

Transcript — George Friedman on Why the US Cares About Venezuela, Cuba and Greenland

Christian Smith: Hello and happy New Year from Geopolitical Futures. I'm Christian Smith. Welcome to our first podcast of 2026 and what a start to the geopolitical year it has been. The National Security Strategy published by the White House a month ago set out that the US Would be prioritizing securing the Western Hemisphere. And boy, did they mean it. Following America's seizure of Venezuelan President Nicolas Maduro on Saturday, the world is now questioning just how far the current administration might go to secure that Western Hemisphere. So today on the podcast, I'm joined by Geopolitical Futures Chairman George Friedman to discuss where this all goes from from here. George, Geopolitical Futures is just about to release its 2026 geopolitical forecast. For those of you who stick around till the end of the show, we might be able to give you just a little flavor of what that might look like and what it might mean for China in particular. Of course, to get that forecast, you will need to go to geopoliticafutures.com and subscribe. Right now though, everyone of course is talking about Venezuela, so we couldn't not dive into that.

George Friedman: Now.

Christian Smith: If missed, our final two podcasts before Christmas, you may want to go back and have a listen as today we'll aim to build off those really. But briefly, George, the attack on Caracas on the weekend largely lined up with your take from last year, except perhaps for the audacity of the action.

George Friedman: Well, the way it was executed was as it had to be. The United States does not want to occupy Venezuela was the one responsible for it, but it wanted to get rid of Maduro and it did that very efficiently. So when we look at the various military adventures in recent years, in recent decades, this is pretty much a clean one. It caused some casualties on their side, none on ours apparently. And the mission was done.

Christian Smith: And I mean the purpose of the mission, I mean, just remind us how this fits into the wider US Geopolitical strategy as you see it.

George Friedman: Well, firstly, the United States has very publicly stated in many ways that our primary focus is not going to be in the Eastern Hemisphere any longer. That 80 year adventure is over and we're going to be really concerned about the Western Hemisphere. Now here is a country that has close ties with Russia, close ties with Cuba, and also as a major

source of fundamental threat to American safety and health, they deal in drugs. If you're going to be concerned with the Western Hemisphere, while that may appear to be a minor thing to many people, it's not insignificant in the United States. And trying to put an end to it is not irrational or anything, but it's a beginning. There is a broader issue in mind because the Western Hemisphere, which the Eastern hemisphere people simply are blind to, has certain geopolitical threats, the most fundamental one being Cuba, where we almost went into a nuclear war during the Cuban Missile Crisis, which we tried to invade during the Bay of Pigs. And this has been a fundamental issue. So when we looked at the action against Venezuela, we also looked, it seemed to me to be far too many ships to do a blockade, far too few ground forces to take Venezuela. And I assumed it had a broader issue, which was Cuba.

Christian Smith: I want to ask you a somewhat theoretical question here, George, a theoretical question in the sense of how you approach your analysis. I mean, it's important for the audience to know that you don't advocate for certain approaches. You're not here saying Trump is good or Trump is bad or anything like that. You rather analyze the broader imperatives facing countries. Now, a lot of people, people have suggested that America's actions here are morally questionable, that they're legal under international law, or that they're just pure imperialism. Trump's talked about the Monroe Doctrine or the Dunro Doctrine, as some people are calling it. I mean, what do you make of those claims about illegality or imperialism here?

George Friedman: Well, if a nation is building its economy and selling illicit drugs in the United States and it's carrying it out on a constant basis, shall we regard that as a moral action? Shall we regard putting an end to it as an immoral action? That's one answer. So if you see this as a attack and a helpless, mild power, it's kind of restating it. But then there was a fundamental question of morality among nation states. The fundamental interest of a nation state is its own self interest and security. Going back to the Greeks, Thucydides, it was a point that was always discussed. What is moral, what is necessary? In this particular case, there was a moral dimension, but there's also a necessary thing if we are going to be in the Western hemisphere dominating. The most important thing in the Western Hemisphere is the Caribbean Ocean. For us, the Caribbean Ocean has been a complex thing with Central America on one side, Venezuela on the other, and Cuba on the other. We have issues. Now, one of the things that many people in the Eastern Hemisphere, particularly in Europe, they see their geopolitical problems and they don't take seriously the geopolitical issues the United States has in its own hemisphere. So is it immoral for the United States to shift its focus from the Eastern Hemisphere where it has limited interests to the Western hemisphere in which it lives. You can

