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## TRUMP ABROAD

**I**N 2018, DYLAN RILEY'S 'What Is Trump?' defined the 45th President as dysfunctional for the American ruling order.<sup>1</sup> A hybrid product of the real-estate underworld and the entertainment industry, his rise was largely due to popular rage at the management of the financial bailouts and Great Recession by smooth-talking Democrats. It would be misleading, Riley argued, to assimilate Trump's *sui generis* character as a political figure to any general category—authoritarianism, populism, fascism, 'semi-fascism'; as a scholar of European fascism, Riley was adamant on that. Trump could better be understood as an ill-fitting amalgam of the three different 'modes of rule', as Weber had defined them, operating like a foreign body within the Federal bureaucracy. The combination of a would-be charismatic leader, ruling in a personalized, neo-patrimonial fashion over a legal-rational state, within an oligarchic representative democracy, involved multiple contradictions. The Administration's incoherence was structural. Trump's milieu of lumpen millionaires and far-right wannabes was too small and inexperienced to run the Federal machine, which boasted of blocking his agenda.<sup>2</sup> Beyond China tariffs and belligerence against Iran—plus, on the home front, tax cuts, voter handouts and right-wing judges—Trump's first administration achieved very little.

Few would call his second inefficacious. Abroad, the US has bombed the Iranian nuclear-enrichment programme, shelled Yemen, blown a dozen or more boats out of the water in the Caribbean, bombarded Caracas, kidnapped the sitting Venezuelan President and his wife, hijacked oil tankers, launched air and missile strikes on Syria, Somalia and Nigeria, blockaded Iran and Cuba, threatening both with regime change and, at

the time of writing, is building up for a full-scale Iranian war. At home, it has expanded the Immigration and Customs Enforcement agency into a combat force that has shot dead opponents of the President's policies. Like Johnson in 1965, Trump has federalized the National Guard, but to opposite effect: instead of de-segregating the South, ICE is re-segregating liberal cities through the *ad hoc* criminalization of Latino workers.

## 2

But how functional is all this for the imperatives of American rule? Roughly speaking, these might be defined as follows. Since 1945, the primary US goals have been, first, to stabilize and defend the international capitalist order; and second, to advance US economic, political and ideological interests within it.<sup>3</sup> Over the first half-century, even if the going was a little rough, America's rulers could congratulate themselves on both counts, with the defeat of the Soviet Bloc, the globalization of investment and production, floated on an ocean of US-managed credit, and the incorporation of all major powers into a US-led world order, animated by ideas that an insider genially dubbed the Washington Consensus. True that the US had accumulated a few additional tasks along the way, including a commitment to Israel that entailed extra duties in the Middle East; but these were easily within the capacity of a military colossus with a well-oiled political-intellectual apparatus.

Yet in the wake of the 2008 financial crisis it was revealed that these prodigious successes had helped give birth to unwanted outcomes: the rise of China, as a huge and perhaps impermeable rival, and the hollowing of the US heartlands, the former industrial working-class regions of the Upper Midwest, battered by falling growth rates, stagnant wages, worsening morbidity issues, rising living costs and soaring inequality.<sup>4</sup> *Post factum*, the two were yoked in right-wing American discourse as

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<sup>1</sup> Dylan Riley, 'What Is Trump?', NLR 114, Nov–Dec 2018.

<sup>2</sup> Anonymous, 'I am Part of the Resistance inside the Trump Administration', NYT, 5 September 2018.

<sup>3</sup> Perry Anderson, *American Foreign Policy and Its Thinkers*, London and New York 2017. On the thought worlds of classical US policymaking, see Anders Stephanson, *American Imperatives: The Cold War and Other Matters*, London and New York 2025; see also Anders Stephanson and George Kennan, 'Correspondence, 1981–97', NLR 156, Nov–Dec 2025.

<sup>4</sup> On the conditions that fostered Trump's rise, see Benjamin Kunkel, 'Great Grievs: Notes on the US Election', *Salvage*, 10 March 2021.

‘China stole our jobs’—handily leaving out the responsibility of corporate boards and shareholder interests for manufacturing’s relocation. This twin dilemma—signalling at best the limits of US power, at worst the advent of US decline—defined a further double imperative: the need to set a floor beneath domestic working-class discontent and to retain US primacy despite, or against, the rise of China.

Trump’s dysfunctional first term was both a symptom of this double dilemma and a flailing attempt at a far-right solution to it. The Biden Administration, however, continued and deepened the few signature policies he had set in place: wrecking-ball sanctions against Iran, embrace of Israeli atrocities in Gaza, embargo of advanced semi-conductor chips for China and a notional ‘foreign policy for the middle class’, code for the working class, picking up Trumpian tropes; to which Biden added his own signature in the triumphalist NATO defence of Ukraine against Russia. Biden’s silent retention of Trump’s moves—albeit with a green sheen, whose value is still to be reckoned<sup>5</sup>—provided affirmation for them.<sup>6</sup> In that sense, at least, it could be said that the American ruling order had found a function for Trump, despite the dysfunctionality of his mode of rule. A normal administration, as Biden’s prided itself on being, could take steadier steps down the path that Trump had recce’d.

Now that Trump has returned, piling up deeds as well as words by which to be judged, it may be possible to press the question of his functionality for Washington’s world hegemony—that is, his role in advancing America’s double imperatives—a little further. Decisive verdicts as to whether Trump portends the end of the rules-based international order, the onset of a new predatory or illiberal type of hegemony, or even the long-delayed dawn of a multipolar age, have already been issued at Davos and elaborated in Washington’s heavyweight periodicals.<sup>7</sup> Recognizing

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<sup>5</sup> Thomas Meaney, ‘Fortunes of the Green New Deal’, *NLR* 138, Nov–Dec 2022.

<sup>6</sup> Perhaps in the tradition of Clinton’s triangulation of Reagan’s moves, though now in weaker, more decline-laden fashion. On the former: Robert Brenner, ‘Structure vs Conjecture’, *NLR* 43, Jan–Feb 2007.

<sup>7</sup> Howard French, ‘Trump’s National Security Strategy Is a Blueprint for the Demise of the West’, *Foreign Policy*, 11 December 2025; Stephen Walt, ‘The Predatory Hegemon: How Trump Wields American Power’, *Foreign Affairs*, 3 February 2026; Amitav Acharya, ‘The World-Minus-One Moment’, *Foreign Policy*, 5 January 2026; Michael Hirsch, ‘No, the International Community Isn’t Dead Yet’, *Foreign Policy*, 28 January 2026; Mark Carney, ‘Special Address’, World Economic Forum, Davos, 20 January 2026; Friedrich Merz, ‘Special Address’, World Economic Forum, Davos, 23 January 2026.

that on key issues, not least China, a clear direction for Trump's second term has yet to emerge, this piece attempts a more preliminary exercise. It sets out to examine the record on the ground across the four major theatres of US world power—Latin America, the Middle East, Europe, East Asia—for any provisional pointers, trusting that future contributors will intervene to criticize and correct any initial findings.

## 3

But first, a brief consideration of how Trump's idiosyncratic mode of rule has altered in his fifth presidential year. Political commentators and journalistic gossip alike have homed in on the internal operations of Trump's White House to discover the secret of his power. Inevitably, in an imperial-presidency system, personalist or characterological forms of analysis predominate: Trump Himselfism, based precisely on the neo-patrimonial aspects that Riley pointed out. Trump's penchant for showmanship and throwing his weight around, his conviction that unpredictability is a strength, his impatience with procedure and preference for high-speed results—all these characteristics have real-world effects, from tariff policy to the war on Iran. Trump's approach is often described as transactional; but that, surely, is the normal mode of politics. Rather, he favours economic coercion, overt displays of power that bring to mind Charles Tilly's thoughts on the protection racket as model for the violence of the state.<sup>8</sup> But Trump Himselfism can be overstated. Much of the executive's work goes on without him; aides are said to have encouraged the East Wing extravaganza in order to get him out of their hair so they can crack on with the agenda, since all he wants to do is talk. Besides, there is a risk in the personalist method of taking Trump's pronouncements more seriously than he does himself.

