

# United States: Maga Carta

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## 2 Maga Carta

Why has the post–Cold War consensus on US foreign policy broken down? What is the Trump administration’s vision for the international order? What will it mean for global politics?

Leonard Schütte

Donald Trump’s presidential victory has buried the US post–Cold War foreign policy consensus. Even before the elections, the assumption that the US remained the unrivaled leader of the world with a historic responsibility for, as well as deep interests in, maintaining the international order had become increasingly contested.<sup>1</sup> As a result of China’s dramatic rise in military and economic power, the US failure to deter wars in Ukraine and the Middle East, and the diffusion of influence in world politics, many in the US foreign policy community advocated adapting the US grand strategy forged during the “unipolar moment” in the wake of the Cold War.<sup>2</sup> President Trump will likely bring this change about. For him, the US-created international order constitutes a bad deal: “We’ve made other countries rich while the wealth, strength, and confidence of our country has disappeared over the horizon.”<sup>3</sup> Instead, he promises more selective, often unilateral, international engagement, only when narrowly construed US interests are at stake. Trumpism will likely usher in a new era of US foreign policy, which will cause reverberations across the globe.

### Past the Post–Cold War Consensus

There had long been an unassailable bipartisan consensus that a grand strategy of liberal internationalism – supporting democracy and human rights, free trade, and international institutions and alliances – backed up by military primacy, would best serve US interests, even if that commitment had always been selective in practice.<sup>4</sup> Voting behavior in Congress on foreign policy exhibited a comparatively high degree of bipartisanship, with politics often stopping “at the water’s edge.”<sup>5</sup> Trump had first pierced this consensus, but Joseph Biden’s victory in the 2020 elections raised the possibility that Trump was a mere aberration. In reality, Bidenism was already a partial emancipation from this consensus. The Biden administration did return to some international organizations and agreements that Trump had left. It revived existing alliances and built new ones, rallied the West in support of Ukraine against Russia’s attack, and strongly backed Israel.<sup>6</sup> But Biden also cemented the break with



“We were being ripped off by European nations both on trade and on NATO. [...] If you don’t pay, we’re not going to protect you.”<sup>7</sup>

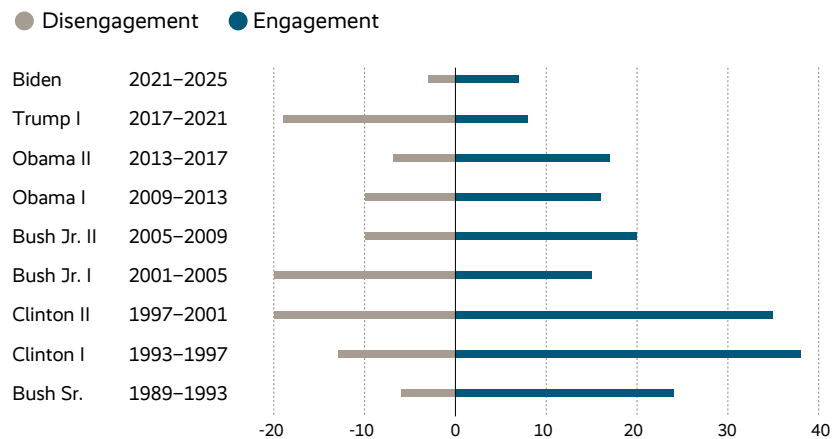
Donald Trump, then-US presidential candidate, presidential debate, September 10, 2024

the erstwhile Washington Consensus on free trade and withdrew the US from Afghanistan.

Trumpism still fundamentally diverges from Bidenism on the grand strategic level. Unlike his predecessors, who shared the conviction that the US was “the indispensable nation [...] that holds the world together,”<sup>8</sup> Trump’s vision lacks “any outsized ethos of responsibility” for the international order.<sup>9</sup> Indeed, his toying with the idea of coercively absorbing Greenland, Panama, and Canada, and his pledge to “expan[d] our territory”, suggests that he will not feel bound by key international norms.<sup>10</sup> Trump’s opposition to the status quo is twofold. First, he maintains that the order allows others to “rip off” the US.<sup>11</sup> Highlighting the fact that the US has the largest trade deficit in the world, he has berated China but also partners like the EU, Canada, and Mexico “because we’re being treated very badly by most of [them].”<sup>12</sup> For Trump, US allies in Europe and East Asia tend to be liabilities rather than assets.<sup>13</sup> And he has withdrawn funding from and criticized international institutions for being unfair. Indeed, in net terms, the first Trump administration disengaged from more international organizations and agreements than any other post-Cold War administration (Figure 2.1).