argue morality all the time. You could always argue that the action of the other nation is immoral while the action of the other nation is more moral. But the question of morality here is in this particular case, was Venezuela acting morally? Is the United States obligated to accept that without responding? Is it moral for the United States government not to take actions to stop the shipment of drugs? And how do you stop the shipment of drugs if you don't remove the leader of the drug trades, if you will? So morality is a very complex thing and it's very, for those who view the world, it's a pleasant undertaking. But in reality there are national interests that are very profound and complex that have to be taken into account. Because as the Greeks said, that was the fundamental nature of relationships between states, cities and so on, so forth. So we have to put morality somewhere in this thing and then consider that the government of the United States is responsible for the well being of the American people. He has not taken an oath to be responsible for the global system. And somehow in the past 80 years it became a sensibility in the Europeans and even among Americans that we have a moral responsibility to fight constant wars in the Eastern hemisphere. And they didn't question the morality of that. So I would say the moral question is interesting, but subsidiary.

Christian Smith: We talked a lot about Cuba before the New Year break. What does it mean for Cuba now?

George Friedman: The island of Cuba has been a long standing issue for the United States. The Spanish American war fought in 19 century, late 19th century was over Cuba. Teddy Roosevelt's famous charge up with San Juan Hill with his Rough Riders was in Cuba. When you look at the map you will understand that Cuba is a fundamental interest of the United States. Fundamentally at this point, because the Florida Straits, the distance between Cuba and Florida skis is only 90 miles. But over well over 50% of American exports and imports come through the Gulf of Mexico, not through New York or any place like that. They come through ports in Louisiana and ports in Texas and so on and so forth. Now that's a very narrow gap. If a hostile power would for example, mine that gap or send submarines in or drones or whatever, that would be a fundamental threat to major national interests. The well being of the United States would be in danger. And this has always been the issue of Cuba, those straits. And the reason that Teddy Roosevelt wanted to take Cuba under his control was to prevent that from happening. And so did John Kennedy who did the same thing. So this has been a long historical issue in the United States, given the situation in Venezuela and their close relationships both to the Cubans. Remember, many of the people defending Maduro were Cuban operatives, and much of the relationship was Cuban with the Cubans. So the question then is, what do we do about Cuba at a time when the United States is engaging partly in the

war in Ukraine and threatening to send Tomahawk missiles, which we haven't done, which is strike deeply into Russia during that time of discussion, Tomahawk missiles, the Russians signed a new agreement for mutual defenses with Cuba. If Cuba had the equivalent of Tomahawk missiles, which the Russians do have, they could strike, as in the Cuban missile crisis deep in the United States, or use Cuba as a base for taking this Florida states under their control. So when that happened, cubits flared up very much on our lights. So when you remember that the people defending Maduro were Cubans, the Cubans had sent security forces, then we see, and that Russia is signing treaties with Cuba, then you will see that Cuba is of interest. Now Cuba is in very bad shape, extraordinarily bad shape, in the sense that this government has led it into actual hunger. The electricity goes off for two days at a time. This is a disaster. At the same time, the elite in Cuba may well want to bring in someone like Russia or China or something like that, and that poses a threat. So when you look at it from the military and geopolitical standpoint, the issue about Venezuela was a preface to a more fundamental issue, and that was what is the status of Cuba? And when you take a look at the forces that were deployed and the size of everything else that I felt that I spoke before was about Cuba. Now, the President has confirmed that after that, we're looking at Cuba next. And this is a very significant part of, of American national security. Is it moral? Well, is it? What is morality in international relations? Is the survival of the state an absolute necessity? Or is doing it in moral terms, even if you fail, necessary? I studied political philosophy in graduate school, and I came to the conclusion that this is the silliest argument in the world. Of course, staying alive, staying healthy, staying vigorous is the moral imperative. Then you could be moral. So this is how I look at this thing. It's a geopolitical issue. It's a threat to the United States. It's not a fundamental threat to the United States, but it is a threat. And therefore it has to be handled. First Venezuela, then Cuba.

