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POLICY BRIEF

FRAMING U.S.-RUSSIA RELATIONS: A NEW INTERNATIONAL ARCHITECTURE?

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The rapprochement between the U.S. and Russia since the election of President Trump for a second term, and more significantly, since his inauguration, has intrigued U.S. traditional allies as well as many politicians in the U.S. The argument presented here explains the causes of that rapprochement and places it within a global context that witnesses the establishment of a new world order, multipolar, in which the U.S. is a key player but not the dominant player it used to be in the post-Cold War order, and in which the main competition to the U.S. comes from China, as do the main threats to U.S. interests. The impact of this new international architecture on Morocco and its many lessons are also analyzed.

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INTRODUCTION

The long videoconference that President Trump held with President Putin on February 12, 2025, which was followed by a vote of the US favorable to Russia in the United Nations General Assembly on a resolution on Ukraine, caused surprise and speculation.¹ Some observers saw in it a rupture with traditional U.S. foreign policy positions, others considered it the beginning of a distancing of the U.S. from its traditional Western European allies. Others still interpreted it as the beginning of an alliance between populist and authoritarian leaders supported by oligarchical regimes.² Most reactions were negative³ and considered those two decisions – the long call with President Putin and the UN vote- by President Trump and his team either to be a mistake or a false step by the new U.S. administration. Very few, if any, saw it as a rational and logical step by Trump and his team.

The argument presented here is that those decisions were neither missteps nor mistakes, and that they reflected a very specific understanding of what the U.S. national interest is. It is that, on the global stage, China is the new source of threat and the new challenger to U.S. hegemony. Consequently, it has to be isolated from its potential allies and its influence has to be contained. Since Russia is as one of the most prominent allies of China, significant efforts should be made to attract Russia to the U.S., and to decouple it from China.

Some of those who agree with this line of thought argue that the invasion of Ukraine by Russia has represented a threat more to Western European states than to the U.S., and it is up to them—the Western European states—to deal on their own terms with Russia, including in relation to Ukraine.⁴ The role that President Trump and his team want to play in Ukraine aims first and foremost to advance U.S. interests on U.S. terms. Stopping the war in Ukraine, even on terms favorable to Russia, is acceptable from that U.S. point of view.

How about the Europeans? Some statements from members of the Trump administration, and from President Trump himself, have affirmed that Western European states should have no say and should not be involved in the negotiations on a ceasefire and an eventual peace deal in Ukraine. The meetings that took place on March 11, 2025, in Saudi Arabia between representatives of the Trump administration and Ukrainian representatives in the absence of European representation, the follow up conference call on March 18 between Trump and Putin, and the conversation that followed it on March 19 between Trump and Ukraine's President Volodymyr Zelenskyy indicate that those were not only words, since Europe was excluded from all those talks. The only option for Europe to maintain some influence has been to show direct support for and solidarity with Ukraine, and to try to play a role in the process through Ukraine and through supporting Ukraine. But the Trump administration has shown no inclination to include Europeans in the process.

Why is that? For two reasons. First, from the U.S. point of view, China is the new main source of threat. This understanding of China is not new. It started during the first Trump administration, it was reinforced under President Biden, and it has been present in Trump's narrative since the presidential campaign. Consequently, the U.S. should avoid having to

1. The US also drafted a resolution to the UN Security Council on the war in Ukraine that was considered favorable to Russia since it did not blame or condemn it for the start of the war. The resolution was supported by Russia while France and the UK abstained from supporting it.

2. For more on this, see Fassihi (2025), Galston (2025) and Zakaria (2025).

3. For negative reactions to the vote, see for instance Landale and Jackson (2025) who report on Republican and Democrat lawmakers expressing their dismay at the US vote. For a longer analysis underlining what is considered the perils of supporting Russia, see also Vindman (2025).

4. See for instance the scenarios presented by Spatafora (2025). See also Daalder (2025).

confront Russia too, since that could weaken the U.S. capacity to confront China—to say the least—by splitting capacities between China and Russia, or even worse, by engaging the US in a new version of dual containment that would be significantly more costly and debilitating than the previous one⁵. Although the 2022 US National Defense Strategy⁶, which is the current reference for national defense in the U.S., defines China as the main source of threat and strategic competition for the U.S., and Russia as a main source of strategic threats against U.S. interests, the Trump administration has tried to avoid that challenge of dual containment, or at least, to avoid its worst version.

