

TRUMP AND LATIN AMERICA: WHERE ARE THEY HEADING?

NIZAR MESSARI





Latin America was barely mentioned in US President Donald Trump's 2024 electoral campaign. Expectations were that President Trump would remain uninterested in Latin America, while Latin America would show pragmatism and restraint in its dealings with him. However, surprisingly, Latin American has been at the forefront of Trump's agenda since his re-election. Aside from migration, which was already prominent in Trump's electoral campaign, although as an internal issue, there is also the prominence of the Panama Canal on President Trump's agenda. As opposed to that, there is the relative relegation to a secondary position of one of the files expected to be at the forefront of President Trump's Latin American agenda: the Venezuelan crisis. In this paper, President Trump's relationship with Latin America is analyzed. An overview of the main issues—those widely expected to be central to President Trump's Latin American concerns and those that have become more recently present—is presented.

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Latin America was barely mentioned in US President Donald Trump's 2024 electoral campaign. Expectations were that President Trump would remain uninterested in Latin America, while Latin America would show pragmatism and restraint in its dealings with him (Hirst, 2024). However, surprisingly, Latin American has been at the forefront of Trump's agenda since his re-election, an aspect that has been confirmed since his inauguration on January 20. And while migration had a central place in the electoral campaign, with clear indications from Trump and his team that he would act on it from day one of his new mandate, nothing indicated that it would rise to become the first major international crisis between President Trump and a foreign leader.

As significant and surprising as some developments related to migration has been the prominence of the Panama Canal on President Trump's agenda. One consequence of these pre- and post-inauguration developments is the relative relegation to a secondary position of one of the files expected to be at the forefront of President Trump's Latin American agenda: the Venezuelan crisis.

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TWO PEOPLE

Developments related to two people indicate in what direction and how U.S. policy on Latin America might evolve during President Trump's second term: the President's fondness for Argentina's President, Javier Milei, and the appointment of Marco Rubio as Secretary of State.

Argentina's President, Javier Milei, is the new favorite world leader of President Trump (Godberg, 2024). Several direct and indirect signs indicated that status. In a phone call shortly after the U.S. presidential election, Trump explicitly told Milei: "you are my favorite President". Shortly after that, Milei was hosted at Trump's private residence at Mar-a-Lago and celebrated as a friend. Milei was also among the very few world leaders who were invited to Trump's inauguration on January 20.

Why is Trump so fond of Milei? For one, they share several similar characteristics: both came to the presidencies of their respective countries as outsiders; both defend conservative values; and both defend the capitalist economy. Neither respects the rules and customs of the political world. Milei has not refrained from name-calling, even insulting, other heads of state, notably Lula from Brazil, Petro from Colombia, and even Sanchez, Spain's prime minister. Although Trump has not spoken in similar terms about world leaders, he has expressed disdain for some states, which he has called out by name, and has shown an arrogant attitudes towards others.

Some of those shared positions and views were evident in a speech given by Milei in early December 2024 in Buenos Aires, to the annual conference of the Conservative Political Action Conference (CPAC), a global meeting of hard right-wing movements from Latin America, Europe, and the United States. In that address, President Milei underlined the importance of waging a cultural war against the left, a war that consists of defending conservative values, while rejecting and condemning some prominent values and objectives that he linked to the left, such as what he referred to as "gender ideology" and fighting

climate change. In contrast, he defended individualism, the importance of merit, and the virtues of the free market.

The consequences of the closeness between the two leaders are many. Trump and Milei are both keen on supporting their allies in the region, notably in Brazil where presidential elections will be held in 2026 and where they both hope to see the re-election—for a second but not-consecutive mandate—of Jair Bolsonaro. If that happens, Trump might succeed in aligning South America on his positions—from isolating China, to relying on and supporting US-based technologies in the new confrontation between the US and China—through democratic means, or to be more explicit, without resorting to military coups as happened in the 1960s and 1970s, when the U.S. supported military coups to prevent South America from falling in the arms of communism.