Figure 2.1

Cases of US engagement with or disengagement from international organizations and agreements, 1989–2024, by administration



Data: Tim Heinkelmann-Wild. Illustration: Munich Security Conference

Second, many in the Republican Party assert that the US is no longer the global superpower with indefinite resources to underwrite the international order. Whereas President Biden, when asked whether the US could support Ukraine

and Israel at the same time, insisted that “we’re the United States of America for God’s sake, the most powerful nation [...] in the history of the world,”<sup>15</sup> President Trump has repeatedly attested to America’s “decline.”<sup>16</sup> Indeed, the notion of “resource scarcity” has become a central premise of Republican foreign policy thinking.<sup>17</sup> At first sight, this argument is hard to sustain (Figure 1.1). US defense spending still dwarfs that of any other actor. The US remains the only global military power with a vast network of alliances, and it is currently upgrading its nuclear arsenal.<sup>18</sup> It is also the largest economy in the world in nominal terms, and the gap to China has actually widened since 2021; US GDP per capita is almost six times larger than China’s.<sup>19</sup> The US dollar remains the dominant global reserve currency,<sup>20</sup> and the US has recently become a net energy exporter for the first time since the 1940s.<sup>21</sup> Indeed, 90 percent of respondents in the 2025 Munich Security Index consider the US a great power – a higher figure than for any other country (Figure 1.3).

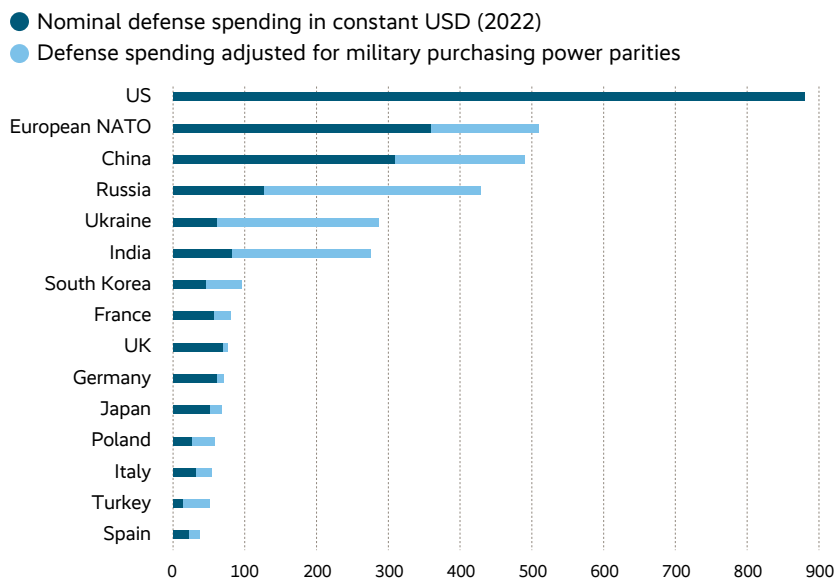


“[In a] world of scarcity, we can’t support Ukraine and the Middle East and contingencies in East Asia.”<sup>14</sup>

J.D. Vance, then-US Senator, Munich Security Conference, February 18, 2024

Figure 2.2

**Defense expenditures of the world's largest spenders adjusted for military purchasing power, 2023, USD billions**



Data: ifo Institute. Illustration: Munich Security Conference

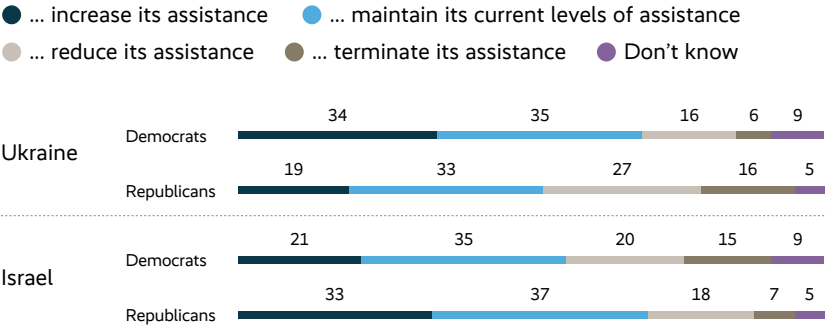
However, many worry that these indicators obscure underlying US weaknesses. Indeed, the defense spending gap has narrowed and, when adjusted for purchasing power, is much smaller than commonly assumed (Figure 2.2). The war in Ukraine also exposed the West’s depleted stocks of key weapons