Another approach, more in line with Riley's analysis, focuses on the policymaking process itself. According to researchers at the European

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<sup>8</sup> 'In contemporary American parlance, the word "protection" sounds two contrasting tones. One is comforting, the other ominous. With one tone, "protection" calls up images of the shelter against danger provided by a powerful friend, a large insurance policy, or a sturdy roof. With the other, it evokes the racket in which a local strong man forces merchants to pay tribute in order to avoid damage—damage the strong man himself threatens to deliver': Charles Tilly, 'War Making and State Making as Organized Crime', in Peter Evans, Dietrich Rueschemeyer and Theda Skocpol, eds, *Bringing the State Back In*, Cambridge 1985.

Council for Foreign Relations, this has shifted in Trump's second term from a technocratic model to what they call a factional one.<sup>9</sup> The Democrats' barrage of partisan lawfare during his wilderness years ensured that, when Trump and his clique re-entered the White House in January 2025, they were stronger and more determined, equipped with the intellectual and human resources of American conservatism and a Heritage Foundation textbook on how to run the Federal state. Homeland rule was centralized under the robotic hard-right figure of Stephen Miller, supposedly Trump's prime minister for domestic affairs, who pre-drafted the hundreds of anti-woke and anti-Palestine executive orders dispatched in the first five months. More menacingly, Miller took over the Homeland Security apparatus set in place by the younger Bush and nurtured by Obama as the instrument for a paramilitary deportation programme.<sup>10</sup>

Foreign policy meanwhile was de-centralized and fragmented. Trump's team set about gutting the senior levels of the National Security Council and State Department, dismantling the apex of the 'legal-rational' bureaucratic state. The NSC would no longer play the role of collating and sifting assorted perspectives from the military, political and intelligence agencies to offer a clearcut choice of options to the Commander in Chief. Instead, different coteries would vie directly for the President's approval. Hence the 'strategic cacophony' of Trump's second term—the flurries of activity followed by inexplicable delays, the conflicting statements and multiple plans, with Trump's off-the-cuff remarks and midnight tweets crowning the confusion—as battles over the course to take rage behind the scenes.<sup>11</sup>

In this view, three conflicting foreign-policy perspectives were battling for the President's ear. The MAGA 'restrainers', America Firsters or 'consolidators', institutionally the most marginal, thought the US should stop trying to run the world and focus on its domestic problems, including the southern border and, by extension, Latin America and the Caribbean.

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<sup>9</sup> Jeremy Shapiro, 'How the Trump Administration Makes Foreign-Policy Decisions: The Technocratic versus Factional Processes', *Blue Blaze*, 23 February 2025. The argument is further developed by Shapiro's ECHR colleague Majda Ruge in 'One Battle After Another', *ECFR*, 6 February 2026. Ezra Klein's *NYT* podcast is another fount of White House gossip.

<sup>10</sup> Ezra Klein, Ashley Parker and Michael Scherer, 'Who Has the Power in Trump's White House?', *NYT*, 20 February 2026.

<sup>11</sup> Ruge, 'One Battle After Another'.

Their representative in the cabinet was Vance. The ‘prioritizers’, or China hawks, thought instead that Washington should make a priority of the PRC, the most serious threat, and pull back from the Middle East and Europe where it had become over-extended. Represented by the Pentagon’s policy directorate, the hapless Hegseth was the China hawks’ official leader, but his deputy, Elbridge Colby, was the more effective operator. Finally the ‘primacists’, or internationalists, representing the traditional foreign-policy establishment, agreed about the importance of China but argued that, to deal with Beijing, America had to sustain its global primacy and could not afford to look weak in any theatre; moreover, through the skilled use of its allies and institutions, it could quite easily hold its present position in Europe and the Middle East. Primacists were strong in the State Department, with Rubio their main man, but could also mobilize external political support from Israel and the major European states, whom the China-firsters threatened to marginalize.

In addition to these we should include Trump’s confidants and night-time cronies, said to constitute ‘his own little superstructure inside the White House’.<sup>12</sup> Among them are Stephen Witkoff, Jared Kushner and Ronald Lauder, Trump’s Greenland whisperer; a preponderance of Florida-based pro-Zionist business executives with major Gulf interests. Absent from the ECFR account is the well-organized Israeli faction, which includes Miller, as well as the confidants with big investments in China. They too must labour to present the desired course of action in terms that appeal to Trump—and to flatter what one sceptic has called his growing but misplaced confidence in his grasp of world affairs.<sup>13</sup>

## 4

The ‘factional mode’ has the merit of providing an explanation for the fits and starts of Trump’s foreign policy. Thus on Iran: when Netanyahu, flush with Israel’s decapitation of Hezbollah and the overthrow of Assad, was pushing in March 2025 for the US to turn the force it had assembled to hammer the Houthis against ‘the head of the snake’ in Tehran, Trump sided with the MAGA restrainers (Vance, Carlson, Bannon, Taylor Greene) and China-first prioritizers (Pentagon, intelligence agencies)

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<sup>12</sup> Michael Scherer in Klein et al., ‘Who Has the Power in Trump’s White House?’.

<sup>13</sup> Walt, ‘Predatory Hegemon’.

who opposed getting bogged down in a regime-change operation in Iran, favouring economic attrition and draconian nuclear restrictions instead; Israel was told to delay its attack. Washington's position in the April–June negotiations with Iran then hardened, presumably under Israeli pressure, to demand an end to all nuclear enrichment. In early June, Trump signed off on the Israeli attack; excited by its success, he dusted off Obama's plans for an attack on Fordow. This was a win for Zionists and primacists and a blow for MAGA restrainers, including Tulsi Gabbard, sharply attacked by Trump for saying that Iran wasn't building nuclear weapons, which everyone knew to be true. It was left to Vance, the restrainers' ideologue, to rescue their position by contrasting Trump's masterly 'surgical strikes' to Bush and Obama's forever wars.

Similarly, the Caribbean operation underway from September 2025 can be read from this perspective as a struggle allying Miller's anti-narco strategy and the restrainers with Rubio's primacists, overcoming prioritizer resistance to the military assault on Caracas with the claim that China would thereby be denied access to Venezuelan oil. Rubio positioned himself as serving up a win for Trump with the abduction of Maduro, with an eye to elbowing Vance aside in the struggle for the 2028 nomination; but there was no agreement on what should follow and Venezuela policy entered an apparent hiatus. Similarly, the Russia–Ukraine war has seen restrainers (Vance), prioritizers (Colby) and cronies (Witkoff, Kushner) supporting Trump's push for a quick deal, while pro-NATO primacists—Rubio, flanked by the Europeans, Zelensky and Congressional hawks like Lindsey Graham—lobby to delay any settlement, insisting on Article Five-style guarantees and long-distance weapons for Ukraine; 'escalate to de-escalate', as one US envoy put it.<sup>14</sup> When the China-first prioritizers at the Pentagon pushed through a suspension of US weapons and intelligence for Ukraine in the early summer of 2025, Trump nixed it. The typical pattern: Witkoff draws up a settlement with the Russians—as in the 28-Point Plan hatched in late 2025 with Kirill Dmitriev, head of Russia's sovereign wealth fund, at Witkoff's Miami Beach lair—which the Europeans hasten to redraft on Zelensky's behalf. And so the war goes on, which is in itself a *de facto* victory for the primacists.

