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From AI to Venezuela: Why 2026 is a hinge year for global power

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Analysis by Brett H. McGurk



Four F/A-18E/F Super Hornets and a U.S. Air Force B-52 Stratofortress operate as a joint force ...



Brett McGurk is a CNN global affairs analyst who served in senior national security positions under Presidents George W. Bush, Barack Obama, Donald Trump and Joe Biden.

One year ago this week, Joe Biden was president. I was in Doha, Qatar, negotiating with Israel and Hamas to finalize a ceasefire and hostage release deal. The incoming Trump team worked closely with us, a rare display of nonpartisanship to free hostages and end a war. It feels like a decade ago. A lot can happen in a year, as 2025 has shown.

Today, the United States has the largest military buildup in the Caribbean since the Cuban missile crisis. Russian envoys are in Miami to discuss a new ceasefire proposal for Ukraine, even as Russian President Vladimir Putin continues to escalate the war there. The US installed a three-star general in Israel to oversee a ceasefire in Gaza after bombing Iran over the summer. President Donald Trump is planning a Beijing summit that might determine the fate of Taiwan, as well as our competition with China in the fields of advanced technologies and AI.

The past year feels more transformational than transitional, with 2026 now shaping up to be a hinge year — with multiple inflection points on the global agenda.

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Let's break it down, with seven issues that I'll be watching closely:



Eight F/A-18E/F Super Hornets, assigned to Strike Fighter Squadrons 31, 37, 87, and 213 from embarked Carrier Air Wing Eight aboard USS Gerald R. Ford, and a US Air Force B-52 Stratofortress operate as a joint force on November 13. (*Petty Officer 3rd Class Daniel R/Digital/USS Gerald R. Ford (CVN 78)*)

1. Venezuela: Standoff

The Trump administration has deployed the largest armada in the Caribbean and western Atlantic since the height of the Cold War. The force includes an aircraft carrier strike group, multiple destroyers, amphibious assault forces, stealth bombers, and special operations units. The goal remains unclear, but the US military is undertaking a deadly campaign against alleged drug traffickers — now with nearly 30 strikes without any congressional authorization or open debate. Over the past week, Trump upped the tension with a declared military blockade against illicit oil shipments and seizure of more oil tankers.

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This looks like a regime change policy with military force to back it up. The White House seems to hope that Venezuela's leader, Nicolas Maduro, will leave power willingly to live out his days in Russia or elsewhere. Trump reportedly made that demand directly.

But that is unlikely to happen. There are few examples of economic pressure and external threats alone forcing a leader like Maduro to cede power. (The removal of Haitian military leader Raoul Cedras in 1994 is one, but there the US military was already in the air to invade the country before he succumbed.)

Trump is now asserting that the US will be the predominant power in the Western Hemisphere, prepared to use force when necessary to advance American interests.

The administration calls its new policy a "Trump Corollary" to the Monroe Doctrine, which warned European colonial powers to stay out of our backyard. In the time of Monroe, however, the US did not have a navy. Now, a significant portion of the strongest naval force on the planet is positioned off Venezuela.

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What does it all mean? The fate of Maduro in 2026 may answer that question. If he stays in power, Trump risks being viewed as more bark than bite. If he leaves, few

could doubt Trump's seriousness as a hemispheric hegemon. For me, none of this seems well thought through, but the die has been cast and how it resolves over the coming year will say much about what to expect from the "Trump Corollary" over the rest of his second term.



A man stands near rows of small flags installed in a designated area honoring fallen soldiers of the Azov Brigade of Ukraine's National Guard at a spontaneous memorial at Maidan Nezalezhnosti, Ukraine's Independence Square, on December 21, in Kyiv, Ukraine. (*Kostiantyn Liberov/Libkos/Getty Images*)

2. Ukraine: Year five

In February, Russia's invasion of Ukraine will enter its fifth year. Putin's intent back then was to seize Kyiv and destroy Ukraine as a sovereign country. Today, his forces are bogged down in eastern Ukraine not far from Russia's borders and have suffered over 1 million casualties. This war has been a debacle for Russia, and yet Putin shows no signs of backing down even if his objectives are now more limited.

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The fifth year of a war can be a tipping point, towards peace as warring parties approach exhaustion or take riskier gambles to break a stalemate. Putin claims to be a student of history and likely views the coming year as an opportunity to break Ukraine's will.

