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Implications of Removing Venezuelan President Maduro

F-2026-01-05a

Classification: TLP:CLEAR

Criticality: Medium

Intelligence Requirements: Geopolitical

January 5, 2026

Scope Note

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| Key Findings

- On January 2, 2026, a U.S. joint military operation removed Venezuela's President Nicolás Maduro by force, transporting him to a New York detention center to face charges of drug-trafficking. In the short to medium term, the U.S. State Department will likely forge relationships with the existing members of the Maduro government. The outcome will very likely include the Venezuelan government abiding by U.S. demands in exchange for remaining in power.
- Ahead of the operation, the Trump administration made clear that criminal and narcotrafficking groups were a national security risk towards the United States and that the U.S. military would be prioritizing the Americas region while deprioritizing its commitments elsewhere.
- The removal of President Maduro makes it more likely that there will be further U.S. military operations against nations with adversarial relationships with the United States, close military relations with either Russia or China, or energy resources.
- There are unlikely to be major supply chain impacts, as Venezuela has few ties to international markets and is therefore unlikely to impact global economic growth or contribute to inflation. Over the long term, the operation is likely to lead to increased access to Venezuela's oil and mineral reserves.

Analyst Commentary

Operation Details

On January 2, 2026, U.S. security forces carried out operation "Absolute Resolve", a joint operation focused on the extraction of Venezuelan president Nicolás Maduro.¹ The operation reportedly took two hours and 28 minutes and involved more than 150 military aircraft (including drones, fighter planes, and bombers) taking off from 20 different military bases and Navy ships and ended with the successful extraction of Maduro and his wife, who were indicted on drug-trafficking charges.²

- Since August 2025, the United States has been amassing a military presence in the Caribbean significantly above the levels seen in recent decades, with more than a dozen major warships with over 15,000 U.S. Marines just off the coast of Venezuela, alongside U.S. bombers and military drones.³ While the stated goal of the deployment is to perform counter-narcotics operations, which has resulted in the targeting of drug boats over a dozen times, the U.S. military presence far exceeds what is required to combat drug smuggling, and ousting Maduro was very likely an additional goal of the deployment.

The Trump administration's decision to forcefully extract a sitting president from within his own region likely represents a significant affirmation of a new U.S. foreign policy approach. These tactics align with the recently published National Security Strategy (NSS), which in part focuses on increasing the U.S. military presence within the United State's "sphere of influence" in the Americas region while deprioritizing U.S. security commitments in Europe, the Middle East, and Asia.⁴

- The extraction also reflects the findings of the U.S. Intelligence Community's (IC) annual threat assessment, a ranking of threats aligned with the U.S. president's priorities. The IC's 2025 assessment ranked "Foreign Illicit Drug Actors" as a primary threat to U.S. national security.⁵

¹ [hXXps://www.nytimes\[.\]com/2026/01/03/us/politics/trump-capture-maduro-venezuela.html](http://www.nytimes[.]com/2026/01/03/us/politics/trump-capture-maduro-venezuela.html)

² [hXXps://www.justice\[.\]gov/opa/media/1422326/dl](http://www.justice[.]gov/opa/media/1422326/dl)

³ [hXXps://www.cfr\[.\]org/article/mapping-us-military-buildup-near-venezuela](http://www.cfr[.]org/article/mapping-us-military-buildup-near-venezuela)

⁴ [hXXps://www.whitehouse\[.\]gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf](http://www.whitehouse[.]gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf)

⁵ [hXXps://www.dni\[.\]gov/files/ODNI/documents/assessments/ATA-2025-Unclassified-Report.pdf](http://www.dni[.]gov/files/ODNI/documents/assessments/ATA-2025-Unclassified-Report.pdf)

During his press conference on January 3, Trump alluded to coordinated cyber operations that led to a blackout within Caracas, providing the cover of darkness for Operation Absolute Resolve.⁶

- NetBlocks also reported on X (Twitter) that there was a loss of internet connectivity in parts of Caracas corresponding to power cuts during the operation.⁷

Considering the already high-alert state Venezuela was in before the extraction, an operation of this magnitude almost certainly required significant preparation and internal coordination inside the Maduro government.