The second reason for the relatively novel U.S. position on Russia is that President Trump, and many Republicans with him, has for a long time pleaded for U.S. disengagement from the role of policeman of the world. According to this position, the U.S. should focus on its own challenges and should not manage the world and its conflicts. This discourse is not an isolationist discourse since it comes with a parallel expansionist, not to say imperialist, discourse: Trump has threatened to annex Greenland and the Panama Canal, to make Canada the fifty-first state, and to ‘possess’ Gaza after expelling its population. In sum, this is a return to the U.S. policy of the nineteenth century, when it expanded its borders because it could.

In this paper, this rationale is explored and explained by presenting the different pieces of the puzzle: the growth of China, the wild card represented by the war in Ukraine, and the resulting global architecture. The impact of these developments on Morocco are also analyzed.

THE IRRESISTIBLE GROWTH OF CHINA

The last few decades have witnessed the steady and strong economic growth of China, transforming it into a world economic powerhouse. Besides investing heavily in its industry with the objective of conquering the global market, China received heavy investment aimed at its considerable domestic market, which has allowed it to host the biggest and most prestigious manufacturers and trademarks in the world. These range from technology (Apple Inc., IBM, Intel Corporation, Microsoft, Samsung Electronics) to the car industry (GM, Volkswagen Group, Toyota, Honda), and others including Unilever and Procter & Gamble. Many of those investments came from US-based companies, but European and other Asian companies also invested in the Chinese market. In 2022 alone, China attracted over \$189 billion, ranking second in the world for foreign direct investment.

U.S. analysts argue that China achieved those results in part because it was one of the biggest beneficiaries of U.S.-led globalization and trade liberalization.⁷ According to them, while the U.S. was dealing with the costs of being the hegemon, China was a free rider that benefited from avenues opened by U.S.-led globalization and grew its economy. Of course, the U.S. also benefited from having the U.S. dollar as the world currency, which allowed it to run huge deficits at relatively low cost. The U.S. also structured and influenced the agencies that were shaping globalization, including the International Monetary Fund, the World Bank, and the World Trade Organization. Nevertheless, according to this analysis, to which many in the U.S. establishment, Republicans and Democrats alike, subscribe, the U.S.

5. In the 1990s, right after the Gulf War, the U.S. adopted a strategy of dual containment against its two enemies in the Gulf: Iran and Iraq.

6. For the full 2022 National Defense Strategy, refer to <https://media.defense.gov/2022/Oct/27/2003103845/-1/-1/1/2022-NATIONAL-DEFENSE-STRATEGY-NPR-MDR.pdf>

7. See for instance for instance the analysis of Hart and Magsamen, in 2019 already, about the challenges coming from China and the necessity to adequately decouple the US economy from the Chinese. For a more recent analysis, see Elizalde (2022).

has now to decouple its economy from China and reduce their interdependence, and must start considering Chinese competition not only as that—competition—but also as a threat.

This was the logic behind several policies approved and implemented by President Biden, such as the stringent investment restrictions he imposed on Chinese technology sectors, or the increase in tariffs on imports from specific sectors, such solar cells (Tankersley, 2024). During the Biden presidency, the issue of Taiwan also gained prominence and heightened tensions between China and the U.S. In the U.S., there have been consistent intelligence and press reports about China's imminent intent to annex Taiwan—which China considers as reunification plans—which alarmed U.S. policymakers and pushed them to renew their commitment to the defense of Taiwan (Gan, 2024). U.S. policymakers also did not hesitate to provoke China. The visit of the former Speaker of the House of Representatives, Nancy Pelosi, a Democrat, in August 2022, was part of those provocations amid renewal of commitments towards to the two-Chinas policy (Friedman, 2022).

However, President Trump takes the logic of strategic competition with China in a different direction and to a different level. The direction is coherent with his worldview. According to President Trump and his team, one important pillar in the U.S. new policy has to be to cease being the policeman of the world, which is one of the roles the hegemon plays. Being a hegemon has benefits, but it also has costs, and by no longer being the policeman of the world, Trump wants to stop having to pay the bill for the system to function. In this new vision, Trump wants his country to adopt new rules that could boost U.S. capacity to defend its interests and remain as a dominant player in world politics, while by the same token, those rules should check China's growth and eventually stall it.

