

Marubeni Washington Report**“America First” Foreign Policy Reconsidered**

How Trump is Shaping a New Middle East Order

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- In his approach to the Middle East, President Trump reconfigures military force and deal-making on the fly, always toward a single aim: contain Iran while minimizing direct U.S. intervention. That elastic approach resulted in the historic Abraham Accords and continues to guide his policies towards Iran.
- By removing the Palestinian issue as a pre-condition, the regional agenda pivoted to Iran containment. Even amid Gaza’s deepening humanitarian crisis, the Arab-Israeli alignment endures, opening a historic opportunity to resolve the Gaza War, complete a nuclear deal with Iran, and achieve Saudi-Israel normalization.
- The very partners Washington has strengthened to lower U.S. burdens- Israel and Saudi Arabia- could, thorough unilateral moves, drag America into the open-ended wars Trump vows to avoid. His legacy will hinge less on deterring enemies than on restraining empowered allies.

President Trump’s “America First” doctrine has become one of the most debated yet least understood concepts in contemporary American foreign policy. When tensions escalated toward U.S. military action against Iran, this ambiguity erupted into open conflict within Trump’s own coalition. Prominent MAGA figures like Steve Bannon and Tucker Carlson clashed with hawks like Senators Lindsey Graham and Ted Cruz over a fundamental question: what does “America First” actually mean in the context of foreign policy?

The restrainers argued that true America First principles demanded non-intervention—that military action would betray Trump’s promise to end ‘forever wars’ and focus on domestic renewal. The hawks countered with their own interpretation, insisting that America First required demonstrating strength abroad, even advocating for regime change in Tehran. This wasn’t merely a tactical disagreement; it reflected competing visions of American power and purpose in the 21st century.

Trump’s response to this debate revealed something more significant than either camp anticipated. Through his handling of the Iran crisis—authorizing strikes yet securing a ceasefire, using force while avoiding protracted engagement—Trump demonstrated that ‘America First’ operates according to his own strategic logic, one that confounds traditional foreign policy concepts. As Trump himself declared: “Well, considering that I’m the one that developed ‘America First,’ and considering that the term wasn’t used until I came along, I think I’m the one that decides that.”¹

This episode illuminated a pattern that extends far beyond foreign policy debates. Throughout his political career, Trump has demonstrated what amounts to ‘definitional immunity’—the unique ability to reshape policies and even his own positions according to immediate needs without losing core support. His political durability has been extraordinary: surviving two impeachments, weathering numerous criminal and civil suits, maintaining his base despite persistently low approval ratings, and ultimately securing a second presidential term. Where other politicians would face accusations of inconsistency or hypocrisy, Trump operates with remarkable freedom to redefine his own terms.

This definitional immunity proves particularly powerful in foreign policy, where traditional constraints of ideological consistency rarely apply to him. The recent Iran crisis perfectly illustrates this dynamic.

¹ Michael Scherer, Trump Says He Decides What “America First” Means”, The Atlantic, June 14, 2025. ([link](#))

Within 48 hours, Trump authorized strikes against Iranian nuclear facilities—satisfying hawks who demanded action—then pivoted to broker a ceasefire between Israel and Iran, giving restrainers the de-escalation they sought. Analysts who had spent years trying to categorize Trump as either a ‘dove’ or a ‘hawk’ suddenly found their frameworks useless.

Yet this flexibility isn’t mere opportunism. ‘America First’ under Trump follows a consistent logic: maximizing U.S. leverage while serving both American interests and Trump’s political and personal objectives. His Middle East strategy exemplifies this approach. Despite his mercurial style, the underlying goal remains constant—containing Iran while building a new regional order aligned with American interests, all while avoiding the military quagmires that defined previous administrations.