systems and the atrophied state of the US defense industrial base.<sup>22</sup> War games show that the US could run out of key munition in less than a week in a war over Taiwan.<sup>23</sup> These weaknesses are augmented by China’s rapid rearmament and growth of its defense industrial base (Chapter 3).<sup>24</sup> China is shrinking the capability gaps across conventional domains and could reach quantitative nuclear parity by the mid-2030s.<sup>25</sup> The bipartisan Commission on the National Defense Strategy attests that China “has largely negated the US military advantage in the Western Pacific.”<sup>26</sup>

The contestation of the post–Cold War consensus is also increasingly reflected in public opinion.<sup>28</sup> For the first time since polling started, only a minority of Republicans (47 percent) supported an active US role in world affairs in 2023 (in 2024, the number increased slightly).<sup>29</sup> 57 percent say that the US needs to reduce its role in the world due to limited resources and domestic woes, compared to 35 percent of Democrats. On most foreign policy issues, except trade and China, the partisan gap is also wide.<sup>30</sup> Only 43 percent of Republicans hold favorable views on NATO compared to 75 percent among Democrats.<sup>31</sup> And as the Munich Security Index shows, there are notable partisan gaps on US military assistance for Ukraine and Israel (Figure 2.3).

Figure 2.3  
US respondents’ perspectives on US military assistance for Ukraine and Israel, November 2024, percent

When thinking about US military assistance for Ukraine/Israel, please choose the statement that comes closest to your view. The US should ...



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

Priority Order

The Trump administration will mostly view its foreign policy through the prism of its rivalry with China.<sup>32</sup> During the election campaign, Trump floated a 60 percent tariff on Chinese goods and a plan to revoke China’s “permanent normal trade relations status” to reduce the vast trade deficit.<sup>33</sup> This policy would

not only expedite the economic decoupling from Beijing and sharply increase bilateral tensions, but also render coordination with European states more difficult. The Trump administration is also likely to continue preventing China from accessing US technology that could aid its military rise. There is less consensus among Republicans on the degree to which China needs military balancing. While some argue it is imperative for the US to defend Taiwan to deny Chinese hegemony over Asia, and hence push for significantly reinforcing the US force posture in the Indo-Pacific, Trump has been equivocal on whether he would defend the island and sowed doubt on US alliance commitments in the region.<sup>34</sup>

As a corollary of prioritizing China, the Trump administration could abdicate its historic role as Europe's security guarantor. While some Republicans warn that the "cost of deterrence is considerably less than the cost of war,"<sup>35</sup> the US will likely shift the bulk of the burden of defending the continent onto European NATO allies, no longer considering the security, democratic stability, or prosperity of Europe strategic priorities.<sup>36</sup> For Ukraine, the consequences could be vast. On the campaign trail, Trump mocked Ukrainian President Volodymyr Zelenskyy as "maybe the greatest salesman" for securing US military assistance and vowed to end the war within 24 hours.<sup>37</sup> Recently, he struck a more supportive tone, saying that "the only way you're going to reach an agreement is not to abandon [Ukraine],"<sup>38</sup> and expressed hope to end the war "long before six months."<sup>39</sup> In December, Keith Kellogg, Trump's envoy for Ukraine and Russia, explained that the US could threaten Ukraine with cutting off supplies while threatening Russia with removing constraints on supplies to Ukraine, to induce both parties to the negotiation table to achieve a ceasefire along current lines.<sup>40</sup> NATO membership for Kyiv is likely not in the cards. Ukraine may not be able to accept such terms as it feels that without credible security guarantees, Russia would use the ceasefire to reconstitute its forces to attack again.<sup>41</sup> And there are no indications that Russian President Vladimir Putin is willing to temper his maximalist goals of regime change and a de facto veto over Ukraine's future foreign policy.