One of the main sectors that illustrates the growing U.S.-China competition is advanced technology. Many analysts agree that both the U.S. and China consider the economic, technological, and security sectors to be intertwined and mutually influencing one other.⁸ The 5G network is a good example of that competition, as countries around the world have been confronted with either/or options, with pressure from both the U.S. and China to acquire their respective technologies. While a few countries have managed to keep a balance between U.S. and Chinese technologies—acquiring 5G from one while continuing to cooperate with the other, as has been done by Brazil, Morocco, and Vietnam—many others have aligned themselves fully with one or the other⁹. The intensity of the competition was revealed by the diplomatic crisis involving the deputy chair of the board—and daughter of the founder and CEO—of the Chinese company Huawei. She was imprisoned in Canada in 2018 at the request of U.S. authorities, and was released in 2021 after a long process that probably involved multi-level negotiations between the U.S., China and Canada (BBC, 2021).

It is important to underline at this stage that the shift in U.S. policy towards China started during the first Trump presidency, when he imposed stiff tariffs twice on China, and adopted an antagonistic narrative towards it (Tankersley and Bradsher, 2018). Part of that narrative was evident during the COVID-19 pandemic, when President Trump consistently referred to the virus as the 'Chinese virus' and accused China of having caused the pandemic and accused the World Health Organization of covering up for China.

In Trump's second term, China remains one of his and his team's top concerns. For instance, Secretary of State Marco Rubio has been very critical of China throughout his tenure as Senator, and makes no secret of intention to deal with China not as a partner but as a

8. See for instance Harwit (2024) and Kuik (2024).

9. For a detailed analysis on the US-China competition and its impacts, refer to Harwit, (2024), and Kuik, (2024)

strategic competitor instead. It is thus no surprise that President Trump has already imposed higher tariffs targeting U.S. imports from China specifically, starting with an initial 10% tariff and doubling it soon after to make it a 20% hike in tariffs on China, while also including China in the 25% tariff increase on steel and aluminum. Moreover, Trump's concerns over the Panama Canal are to a large extent related to China: the U.S. President expressed his concern that China would come to control the canal and harm U.S. interests there. That suspicion was based on the fact that a Hong Kong-based company was managing the canal. That concession was rescinded by the Panama government after strong pressure from the Trump administration, but that development underlined the importance and the susceptibility of the Trump administration to fears about China's rise as a global power and the threat that represents to U.S. interests.

Last but not least, China and Russia have established a very close partnership. In 2009, both were among the founding members of the BRICS, which has the objective of enabling the leading non-Western countries to promote their views in a world they deem to be dominated by the West. The BRICS countries seek to cooperate and eventually support each other for mutual benefit. In 2023, that informal alliance, which nevertheless has achieved some level of institutionalization, with regular meetings of heads of states and ministers, and the establishment of a development bank with headquarters in China, expanded to new members and has announced further expansions plans. With Russia currently chairing, and with China the main powerhouse behind it, BRICS provides both countries with a privileged environment in which to cooperate and align their policies and their strategies on the world stage. Moreover, at the bilateral level, in 2022, after the invasion of Ukraine by Russia, the leaders of China and Russia declared a *"no limits"* partnership between their countries, which translated into substantial economic support provided by China to Russia, enabling the latter to sustain its war efforts in Ukraine at relatively tolerable levels. Finally, and for the fifth year, in March 2025, Russia, China, and Iran held joint military exercises in the Strait of Oman, underlining their close relationship and their symbolic commitment to support each other, including militarily.

In sum, if China is the rising challenger to the U.S., it makes sense at many levels for the U.S. to try to split the Chinese-Russian partnership by building closer relations with Russia.

THE WAR IN UKRAINE AND ITS CONSEQUENCES

Russia's invasion of Ukraine in February 2022 created a new strategic conundrum for the U.S. While the U.S. mindset, politics, and vision were focused on China, one of the consequences of that invasion was to scramble the cards again: the U.S. and its Western European allies saw it as a rupture of the rules-based world political order, and an expansionist and highly threatening move by Russia that needed to be unequivocally countered.