In Ukraine today, however, neither side seems poised for a breakthrough. Year five may look much like the last four — with Putin pouring manpower into a meat grinder to pick up limited territory month-by-month, and Ukraine counting on support from its partners in the West for economic support and military supplies. Trump is pursuing a peace deal that would reportedly guarantee Ukraine's security in exchange for Ukraine ceding land as a means for Putin to climb down from maximalist aims.

Putin thus far shows no sign of doing this and the question then is whether Trump rightly blames him for the failed negotiations or decides to back away altogether and weaken Ukraine's ability to withstand the onslaught. In this regard, the fifth year of this war may be decisive indeed — albeit more so in Washington than on the battlefield.



Chinese President Xi Jinping welcomes Russian President Vladimir Putin during a ceremony at the Shanghai Cooperation Organisation summit in Tianjin, China, on August 31. (*Alexander Kazakov/Sputnik/Reuters*)

3. Taiwan: On the menu

One defining image of 2025 may be the chummy embrace during a Beijing gathering of Putin along with China's President Xi Jinping, and North Korea's President Kim Jong Un, with Iran's president in the background. These four countries (known as CRINK) are working together to support Russia in Ukraine and aim for a divided world with Russia and China calling the shots in their so-called spheres of influence as the US recedes. Theirs is a world in which large powers assert their will, and smaller powers succumb to it.

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Curiously, the policies of the Trump administration seem to align with this view. Its new National Security Strategy, or NSS, describes the US as a hemispheric power and says, “The days of the United States propping up the entire world order like Atlas are over.” The document goes on to berate traditional European allies as feckless and at risk of “civilizational erasure” due to lax immigration policies. Putin’s spokesman Dmitry Peskov said Trump’s NSS seems to “correspond in many ways to our vision.”

Taiwan is where this no longer becomes academic. Washington for a half century has enabled the growth of Taiwan and helped keep the peace with an ambiguous policy that recognizes Taiwan as a part of China while maintaining security and economic ties with the island. Trump last week approved the largest arms package in history for Taiwan, totaling nearly \$11 billion in missiles, drones, and advanced air defense equipment. China, meanwhile, is known to be preparing its military to be ready for an invasion of Taiwan by 2027.

When Trump travels to Beijing for a summit with Xi as expected this spring, Taiwan will be a central topic — and its future may be on the line. This is among the highest-stakes issue on the global security agenda. Taiwan is central to our daily lives, where most semiconductor chips that power our cars and phones are made, and the projections of global disruption should China invade or de-stabilize the island approach \$10 trillion.

Yet, it remains unclear whether Trump will back up decades of American policy — as his recent arms sale suggests — or cede interest in pursuit of a trade deal and acceptance of Beijing as dominant in its sphere — as his NSS previews. His Beijing summit will be watched closely in Taipei, with the adage: when not at the table, you’re on the menu.



Iman Al-Atoutt repairs her tent after days of rain in a makeshift camp for displaced Palestinians set up on the beach in Gaza City, on December 16. (*Abdel Kareem Hana/AP*)

4. Israel: Pivotal elections

In terms of military success, Israel had a good year. It started with a hostage and ceasefire deal in Gaza and is ending with all living hostages freed and a 20-point ceasefire plan that is endorsed by the UN Security Council and calls on Hamas to disarm. Iran is in its weakest position since its 1979 revolution. Leaders of the terrorist groups that once surrounded Israel — Hamas and Hezbollah — are dead.

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Overall, however, Israel has failed to translate military success into lasting political and diplomatic achievements, in part due to its own divisions. Israel today is governed by one of the narrowest coalitions in its history, dominated by nationalist rightwing parties that polarize Israeli society and alienate new openings with Arab capitals. Israel's Prime Minister Benjamin Netanyahu, the longtime leader of Israel's traditional right, refers to himself as the most liberal member of his own extreme right coalition government.

Few Israelis believe this narrow governing formula after two years of war can or should last much longer. In 2026, they will have a chance to do something about it. Israel must hold parliamentary elections by October 27, 2026, four years after the last vote, and the elections might come sooner if Netanyahu calls for them or his government fails to pass a budget in the spring. The outcome may determine whether Israel is able to consolidate its military success or remain in a fragile and uncertain status quo.

If Israel emerges from these elections with a new unity coalition or at least a coalition without the extremist members of Netanyahu's current government, the odds increase that Trump can expand the Abraham Accords before the end of his term — to include a deal with Saudi Arabia. If the elections deadlock and fail to produce a new government or worse produce the government that Israel has now, then there is unlikely to be any diplomatic progress, and Israel may well forfeit a historic opportunity.