Yet even if accurate, there are limits to this type of 'police' analysis, as Marx would have styled it, which reads political outcomes as the direct

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<sup>14</sup> Gen. Keith Kellogg, cited in Ruge, 'One Battle After Another'.

result of plots behind closed doors, rather than situating them in the context of larger social and geopolitical forces.<sup>15</sup> To evaluate Trump's meaning for the international system means getting a bead not just on policymakers' intentions but on their deeds, as these weigh upon what the left's classical tradition would term the contradictions of real-world development. To frame a telegraphic overview of the political logics at stake here, it may be useful to recall the distinctions once drawn between, first, the 'principal contradiction' governing a given situation—the determining struggle, at any one time—as opposed to the many secondary contradictions in play; and, second, within that leading contradiction, which of the two opposite forces or 'aspects' conjoined in struggle is the most dynamic, the 'principal aspect'?<sup>16</sup> How might such an approach illuminate Trump's interventions in Latin America, the Middle East, Europe and East Asia?

## 5

What leaps out in the Latin American and Caribbean context is the sheer number of states that have nurtured left alternatives to Washington Consensus neoliberalism over the past quarter-century: the Venezuela of Chávez, the Bolivia of Evo Morales, the Brazil of Lula, the Ecuador of Correa, the Argentina of Néstor Kirchner. Drawing on the continent's revolutionary-republican traditions, the militancy of the Andean indigenous populations or the self-organization of urban workers, they rose against water and land privatizations or crisis-driven austerity programmes, achieving modest advances in welfare provision, literacy rates, healthcare and social recognition, buoyed by the commodities cycle that was in turn kick-started by China's transformation into a high-tech metropolitan power.<sup>17</sup> They brought the isolated state-socialist experiment of Castro's Cuba in from the cold, enlivened by economic, intellectual and cultural exchange.

The reaction took the form of virulent new rights, initially on the narrow base of the former ruling elites—the wealthy eastern neighbourhoods

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<sup>15</sup> Karl Marx, 'The Civil War in France' [1871], *The First International and After: Political Writings, Volume 3*, London and New York 2010.

<sup>16</sup> Mao Zedong, 'On Contradiction' [1937], collected in Mao Tse-Tung, *On Practice and On Contradiction*, intr. Slavoj Žižek, London and New York 2007, pp. 67–102.

<sup>17</sup> Recognition: 'They say I'm ugly', Chávez would tell his mass audience in Caracas. 'They say I have thick lips, a thick nose. Okay, we're ugly. But *we are Venezuelans!*'

of Caracas, the agribusiness clans of lowland Bolivia, the landed classes and media conglomerates in Brazil and Argentina—but expanding in the 2010s to find a mass base among petit-bourgeois layers resentful of popular social enfranchisement, the young whose hopes had been raised and then dashed by the limits of economic transformation and evangelical congregations moved by the impassioned anti-communism of their preachers. The character of these Latin American radical rights—Bolsonaro, Milei, Bukele, Kast—is quite distinct from the far-right movements in Europe and the US.<sup>18</sup> Immigration is scarcely an issue: quite a few of the new leaders are the children of Italian or Lebanese migrants; when salient, their racism is directed against the indigenous masses. Instead, what animates them is a visceral hatred of the left.

The leading contradiction here polarizes Washington and these local far rights, along with their bourgeoisies, against what remains of Latin America's left states and movements. It need hardly be said that the former is the most dynamic and powerful of these two 'aspects'. Within this pole, the Trump Administration has bolstered the Latin American far rights with huge handouts, pledging \$20 billion in US taxpayers' money to help Milei through the October 2025 mid-terms. In its treatment of Venezuela and Cuba, it has hardened US policy by several notches, shifting from a war of attrition to a strategy of overthrow—a novel counter-revolution in the counter-revolution, so to speak, directly informed by its own base in greater Miami, from the beachside mansions of Trump, Witkoff and Kushner to the Venezuelan TV barons and Cuban *émigré* mafia.<sup>19</sup> The Floridization of US policy under the Trumpian right combines with a more diffuse 'Southern' ideology of national belonging with its own tradition of Caribbean expansionism.

Cuba is the prize, and no price is too high—the criminal blockade of the island and hijacking of its fuel supplies; the targeting of third countries that welcome Cuban doctors—to extinguish the social gains made on the island, however compromised by bureaucratic wooden-headedness. Alone in the Caribbean, Cuba pioneered a mass rise in educational levels, healthcare provision, crime prevention and community-based

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<sup>18</sup> A point made by Martín Mosquera in 'The Meaning of Milei', NLR 155, Sept–Oct 2025.

<sup>19</sup> This principal political-ideological focus doesn't preclude more businesslike forms of coercion, including the forced sale of Chinese assets on the Panama Canal and extortion of trade concessions from Mexico with the threat of unilateral drone strikes on drug cartels.

hurricane protection. It struggled with some success to retain these *logros*, the ‘achievements’ of the Revolution, after the crisis of 1991–94, through the expansion of tourism and healthcare exports. The Cuban leadership was too much taken in by Obama’s opening in 2016, delayed until the lame-duck final year of his second term, the aim of which was to sap the Cuban regime by *doux commerce*. In its own way, that worked. Havana rolled out a giant expansion of its hotel-building programme and implemented a punitive currency adjustment in 2021 that led to hyper-inflation and the collapse of the value of state-sector salaries and pensions. The tourism boom was stillborn, hit by the pandemic and undermined by poor internet connection that left holidaymakers unable to post their selfies. Between 2019–24, the Cuban economy contracted by 11 per cent, nearly three times more than the West’s Great Recession; in 2025, it shrank by another 5 per cent. Hunger has returned, food spoiling during the power cuts, along with epidemics like dengue fever and chikungunya. Rubbish is piling up in the cities, with no fuel for the refuse lorries. Schoolchildren, once Cuba’s pride and joy, are begging in the streets. Rumour says that Raúl Castro’s son, or perhaps grandson, is in talks with Rubio, who has set a deadline of December for regime change—‘the defining test’ for the Administration’s national security strategy to remake the region.<sup>20</sup>

## 6

In the Middle East, amid multiple struggles over the course of development, what stands out in the present conjuncture is Israel’s militarist expansionism, both as a settler-colonial power crushing the native Palestinian population and as a regional hegemonic force, remaking once robust national-secular republics into a shatter-belt of ethno-statelets.<sup>21</sup> This represents an alteration of the balance of forces within the imperial-colonial pole as, through at least to 1973, Israel had been a vulnerable settler outpost, sheltering under first British, then American protection. For Tel Aviv, however, the operative political logic has always been one of colonial conquest and consolidation; an ongoing

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<sup>20</sup> José de Córdoba et al., ‘The US Is Actively Seeking Regime Change in Cuba by the End of the Year’, *WSJ*, 22 January 2026. Trump is said to have a landing strip and golf resort already marked for investment: Ruaridh Nicoll, ‘Farewell to the Revolution’, *Guardian*, 14 February 2026.

<sup>21</sup> See ‘Israel after Fordow’, *NLR* 154, July–Aug 2025.

process of eliminating native revolt and seeking pliant local leaders with whom to come to terms, while weakening the surrounding states who might ally with them.