In regional forums, Trump can count on Milei not to remain isolated when voicing hard positions on issues such as migration and Venezuela. Also regionally, the eventual signing of a free trade agreement between Argentina and the U.S., as hoped for by Milei, will represent a blow to regional integration efforts, in particular under Mercosur, and could be another obstacle for the penetration of the region by non-continental commercial powerhouses such as China and the European Union. Finally, Milei hopes that the Trump administration will support his plea with the International Monetary Fund for substantial financial support, which Argentina badly and urgently needs to be able to continue the radical reforms started by the president.

The significance of the appointment of Marco Rubio as Secretary of State starts with the fact that he is generally considered to have hawkish views on world affairs, notably on both Russia and China, not to mention Venezuela, Cuba, and Nicaragua. One of the consequences of these views is that he will likely push for the reaffirmation of U.S. prevalence in South America, which would translate into marginalization of China.

It this context, there is talk in the region of a new corollary to the Monroe Doctrine. That doctrine, which was articulated over two centuries ago, called for the preservation of the Western Hemisphere from European influence. Translated into the contemporary context, the threat and the need for preservation is not so much from Europe, rather from China. Moreover, as opposed to many of his recent predecessors in the job, Rubio has clear views and a close understanding of Latin America and Latin American politics. A fluent Spanish speaker, in his relatively long Senate career (14 years, meaning two plus mandates, and re-elected twice), he has constantly expressed tough positions on Cuba, and on Venezuela under Hugo Chavez and then his successor Nicolas Maduro. He has also expressed clear concerns about China's growing presence and influence in Latin America. In other words, this is someone who knows the region, who has his own biases and prejudices about it, and who, as such, can have a clear impact on President Trump's policy in the region. The fact that he reserved his first international visit as Secretary of State to Latin American countries—instead of traditional Western U.S. allies, or the Middle East, or East Asia, like his predecessors—can be interpreted as both a sign of the importance of the Latin American agenda for President Trump (as Rubio's first visit was to Panama and all the other visits during the same trip were related in many ways to the migration agenda), and the relevance of the region for the newly appointed Secretary of State, for better or for worse.

TRUMP'S GENERAL AGENDA FOR LATIN AMERICA

From a more general perspective, there are certain expectations about how President Trump will deal with Latin American states.

The U.S. and Mexico are linked by a free trade agreement, the United States – Mexico – Canada Agreement (USMCA), which was negotiated by Trump during his first mandate, and which replaced NAFTA. Mexico is the U.S.'s most important trade partner, not only in Latin America but worldwide. Mexico represents 16% of total U.S. foreign trade, the equivalent of \$807 billion in 2023 (U.S. Department of State, 2025), ahead of Canada (14%), and China (11%) (U.S. News and World Report). The U.S. is even more important for the Mexican economy, as, in 2022, 78% of Mexico exports headed to the U.S. Moreover, 38.8 million individuals who either identify themselves as Mexicans or as of Mexican descent live in the U.S., the great majority being either U.S. citizens or legal residents in the U.S. Some are illegally in the U.S. and risk being expelled under the new Trump policies (Batalova, 2024).

Mexico was bracing itself for a difficult relationship with Trump, although it indicated that it was ready to handle that challenge. Mexican authorities argued that they were taken by surprise by Trump's first election, but after a bumpy start, have learned how to deal with him and his policies. But there is a significant difference between the first Trump presidency and the current one. Trump's first mandate coincided with the presidency of Andrés Manuel López Obrador (AMLO), who came from the left, but who incarnated the aura of a strong populist leader. Those characteristics helped him build a personal relationship with Trump, one that was—broadly speaking—similar to the relationship Trump established with other populist leaders around the world, including Turkey's Islamist leader, Recep Tayyip Erdogan, and Hungary's right-wing populist prime minister, Viktor Orbán.