Christian Smith: Hold onto that thought about morality, because we might come back to it again in a moment. But sticking with Cuba as people Want to go back and listen to our podcast? Before that were in December. We dove into this in quite a lot of detail. Now, though, do you think it's almost inevitable that the US Will move against Cuba?

George Friedman: It's inevitable that it's going to move against Cuba. What that move consists of is unclear. There must be substantial unrest in Cuba, given the economy, given that it's as bad in the third World at this point as it could be, and given its relationship with Russia, I'm not clear on what the strategy is. Is it trying to foment arising inside of Cuba? Is it meant to be landing in Cuba, getting rid of the government, occupying all of Cuba? These things I'm not sure of that. The Cuban issue that really has been burning currently from 1959 when Fidel

Castro took it over through the Cuban Missile Crisis and all the other things that certainly it is in interest of the United States to settle this issue, particularly when it says, look, we're not going to be in the Eastern Hemisphere, we're going to worry about the Western.

Christian Smith: Enjoying the show? Take a moment to follow and rate us on your preferred podcast platform for video versions of the show and much, much more. Subscribe on YouTube and as always, you can find expert geopolitical analysis@geopoliticalfutures.com how much will the lack of Venezuelan oil to Cuba now impact it? I mean, it was already struggling enormously, but a lot of something like 40% or something like that of its oil came from Venezuela as a sort of quid pro quo for Cuban help with its intelligence services. So how much will this actually impact it?

George Friedman: Quite a bit. They get a lot of their oil, most of it, in fact, from Venezuela. They also get some oil from Mexico, which I think we will discuss, with Mexico cutting back somewhat, and also some shipments for Russia. But Venezuela is the key. So the Velazarian action, particularly the focus on the oil industry and saying that the United States will be buying several billion dollars worth of oil, says one, we don't want to destroy Venezuela. We don't even want to occupy it. We will buy the oil, we will pay you for it, but we don't want that Cuba be getting its oil from Venezuela, deepening the crisis of Cuba.

Christian Smith: I think it's unclear at the moment if the U.S. i mean, this is somewhat beside the point for what we're talking about here, but it's unclear at the moment exactly if the US Will pay Venezuela or. I think Trump said this morning when recording this on Wednesday that he was going to split the proceeds between the Venezuelan people and the American people. But. But that's, I suppose, somewhat by the by. But I suppose the wider question now is if one takes this modern Monroe Doctrine that Trump is looking at, and this is where we can almost bring that morality back a bit, I suppose, if you follow it to its logical conclusion, where does that end? In the Western Hemisphere. So this seems, as you're saying, George, it seems very likely that the US Will want some form of change in Cuba. But obviously everyone at the moment is now talking about potential questions about Greenland, even Canada, and the comments about it becoming the 51st state. Do you think we might actually see this?

George Friedman: I doubt very much that any action will be taken against Greenland. I think one of the things that he's doing is testing NATO. We have always been talking about defending Europe in NATO. A threat is emerging through the Arctic that the Russians could potentially, or in the Chinese could, in a net war, move through it. Let me go into this a little bit. In the Cold War, there used to be such a thing called the Duke Gap. Greenland, Iceland, the

United Kingdom. That gap was a fundamental threat to the United States. Because if the Soviets at that time would come around through the ocean, come down through the Jura Gap, okay, they could cut supplies flowing from the United States to Europe in the event of a Russian invasion, which never happened. It was only theoretical, but it was still a concern. So this issue of GeoGAP, which is kind of shocking the Europeans, is a very old one. Now. Greenland was always very cooperative. The Danes were always very cooperative. They were all there. And I see this as unreasonable in the extreme, that we should be wanting to take it. I don't think we want to take it. But here's what I do think. We want the Europeans to start thinking about American security as well as the Americans. Speaking of European security, the Europeans always focused in on what America could do to help Europe. Well, with the new American strategy focusing on the Western hemisphere, bringing up this issue and being shocked, shocked, I say to the United States would like to take control of a minor island that has long been on a map of NATO is sort of a test of the Europeans that we would be willing to occupy areas of Europe in order to protect them. That was reasonable. That we would want to do that in the Western hemisphere is a travesty. So part of it is, I think, psychologically testing the Europeans because militarily it's a stupid idea. Of course the Danes will let us come in there and so on and so forth. Why make such an issue of puts Europe on a spot. This time, we're saying to the Europeans, we need access to your land to protect ourselves. And by the way, we'd like your help on that, too. So on the surface, it appears psychotic to be talking about this, but when you go back in the Cold War and see how important Greenland, Iceland, and finally UK was to control of the Atlantic Ocean, it's not that mad. Europeans never complained during the Cold War when we were wanting to access to Greenland.

