under the pretext of guaranteeing the return to democracy, but with the aim of controlling access to and use of Venezuelan natural resources (oil, gold, rare earths) and consolidating its geostrategic presence in the southern Caribbean. Possibility in the short term (before 3 months) is intermediate, possible in more than three months because it would have to be accompanied by a unified political decision in the US Congress, something that is not envisaged in the short term.

Scenario 5: Internal destabilization through the activation of US intelligence in Venezuelan territory; generate mobilizations and chaos to promote a Latin version of the Arab Spring. This would justify direct military intervention – later – as support for the reinstallation of democracy. The final purpose is the same, to place permanent military forces in Venezuelan territory. The problem for this scenario is that the civic-military-police alliance of *Madurismo* has built an apparatus and network of control and effective social repression, which has instilled fear in the population not to go to prison, which limits the willingness of the population to take to the streets: in addition the most rebellious sector of the opposition and the youth who would protest in the streets is currently in a situation of migration, outside the country. Efficiency impossible to foresee. Low probability.

Scenario 6: Successful negotiation between the Trump administration and the Maduro government to avoid military actions in Venezuelan territory. In this case, *Madurismo* decides to authorize the installation of US military bases in Venezuela, under the format of a memorandum of collaboration for the shared fight against drug trafficking, while committing to an orderly democratic transition, in the next two to three years. The point of honour for the United States is the authorization of US military deployment in Venezuela. The collateral effect would be the overcoming of the MCM-EGU duo as the head of the transition, building a new axis of democratic opening in the opposition (leadership built from the opposition that dialogues with the government, called scorpions), which guarantees *Madurismo* that there will be no persecutions. The problem in this case would be for *Madurismo*, which would have to accept that now its displacement of power was serious, which would imply a reengineering of the correlations of forces (internal to *Madurismo* and with the oppositions) to make the agreement possible. High probability.

Scenario 7: The combination of the above scenarios to produce a change of political regime in 2026. This scenario would require at least three months to build viability, so its start would be from February-March 2026. For this scenario, the ideal moment would be after the elections in Colombia, where they aspire to displace progressivism, creating the conditions for the creation of a multinational force that intervenes from the New Granada border with US air and missile support. The ultimate purpose is to place permanent US military forces on Venezuelan soil. Probability in the short term is low-intermediate.

Scenario 8: a false flag attack against US military or civilian targets, which unifies the gringo political bloc, for the start of operations focused on the short term. In this case, the purpose would be to promote the prompt fall of *Madurismo*, gaining time to prepare the conditions for intervention with a multinational force in the medium term. Intermediate probability.

Scenario 9: Maintain the siege for the next three months, with an escalation of psychological and technological

warfare, to produce an erosion of *Madurismo* and the beginning of an agreed transition, which includes the placement of military forces in Venezuelan territory. Intermediate probability.

Scenario 10: maintenance of the current situation for a few more months, with the purpose of creating the political conditions (consensus in the US Congress), military (formation of a multinational force) and economic conditions (total drowning of the Venezuelan economy) that make possible the development of multilevel operations for the displacement of *Madurismo*. MCM and her Nobel Prize would play a central transitional role in this strategy, although it can be moved in the medium term. High probability scenario.

Scenario 11: Trump backs down without pain or glory. In this scenario, the United States demobilizes the military infrastructure deployed since August, with any argument and pretext. This would be read as a victory for *Madurismo* that would allow it to consolidate its grip on power. Very low chances.

Scenario 12: The United States intervenes in Venezuela and is surprised by an armed resistance, with a consciousness of prolonged popular struggle. This scenario would be unfeasible because the majority of the population attributes responsibility for their material living situation to the mistakes of the Maduro government. Very low chance.

These twelve scenarios are hypothetical and were constructed from existing multi-referenced information. A factor can evolve in another direction, modifying the possibilities of each scenario. Therefore, the monitoring of the scenarios must be daily.

Anti-imperialism and a culture of peace

There may be multiple differences of different kinds with the government of Nicolás Maduro and *Madurismo*, but these discrepancies cannot serve to justify a US intervention on Venezuelan soil. In this sense, the progressive, democratic, nationalist, popular and socialist forces of the continent and the world must denounce the attempts of the Trump administration to violate sovereignty. A military attack on Venezuela is on the sovereignty of all Latin America.

We have to combine this with the denunciation of the anti-democratic, anti-working class, neoliberal character with the left-wing discourse of the Maduro government. *Madurismo* and Maduro are not socialist or revolutionary, they are the political representation of a new bourgeoisie that has emerged in the last twenty-five years, which will have differences with US imperialism until it manages to demonstrate that they can be its best allies in common objectives.

For this reason, a people that has suffered in the last decade a situation of terrible misery, the dismemberment of families due to migration, the destruction of social institutions, the disappearance of wages as a source of survival, does not deserve to die under the bombs and bullets of an invasion that, like *Madurismo*, does not think about its interests. Consequently, any initiative that avoids the military escalation of the conflict must be welcomed from the perspective of the people.

Reality is usually richer than any analysis, so we will be very attentive to what happens in the coming days.

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Translated by **International Viewpoint** from [VientoSur](#).

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[1] [2] In antiquity - the Middle Ages, the earliest records of probability calculations come from gambling and betting in Greece, Rome, but these did not express formally established mathematical models. In the seventeenth-eighteenth centuries, formal theory was born, from the contributions of two key figures, Blaise Pascal and Pierre de Fermat, who analysed betting problems and laid the foundations for the calculation of probability. Huygens, Jakob Bernoulli and De Moivre then formalized the "mathematical expectation" through compound probability and error theory. In the nineteenth century, horse racing bookmakers in England established bookmaking, fractional odds that are combined with empirical statistics. In the twentieth century, the odds began to have political and military application, especially in the Second World War, with Bayesians -who analyse their beliefs based on probabilities every time new information arrives-, intelligence analysts, and military statisticians, who use probabilistic models to anticipate attacks, predict movements, evaluate strategic risks. This is how the discipline of quantitative geopolitical risk analysis was born. In the 21st century, advanced models have been built that are used for war prediction, country risk, automated open intelligence (OSINT), machine learning models, predictive markets (Prediction Markets) and financial analysis. Today organizations such as the Good Judgment Project, Metaculus, RAND Corporation, Swift Centre, publish geopolitical probabilities based on experts + mathematical models. The odds have advantages over traditional probability because they allow direct comparison to be seen -3 times more likely to happen than not to happen- they integrate qualitative signals well, they are intuitive to measure rapid changes. These are not certainties, absolute predictions, evidence of secret decisions, non-public intelligence information, they are simply probabilistic tools, based on the observable and the historically comparable.