The challenge now is that AMLO is no longer Mexico's president. His successor, Claudia Sheinbaum, is unlikely to strike the same chords AMLO struck with Trump; not only is she a left winger like her predecessor and mentor, AMLO, but she is a scientist who holds a doctoral degree in biology, which means that she is more about reason than about emotions or feelings, and that she believes in science. It is true that she passed the first test, after Trump threatened to impose a unilateral 25% increase on tariffs on all Mexican imports. She managed to avoid, or at least to postpone, this through different negotiation channels Mexico opened with the Trump administration, and notably after a long phone conversation between her and Trump (Wagner and Villegas, 2025). The crisis and the negotiations resulted in concessions and commitments made by Mexico, but she also made clear that the U.S. had its share of responsibility, and that the heavy and sophisticated weapons used by drug gangs in Mexico come from the U.S., through which she meant that she expected the U.S. also to do its part and control its side of the border.

The question about a U.S.— Mexican clash under Trump was not about whether it would take place but when. Mexican authorities were expecting it, and were prepared for it, and so was Mexican public opinion. In his first day in office, President Trump signed an order that called Mexican drug cartels terrorist organizations, a move that was long opposed by Mexico because of the heightened (although very remote) risk—among others—of U.S. military intervention in Mexico. Mexican governments also used to argue that Mexican drug cartels aim at financial profit and have no political objectives, distinguishing them from terrorist organizations. But even before that, signs of tensions were mounting.

Indeed, right after his electoral victory, Trump used language that became more explicitly threatening towards Mexico, repeatedly threatening to impose high tariffs on Mexican imports because of the country's lack of cooperation on migration, despite the existence of USMCA and the interdependent nature of the economies of both countries. Analysts also noticed the unorthodox decision to use tariffs to put pressure on an ally, and to use tariffs to obtain concessions on an issue unrelated to trade. Those surprises notwithstanding, Trump announced the tariffs on Mexico, Canada, and China on January 31, 2025, and established February 4 as the start date for their enforcement. As a result, and while Mexico refrained from grandstanding and confrontational statements, preferring a discrete but firm commitment to protect the national interest, intense negotiations started between both countries. These culminated in a phone call between the two heads of state, who agreed to postpone the imposition of tariffs by a month, giving time to Mexico to adopt concrete actions that would reduce the flow of migrants to the U.S., and ultimately avoid the tariffs altogether.

There is even speculation that President Trump fabricated a crisis with Mexico about migration, but his real objective was to obtain concessions from Mexico in relation to the unfavorable trade balance between the U.S. and Mexico. According to this reasoning, Trump was aware of the efforts Mexico was making to control migrant movements on its border with the U.S., as well as of Mexico's vulnerability in its terms of trade with the U.S. He used the issue to obtain trade concessions from Mexico (Kanno-Youngs and Stevis-Gridneff, 2025). Whether or not this was the case, the episode made clear that Trump will not hesitate in using all kinds of pressure available to him to reach his objectives.

President Scheinbaum, meanwhile, was so impressive and reassuring that shortly after those events she received a standing ovation from Mexican business leaders, who are traditionally not her allies. They were forced to acknowledge her achievement and admire her calm, despite the high sensitivity of the circumstances. In any case, the crisis confirmed to the Mexican President and her staff that the four next years will see constant pressure and tension from their northern neighbor.

Brazil, the largest Latin American economy, has been conspicuously absent from Trump's Latin American agenda, apart from some mentions of Jair Bolsonaro, the previous president. For the time being, Brazil is content with that absence. It should be noted that under the Lula and Biden presidencies, Brazil and the U.S. intensified their relationship without turning it stellar: both countries took different positions on the Middle East, and Brazil's close relationship with China was mildly appreciated by the Biden administration (Hirst, 2024).

With the Trump presidency, US relations with Brazil are going to get even cooler. Politically, the close relationship Trump has with two nemeses of Brazil's President Lula—Argentina's President Milei and Brazil's former president, Jair Bolsonaro—do not seem to augur well for Lula's Brazil and its relationship with the U.S. Since Milei and Lula follow almost opposite economic and financial policies, Argentina is bound to become closer to the U.S. under President Trump, which Brazil sees as being done at the expense of Mercosur and stronger intra-Latin American links.