For NATO, Trumpism will also involve enormous consequences. While a formal US withdrawal from the Alliance is unlikely, the credibility of both Article 5 and the US nuclear umbrella are in doubt, as Trump has suggested conditioning NATO's collective defense guarantees on Allies spending as much as five percent of GDP on defense. Moreover, people in Trump's orbit have developed plans to significantly reduce the US military footprint in Europe and transform the Alliance into what some have called a "dormant NATO."<sup>42</sup> Given Europe's sluggish rearmament and dependency on the US, such withdrawals could create a security vacuum, exposing Europe to Russian aggression toward the



"We have not seen this kind of military buildup since Germany in the 1930s. [...] We need to begin focusing the nation on the threat that [China] is."<sup>27</sup>

Michael Waltz, then-US Representative, Atlantic Council, October 28, 2024



“My proudest legacy will be that of a peacemaker and unifier.”<sup>47</sup>

Donald Trump, US President, inaugural address, January 20, 2025

end of the decade. This dire prospect is not predestined, however, because Trump’s pressure could also force the Europeans to, finally, seize the responsibility for defending their continent. This would, as former NATO secretary general Jens Stoltenberg put it, “remind the incoming administration that, far from being a burden, the transatlantic relationship is a key strategic asset in this era of great-power competition.”<sup>43</sup>

The Middle East may constitute the exception to the logic of prioritization. The Trump administration could maintain significant US involvement in the region, at least in the short to medium term. President Trump not only picked several stalwart defenders of Israel for his cabinet; he also told Israeli Prime Minister Benjamin Netanyahu to “do what you have to do” in the campaign against Hamas and Hezbollah, reflecting his staunch support for Israel during his first term.<sup>44</sup> In what would be a reversal of decades-long US policy, he cast doubt on the desirability of a two-state solution to the conflict.<sup>45</sup> Furthermore, the Trump administration has signaled that it wants to resume the maximum pressure campaign on Iran to halt its progress toward a nuclear bomb and seek a broader regional realignment by normalizing relations between Israel and Saudi Arabia.<sup>46</sup>

The Trump administration’s narrow pursuit of national interests will also have far-reaching consequences for countries in the so-called Global South.<sup>48</sup> The administration’s overriding focus on China means it will likely try to forge close relations with those countries it considers critical in containing Beijing, such as India, but others will be low on the agenda.<sup>49</sup> Trump’s possible withdrawal from key international institutions like the Paris Agreement, his critique of the UN, and his transactional approach to development spending could also alienate many countries in the Global South and drive them to hedge against the US,<sup>50</sup> thus fueling the very process of “multipolarization” ([Chapter 1](#)). Furthermore, US protectionism could deal a major blow to the World Trade Organization (WTO) and would accelerate the fragmentation of the world economy, with the Global South particularly affected.<sup>51</sup>

### The New World

Trump’s presidential victory marks the end of the post–Cold War consensus. By engaging more selectively and prioritizing the bipolar contest with China, the Trump administration could accelerate the multipolarization of the international system as other actors will (have to) assume greater responsibility for certain regions or policy issues. The next four years could thus conclude the fundamental debate about whether the US being active in the world contains or fuels global disorder.<sup>52</sup> People in Kyiv, Taipei, Gaza, Tel Aviv, and elsewhere will be watching anxiously.



## Key Points

- ① The post–Cold War consensus that the US remained the unrivaled leader of the world, with deep interests in, and responsibility for, maintaining the international order, was already under pressure before the US elections. Donald Trump’s victory buried it.
- ② For President Trump, the order was a bad deal for the US, allowing rivals and partners to benefit disproportionately from US leadership – thus contributing to US decline. Instead, he promises more selective international engagement only when narrowly construed interests are at stake.
- ③ The Trump administration will prioritize containing China’s rise and supporting Israel. But the US security commitment to NATO and Ukraine will likely suffer, as will US involvement in multilateral institutions.
- ④ The next four years will show whether a more selectively engaged US fuels or contains global disorder. As other actors will (have to) step up to fill the gap, the multipolarization of the international system could accelerate.

Quotations originally in British English have been adapted to American English. In some cases, stylistic adjustments were made to quotes.

# Endnotes

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