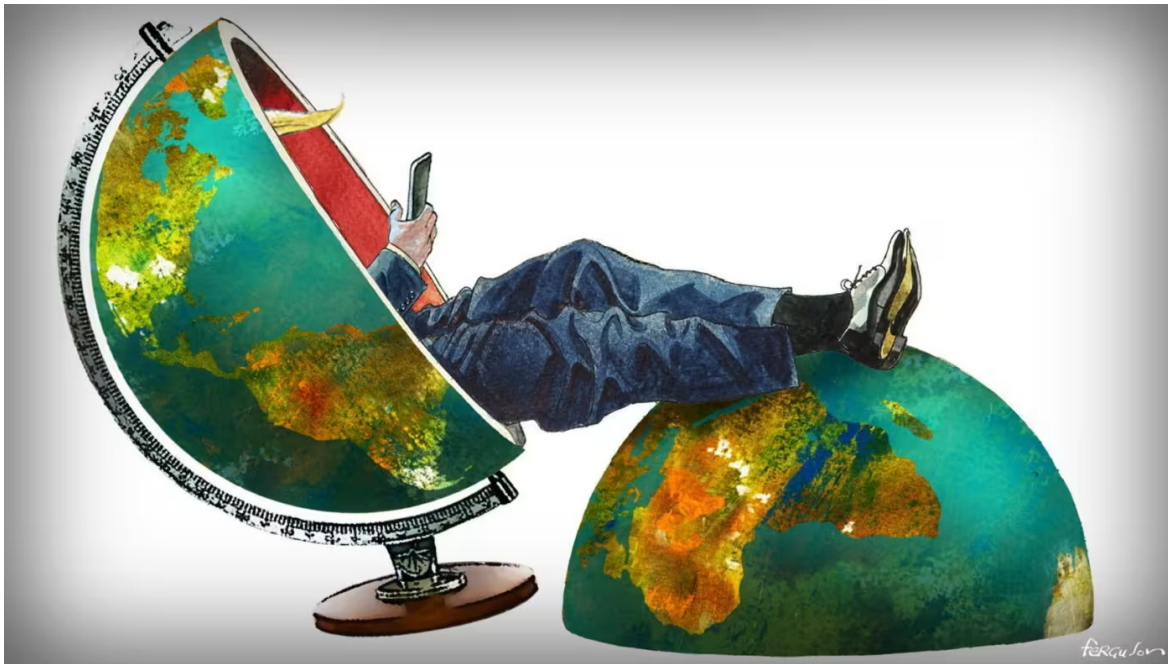


Opinion **Geopolitics**

What the global south gets wrong about Trump

A world without rules is one in which the strong prey upon the weak

GIDEON RACHMAN



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Gideon Rachman YESTERDAY

Like a true “globalist”, I watched Donald Trump’s inaugural address on my phone, while stuck in a traffic jam in Davos. A European executive, sharing the World Economic Forum shuttle bus with me, buried her head in her hands and lamented: “I can’t believe this is happening.”

But the response of delegates from the Middle East, Asia and Africa was very different. Many people from the global south (to use the annoying shorthand) think Trump is good news for them. Recent [polling](#) shows that, in countries such as India, Indonesia, South Africa and Brazil, this pro-Trump attitude extends well beyond the Davos-going elites.

The US president is widely seen, outside the west, as transactional, pro-business and a peacemaker. What’s not to like?

Plenty, actually. Look beyond the hype and there are many reasons for the global south to be deeply concerned about Trump’s America.

The US president is essentially pushing for an abandonment of the “rules-based international order” that has provided the stability and open markets that allowed China, India and a large part of south-east Asia to become much richer over the last 30 years.

Ripping up those rules and moving to a completely transactional world may sound refreshingly straightforward. But a world without rules is one in which the strong prey upon the weak — without any framework of law or principle to constrain them. And most of the countries of the global south are more likely to end up as prey than predator.

Panama, [Colombia](#) and Mexico are among the first nations to discover how uncomfortable a Trumpian world can be. Some 80 per cent of Mexico's exports go to the US. If Trump goes ahead with his threatened tariffs, he could push America's southern neighbour into an economic depression.

Mexico, of course, is not alone. Trump has threatened most major trading nations in the world with tariffs. The notion that this does not really matter because the president is “transactional” — and that all his threats are simply preludes to a deal — ignores the way that business operates. International companies need stability and predictable legal regimes if they are to have the confidence to make long-term cross-border investments.

The evidence is that even when Trump makes a deal, there is no guarantee he will stick to it. During his first term, the US negotiated a new trade agreement with Canada and Mexico — known as the USMCA. But Trump is now demanding fresh concessions.

If all agreements can be ripped up, in response to some new grievance or to take advantage of a shift in the balance of power, then no trade deal is secure. As one former central banker put it to me in Davos: “The logic of that is that you end up only being safe trading inside your own borders.”

Westerners may be shocked to see a US president talk like a mafia boss who wants more protection money. But many in the global south have always believed that American leaders act like mobsters — even if they talk like missionaries. At least, they say, Trump has now dropped the infuriating moralising. The hope is that a less hypocritical US will be easier to deal with, because it will not make unrealistic demands based on irrelevant western values.

But we are beginning to see what a US that proudly proclaims it has no altruistic interest in the outside world looks like — and it is not pretty. Marco Rubio, the secretary of state, has announced a suspension of almost all US aid programmes. Only those that directly benefit Americans will be renewed. That could end programmes such as [Pepfar](#), which provides drugs to combat HIV and Aids and

has saved millions of lives around the world.

Trump, meanwhile, has casually appeared to endorse ethnic cleansing in Gaza. That could be terrible news for the Palestinians who would lose their homeland — and will also deeply alarm Jordan and Egypt, which are meant to take in the new refugees.

The US will certainly not be volunteering to resettle anybody. The poem carved on the Statue of Liberty proclaims: “Give me your tired, your poor . . . The wretched refuse of your teeming shore.” But, to put it mildly, that is not the mood of Trump’s America, where the president’s supporters wave banners demanding “mass deportation now”. Programmes to resettle refugees in the US have already been [suspended](#).

Cutting down on legal immigration from places that Trump once described as “shithole countries” might also sound like good policy to many Americans. But it does not sound like good news for the middle classes of the global south, who may find that prized visas for skilled immigrants or students are much harder to come by.

Still, perhaps all the concerns about trade, aid and migration can be waved away if Trump makes good on his promise to end wars around the world. However, the president’s aspiration to be a global peacemaker is difficult to reconcile with his proclaimed ambition to expand US territory.

If there is one idea that the countries of the global south all claim to repudiate, it is imperialism. If Trump turns out to be both serious and literal about his plans to expand America’s borders, their applause for him may quickly fade away.

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