

Confession: I Can't Figure Out Trump's Latest Move

by George Friedman - January 19, 2026

The task I have dedicated my career to is understanding the things that nations must do and what they must not do. I see leaders not as free actors but as manifestations of national imperatives and interests. They become leaders because they pursue these imperatives and interests; those who do not damage the nation and, in turn, are rejected by the governed. This is true in democracies and dictatorships alike. In each, the process is different, but leadership and success are fundamental in both cases, although the ways nations deal with failed leaders in both situations are distinct.

Therefore, national imperatives and interests – the things that are necessary for a nation to do – are a guide to what nations, via their leaders, will do. Whatever success in geopolitical forecasting I have achieved is based on this concept, although in practice it is more complex than I have presented here.

In the past, I have been charged with being an apologist for a corrupt or incompetent leader when I sought to understand and explain their nation's actions. During the Biden administration, when I explained what he was doing in Ukraine, I was charged with willfully ignoring the fact that his actions were based on his son's and his own private interests in Ukraine. Similarly, I have been charged with being an apologist for President Donald Trump by explaining the reasons behind his actions that are seen by others as irrational. The process of explaining can appear as a justification of corruption and irrationality, but I have been confident that I understood the impersonal forces that compelled them to act as they did in achieving the national interest.

There are times when my method of thought does not work, as is the case with all methods of thought. I am at that point now. I must confess that I do not understand the reasons or forces behind Trump's decision to impose tariffs on European countries that are not willing to cede Greenland to the United States. I clearly **understand** the importance of Greenland from a national security perspective, of the Arctic route, and even of wanting access to the minerals there. I understand to some extent Trump's desire for greater control of Greenland, but I confess I do not fully understand why he thinks the U.S. lacks sufficient control under the current agreement with Denmark. What I cannot understand or explain is why he has decided to impose tariffs on European nations that

oppose giving the U.S. formal command of Greenland. By treaty – and in reality – the U.S. has all the control it needs over Greenland, such that acquiring the island does not seem to be an imperative – certainly not so urgent as to require punishing allied nations. To this point, I have understood his intentions. At this point, I can no longer explain them.

This may well be a failure on my part to understand the national imperative to own Greenland, or that this might be a way of forcing European and NATO solidarity and thus the United States' ability to defend itself. I see no danger that NATO would or could deny the U.S. access to Greenland. I could understand this move if there was a danger that Europe would deny such access. But that has not happened, and it is not likely to happen. If it were to happen, the U.S. could easily impose its control over the island. Therefore, creating a crisis in trans-Atlantic relations is something I cannot explain. It could be that Trump is using this issue to force a full break with NATO, but I don't see this as a rational intention or Trump's move as a method for doing so. If that is his intent, there are easier ways to achieve it.

I admit that I was tempted to use this space to explain Trump's actions rather than admit that I don't understand them, but the fact is that I cannot understand them. Trump has often used economic weapons to get what he wants, yet in this particular case, it seems there were few barriers to overcome without reverting to this action.

It's possible that my inability to understand is due to the limits of my own mind, and that in time it will become clear and rational. But I have always been honest with my readers, and I stand firm on things I think and do understand. I must now confess that my method is insufficient to explain these tariffs. If the president has an imperative on the matter, I cannot see it.

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