By any objective measure, this is dysfunctional both for the region's development and for Washington's broader interests, engaging a disproportionate amount of time and firepower, and creating the unwanted blowback of Muslim hostility. Official US policy has always been to achieve a 'final' settlement, whereby the Palestinians will be paid off and the Arab states will come to a *modus vivendi* with Israel, which will retain its nuclear and military-intelligence superiority across the region, allowing America to withdraw to a more 'normal' role. But the Israel lobby's tight grip on Congress and broader influence in Washington, backed by the vast inflation of its asset wealth over the last twenty years, has prevented any disengagement. Besides, for Israel's visionaries, the final settlement has always gone much farther: a Jewish state with borders comfortably beyond the east bank of the Jordan River, extending into southern Syria and Lebanon; the expulsion of the majority of the Palestinian population into Jordan, or beyond; the fragmentation of the remaining pluri-cultural republics of the region along linguistic, cultural and religious lines—Sunni, Shi'ite, Arab, Druze, Alawite, Kurd, Turkic, Azeri, Persian, Armenian, Baluch—creating a patchwork of smaller ethno-confessional states on its own model, over which it will be paramount, playing them off against each other.

In practice, American policy on both issues, Palestinian resistance and the surrounding states, has historically veered between the two poles: perceived US regional interests and Israeli goals. Under Carter, Egypt was kept intact but pinioned into condoning Israel's 1967 occupation of the Palestinian territories. Under the first Bush, Iraq was beaten, sanctioned and stripped of its Kurdish north, which provided Israel with a firm foothold for influence and intelligence. A Palestinian 'peace process' began, completed at Oslo under Clinton, which Israeli negotiators ensured would not cramp the settlement project for the West Bank—and opened the way for an upsurge in foreign investment, complemented by the arrival of a million highly educated Russian Jews from the former Soviet Union. Under the second Bush, Iraq was fully occupied and dismantled by Anglo-American forces, without a drop of Israeli blood being shed; but Bush permitted Iran to extend its influence across the Shi'ite south and erred in trying to paint his project as a democratic one,

allowing Palestinians to elect Hamas to run the native governing authority, requiring a shoot-out before it could be restricted to Gaza. Obama condoned and financed Israel's aerial warfare against Gaza in 2009 and 2014. Imposing harsh financial sanctions on Iran—oil revenue fell by 45 per cent<sup>22</sup>—he pushed through the JCPOA agreement to preserve Israel's nuclear monopoly and leave the Islamic Republic weakened but intact; to Israel's disapproval. Trump campaigned in 2016 on a policy of scrapping the JCPOA and did so in 2018, imposing new sanctions on top of the old in a strategy of 'maximum pressure' that induced chronic currency turbulence, galloping inflation and a collapsing public sector, with 9 million Iranians falling below the poverty line.<sup>23</sup> Biden kept up the pressure, also aiding and abetting Israel's erasure of Gaza and slaughter of over 70,000 Palestinians.

Without breaking this pattern, Trump in his fifth year of office has been pushed farther by Israel than any president since the invasion of Iraq. It's true that he finally gave Saudi Arabia and the Gulf States some relief by imposing a ceasefire in Gaza in October 2025, which slowed the IDF kill rate there from thousands to dozens per week and allowed Israel to retain more than half the Strip. He slapped Netanyahu's wrist for trying to kill the chief Hamas negotiator by shelling Doha. But Trump's shift from strategy of attrition to military assault on Iran is visibly driven by Netanyahu's pressure. From the closing months of 2024, flush with its bombardments of Lebanon and Syria and exhilarated by its decimation of Iran's air defences in the tit-for-tat strikes over its assassination of Nasrallah, Israel was eager to make the most of its growing aerial supremacy over the region. In March 2025, Trump was drawn into air and sea attacks on the Houthis who, in solidarity with Gaza, were firing at Israeli vessels *en route* to the Suez Canal.<sup>24</sup> Netanyahu urged him to

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<sup>22</sup> Masoud Nili, 'Economy of Iran', 2025; a synthesis of data from the Central Bank and Statistical Centre of Iran produced by the former deputy head of Iran's planning body under Rafsanjani and Khatami, a principal economic advisor to Rouhani. Nili shows that Iran's substantial manufacturing base—chemicals, automobiles, metals and electrical goods, as well as food products and textiles—never recovered from the 2012 sanctions shock. Thanks to Kevan Harris for his translation.

<sup>23</sup> Trita Parsi, 'Iran's Despair Is US Policy', *Foreign Policy*, 4 February 2026; Leila Gharagozlou, 'How Western Sanctions Undermined the Middle Class That Could Push for Reform', CNN, 19 October 2025.

<sup>24</sup> In the Signalgate group chat discussing the attack on Yemen, leaked after National Security Advisor Mike Waltz accidentally looped in the *Atlantic* editor, it is Miller who shuts down Vance's arguments against the attack: 'Full Transcript of Trump Team's Yemen Attack Plan That Was Shared on Signal', *Al-Jazeera*, 27 March 2025.

strike at the head of the snake. On 13 June, Israel with Trump's blessing launched 200 fighter jets against Iran, while Mossad plants unleashed a sabotage campaign. Trump's excited posts make clear how he relished the moment.<sup>25</sup> Within days he had committed the US to its first direct military attack on Iran. On 22 June, seven B2s dropped over 400,000 pounds of ordnance on the nuclear plants at Fordow and Natanz.<sup>26</sup>

Though kowtowing to Trump's insistence that the war 'be considered, ENDED!', Netanyahu had another message for Israelis: 'We must complete the campaign against the Iranian axis'.<sup>27</sup> Starmer, Macron and Merz cranked up the sanctions on Iran still further.<sup>28</sup> With no way out, the clerical regime and its militarized security forces cracked down on rising discontent, alienating the layers that once formed its base—the public sector, workers, the poor—while closing down the road of parliamentary reform for which a majority still voted.<sup>29</sup> As the rial plummeted towards 1.4 million to the dollar in late 2025, amid trade collapse and banking failure, Trump's Treasury Secretary crowed that the pressure was working, the December protests the 'grand culmination' of American efforts.<sup>30</sup> Even before the demonstrations began to spread, a barrage of

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<sup>25</sup> Marium Ali, '12 Posts from "12-Day War": How Trump Live-Posted Israel-Iran Conflict', *Al-Jazeera*, 25 June 2025.

<sup>26</sup> Al-Jazeera Staff, "'Nobody Knows What I'm Going to Do": Trump Embraces Ambiguity towards Iran', *Al-Jazeera*, 18 June 2025; Amichai Stein, "'Finish the Job": How Netanyahu Convinced Trump to Strike Iran's Nuclear Sites—Exclusive', *Jerusalem Post*, 22 June 2025. See also 'Israel after Fordow'.

<sup>27</sup> 'Statement by PM Netanyahu', Israeli Ministry of Foreign Affairs, 24 June 2025.

<sup>28</sup> In August 2025, the UK, France and Germany began a campaign to 'snap back' UN sanctions against Iran that had been lifted ten years before, when the JCPOA was agreed. Although Trump had torn up the JCPOA in 2018, Starmer, Macron and Merz now accused Iran of failing to comply with it and demanded the re-imposition of UN sanctions as punishment, duly inflicted by the UNSC in September. Stephen Quillen, 'UN Security Council Rejects Resolution to Extend Iran Sanctions Relief', *Al-Jazeera*, 19 September 2025.

<sup>29</sup> The Council of Guardians, a body of senior clerics sovereign over the parliamentary process under the Islamic Republic's Constitution, disqualified all the reformist candidates in the 2021 presidential election, leading to a drop in turnout to 48 per cent. In the 2013 and 2017 elections, turnout had been 73 per cent, the reformist Rouhani winning both times, with 51 and then 59 per cent of the vote. Another reformist, Pezeshkian, was allowed to run in 2024 and used *Baraye* [*Because*], the hit song of the 2022 Woman, Life, Freedom protests, as his campaign tune. Pezeshkian was elected on a turnout of 50 per cent, with 55 per cent of votes cast.