Christian Smith: Well, I think that's interesting because I think that, I mean, it's the same here in the sense that in this instance, I mean, in the sense that the Danes have basically said to the US you can send as many troops to Greenland as you want. And actually, the US has reduced this number of troops in recent years. And I think it's the sovereignty moral question more, as we were saying, that they're taking issue with.

George Friedman: Well, and that's what we want them to take issue with because we regard it, given the past 80 years of our commitment to the Europeans to block the Russians, they seem to have a moral obligation to be more receptive to the defense of the United States. So what he's done, and I'm guessing what he's thinking, because I hope he's thinking something rationally. He's saying, look, we have been deployed all over Europe, all right? We really need access to the island of Greenland. We know you'll give it to us, but we're going to ask for something a little more. Let us own it. I don't think he gives a darn about whether we own it or

not. Okay? But he's engaged in a romantic tiff with the Europeans, so to speak, with the Europeans saying, how dare you care for the Western Hemisphere more than the Eastern Hemisphere? And he's saying, hey, why don't you care more about the Western Hemisphere yourselves? So it's an interesting psychological challenge. It's a completely irrational. Seems irrational in its intent and in terms of military possibilities. Danes, of course, will let us put anything we want in there. So why is he doing this? He wants to drive the Europeans to the point of saying, okay, the 80 years are done. Come on, give us a hand in the Western Hemisphere. He's trying to reshape that in thinking, I think he's brighter than he looks. And I think that Trump actually thinks these things through and then appears to be random action. But there is a logic to it.

Christian Smith: And what about Canada? And I suppose to a lesser extent. Well, not a lesser extent, but a different extent, Mexico and suggestions of a 51st state and things like that.

George Friedman: Those I don't think are being taken seriously. But in a way, the Canadians used to refer to themselves sometimes as the 51st state, quite comfortably and happily. And at the same time, the United states were intimate. U.S. and Canadian intelligence are the same. The Canadians fought with us side by side in all our wars. The Canadians are part of North American air defense system. The furthest radar lines run through northern Canada. And an American at Cheyenne Mountain, which is the center of strategic military actions, is commanded by an American, but always has a deputy Canadian cap. And that didn't change. But at the same time, the Canadians have to now see to some extent the American interests. I think his actions initially were too much. The Canadian response was far too much. And so he is trying to. If he's going to be focusing on the Western Hemisphere, redefining relations there, is he going to invade Canada? Of course not. Are the Canadians going to break with us? No, they're still sitting in NORAD doing the same things they normally did. Canadian intelligence is part of Five Eyes. All that goes on. But I think if we look at this rationally, he's trying to shock the Canadians and the Mexicans into the idea this is a new global system. The old global system is not there. We have a primary interest in things like migration, primary interest in Cuba. In Cuba and primary interests in Canada and Mexico joining us in this. It is not what I would do if I were president, but no one, Hussein, would ever think of me as a president. Okay? And that's why not Presidents sometimes have to do this. So if you consider the dramatic shift in geopolitics that is taking place, and would have taken place under any president, that we reduce our presence in the Eastern Hemisphere, focus on the Western Hemisphere. He does it with a shocking intensity that puts everybody on nerves. But creative destruction is something that he believes in. So when we look at this, there's going to be no invasion of Mexico, but the

Mexicans may be more interested in monitoring their borders. There's not going to be any attack on Canada, but the Canadians may have to shift some of their trade agreements and so on and so forth. But he begins by vastly overstraining the threat, the threat against Venezuela that he does a much smaller action, but he does act. And this is what he's trying to portray to the world.

Christian Smith: Well, there's almost an element. You wonder where it's. Well, as you say, George, he's done something in Venezuela here that seemed on the verge of impossible. You know, I think A lot of people sort of thought, oh, well, you know, at the extreme there might be some tactical strikes, you know, to show they're serious or something like that. But he's gone and he's done something that is so outrageous in many ways to then suggest. And this is exactly how Europe is currently reacting. The sense is everything is actually possible. So, so the idea of a military attack on Greenland, and you had Stephen Miller this week saying, oh, we're not going to rule out military action with Greenland. It makes people believe that anything is possible.