This analysis does not attempt to predict the future trajectory of Middle Eastern affairs—a region where, as Aaron David Miller aptly observes², American ideas of warmaking and peacemaking “more often than not go to die.” Indeed, no serious expert today would claim the ability to forecast outcomes in this perpetually volatile theater. Rather, this report represents an effort—perhaps quixotic—to understand how President Trump himself perceives the current regional dynamics and what opportunities he might identify within them. The goal is not prognostication but interpretation: to examine the strategic logic, however unconventional, that may guide Trump’s approach to a region that has confounded American policymakers for generations.

Present At the Creation

Understanding Trump’s approach to the Middle East requires examining his broader Middle East strategy—one that reveals surprising consistency beneath the tactical flexibility. Despite his unpredictable style, Trump has pursued a coherent regional vision: forge an Arab-Israeli coalition against Iran while avoiding direct military entanglement. This strategy, driven by both geopolitical calculation and personal interests, has fundamentally reshaped Middle Eastern alignments.

Trump’s pursuit of regional stability stems from multiple motivations. His business ties to Gulf states and Israel create personal stakes in the region’s prosperity³. His desire for a transformative foreign policy legacy—potentially even a Nobel Peace Prize—drives ambitious diplomatic initiatives. But beyond these personal interests lies a strategic insight: that Iran represents the primary obstacle to a stable, U.S.-aligned Middle East.

His method was straightforward if revolutionary. Rather than pursuing traditional peace processes, Trump sought to unite Israel and the Gulf states against their common Iranian adversary. This approach manifested in concrete policies: withdrawing from the Iran nuclear deal in 2018, imposing crushing sanctions, and demonstrating credible military threats. Each action served the broader objective of isolating Iran while building a new regional architecture.

The most significant departure from conventional diplomacy was rejecting the “Palestinian veto”—the decades-old Arab insistence that any normalization with Israel required resolving the Palestinian issue first⁴. Trump simply discarded this framework. He recognized Jerusalem as Israel’s capital,

² Aaron David Miller, interview by Ezra Klein, “The Ezra Klein Show,” The New York Times, June 26, 2025, podcast, 41:58. ([link](#))

³ A deeper look into his motivation is covered in a previous report. ([link](#))

⁴ Saudi-proposed peace plan adopted by the Arab Summit in Beirut in 2002 that called for the establishment of normal relations in the context of a comprehensive peace with Israel. Specifically, it called on Israel to (1) withdraw from all Arab territories occupied since 1967, achieve a just solution to the Palestinian refugee issue, and accept the establishment of a sovereign independent Palestinian state on the territories occupied since 1967 in the West Bank and Gaza Strip, with East Jerusalem as its capital. ([link](#))

acknowledged Israeli sovereignty over parts of the West Bank, and secured moderate Arab states' acquiescence through a four-year freeze on further annexation. The message was clear: Palestinian rejectionism would no longer dictate the pace of regional transformation.

This rejection of the Palestinian veto faced an early test. Trump's "deal of the century," unveiled in January 2020, collapsed almost immediately when Netanyahu declared that Trump had authorized immediate annexation of the Jordan Valley and West Bank settlements. Yet Trump quickly pivoted, pressuring Netanyahu to abandon annexation in exchange for something more valuable: formal diplomatic ties with the UAE. This became the Abraham Accords.

The Accords represented a fundamental shift in Middle Eastern politics for three reasons. First, they severed the link between Palestinian statehood and Arab-Israeli relations. As journalist Barak Ravid observed, Trump sought not a traditional peace deal but a regional realignment against Iran. Netanyahu embraced this framework, gaining Arab recognition without making concessions to Palestinians.⁵

Second, the Accords reoriented regional priorities from Arab-Israeli conflict to Iranian containment. This enabled unprecedented military cooperation—integrated missile defense systems, joint naval exercises, and intelligence sharing. The U.S. sweetened these deals with advanced weapons sales, including F-35s to the UAE, creating a military coalition capable of deterring Iranian aggression.