<sup>30</sup> Parsi, 'Iran's Despair Is US Policy'; Yashraj Sharma, 'US Says It Caused Dollar Shortage to Trigger Iran Protests', *Al-Jazeera*, 13 February 2026.

US-Israeli propaganda was egging them on. ‘We are locked and loaded and ready to go’, Trump tweeted, and later: ‘Occupy your institutions! Help is on its way’. That rendezvous was missed. Protestors fell in a hail of IRGC bullets on January 7–8 and the regime cut the internet.

As this number of NLR goes to press, both sides are preparing for war.<sup>31</sup> The resumption of the US–Iran talks about talks in Oman can be read as a formal preliminary for US–Israeli attacks that may come within weeks or days. As expressed by Trump, US war aims oscillate between punishment beating and regime overthrow. Israel won’t assent to another nuclear agreement, while the US may blanch at the full-scale occupation of a country of 90 million, three times the size of Iraq, defended by an ideologically—and religiously—motivated IRGC, 150,000 strong. Between the two lies a ramped-up version of the Syrian option: protracted shelling of the regime and militarization of a democratic uprising, aiming to weaken the state from all sides, cut off its sources of income and reduce it to a delegitimized rump, shelling its own people. The so-called Trump Route for International Peace and Prosperity already threatens the Armenian side of Iran’s northern border, which now hosts a significant American military and intelligence presence. From Azerbaijan, Mossad has been busy stoking secessionism among the Islamic Republic’s 20 million Azeri minority. To the west, the so-called ISIS prisoners of war might be marshalled as another factional army against the Shi’ite state. The cost to this vast region of Israeli wrecking tactics, backed—as tail wags dog—by US force, is beyond reckoning.

## 7

In Europe, the US exercises hegemony over what were, before 1945, its great-power rivals—in one case its former colonial master, now head servant. Historically, those inter-state rivalries were subsumed under the great capitalist-communist polarization of the Cold War. Since it ended, European ruling classes have had major incentives to remain in line: deep US capital markets to stabilize their systems, an evolving ideology—1960s: free world; 1990s: liberal democracy; 2010s: international rule of law—with which it was easy to concur. American hegemony here comes

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<sup>31</sup> On the situation in Iran, see the interview below with Ervand Abrahamian, ‘Iran Under Fire’, NLR 157, Jan–Feb 2026.

closest to the *beau idéal* of maximum consent and minimum coercion; merely extensive basing rights for US nuclear missiles and combat forces. Above all, European elites were offered a sub-imperial role in which they could still command lesser peoples, so long as they did so in line with American interests. Britain could play a supporting part in US wars and occupations. France could put its Mediterranean and Arab-world experience to work for the greater good. Germany could be encouraged to take on a larger role in Central Europe and the Balkans, under American tutelage. These willing subordinates were understandably seen, especially by themselves, as of enormous benefit to American world power, offering a prosperous market of 500 million, ample airfields, ports and listening posts across the western wing of Eurasia, thirty national armed forces under American command in NATO, diplomatic support in every world forum and ideological amplification of ‘the West’ as the planet’s most civilized region.

The reunification of Europe after the collapse of the Soviet Bloc also involved a redivision, under Washington’s final say: insisting first on East Germany’s incorporation into NATO, then extending the privilege to other former satellites. With the Maastricht Treaty, European governments simultaneously subordinated their electorates to the EU’s supranational control over most economic regulation, which was given a strong neoliberal tinge. The pay-off was a sea of international credit which washed in with the launch of the euro in 2000, lifting all boats, especially in the poorer countries of the Mediterranean and Atlantic periphery; then evaporated with the 2010 Eurozone crisis, leaving European economies and societies worse off—more deindustrialized, more stagnant, more unequal, more resentful—than before. The continent’s slow decline under its doubly compromised sovereignty cast the European working classes onto a defensive footing, trying to hold on to past gains, and so objectively conservative—more open to the radical right’s solution, immigration control, than the radical left’s programme of diluted social democracy—while its political leaders grew more liberalized, cosmopolitan and green (compare Merkel to Kohl, Cameron to Thatcher), embracing their sub-imperial roles in Afghanistan, Iraq and Libya and extending the promise of liberal-capitalist civilization to the Balkans, the Baltic states and Ukraine.

But there was still a major contradiction between the Europeans’ *de jure* independence and the *de facto* control of the continent’s destiny—

above all, relations with its giant Russian neighbour—by an offshore power. The struggle between Washington and Moscow over a negotiated limit to NATO expansion largely took place over European leaders' heads; Merkel and Sarkozy were then bulldozed into conceding that 'Ukraine and Georgia will join NATO' at the 2008 Bucharest summit.<sup>32</sup> When in 2014 Washington backed the overthrow of the elected government in Kyiv by right-wing militias, and Moscow responded by annexing Russian-speaking Crimea, European leaders' sub-imperial instincts ensured that they rallied to the US side. (Merkel has since averred that the Minsk agreements for a federated Ukrainian republic were designed to string Moscow along while Ukraine was militarily primed to withstand its future attack.) With the crisis of the Russian invasion in 2022, Europe's leaders steeled themselves to put their ideological commitment to the West—that is, Washington's leadership—above their populations' interests, considering the massive hike in fuel prices, lethal for Germany's *Mittelstand* firms, a small price to pay. Moreover, the well-publicized atrocities allegedly committed by the Russian forces in Bucha during the first months of the war naturally rallied European societies to the Ukrainian cause.

Hence the shock, the outrage, the neurotic reactions—'Daddy, Trump!'—and proclamations of the end of the liberal-international order by European leaders, at finding their self-sacrificial devotion met by Trump and his entourage with tariff barriers, demands for cash, threats of military disengagement, Oval Office insults for the EU's totemic Ukrainian, musings about Greenland, disparagement of their immigration policies, accusations of civilizational erasure and support for lumpen hard-right figures. For many commentators, this treatment of allies is irrefutable proof of the Administration's dysfunctionality, which gratuitously 'weakens US networks of power and influence'.<sup>33</sup> More concretely, they point out that America needs its allies' additional capabilities to meet the challenge of China's scale in economic capacity and human resources.<sup>34</sup>

But Trump may have the sharper instincts here. In practice, European allies have mostly responded by scurrying to obey—offering advantageous trade deals, bludgeoning Iran, vowing to spend 5 per cent of

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<sup>32</sup> NATO Bucharest Summit Declaration, 3 April 2008.

<sup>33</sup> Walt, 'Predatory Hegemon'.

<sup>34</sup> Kurt Campbell and Rush Doshi, 'America Alone Can't Match China, but With Our Allies, It's No Contest', *NYT*, 7 September 2025.

GDP on defence, naturally without consulting voters.<sup>35</sup> Despite their bleats about the international rule of law, none has raised a finger over Maduro's abduction, the blockade of Cuba or the assault on Iran. Tellingly, the one issue on which they managed to screw their courage to the sticking place was the Kingdom of Denmark's historic right to the possession of Greenland, where sub-imperial pride was stung. A genuine strategy of disengagement would look very different: declaring an end to NATO expansion and out-of-area operations would be a first step; drawing down American forces in Germany, Poland and Romania would follow.<sup>36</sup> A European left that was serious about democratizing the continent would fight for it to be free of all foreign bases.