President Trump's entourage, meanwhile, sees many similarities between Trump and Bolsonaro. Bolsonaro and his entourage continue to repeat that the 2020 U.S. presidential elections were stolen from Trump, while Trump and his entourage are convinced—without proof—that the Brazilian elections of 2022 were stolen from Bolsonaro. This double complicity (Trump/Milei and Trump/Bolsonaro) forces the Brazilian government to adopt a

low profile and avoid antagonizing the new U.S. administration. Brazilian diplomats repeat that Brazil will defend its interests, but that it will do so quietly. The imposition of 25% tariffs on steel and aluminum, which were not directed at Brazil specifically, and the quiet and calm reaction of the Brazilian government show how Brazil will deal with mercurial changes imposed by the Trump administration.

A further complicating factor for Brazil's relationship with the U.S. under Trump is the recent confrontation between its highest court and Elon Musk, who is prominent in the Trump administration. Between August and September 2024, Minister Alexandre de Moraes of the Brazilian Superior Federal Tribunal, fined X (former Twitter) heavily for breaching Brazilian legislation. Musk initially refused to pay the fine and entered into an insulting spat with the judge, but when the judge requested Brazilian authorities to suspend X in the country, Musk ended up paying the fine and reestablishing X in Brazil. Although there is no doubt that Musk has more urgent tasks to deal with, both in his new U.S. government role and in his businesses, there is little doubt that the animosity between these two highly influential individuals in their own countries could spark unexpected—and unnecessary—clashes between them.

THE INEVITABLE CLASH ON MIGRATION

Migration and the threat migrants represent to the U.S. were key elements of Trump's election campaign. He already portrayed migrants as a threat during his first term, but the fact that the Biden administration seemed to be initially inclined to be more open to migrants and migration became an incentive for Trump and his allies and surrogates to make migration central in the 2024 presidential campaign. Trump committed to conduct massive deportations of illegal migrants back to their countries of origin.

Such mass deportations are not a new phenomenon; U.S. governments have been conducting them for many years. For instance, a protocol has existed between the U.S. and Brazil since 2021 that regulates the manner in which Brazilian detainees are sent home (Folha de São Paulo, 2025). It includes details on handcuffing and shackling with chains. In the first two weeks of the Trump administration, daily averages of what the U.S. refers to as criminal deportations were similar to those during the Obama administration, although the media blitz around it made it sound more intense and aggressive under Trump (Ward and Piper, 2025). This is one reason for the muted and subdued reaction of Latin American governments to these extraditions. Of course, the expectation is that those daily averages will increase steadily, although Trump will face serious financial hurdles to achieve a substantial rate of deportations (Gamboa, 2025). Trump's administration is also adding other restrictive measures against migrants and against asylum seekers and refugees.

Two episodes illustrate the central importance of migration for Trump's political agenda. First, migration was the cause of the first international crisis of his second mandate. Second, migration was the opportunity for the first international negotiation of this new mandate. The crisis started when the Colombian President, Gustavo Petro, denied access to Colombia's national air space to U.S. military planes carrying handcuffed and shackled Colombian migrants. When Trump threatened to impose tariffs on Colombian exports to the U.S. if Colombia did not take back its citizens, Petro threatened to retaliate with a similar tariff hike on U.S. exports to Colombia. Subsequently, however, the Colombian president backed down and accepted the return of Colombian migrants, even under those inhumane conditions. That outcome allowed Trump to affirm that the U.S. was going to be respected

again (Stewart and Griffin, 2025). Another consequence of that standoff between the Colombian and the U.S. presidents was that Petro's populist and radical reply gave Trump an opportunity to provide evidence that he was ready to use tariffs on issues unrelated to trade, and to reach his objectives at any price. The other migration related episode was the above-mentioned crisis between Mexico and the U.S.

A FEW UNEXPECTED DEVELOPMENTS

One unexpected issue has held an awkwardly important place for Trump: his unilateral decision to change the name of the Gulf of Mexico to the Gulf of America. Trump announced that decision before his inauguration and has sought to enforce it through an executive order. States in the region, other international partners, and international organizations are unlikely to accept that unilateral change, but the Google app and other map apps used in the U.S. have started using it, and when those apps are accessed from other countries apart from Mexico, both names appear. Beyond the risk of unnecessary friction and tension, the name-change desired by Trump might not have a substantial impact, but it underlines Trump's intention of not respecting diplomatic traditions and of imposing his views, even on relatively trivial matters.