The war in Ukraine has represented a formidable challenge to the rules-based international order, which has been in the making for over a century. One of the cornerstones of that order is the norm of sovereignty, in the sense that state sovereignty is absolute and must be respected by all other states. Although some exceptions have been established over the years, notably through another norm of the same international order, that of the Responsibility to Protect, the inviolability of sovereignty remained one of the key principles of the international system. So, when Russia, a permanent member of the UN Security Council, violated the sovereignty of a weaker and smaller state, the legitimacy of the international order was at stake. It goes without saying that the invasion of Ukraine was far from being the first frontal challenge to the 'rules-based international order', as that order has been accused of inconsistency and hypocrisy. Still, the invasion of Ukraine represented a challenge that many in Western Europe and the U.S. found unfathomable and necessary to counter forcefully.

As the West defined the war in Ukraine as an invasion of Ukraine by Russia, it also underlined the military and geostrategic risks of abandoning Ukraine. The reasoning was that if Ukraine fell to Russian domination, Russia would feel emboldened and would threaten and eventually invade other European states, in particular those that were part of the defunct Soviet Union. Past historical mistakes made by previous European leaders—in particular, Neville Chamberlain, the British Prime Minister who adopted an appeasement strategy towards Hitler in the 1930s—were summoned to reinforce the necessity of countering Russia and avoiding repeating those past mistakes. Western Europe and the U.S. were aligned on that approach and they strongly supported Ukraine’s resistance against Russia.

Moreover, in the U.S., some in the Biden administration considered what they referred to as the Putin aggression against Ukraine as a unique opportunity to defeat Russia and Putin militarily, and to silence, at least for a long time, that country and any threat from it. According to that offensive realist view, if an appeasement policy towards Putin would have dramatic consequences, a Russian failure and retreat from Ukraine would bring substantial benefits: a subdued and militarily weaker Russia, that would be eventually subject to UN sanctions and monitoring, and the elimination of the Russian threat for the foreseeable future. That was part of the rationale behind imposing increasingly crippling sanctions of all kinds against Russia and its leaders, and behind supporting Ukraine militarily and economically, portraying Ukraine as the victim of foreign aggression. The moment seemed in many respects like an ominous return to the logic of the Cold War, and to considering Russia as the successor of what used to be considered back then the expansionist and threatening USSR, and hence, an adversary that needs to be defeated.

Consequently, many Cold War logics were revamped, including economic measures such as boycotting Russian products, including gas supplies to Western Europe, and military measures, as the risks of a nuclear confrontation with Russia increased substantially¹⁰. Some Western reactions were reminiscent of the Soviet invasion of Afghanistan, when sanctions were imposed on the USSR. The West boycotted Moscow’s 1980 Olympic games and the USSR was considered a pariah. Since Russia’s invasion of Ukraine, new versions of those same policies have been adopted: Russian teams have been suspended from international sports events, sanctions have been imposed on Russians interests and leaders, and Russian financial assets have been frozen in the West. Also, and in a first of its kind, the Russian President was indicted by the International Criminal Court, which was unprecedented for the leader of a permanent member of the UN Security Council. With that, this awkward turn of events relegated China to a lower level of priority, as it ceased, at least temporally, to be considered the main source of threat. Was that a U.S. overreaction to Russia’s invasion of Ukraine? Or was it a distraction from the U.S.’s main strategic interest, i.e. confronting China? Or was that an unplanned predicament that the U.S. had to deal with and which represented an opportunity to undermine one of its traditional adversaries—and a close ally of China—which would place the U.S. in a better position to confront China on the world stage?

In that moment, some in the U.S. were inclined to defend the necessity of splitting Russia from China according to a Cold-War logic. According to them, the U.S. had to make efforts to isolate Russia and weaken it by attracting China back and enticing it to abandon Russia and strengthen its links with the U.S. instead. It looked as if the perception of China as a competitor and a threat to the U.S. and the U.S.-led world order had fallen into oblivion.

There were complicating factors. Despite all the sanctions imposed on Russia and the

10. It is true that nuclear risks were initially heightened by Putin and that the U.S. remained cautious in its response to Russian threats. It is also true that not all Russian gas deliveries to Western Europe have been suspended and many pipelines continue to operate.

Western imposed boycotts against its products, Russia has been resilient as the Russian economy has not unraveled or even been paralyzed. Why? As previously noted here, China's imports from Russia, mainly oil and gas, have provided Russia with an essential economic lifeline, which, once more, underlines the strategic alliance between Russia and China and the possibilities it offers both countries to defend their interests.