In practice, the second Trump Administration has continued to funnel arms to Ukraine, including long-distance weaponry and intelligence on Russian targets—helping to extend the war by another year. The incoherence reflects the split over Russia policy in Washington that goes back to the 1990s, pitting Brzezinski against Kennan. Trump may imagine some fellow feeling with Putin, but he is no more capable than Biden—or Obama, Bush or Clinton—of acknowledging that there could be a limit to US power on this front. Despite the flashy Alaska summit, his trajectory here has followed that of every US administration since the fall of the Soviet Union: expand eastward, until forced to stop.

## 8

The multiple contradictions of the US–China relationship revolve with accelerating speed. Their initial conjunction in the 19th century figured as a clash between two imperial powers, East Asia's oldest and North America's most expansionist. From the 1850s, the US had fought island by island to establish footholds along the Pacific Rim. Its paradigm for the region was one of conquest and trade, similar to the bridgeheads imposed by British gunboats. By the late 1940s the US had taken command of East Asia's industrial heartlands, with the occupations of Japan and South Korea, with military bases spreading from Okinawa and

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<sup>35</sup> European appeasement of Trump has been given intellectual cover as 'realism' by the whole stable of *Financial Times* commentators, with the notable exceptions of Martin Sandbu and Edward Luce.

<sup>36</sup> Such a programme is canvassed in Peter Slezkine and Jennifer Kavanagh, 'The Fatal Flaw in the Transatlantic Alliance', *Foreign Affairs*, 30 September 2025.

Taiwan down through the Philippines archipelago, while China was in the throes of modernizing itself by communist revolution. By 1972, the Cold War polarization between the two had flipped into an inter-state alliance against the Soviet Union, and then into a multi-trillion-dollar financial and economic symbiosis between a global capitalist superpower and the world's largest communist-ruled society. Out of this, some time around 2008, arose the great-power rivalry that now structures the principal contradiction between them, of which China appears to be emerging as the most dynamic aspect.

The polarization between the two features a series of asymmetries. While China's population is four times larger, the US Navy has owned the Asian seaboard for over half a century, its vessels routinely cruising China's shores. Though both shared the conviction that time was on their side, American and Chinese strategic goals were mutually exclusive. For American policymakers from the 1940s on, a precondition for US paramountcy over the Eurasian landmass as an offshore power was to stall the rise of any rival hegemonic state on the continent itself by blocking its expansion (containment) and rallying its neighbours against it (balancing), in order to weaken and, if necessary, destroy and rebuild it on a more compliant basis (as with Germany and Japan). This applied with triple strength to an adversarial regime governing a state-socialist system, both of which should ultimately be dismantled.

But China's size, its diplomatic history of collaborating with the US against the Soviet Union and Deng's well-demonstrated willingness to take the capitalist road, combined with American post-Cold War confidence in the potency of its free-market example, suggested a happier outcome. As Bush Jnr's speechwriters put it: 'Economic freedom creates habits of liberty, which create expectations of democracy.' By contrast, a strategy of overt confrontation would only strengthen CCP 'hardliners'. A 1993 NSS document defined the imperatives: 'support, contain, balance'. Economic cooperation and tutelage were always backed with reminders of military 'overmatch'; half of the US Navy's largest ships were stationed in the West Pacific and a hundred thousand US servicemen were on forward deployment there. But the hope was that a strategy of engagement would exert a softening influence over the CCP leadership, whose children would be welcomed into top US universities to learn American ways, producing a layer of Chinese Yeltsins and Gorbachevs who would discard communist dogma, dismantle the one-party system

and, through a sort of offshore *trasformismo*, bring about the regime change Washington desired.

By the time of the financial crisis, it became apparent that this was not working. Still posting 10 per cent annual growth rates, China was increasingly insistent that US corporations respect its demands and resistant to human-rights scoldings. It was expanding trade networks through Africa and Latin America, modernizing its military and toughening its defences against internal regime change. The shock 2009 victory of Hatoyama in Japan, putting in question the terms of the US security alliance and open to closer relations with China, heightened the sense of danger. But though they grasped the importance of the China question, US policymakers struggled to find an effective strategy to deal with it. Obama's 'congame', an ill-defined synthesis that put containment—naval pressure in the South China Sea—ahead of engagement, was the best they could come up with. The CCP's strengths and weaknesses—cohesion, corruption?—and even its intentions were hard to parse. Whether through reticence or uncertainty, the leadership's views were concealed by the impenetrable secrecy of the apex party bodies and thousand-year-old traditions of Chinese statecraft. Instead of Yeltsins, it produced the police-minded Xi Jinping. The emergence of a plural political system in Taiwan and the harsh repression meted out to proscribed Islamists in Xinjiang also weighed in the balance.

By 2010, there was a growing consensus that Washington's best bet was to harden its stance, a position helped by American domestic politics in the trough of the Great Recession, with the new right raising slogans about China stealing US jobs. Trump rode that tide into office in 2016. His first National Security Strategy paper lashed his predecessors for their illusions about liberal-democratic peace with China and announced a new era of great-power competition, a clash between free-world outlooks and repressive ones. The CEO of Huawei was treated like a criminal and the PRC became the chief target of Trump's 2018 tariff wars.<sup>37</sup> Biden's aides further toughened the US stance: American warships were sent to menace the Chinese coastline on a monthly basis, semi-conductor exports were banned and allies were signed up to a bellicose NATO

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<sup>37</sup> *National Security Strategy of the United States of America*, Washington DC 2017. Trump's hard line on China had the backing of the Atlantic establishment: 'America needs to be strong', the *Economist* editorialized. 'Trump's willingness to disrupt and offend can be effective': 'China vs America', *Economist*, 18 October 2018.

strategy document that accused the PRC of ‘coercive polices’ and ‘malicious operations’ which harmed Atlantic security.<sup>38</sup> Meanwhile China, for all its problems, continued to speed ahead in solar panels, electric vehicles, advanced medical technologies and artificial intelligence, while its southern coastline bristled with advanced weaponry, hypersonic missiles and novel types of drone.

China’s aim, according to one account, was the quiet development of its national strength to the point where balancing against it would appear hopeless and accommodation to its wishes the only course; to win without fighting, in the classic phrase. Economic capability was the taproot on which social cohesion and military defence should draw. Concretely, its goals involved keeping Taiwan in, Japan down and America at bay; or at least, preserving an ambiguous situation on these questions until more favourable prospects prevailed. Tactically, the priority was to stabilize the hinterland and focus on coastal threats.

In determining their policy approach, Chinese strategists began—it is said—not from *a priori* imperatives on the American model but from a careful evaluation of the developments that defined the era, in their various dominant and recessive aspects, and of the relation of forces in play; aiming to exploit the most favourable configurations while battenning down through stormy times.<sup>39</sup> In 1985, Deng and his comrades had described the prevailing tendencies of the age as ‘peace and development’, following the Maoist era of ‘war and revolution’ (somewhat contradicted by the sporadic border war Deng was still sustaining against Vietnam). The shock of NATO’s 1999 bombing of the Chinese Embassy in Belgrade during the Yugoslav war forced a re-evaluation at the turn of the century. Peace and development were still the dominant aspects, favouring the emergence of a more balanced, multipolar world with the reunification of Germany, recovery of Russia and return to the world stage of China itself. But those currents were slowing; the US would retain its superpower status for another twenty years and there were troubling signs of its growing hegemonism, in the Chinese sense—willingness to use force to crush anything in its path—and military interventionism.<sup>40</sup>

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<sup>38</sup> ‘NATO 2022 Strategic Concept’, adopted at the Madrid Summit, June 2022.

