

'Rely on America at your peril'

A year on from his re-election, foreign leaders are turning to flattery to win favour with Donald Trump. But this transactional approach may ultimately lead Washington's allies to hedge against US power.

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When Sanae Takaichi met Donald Trump this week, she had some good news. The new Japanese prime minister was nominating Trump for the Nobel Peace Prize. In doing so, Japan followed in the footsteps of the governments of Cambodia, Pakistan and Israel.



Flattering Trump is now standard practice for foreign leaders. Sir Keir Starmer, Britain's prime minister, used his first Oval Office meeting with Trump to offer a second state visit to the UK. This, he emphasised, was "truly historic" and "unprecedented".

This kind of fawning behaviour is undignified. But, a year on from Trump's re-election, America's allies have concluded that it is indispensable. To an extent that is genuinely unprecedented in the modern era, US foreign policy is driven by the personal whims of the president.

Get on the wrong side of Trump and the consequences can be nasty. Relations between the US and India went into a tailspin after the Indian prime minister, Narendra Modi, refused to give Trump the credit for making peace between India and Pakistan. The US later hit

India with 50 per cent tariffs. Trump also recently increased tariffs on Canada because he took umbrage at an anti-tariff television advertisement placed by the province of Ontario. Trump's sudden changes of direction can make his foreign policy seem bewilderingly unpredictable. But there are some clear themes that have emerged over the past few months.

The president has certain unwavering obsessions. He loves tariffs — believing that they will make America richer and more powerful. He is also convinced that the US has been “ripped off” by its allies and is determined to remake the international system to align with his “America First” policy.

Trump's approach to world affairs is deeply transactional. Talk about American values and freedom — beloved of former presidents — has been dropped. Instead, Trump likes to talk about American strength and to pocket “wins”. Those victories could be the promise of huge investments into the US. Or they could be another peace settlement that he can take credit for.

The president's desire to be a peacemaker seems to be genuine enough. It could be driven by an urge to match the Nobel Peace Prize that was (bafflingly) awarded to Barack Obama in 2009. Trump himself has suggested that he wants to improve his chances of getting to heaven, musing: “I'm hearing I'm not doing well. I am really at the bottom of the totem pole.”

But even Trump's instinct to be a peacemaker has waxed and waned. At the moment, the president and his entourage are keen to highlight his role in brokering a ceasefire in Gaza and getting Israel and Hamas to sign up to a 20point plan for peace in the Middle East.

But Trump has also — on occasions — been prepared to give war a chance. In June, after Israel attacked Iran's nuclear facilities, he authorised American participation in follow-on air strikes on Iran. This was a step that had been contemplated — and rejected — by successive US presidents over the previous 20 years. In the aftermath of the strikes, Trump was quick to claim credit for “obliterating” Iran's nuclear facilities. Doubters within the administration were quickly silenced.

Even as he rejoices in presiding over another peace deal — this time between Thailand and Cambodia — Trump is pivoting to the use of force in the Caribbean. In recent weeks, the US has carried out a series of deadly strikes against boats that were alleged to be carrying drugs. The aircraft carrier USS Gerald R Ford has just been dispatched to the region — and there is talk of an effort to force regime change in Venezuela.

For large parts of the world, it is Trump's tariff policies that are now the single most important aspect of their relationship with the US. The massive global tariffs that Trump announced on his so-called liberation day — April 2 — were swiftly watered down in the face of an adverse market reaction. But the Trump administration has since followed a policy of imposing bespoke tariffs on individual countries.

Following a process that is often hard to fathom, Britain has ended up with a base rate of 10 per cent, while Japan and the EU got 15 per cent, the Philippines got 19 per cent and South Africa 30 per cent. China was recently threatened with 100 per cent tariffs, but following the Trump-Xi meeting in Seoul, the average tariff on US imports from China will be 45 per cent.

Trump's apparent desire for a grand bargain with Xi has disrupted one of the few areas of US foreign policy where a bipartisan consensus had emerged.

It was the first Trump administration that placed "great power competition" back at the centre of US foreign policy — with China identified as the major challenger to American power. The Biden administration called China "the pacing threat" for the US and sought to rally American allies in an effort to contain Beijing's power.

The second Trump administration seemed poised to continue this effort. It was widely anticipated that Trump's tariffs would focus on China — aligning his economic instincts with the broader goal of containing Chinese power.

But the tariffs that Trump has imposed on key Asian allies and friends — such as Japan, India, Taiwan and South Korea — have run counter to efforts to isolate China within Asia. Countries such as India and Vietnam are now trying to get closer to Beijing.

So what is the world to make of all these conflicting initiatives and policies? Will the history books one day discern a coherent "Trump doctrine" to stand alongside the "Truman doctrine" that was put in place at the beginning of the cold war?

It is probably too much to expect that an instinctive and egotistical figure like Trump will ever come up with a fully formed and internally consistent approach to the outside world. But there are many people in his administration who are keen to take on that work. In the process of defining a Maga foreign policy, they also hope also to push it in their preferred direction.

One of the most influential efforts to define the different foreign policy schools strands within Trump's political movement was crafted by Majda Ruge and Jeremy Shapiro of the European Council on Foreign Relations. Writing in November 2022 — two years before Trump's re-election — they identified "three Republican tribes", whom they labelled restrainers, prioritisers and primacists. These categories have since been adopted by many Republicans and continue to be used as a useful shorthand in Washington.

The primacists are committed to the US playing its traditional role as the global super-power — underpinning the global security order in Europe, Asia, the Middle East and Latin America. For now, Marco Rubio, the secretary of state, Senator Lindsey Graham of South Carolina and Mike Waltz, Trump's former national security adviser and current UN ambassador, are all identified with the primacists.