Looking Forward

It is unclear what government will emerge following Maduro's ouster. During a press conference, President Trump stated that the United States will "run" Venezuela until a "safe, proper and judicious transition," using "boots on the ground" if necessary.⁸ Opposition leader María Corina Machado, whose coalition won the 2024 general elections, also signaled her team is ready to take power.

However, in subsequent days the Trump administration has said it will work with Maduro's vice president, Delcy Rodríguez, and threatened a second military strike if U.S. demands are not met.⁹

- Allies of Maduro, including Rodríguez, were initially combative following Maduro's fall. Rodríguez initially called for the return of Maduro while saying Venezuela will "never again be a colony."¹⁰
- This followed statements from other key players, such as Interior Minister Diosdado Cabello and Vladimir Padrino López, the Minister of Defense for the National Bolivarian Armed Forces, who have called on Venezuelans to take to the street in a show of defiance and support.¹¹¹²

⁶ [hXXps://www.politico\[.\]com/news/2026/01/03/trump-venezuela-cyber-operation-maduro-00709816](https://www.politico.com/news/2026/01/03/trump-venezuela-cyber-operation-maduro-00709816)

⁷ [hXXps://x\[.\]com/netblocks/status/2007434366545174662?s=46&t=7qgObawVR3sD59eITHivyA](https://x[.]com/netblocks/status/2007434366545174662?s=46&t=7qgObawVR3sD59eITHivyA)

⁸ [hXXps://www.bbc\[.\]com/news/articles/cd9enjeey3go](https://www.bbc[.]com/news/articles/cd9enjeey3go)

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[hXXps://www.reuters\[.\]com/world/americas/trump-bets-intimidation-force-venezuelan-leaders-into-line-2026-01-04/](https://www.reuters[.]com/world/americas/trump-bets-intimidation-force-venezuelan-leaders-into-line-2026-01-04/)

¹⁰ [hXXps://www.theguardian\[.\]com/us-news/2026/jan/03/trump-venezuela-oil-industry](https://www.theguardian[.]com/us-news/2026/jan/03/trump-venezuela-oil-industry)

¹¹ [hXXps://cnnespanol.cnn\[.\]com/2026/01/03/venezuela/video/maduro-venezuela-eeuu-diosdado-cabello-sot](https://cnnespanol.cnn[.]com/2026/01/03/venezuela/video/maduro-venezuela-eeuu-diosdado-cabello-sot)

¹² [hXXps://www.aljazeera\[.\]com/news/2026/1/4/venezuela-decries-cowardly-kidnapping-as-officials-back-maduro](https://www.aljazeera[.]com/news/2026/1/4/venezuela-decries-cowardly-kidnapping-as-officials-back-maduro)

However, since then, Delcy Rodríguez has adopted a conciliatory tone and favored collaboration between both parties, inviting the United States to work with Venezuela on a “cooperation agenda.” Rodríguez also called for a “balanced and respectful” relationship between the two countries.¹³¹⁴

At the same time, President Trump dismissed the prospect that María Corina Machado, arguably Venezuela’s most popular politician, would replace Maduro instead.

- This is likely to maintain stability. Maduro allies remain in leadership roles within the Venezuelan military and intelligence services, and a Machado-controlled government would very likely need U.S.-led security protections against those interests, which would likely destabilize the country.

U.S. Secretary of State Marco Rubio acknowledged being in contact with Delcy Rodríguez and appeared to recognize that her remarks were designed for domestic consumption, stating that the United States would judge the new leadership based on their actions, not their statements.¹⁵ Rodríguez will likely maintain control over Venezuela’s security infrastructure in exchange for permitting U.S. financial, energy, and mining interests in Venezuela.

- The Trump administration’s sidelining of María Corina Machado is likely due in part to her lack of credibility within Venezuela’s security forces.

For now, there appears a likely chance that the United States will hold off on further military action unless significant developments occur, with Venezuela maintaining its current power infrastructure. Internal competition is likely ongoing, and allegiances are being established as different players are likely seeking to gain influence within the vacuum left by Maduro’s exit from the country. Key figures such as Minister of Interior, Justice, and Peace Diosdado Cabello and Minister of Defense Vladimir Padrino López still maintain de facto control over Venezuela’s security forces, and Rodríguez will have to contend with them if she intends on maintaining control.