George Friedman: Well, in the United States, we're cracking up. So the Europeans being upset is exactly what Trump wants. It wants to shock them out of that old reality into the new one. In addition, it's very interesting that this is not new to the United States. We have invaded many places recently in the past decades. In Nicaragua, we invaded Panama at a certain time, Grenada Islands, okay, operated in the Shetlands Islands along with the British and so on. So when you look at American behavior, there's nothing abnormal about the United States being concerned about what's going on in Latin America. And part of the Cold War that people don't realize was fought in Latin America, the Cuban situation, for example, many of the cartels were linked in some ways with Soviet intelligence or Cuban intelligence during that period. So while the Europeans were very aware of the Cold War raging in Europe, they were not even noticing things like the Cuban Missile Crisis and so on. So given the fact that the Russians are doing so poorly in Ukraine doing the fact that the Poles are building a massive defensive force against them, we are now free in a way to move back. This seems like a shocking betrayal of a moral obligation. There are no moral obligations here. There is a strategic obligation. And that reality is over and focusing the Western Hemisphere. But then the Europeans do not realize how much activity the United States had in the Caribbean and other Latin American countries for years, for decades.

Christian Smith: What about China here? China, along with perhaps to a lesser extent than Russia in Venezuela, has been involved. And that, of course, is one of the complaints that the

administration in Washington has had. What will their reaction be? What do you think they'll be thinking in Beijing?

George Friedman: Well, one of our forecasts, the main forecast, is the United States and China will this year reach a mutual understanding that will change the structure, re anchor the world in a new relationship. The Chinese economy is in very bad shape relative to how it was. It's still a significant economy. Brisbane decline. It grew out of access to the American markets for exports and from American investment. It maintains a potentially hostile relationship with the United States militarily. The American position is we cannot be dependent on China and have a hostile relationship militarily, potentially with China. So what has been going on, and we see it in many ways, is discussions with the U.S. Americans and Chinese, particularly with Xi and Trump in South Korea, reaching an understanding that we are going to reach economic understanding and a military understanding and understanding over Taiwan. And these things are all evolving now at this time. It's a very interesting point that we blocked Venezuelan shipments to everywhere, but shipments is China. China is the largest importing power of oil in the world. It doesn't have much of it. It imports it. A good deal of it came from Venezuela. The ships we stopped were going elsewhere to Cuba or to Russia or something like that. The ships to Cuba, to China, I should say the ships to China were let through. So that's an indication of what we're looking at in the next world. Just as we are focusing in on Cuba, we're also focusing in on finding an understanding with China. We tried doing that with the Russians. The talks failed. The Russians didn't want. We offered we would be investing and dealing and integrating you into the world economy. Putin couldn't do that. We gave the same offer to the Chinese when the two met, and I think the Chinese bought it. One of the most interesting things that nobody noticed in the Venezuelan situation was we blocked all shipping to the world except ships that were destined for one country, China. The Chinese ships went through. And that is a very significant sign that tells us what the relationship between the United States and China are going to be. And it's a radical change. It's as radical as the change was in 1945. Before 1945, the world was a very different place before World War II, and it was very different afterwards with the end of the Cold War, with the failure of Russia and Ukraine, it's a very different place now. The U.S. Chinese relationship will evolve dramatically this year into not an alliance, but a very fruitful and stable relationship, the foundation of the world system.

Christian Smith: Well, if that's not an impetus to go and subscribe to geopoliticafutures.com so that you can get the full forecast when it comes out in the next few days. Am I right in saying, George, the 16th, the 16th, the 16th of January. You heard it here first, then I don't know what is. But for now, we will leave it there. We'll be back again soon

with another podcast. George, thank you very much. Thank you out there for listening. Remember to subscribe to this channel on YouTube or on wherever you get your podcasts. Tell your friends about it. If you like it, if you think it's any good, and if you don't, well, then don't bother. Thanks very much for listening and goodbye. Find all of our expert geopolitical analysis@geopoliticalfutures.com.