Another development was a surprise and a disappointment to the U.S. and to Western Europe: one third of UN member states showed indifference to the war in Ukraine. Many states in Africa—including Morocco—Asia and Latin America have not taken sides in the conflict, remaining neutral and insisting on the diplomatic language of solving international conflicts through negotiations and diplomacy. That indifference indicated to the West that its capability to influence world affairs and decisions made by states from the Global South is diminishing, and other states—including China and Russia—had at least as much influence at the West on those states. That neutrality also highlighted the dimming lights of the Western led 'rules-based' international order. A new reality was emerging, a new world architecture was being put in place.

In 2024, the war in Ukraine has become a stalemate. The military front has been paralyzed, with few gains on either side. Ukraine made some advances inside Russia in Kursk, in what could have represented a bargaining card in eventual negotiations with Russia, while Russia managed to keep hold of large Ukrainian territories and defend its positions and even expand them marginally. The war has become a new version of a war of the trenches, and the hoped-for solid and decisive military victory of one side against the other has become increasingly distant and unlikely. Something new had to be tried.

THE U.S., RUSSIA, CHINA, AND A NEW WORLD ORDER

During the 2024 U.S. presidential campaign, Trump repeated that he would easily and swiftly bring the war between Russia and Ukraine to a stop, while he expressed positive views of Putin and negative views of Zelenskyy. After he was elected, he reinforced that narrative and even reached out to Putin right after his election (Nakashima et.al, 2024). After his inauguration, President Trump started insisting that Ukraine should repay the U.S. for the support it received by signing an agreement that would guarantee U.S. rights to rare minerals in Ukraine. U.S. envoys went to Ukraine to negotiate an agreement, but when Ukrainian authorities showed resistance to signing such an agreement, President Trump attacked Ukraine and its president, alleging that the Ukraine was responsible for the war and that Zelenskyy was a dictator. Meanwhile, Trump's official phone conversations with Putin were far friendlier, and his comments about the Russian president were also mostly positive. Moreover, and for the first time since the start of the war, and as noted earlier, the U.S. voted with Russia and against Ukraine and all its Western European allies on a resolution on the war in Ukraine presented to the UN General Assembly. Through these moves, President Trump opened a direct line of contact with the Russian president and both presidents reinforced the friendly terms of their personal relationship, but the U.S. also earned the trust of Russia and opened a new page in their mutual relationship. These moves were alarming to the U.S.'s European allies as well as to influential US policymakers, as noted earlier hereabove.

One way of looking at these moves is that they are reminiscent of former President Nixon's move in the opposite direction. Nixon wanted the containment of the Soviet Union and hence its isolation from Communist China by getting closer to China and offering it alternatives to foster its economic growth. Trump is attempting a similar move, but in

the other direction. As Trump and the U.S. consider China the most important source of challenge and threat, Trump wants to aim at the containment of China. Therefore, he is attempting to isolate China by separating it from its natural ally, Russia. And China—and Russia—are very much aware of that.

The world, as seen from Trump's perspective, is a world in which the norms that held the international system together, as hypocritical as they were, are useless. His world is one of might and power, a world in which the U.S. is no longer the hegemon. The U.S. has to defend its interests without relying on or taking into account its allies. This is why Trump's threats against NATO allies, from Canada to Denmark, and UN votes against U.S. traditional military allies, are acceptable and part of the game. And if China is the adversary, it has to be isolated and attracting Russia becomes acceptable. This is not the old Cold War any more, it is a new one in which the threat is not Russia but China.

The Europeans have to defend themselves, and although they realize that, it is a hard wake-up call for them. If it is the U.S.'s strategic interest to get closer to Russia, and if that makes the Europeans unhappy, so be it. Trump wants also to disrupt BRICS, as he sees it as a potential competitor, if not an adversary. It is no coincidence that he has explicitly and directly threatened BRICS members if they ever cease to use U.S. dollars for their trade exchanges.

It is then not only the U.S. that is following policies that resemble policies adopted back in the nineteenth century, since from a systemic point of view, it is possible to argue that a multipolar world has returned, just like in the nineteenth century. Alliances are multiple and they vary. Avoiding isolation is important, but maybe avoiding losing allies is also important. The U.S. has NATO, but Trump sees it as a burden, not an asset. How wise is that? How would that dynamic work?