Third, the Accords restored American credibility as the indispensable dealmaker in Middle Eastern affairs. After decades of stalled peace processes that eroded confidence in U.S. mediation, Trump had delivered what his predecessors couldn't: tangible Arab-Israeli normalization agreements that created facts on the ground. This success reestablished the U.S. president as the region's center of gravity—a position that had been increasingly questioned after years of failed initiatives. Whether by design or accident, Trump had not only nullified the Palestinian veto but demonstrated that a transactional American president could still reshape regional dynamics. This renewed credibility would prove essential for any future diplomatic efforts, as regional actors once again looked to Washington as the broker capable of delivering results. Even President Biden, despite pursuing the same strategic path toward Saudi-Israeli normalization, lacked Trump's dealmaking credibility—a limitation that may have contributed to why the ultimate prize remained elusive during his tenure.

Continuity and Consistency in Trump's Middle East Strategy

The durability of Trump's approach became evident under the Biden administration, which pursued the ultimate prize: Saudi-Israeli normalization. This represented remarkable continuity, given Biden's harsh criticism of Crown Prince Mohammed bin Salman over Jamal Khashoggi's murder. Yet Biden recognized the strategic logic—Saudi normalization would cement the anti-Iran coalition while further marginalizing Palestinian claims to veto regional progress.

For Iran and its proxies, this emerging Saudi-Israeli deal posed an existential threat. It would eliminate their most potent narrative—that Israel remained isolated and illegitimate in the Muslim world. Without intervention, the Palestinian cause risked losing its power as a unifying force against Israel. Many analysts now believe that preventing Saudi-Israeli normalization was a primary motivation behind Hamas's October 7 attack.

Paradoxically, the violence that followed may have advanced Trump's original vision. Israel has

⁵ Barak Ravid, *Trump's Peace: The Abraham Accords and the Reshaping of the Middle East* (Tel Aviv: Miskal, Yedioth Books, 2021).

systematically degraded Iran's regional proxy network: Hamas's military infrastructure lies in ruins, Hezbollah has suffered severe losses, and Syria's Assad regime—Tehran's crucial ally—has fallen. Israeli airstrikes have demonstrated the ability to penetrate Iranian airspace at will. Despite the humanitarian catastrophe in Gaza straining regional relationships, the Arab-Israeli alignment against Iran remains fundamentally intact.

This weakened Iranian position created the opening for Trump's recent diplomatic gambit. Despite five rounds of negotiations and plans for a sixth, Tehran refused American demands for zero uranium enrichment and intrusive inspections. The Israeli attacks, followed by U.S. strikes on Iran's nuclear facilities, appeared to derail diplomacy. Yet for Trump, these strikes followed his established pattern—using overwhelming force not to start wars but to create leverage for better deals.

Trump's recent strikes follow a pattern established in his first term. The 2020 assassination of Iranian General Qasem Soleimani demonstrated this approach perfectly: a shocking escalation designed not to initiate war but to force Iran to recalculate. The operation succeeded—Iran opted for a face-saving but limited missile response rather than full retaliation, and tensions quickly de-escalated.

The recent strikes followed an identical script. After U.S. attacks on Iranian nuclear facilities, Tehran conducted a carefully choreographed missile strike on a U.S. airbase in Qatar—enough to preserve domestic credibility while signaling its desire to avoid further escalation. As with Soleimani, there were no American casualties, and both sides pulled back from the brink.

This pattern reveals Trump's consistent strategic logic: overwhelming force serves as a diplomatic tool, not an end in itself. Where traditional foreign policy doctrine views military action and diplomacy as separate tracks, Trump uses them as complementary instruments. A devastating strike creates urgency for negotiation; the threat of more compels compromise. This approach has now produced a ceasefire that, for the moment, appears to be holding.

The Path Forward for Trump: Three Interconnected Objectives

The success of Trump's pressure campaign has created a unique strategic moment. With Iran weakened and regional dynamics in flux, Trump can now pursue three mutually reinforcing goals that could reshape the Middle East: ending the Gaza war, securing a nuclear deal with Iran, and achieving Saudi-Israeli normalization. Success in any one area would enable progress in the others; failure in any could unravel the entire framework.