<sup>39</sup> Aaron Friedberg, *A Contest for Supremacy: China, America and the Struggle for Mastery in America*, New York 2011, pp. 119, 147, 174, 167.

<sup>40</sup> Friedberg, *Contest for Supremacy*, pp. 124–38. On classical and contemporary Chinese meanings and usage of hegemony, see Perry Anderson, *The H-Word: The Peripeteia of Hegemony*, London and New York 2017, Chap. 9.

At the same time, Jiang Zemin declared at the 16th Party Congress in 2002, the next two decades offered ‘a strategic opportunity to accomplish great things’, since the US was preoccupied with problems in the Middle East. In late 2022, the Ukraine war raging, Xi announced a new and more difficult configuration, one of ‘opportunities, risks, dangers’. The response would require putting security before growth and—wisely or otherwise—concentrating further powers in loyal party hands.<sup>41</sup>

Trump’s return in 2025 seemed at first to confirm the prognostication of risks and dangers. His second term started off as expected, with a blood-curdling blueprint for military containment<sup>42</sup> and tariffs on China escalating to 145 per cent. But after Beijing responded with an export embargo on rare earths that threatened to bring US manufacturing to a halt, the Trump Administration fell uncharacteristically silent. There were signs of a U-turn: the embargo on advanced Nvidia chips lifted, no admittance to the US for the Taiwanese President on his way to Central America. A somewhat defensive attempt to gloss this somersault as grand strategy describes it as ‘strategic consolidation’. Geo-economic détente, as the author calls Trump’s retreat from China tariffs, is ‘a common move for great powers that to combat with [sic] an economic rival while also preparing for possible war against it’:

Right now, the US needs a breathing space, to rebuild its neglected defence-industrial base, increase energy production . . . and find a near-time *modus vivendi* with China while cultivating long-term factors of strength.<sup>43</sup>

The apologia is of course falsified by the entirety of Trump’s Middle East policy. But a question mark still hangs over his attitude to Beijing.

## 9

For all their cruelty, Trump’s policies have for the most part hewn to American imperatives. In Latin America he is defending and extending the capitalist system against hold-out leftist regimes, and so advancing American economic, political and ideological interests. It was claimed

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<sup>41</sup> Friedberg, *Contest for Supremacy*, p. 146.

<sup>42</sup> Joel Rea, ‘A Forward Denial Defence: Inside the First Island Chain’, USNI, March 2025.

<sup>43</sup> Wess Mitchell, ‘The Grand Strategy Behind Trump’s Foreign Policy’, *Foreign Policy*, 14 January 2026.

that the Venezuelan coup would deny China access to Maracaibo oil, while protecting the homeland from drug traffickers and immigrants, who would be deported back to Caracas. In the Middle East, rulers of the US have long carved out an exception to their nationalist norm with the claim that advancing Israel's interests was advancing America's, too. In Europe, capitalism no longer needs US defence; whether Trump's approach has advanced US interests here is moot. If international hegemony is defined as the direction of an effectively subordinate state, on matters important to the hegemon, by largely non-coercive political, ideological and economic means, and domination as the resort to systematically coercive ones, then Trump represents a distinct shift towards the dominance side of the spectrum. His ideologues have explicitly discarded the liberal-cosmopolitan worldview to which America taught EU elites to subscribe, and Europe's leaders have been subjected to harsher diatribes than China's.

Trump can say that he was, after all, elected on the platform that liberal-internationalist ideology had failed to advance the interests of the US; had instead underwritten the rise of China and Middle America's deindustrialization. He has a mandate to try another approach and is being truer to democratic principle than the EU would have him be. The tactics have worked, in that they have produced trade deals advantageous to certain US firms and pledges to pour hundreds of billions into the American armaments industry—the latter acclaimed ('high time') by Europe's liberal media. Offended EU leaders have made ostentatious trips to Beijing, with few concrete results. Naturally they hope there will only be another thirty months of this to go, *pourvu que* it's not Vance in 2028.

On the third imperative, the vital question of China, the next few years may clarify Trump's effective if untheorized position. It's understandable that online Chinese commentators ironically applaud him as 'the nation builder'—that is: building the PRC—and that the American intelligence community is bitter and bewildered by the cuts made to its China-facing cohort.<sup>44</sup> Trump's defenders can retort that the Obama–Biden record was no more effective, but that applies in spades to his first term.

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<sup>44</sup> See, respectively, Zhang Yongle, 'Reconfiguring Hegemony: Modes of Winning from Fukuyama to Trump', NLR 153, May–June 2025, pp. 5–6; Aaron Friedberg, 'The Trump Administration's Surprising China Policy', on *Conversations with Bill Kristol*, 11 September 2025.

On the fourth imperative, the stabilization if not amelioration of the condition of the American working class, Trump's fifth year has been a flop. The class character of his project was on vivid display in the OBBB Act: tax handouts of \$97,260 for the top 0.1 per cent, around \$2,000 for the masses and net deductions of \$600 for the poor; cuts to food stamps and Medicaid; private jets now tax deductible<sup>45</sup>—like a cartoon version of the lumpen far-right super-rich in power, in a country that has the highest poverty rate and largest inequality gap (of rich to poor) of all advanced economies; the worst health coverage and highest chronic disease morbidity; the lowest life expectancy; the highest rate of deaths by alcohol, drugs or suicide; the most children going hungry.<sup>46</sup>

The OBBBA allocated a budget of \$170 billion for the expansion of Trump's deportation programme, which has seen over 20,000 masked ICE officers, poorly trained, heavily armed, unaccountable to elected city or state officials, urged by their boss, Homeland Security advisor Miller,<sup>47</sup> to make the most of their legal impunity and up the quotas of 'aliens' snatched without warrant from streets, homes and worksites, to be penned in detention centres across the expanses of the rural South, where some 67,000 are held; over half a million have been deported.<sup>48</sup> The dysfunctionality of such a policy—dividing the country by violent assaults on neighbourhoods to rob it of the strong (and cheap) young workforce its businesses need—is apparent and has engendered broad repudiation. After the ICE killings of protestors in Minnesota this January, 65 per cent of Americans said that ICE had 'gone too far', 62 per cent thought it was making Americans less safe. A majority, 54 per

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<sup>45</sup> Doug Henwood, 'Trump's Big Beautiful Bill Will Deepen Inequality', *Jacobin*, 11 July 2025.

<sup>46</sup> OECD data.

<sup>47</sup> On 13 January 2026, Miller messaged ICE officers from the Department of Homeland Security: 'REMINDER: To all ICE officers: You have federal immunity in the conduct of your duties. Anybody who lays a hand on you or tries to stop you or tries to obstruct you is committing a felony. You have immunity to perform your duties, and no one—no city official, no state official, no illegal alien, no leftist agitator or domestic insurrectionist—can prevent you from fulfilling your legal obligations and duties.' Cited (in shortened form) in Ezra Klein, 'Trump Has Overwhelmed Himself', *NYT*, 1 Feb 2026.