The Iranian national flag flies atop a pole at Bam-e Tehran in Tehran, Iran on October 24.
(Bahram/Middle East Images/AFP/Getty Images)

5. Iran: Something gives

Iran had a horrible year, and 2026 may be worse. Not long ago, Iran claimed strength and influence across the Middle East through proxy networks it controlled — Hezbollah, Hamas, Iraqi militias, and the Houthis — as well as a vaunted missile program, sophisticated Russian air defenses, and a nuclear program advancing beyond any conceivable civilian use case. Tehran enjoyed a staunch ally in Bashar al-Assad and used Syria as a staging ground to strengthen its networks across the region and surround Israel with a declared aim to wipe it from the map.

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That's all been turned on its head. Iran made the fateful choice to join the mayhem after Hamas' invasion of Israel on October 7, 2023. It never anticipated the blowback. Today, many of its leaders are dead. Its proxies are dismantled. Its air defenses are destroyed. Its nuclear program is buried. Its Syrian ally is gone.

The country is hobbled militarily and economically. A water shortage may result in evacuations and rationing in Tehran. On top of that, its Supreme Leader, Ali Khamenei, is 86 years old, reportedly ill, rarely seen in public, and there is no named successor.

In 2026, nothing gets better for Iran. Israel may well strike Iran again should the country move to restore its nuclear program or — as has been reported — its missile arsenal. Iran's youthful population rejects the ruling clerical system and with a succession crisis after Khamenei, that system may teeter. At the same time, a hobbled regime might lash out with terrorism or with reckless attacks on Israel. So, pay attention to Iran this year. As in 2025, there may be some surprises there.



Police and Forensics begin the task of body retrieval from the site where a shooting incident occurred on a Jewish holiday celebration at Bondi Beach in Sydney, Australia December 15. (*Dean Lewins/AAP/Reuters*)

6. Terrorism: It's back

I was recently asked on a podcast what keeps me up at night after two decades in the field of national security and diplomacy. My answer was terrorism. That has not been a fashionable answer in national security circles over the last decade, as successive administrations have sought to emphasize great power competition with China and Russia partly to veer away from the hard and resource-intensive work of countering threats from extremist groups around the world, including Al Qaeda and ISIS.

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Unfortunately, we are always one attack away from changing the course of history — something we must never forget even 25 years after 9/11.

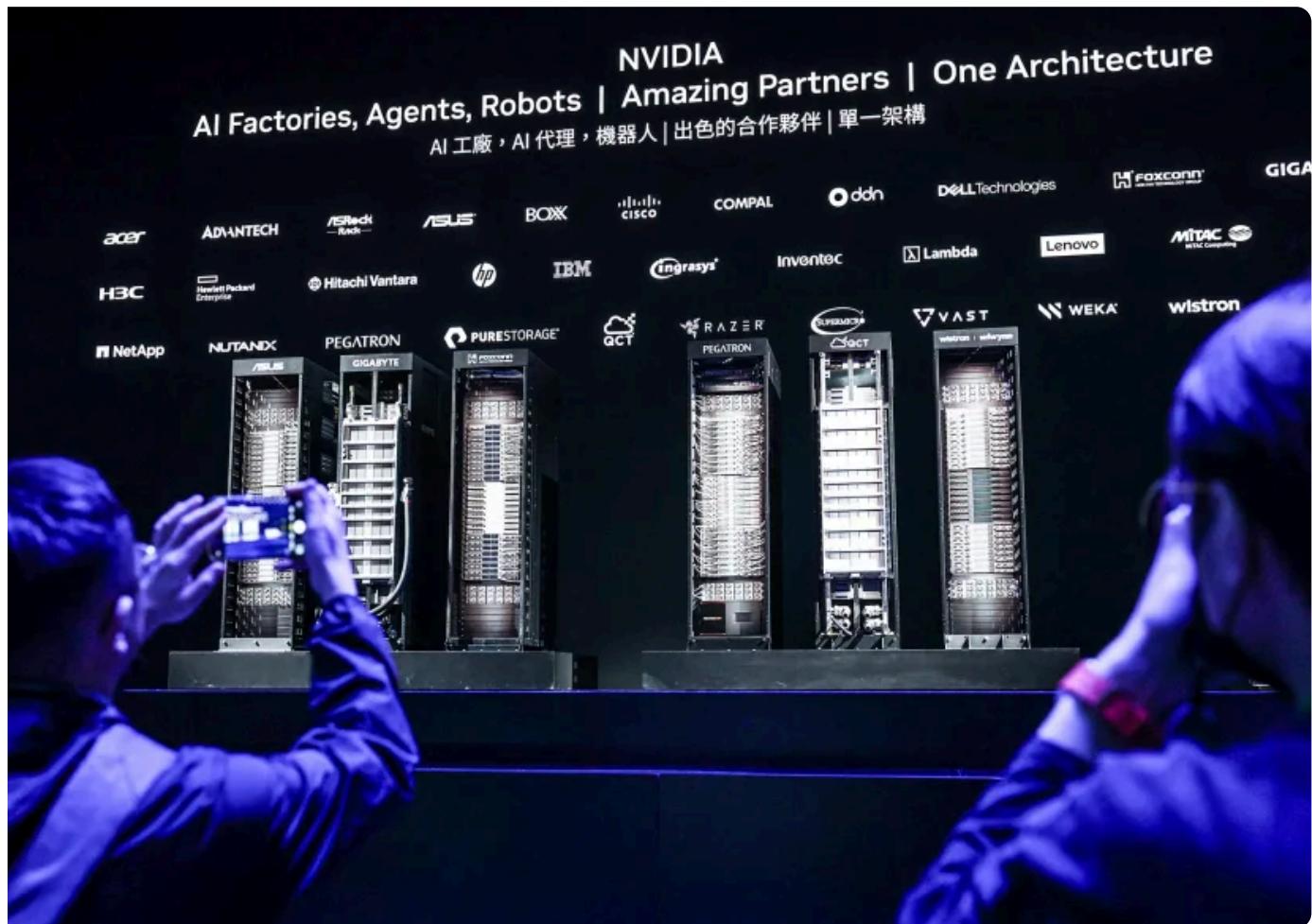
Between 2014 and 2018, I helped lead the campaign against ISIS. The US built an international coalition of 80 countries and organizations such as INTERPOL to track ISIS operatives, combat its financing, counter its ideology, and uproot its networks. It worked: between 2014 and 2020, the number of terror attacks worldwide, heavily influenced by ISIS, dropped by nearly 60%. The sophisticated attacks that we saw across Europe in 2015 and 2016, such as in Paris (November 2015) and Brussels (March 2016), stopped altogether.