Ending the Gaza War

Gaza represents Trump's most immediate challenge. While his leverage from the airstrikes gives him influence over Netanyahu, Israeli domestic politics complicate any solution. Netanyahu's political survival partly depends on maintaining conflict—it delays his corruption trial and deflects accountability for the October 7 intelligence failures. Though Trump may secure an initial ceasefire (negotiators are currently discussing a 60-day arrangement in Doha), converting this into permanent peace requires sustained pressure and careful management of Israeli politics. Success here would eliminate Iran's ability to leverage Hamas as a destabilizing force.

Nuclear Negotiations with Iran

The nuclear negotiations represent Trump's highest-stakes opportunity. Iran's weakened position—damaged nuclear facilities, degraded proxies, continued economic isolation—creates genuine incentives for compromise. For Trump, an agreement would neutralize the region's greatest threat while delivering a historic achievement. His pattern of using maximum pressure as diplomatic

leverage suggests the recent strikes were calculated to force this outcome.

Yet significant obstacles remain. Iran faces a profound trust deficit after Israeli strikes during negotiations and U.S. attacks on its facilities. Tehran will demand substantial guarantees—comprehensive sanctions relief and protection from future strikes. Even so, it is questionable whether Tehran would accept zero enrichment—a core demand from Trump. The window for agreement is narrow.

Israel-Saudi Normalization

Saudi normalization remains the crown jewel—a breakthrough that would consolidate the anti-Iran coalition while securing Trump’s legacy. With Iran contained and Gaza stabilized, Riyadh would face fewer obstacles to normalization. The benefits are clear: enhanced U.S. security guarantees, potential nuclear cooperation, and deeper integration into the American-led order. For Israel, it means historic recognition from an Arab superpower. For Trump, it represents the ultimate validation of his transactional approach—reshaping the Middle East through strength and pragmatism rather than idealism.

The Alliance Paradox

Yet Trump’s strategy contains an inherent contradiction that strikes at the heart of his political brand. Throughout his campaigns, Trump has promised to end America’s “forever wars” and avoid new military entanglements—a pledge central to his appeal among war-weary voters. Yoram Hazony, a prominent “new right” intellectual, recently observed that Trump prefers cultivating strong allies over maintaining dependent protectorates. Israel exemplifies this model—a capable partner that handles its own security while requiring minimal U.S. intervention.

But this approach creates a dangerous paradox: the very allies Trump empowers to reduce American military burdens could drag the United States into the conflicts he’s promised to avoid.

This isn’t theoretical. During Trump’s first term, Netanyahu torpedoed the carefully planned ‘deal of the century’ at its unveiling. More recently, while Trump pursued delicate negotiations with Iran, Israel launched unilateral airstrikes that threatened to derail diplomacy entirely. Each unauthorized action by an empowered ally increases the risk of escalation that could force Trump’s hand—support the ally and risk war or abandon them and appear weak.

The moral hazard is clear. Allies who know Trump needs them for his regional strategy may calculate they can act with impunity, confident that Washington cannot afford to abandon them. This dynamic threatens Trump’s core promise to his base: that he would be the president who ended wars, not started them. A single miscalculation by Israel or Saudi Arabia could transform Trump from peacemaker to war president—destroying the very legacy he seeks to build.

The Middle East presents numerous scenarios where this nightmare could materialize. If Israel launches unauthorized strikes on Iranian nuclear facilities, Trump faces an impossible choice: support the attack and risk regional war or condemn it and fracture his coalition. If Saudi Arabia escalates against Iranian proxies, does America get pulled into another Gulf conflict? Each empowered ally represents a potential tripwire for the ‘forever war’ Trump has vowed to prevent.

Ultimately, Trump’s Middle East legacy will be judged not only by his management of adversaries but by his ability to constrain allies powerful enough to shatter his promise of peace. The bitter irony of his strategy is that in trying to avoid direct military involvement by strengthening regional partners, he may have created the very conditions that make such involvement inevitable. Whether he’s

remembered as the president who ended America's forever wars or inadvertently started new ones may depend less on his intentions than on the independent decisions of those he's empowered.

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