MOROCCO AND THE NEW WORLD ORDER

Morocco must read this new world architecture according to its interests. The main question is: should Morocco be a non-aligned country? And how should it operationalize that understanding? Indeed, this is not the old Bandung spirit:¹¹ there is no coordination between states that are opting out of alignment, and there is seemingly no attempt to bring all those states together. Non-alignment might hence become a risky bet, as the non-aligned might become easy targets for retaliation from the most powerful states.

The challenge for Morocco is that its choices are among difficult options. Morocco has had traditionally close political and economic relations with France and Spain, two influential European Union members. Morocco has also had a close relationship with the U.S., and at the end of the first term of President Trump, he recognized Morocco's sovereignty in the Sahara. Morocco has also good relations with both Russia and China, as demonstrated by past and current trade relations with the former, and trade and investments with the latter. Last, but not really least, Morocco has its own policy and interests to manage in Africa, which it seeks to advance independently of the interests of others. These difficult choices make non-alignment a valid option for Morocco.

So how could Morocco defend its interests by being non-aligned? This is the posture that explains why Morocco refrained from voting against Ukraine (it did not want to provoke its main trade partner, the EU, and some of its closest political supporters, France and Spain),

11. The Bandung Conference was held in April 1955 and brought together leaders from Asian and African mostly recently independent states, who explored and agreed on ways to join their efforts to make the voice of Third World countries heard in that specific historical moment dominated by the Cold War.

but it did not vote against Russia to avoid provoking both Russia and the U.S. Morocco just did not vote.

Finally, Morocco needs to be ready to bargain with the U.S.: what can it offer to a leader like President Trump? This is a transactional president and administration which makes multiple offers on multiple fronts, without necessarily intending to bargain or even win on all of them. In this sense, Morocco should give up on a grand strategy with the U.S. and adopt a tactical approach: negotiate, exchange, make concessions while seeking concessions.

FINAL REFLECTIONS

The nineteenth century is back, with a new version of multipolarity, the U.S. following its manifest destiny (French, 2025), as well as a new corollary to the Monroe Doctrine. This is a world in which alliances are multi-dimensional and temporary, in which rules and norms are secondary, and in which might justifies actions. This is a world of our making, and more specifically, a world forged by a few of us, and by President Trump and his team in particular.

In his two first months in power, President Trump has shifted several U.S. foreign-policy paradigms. He has put in doubt the U.S. commitment to NATO, struck up a friendly relationship with President Putin of Russia, wavered up on U.S. commitments to Ukraine, and through that, to a rules-based international political order. He has also adopted a posture of power and might (as is the case with threats to annex Canada, Greenland, and eventually Gaza, and threatening to 'get back' the control of the Panama Canal), and has dismantled one of the main tools of soft power that the U.S. has, which is USAID. With this attitude, he has dismissed the relevance or even the usefulness of soft power, and has focused on what his power and strength allow him to achieve.

In this new world order, which resembles to some extent to the XIX century multipolar system, but which is different from it -as the world has experienced a norms-based order for 80 plus years, and many are attached to it and do not accept to see it disappear-what will be the limits to pure power? Is it really wise to dismiss the usefulness of soft power? And is it wise to abandon old, traditional, and reliable allies, and to seek alliances with former adversaries? How reliable is a state, even a superpower, which does not deliver on its commitments? These are the key questions to which President Trump and his team seem to have answers that are radically different to those of many analysts in the U.S., and to their key European allies.

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ABOUT THE POLICY CENTER FOR THE NEW SOUTH

The Policy Center for the New South (PCNS) is a Moroccan think tank aiming to contribute to the improvement of economic and social public policies that challenge Morocco and the rest of Africa as integral parts of the global South.

The PCNS pleads for an open, accountable and enterprising "new South" that defines its own narratives and mental maps around the Mediterranean and South Atlantic basins, as part of a forward-looking relationship with the rest of the world. Through its analytical endeavours, the think tank aims to support the development of public policies in Africa and to give the floor to experts from the South. This stance is focused on dialogue and partnership, and aims to cultivate African expertise and excellence needed for the accurate analysis of African and global challenges and the suggestion of appropriate solutions.

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