The restrainers — closely identified with vice-president JD Vance — are much more cautious about the exercise of American global power. Scarred by the experience of the Iraq and Afghan wars, they are suspicious of America's allies in Europe and Asia — fearing that they might drag the US into new wars.

The prioritisers — sometimes called the “Asia First” group — argue that America no longer has the resources to play the role of global policeman. Instead, it must pick its battles. In the mind of Elbridge Colby, a senior official in the Pentagon, this meant deprioritising the Ukraine war in favour of the containment of China in Asia.

Trump himself is not a member of any of these camps. As Shapiro puts it: “The president doesn't care about any of these schools. He's driven by his own personal and psychological interests.” As a result, all three groups have attempted to shape policy, by aligning themselves with the president's whims and desire for “wins”.

Each school has had victories and setbacks. The restrainers were enthusiastic backers of the idea of cutting Ukraine loose and seeking a rapprochement with Vladimir Putin's Russia. Vance played a central role in February's televised Oval Office confrontation with Volodymyr Zelenskyy, the president of Ukraine.

They have succeeded in getting the Trump administration to cut off all financial aid to Ukraine — forcing the Europeans to fill the financial gap. They have also backed Trump's scepticism towards Nato and his successful demand that European countries pay more towards their own defence.

But another idea that appealed to the restrainers — a rapprochement with Putin's Russia — has not come to pass. Trump was clearly disappointed with the outcome of his August summit in Alaska with Putin. Of late, he has sounded more friendly towards Zelenskyy and tightened sanctions on Russia.

The restrainers have experienced other setbacks. The decision to bomb Iran caused an open rift in the Maga movement — with influential figures like Tucker Carlson and Congresswoman Marjorie Taylor Greene condemning the move. A leaked group chat between Vance, the defence secretary Pete Hegseth and others, revealed the vice-president's reluctance to go along with a decision to bomb the Houthis in Yemen. “I think we are making a mistake,” Vance wrote. “I just hate bailing Europe out again.”

The bombing of Iran was a triumph for the primacists — who believe in the robust use of American power. But Trump's decision to call a swift halt to that campaign disappointed some in the camp, who were hoping that the US would continue with the war and push harder for regime change in Iran.

Rubio, who is probably the primacist-in-chief, is a key figure pushing for an aggressive policy towards the Maduro administration in Venezuela. By aligning Venezuela policy, with the president's domestic concerns about drugs and immigration, Rubio may notch up another victory for the primacists. The Rubio faction has also successfully curtailed any

presidential instinct to withdraw from Nato. The current policy — to stay within the alliance, while forcing the Europeans to spend a lot more — looks like a workable compromise.

The prioritisers have arguably done worst of the three schools. Colby's argument that the US should play down the Middle East and Europe, in favour of a renewed effort to contain China, appears to be stuttering.

Cuts in military aid to Ukraine certainly fit with the Colby vision. But the rumour that the Department of War (as the Pentagon is now called) is working on a new national defence strategy that will prioritise the western hemisphere over Asia sounds like a potential repudiation of the prioritisers world view.

Any trade deal with China that sacrificed Taiwan's interests would also be a major blow to both the primacists and the prioritisers.

The three foreign policy schools laid out by Ruge and Shapiro — while helpful — cannot fully capture the chaotic instincts and influences of Trump's second term.

One campaign that almost nobody anticipated was the early statement of a new form of American imperialism — manifested in the president's stated desire to annex Greenland and his repeated suggestions that Canada should become the 51st state. This was strong stuff — even for the primacists — and there is still some dispute about who put these ideas on Trump's agenda.

Overt imperialism is being played down for now — although there may be ongoing covert efforts to further Trump's ambitions in Greenland. But threatening Canada and Denmark, insulting India and Brazil, imposing tariffs on all America's allies and encouraging the far right in Europe, may still have a long-term cost.

Trump's supporters argue that complaints about these policies is liberal hand-wringing. They believe that the president's willingness to use American power and leverage has secured positive results in Gaza, changed Nato for the better and secured vastly improved terms of trade for the US.

An alternative view is that, as Shapiro puts it, "Trump is trading short-term victories for long-term problems. He is spending down 80 years of American diplomatic capital". That capital was accumulated, in large part, by underpinning the global trading system and by underwriting the security of America's allies in Asia and Europe.

That has made countries such as Japan, Britain, Canada and many others highly dependent on the US — which gives America enormous leverage. But by using that leverage in a startlingly ruthless fashion, Trump is also sending out a message for the future — rely on America at your peril.

The almost inevitable consequence is that America's allies will begin to hedge against US power. Sometimes this process is explicit. Mark Carney, the Canadian prime minister, has

made it clear that he intends to do his utmost to diversify his country's trading relationships. Sometimes the process is more understated. Witness the new drive to develop European defence and satellite capabilities that can operate without the US.

Countries that are not US allies — and that do not rely on an American security guarantee — are even freer to respond robustly to perceived bullying from the Trump White House. Brazil's President Luiz Inácio Lula da Silva pushed back hard against efforts from the Trump administration to prevent the prosecution of former president Jair Bolsonaro, a key Trump ally. Modi, the Indian prime minister, reportedly refused to take phone calls from Trump in the aftermath of the India-US row.

As a result, America is losing influence with key players across the global south. In an article for Foreign Affairs, Richard Fontaine and Gibbs McKinley say that America is alienating the swing states in the global system and argue that "Washington is driving the Brics to become an anti-American bloc".

Trump may be finding ways to demonstrate the enormous power that the US still wields. But he may also be ensuring that his successors will have significantly less global power to deploy.