<sup>48</sup> An outstanding analysis is JoAnn Wypijewski, 'Life in Death', *NLR-Sidecar*, 11 February 2026.

cent, thought that lowering prices should be the government's priority, compared to 22 per cent who said it should be immigration.<sup>49</sup>

American thinkers have been well aware of the need to balance strategic commitments with a sound economic base—to keep 'its means equal to its purposes', as Walter Lippmann put it as early as 1943—and that failure to do so paved the way to imperial decline.<sup>50</sup> Since 2016, the imbalance between America's superordinate world-power role and the deteriorating situation of its working class has been widely recognized as, so to speak, its principal contradiction. Yet political leaders in hock to billionaire donors and a Congress directed by big business have struggled to address it. Obama exacerbated the situation, combining maximal bailouts for the financial sector, and minimal help for distressed mortgage-holders, with pro-cyclical austerity. He cut working-class voters loose from the Democrats when he appointed arch elitist Hillary Clinton as his successor, a candidate even more tin-eared politically than himself. Trump's first term coincided with the long-awaited recovery from the Great Recession, bringing some relief. But his main contributions to the social crisis were ideological—'Build the wall'—and, with the tax cuts, fiscally regressive. Congress's extraordinary blitz of social spending during the pandemic—for the first time, bringing US provision within reach of Europe's<sup>51</sup>—was allowed to expire under Biden, as Congress reliably implemented corporate America's wishes, and workers were hit by a cost-of-living crisis caused in part by the residual inflationary effects of the Covid payouts.<sup>52</sup>

In Trump's second term, the notional MAGA strategy of using tariffs to pay down the deficit while priming the pump with tax cuts has only reinforced the pattern of K-shaped growth, which there are no plans to reconfigure. The money-saturated American political machine and

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<sup>49</sup> Marist Poll, 'The Actions of ICE', 5 February 2026. Again, 56 per cent think tariffs hurt the economy and 67 per cent are opposed to the annexation of Greenland.

<sup>50</sup> Walter Lippmann, *US Foreign Policy: Shield of the Republic*, New York 1943, p. 7, cited in Marco D'Eramo's witty history of US decadence in theory and practice, 'American Decline?', NLR 135, May–June 2022, p. 5.

<sup>51</sup> See 'Paradigm Shifts', NLR 128, March–April 2021.

<sup>52</sup> The Democrats' corruption was by this stage so far gone that, when Biden's kitchen cabinet attempted to foist him on the country as a severely diminished, mentally unfit nominee for a second term, the party's senior leadership was too deferential to act until it was too late, and the primary season was over.

the top-heavy economy are now so interlocked that the system may be unreformable. A coherent left strategy for a redistributive ‘Come Home America’ will need to tackle this immovable political-corporate symbiosis; or at least, in the first instance, to render it visible.

## II

Of all the coteries and factions vying to determine Trump’s direction, as of early spring 2026, Israeli expansionism is clearly in the saddle. What role Israeli interests play in determining Washington’s other policies—in China; on Russia—is not yet clear. The Israeli military-industrial-intelligence complex does a lot of business in China, which in turn does a lot of business in the Middle East. Naturally there are many other interests in play, including the material limits of the Pentagon’s weapons inventory; but China hawks, like MAGA restrainers, seem to have had a bad first year. On other fronts, Miami reaction is advancing under Rubio’s direction. The primacist Secretary of State also scored a standing ovation from European elites at Davos on informing them that they were still part of the West.

Beyond this, the Trumpian far right in office has barely altered the list of Washington’s friends and enemies. America’s policy in the Middle East is determined more directly than ever from Tel Aviv. In the Caribbean and Latin America, material support for ‘Washington Consensus’ parties and military or undercover operations against Cuba and Venezuela have a long history. The European Alliance is tighter than ever judged by NATO spending. Russia remains the ambiguous former adversary that Washington doesn’t know how to deal with. China is still the former apprentice turned major competitor. Across the board, Trump’s moves have essentially involved the escalation of existing policies: from covert to overt assassinations, from sanctions to blockades, from sieges to regime toppling. But the category of targets still resembles that of Clinton, Bush, Obama: relatively peripheral states, weakened over the years by long wars of attrition, ripe for the picking.

Does this hardening of US foreign policy mean the initiation of a new international order—or at least, as Carney and Merz have proclaimed, the death of the old one? The rules-based international order is an ideological concept, like the free world or the international community

before it, and as such cannot die.<sup>53</sup> The operative pattern of world power since the fall of the Soviet Bloc has been a unipolar hub-and-spokes system with the US at its centre; the panoply of US-designed international and supranational institutions and treaty organizations, accumulated over the years—UN, IMF, WB, NPT, NATO—are brought to the fore or left to moulder, depending on their utility to Washington at any particular juncture.

To date, the reactions of the other powers to Trump's fifth year in office have strengthened and perpetuated this unipolar system. The coalition of Global South opinion that seemed to be coming into existence against Western policies on Gaza and Russia has failed to defend Cuba or Maduro, and sits on its hands as Trump and Netanyahu menace Iran with military obliteration. At Davos, Carney was applauded for recycling that EU trope of the early 2000s, a 'variable geometry' of alliances. But it is unimaginable that a third force led by Canada and Germany would send a fleet to lift the blockade of Cuba or rally an international campaign against the US and Israel in defence of Iran. Just like the EU, it would more likely make up the baggage train of the American forces, in Régis Debray's description, busying itself with First Aid and platitudes. To that degree, the US far right in office is still working with the grain of the liberal leadership of the major states. American hegemony is still operative under Trump.

This does not mean that things remain exactly as they were. A shift in the international order can come about step by step—as with the rise of IMF–WB structural adjustment programmes to open up and re-engineer national economies in the 1970s and 80s, for example—as well as by catastrophe and rupture. The sole historical precedent of a modern world hegemon confronted by a fast-rising rival suggests as much. Britain had acquired the different components of its empire haphazardly, over the years, building on the pre-modern conquest of Ireland, Caribbean piracy, slave plantations, settler colonies, the East India Company's expansion across the Subcontinent by war and alliance, the spreading informal empire of free trade, headquartered in the City, backed by the Royal Navy, casting its nets from Buenos Aires to Shanghai. From

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<sup>53</sup> That is: an ideal construction based on the projection of the—feasible and desirable—rule of law within states, equipped with all the necessary apparatus (a legislature enjoying popular consent, police, judiciary and penal system) onto the international plane, where no equivalents exist.

the 1870s, dynamic new industrializing powers, seeking new outlets, seemed suddenly to loom menacingly over this loosely guarded assemblage: the continental US eyeing the Caribbean, Germany and Russia bearing down on the Middle East, France expanding in Africa. Already laden with possessions, Britain responded by initiating a pre-emptive landgrab of strategic territories before the others did: Cyprus, Egypt, the eastern spine of Africa and the Niger Delta; Burma, Sarawak, North Borneo and Brunei. Growing anti-imperial resistance required a harder crackdown against al-Arabi, the Mahdi, the Boers. Britain played a decisive role in the late-19th century rush for arms and territorial expansion, leading the transition from informal free-trade empire to the new order of clashing national imperialisms, the formation of blocs and polarized alliances—the world hegemon, as Giovanni Arrighi put it, ‘pulling the whole international order in its sway’.<sup>54</sup>

If this hardening was a response to the onset of Britain’s relative decline, Trumpians could argue that it was on its own terms a successful move. It would take another seventy years—and 50 million deaths—before London even began the long and bloody process of disentangling itself from its empire and handing the baton to the vastly more powerful US. It is possible to imagine present-day dynamics as already evolving from free-market globalization towards rival imperialist-bloc formations, as per *The Geometry of Imperialism*; driven as ever by uneven capitalist accumulation and development within a pre-existing order of territorial nation states—and only hastened by the chilling new Western consensus around rearmament. But if Trump is setting the world off down that path, pulling the international order in his sway, these are only first steps. Much depends on whether the next administration carries on in the same direction, as Biden did—pocketing the privatization of Venezuelan oil, regime change in Havana, Syrianization of Iran, ‘consolidation for future war’ against China. For now, the way ahead remains uncharted.

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<sup>54</sup> Giovanni Arrighi, *The Geometry of Imperialism: The Limits of Hobson’s Paradigm*, London and New York 1983, rev. ed, trans. Patrick Camiller.