¹³ [hXXps://www.instagram\[.\]com/p/DTHlbhkjPsf/?hl=en&img_index=1](https://www.instagram.com/p/DTHlbhkjPsf/?hl=en&img_index=1)

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[hXXps://www.theguardian\[.\]com/world/live/2026/jan/05/venezuela-live-updates-trump-us-interim-president-collaborate](https://www.theguardian.com/world/live/2026/jan/05/venezuela-live-updates-trump-us-interim-president-collaborate)

¹⁵ [hXXps://www.ft\[.\]com/content/4b87b114-1d16-46ea-ab75-cb511d441431](https://www.ft.com/content/4b87b114-1d16-46ea-ab75-cb511d441431)

- There is a parallel between this military action in Venezuela and the U.S. bombing of Iran's nuclear facilities in July 2025. The Trump administration quickly asserted that they had no intention of maintaining military operations beyond the initial strikes in Iran. However, the prospect of renewed military action continues to be threatened if U.S. interests in Iran are put at risk.

A Warning to Regional Competitors

The Trump administration is likely to leverage its successful operation to further influence and threaten competing Latin American countries. This operation sits within the U.S. wider campaign to re-establish its dominance in Latin America, as spelled out in the NSS, that has also coincided with the successful election of multiple pro-U.S. leaders and the curbing of Chinese influence within the region.

- On Sunday, Trump stated that he could take action against other countries and threatened Colombia and its president; he also stated that Cuba was "ready to fall."
- Trump and Colombian President Gustavo Petro have been engaged in a high-profile feud that ramped up in late 2025, when the former called the latter an "illegal drug leader," resembling rhetoric used by Trump against Maduro.

There is a roughly even chance that President Trump will direct his attention towards Colombia as another nexus point of drug-trafficking into the United States, especially as the country approaches elections early next year. Petro's dwindling approval over his perceived inability to solve security issues will likely impact his party's popularity and likely give rise to a conservative, U.S.-friendly candidate, as has been the case in countries like Honduras, Chile, and Bolivia. If the favorable candidate does not win, there is a possibility that the Trump administration may mimic similar rhetoric as seen with Venezuela.

Cuba may be similarly focused, maintaining close ties with Venezuela and having likely increased military ties with Russia since its invasion of Ukraine.

Supply Chain Impacts

There is unlikely to be a major negative short-term supply chain impact from the ouster of President Maduro, as there are no obvious economic growth or inflationary impacts from the operation. Instead, there is a roughly even chance of positive economic

developments from the operation, as it makes it more likely that Venezuela's energy and mineral potential is realized over the long term.

- Venezuela's oil production is near its lowest level in a century, and there is already a glut in global oil supply.
 - Venezuela only supplies around 1 percent of global supplies, and prices have dropped roughly 23 percent in 2025. Venezuela contributes around 600,000 barrels of oil to the global market per day, with most going to China; roughly half of that is sanctioned. For perspective, global consumption is around 100 million barrels per day.¹⁶

However, with Maduro removed from power, it is very likely that foreign oil companies will return to Venezuela and significantly increase its oil production in the coming years.

- Venezuela has the world's largest oil reserves. Given the extent of its international isolation, renewed production will seem like a massive new stream of oil supply to global markets.

If Venezuelan oil sanctions are lifted, Venezuela will very likely make a more meaningful contribution to global oil supplies.

| Conclusion

There is likely to be a reduction in direct U.S. military operations in the short term as Venezuela goes through a power restructuring. As acting president and potential U.S. favorite, Delcy Rodríguez will likely need to balance control over Venezuela's security forces and appeasing U.S. interests—the consequence of which will likely lead to an internal power struggle.

Given the initial short-term success, there is a roughly even chance the United States will pursue similar operations elsewhere, with President Trump highlighting Mexico, Cuba, Greenland, and Colombia as a potential refocus. The collapse of the Cuban government

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[hXXps://www.bloomberg\[.\]com/news/articles/2025-12-16/trump-says-he-s-ordering-a-blockade-of-oil-tankers-in-venezuela](https://www.bloomberg.com/news/articles/2025-12-16/trump-says-he-s-ordering-a-blockade-of-oil-tankers-in-venezuela)

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would present few obvious negative impacts, as, like in Iran and Venezuela, the government has been internationally isolated for decades.

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%