That is no longer the case. From 2022 to 2025, fueled by the Hamas attacks in Israel, incidents and deaths are rising again. Global networks are recharging.

This past month alone witnessed the massacre in Australia, targeting Jews at Hanukkah, and disruption of a plot in Los Angeles to detonate bombs in crowds on New Year's Eve. In Syria last week, ISIS killed two American troops for the first time since 2019. The US responded with strikes against "70+ ISIS targets" in Syria days ago, which begs the question why those targets were not destroyed earlier. The UK's head of internal security recently described the ISIS threat there as "huge," and European Union officials said it's once again "the most prominent threat" in member countries.

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The coming year seems poised to continue this worrying trendline. To reverse it, the US and its partners must strengthen law enforcement cooperation across borders with no tolerance for those who espouse or excuse violence to further a political cause. The counter ISIS coalition is a good model.



Participants take pictures of Nvidia GPUs on the stage after Nvidia CEO Jensen Huang gave the first keynote speech of Computex 2025 at the Taipei Music Center in Taipei on May 19. (*I-Hwa Cheng/AFP/Getty Images*)

7. AI: The revolution

Few issues have risen as quickly — or as decisively — to the top of the global agenda as artificial intelligence. It is poised to stay there. In both Beijing and Washington, AI is viewed as an existential competition — often compared to the Cold War space race — given its military applications and its capacity to transform nearly every domain of national policy.

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In 2025, China surprised the world with the launch of a new frontier reasoning model, DeepSeek R1, which challenged leading American models at a fraction of the cost. It rapidly climbed to the top of Apple's App Store and briefly rattled financial markets, triggering a sharp Nasdaq dip and a historic one-day loss for a major US chipmaker. Markets recovered — but the surprise was the lesson. The episode underscored how quickly assumed technological advantages can erode.

The United States has sought to strengthen its position through export controls and an expanding network of partners reliant on US technology for AI adoption. The Trump administration has moved to deepen those partnerships while also proposing to loosen some export restrictions —including to China — a step that has raised bipartisan concern and has yet to be implemented.

At home, constraints are mounting. The United States lags China in the electricity generation needed to support a rapidly expanding network of data centers, even as power demand surges. Some Democrats have begun calling for limits on new data-center construction altogether. As during the Cold War, global technological competition may increasingly collide with domestic political pressures.

In 2026, expect growing friction between rapid advances in AI, unsettled policy debates, and intensifying geopolitical rivalry. Together, they are likely to make AI one of the most consequential forces shaping global politics in the years ahead.



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