Another surprising, but certainly more significant development, was the place the Panama Canal ended up holding in the agenda of the new U.S. President. In the same press conference at which Trump announced the name change of the Gulf of Mexico, he also complained about the growing influence of China on the Panama Canal, made false allegations that China controls the canal, and that it has a military presence there, leading Trump to identify that influence as a national security threat. Trump also stated his intention that the U.S. should take back the control of the canal. He also complained about the hefty fares paid by U.S. ships passing through the canal. Later, he added that he would be ready to use all means to take the control of the canal back, including military means.

Although Mr. Trump was quickly rebuffed by the President of Panama, José Raúl Mulin, who declared that Panama had no intention of negotiating its sovereignty over the canal, the canal became the source of a growing crisis. Because of the crisis, the first international visit of the new U.S. Secretary of State, Marco Rubio, was to Panama, with the canal as a central item. Although Rubio took an aggressive posture in his contacts with his counterparts in Panama, and although the threat of the U.S. retaking control of the canal remains, it is noteworthy that Rubio's visit had tangible results. Not only did Panama announce it would withdraw from China's Belt & Road Initiative (BRI), but President Mulin also confirmed the existence of a previously planned internal audit of CK Hutchinson, the company managing the canal. The audit will be an opportunity to evaluate the concession made to the company to operate the canal, opening up the possibility that the agreement with that company could be rescinded to satisfy Trump and avoid escalation of the crisis. Rubio also secured guarantees that Panama would cooperate with the U.S. on migration, by receiving criminal migrants expelled from the US, and by controlling more closely the Darien Gap, a crucial and dangerous trail that migrants take through Panama on their way to North America (Crowley and Correal, 2025).

^{1.} President Trump's accusation that China controls the Panama Canal is false. In reality, a Hong Kong-based firm, CK Hutchinson manages the canal—under Panamanian sovereignty—and that fact was used by Trump to allege that China controls the canal. If one adds that Panama recently joined China's Belt and Road Initiative, it becomes evident that the growing proximity between Panama and China looked disturbing to the U.S.

A final surprising development concerns Venezuela. Rubio has been a staunch opponent of the regime of President Maduro, and during the previous Trump term, the U.S. supported and recognized the authority of Juan Guaidó, who claimed the interim presidency of his country on the basis of the corrupt nature of the previous presidential elections. But so far, at least for the time being, the new Trump administration has been silent on Venezuela and has not reacted to the inauguration of Maduro for a new term only a few days before the inauguration of Trump himself.

Furthermore, Trump dispatched Richard Grenell, his envoy for special missions, to Caracas to negotiate a deal on Venezuela accepting back its citizens expelled by the U.S. That meeting went smoothly without any major clashes. Grenell also obtained the release of six U.S. prisoners in Venezuela, indicating a willingness on the part of Maduro and his government to make deals with Trump and his team. Is the fact that Venezuela is a relatively geographically close oil producer a factor in this calmer-than-expected relationship between the newly inaugurated administrations in both countries? That might be the case. Maduro's cooperation on the return of Venezuelan migrants to his country has likely lowered the importance for Trump of confronting the Maduro administration. However, hasty conclusions should be avoided as Rubio will be sure, despite his numerous concerns, to keep Venezuela under pressure (Jaramillo and Lau, 2025).

CONSEQUENCES FOR MOROCCO

The main consequences of these developments for Morocco are the lessons that can be learned from the different clashes the Trump administration has had with Latin American countries. In relation to Colombia, the main lesson is that it is a losing card to confront Trump head on, because he will not hesitate to use all the power and all the tools available to him to obtain what he wants.

The lesson learned from the clash with Mexico is that in case of a crisis provoked by Trump, the best action is to take advantage of his tendency to be transactional. This should translate into analyzing the issue at hand carefully, and preparing a counter proposal based on which a negotiation with him can be started. When negotiations begin, concessions can be offered, and in the process, Trump's maximal initial demands can become more palatable, more acceptable, and more reasonable. Concessions can also be obtained from him. In sum, it is essential to avoid confrontation or to exhibit positions of principle, and instead to engage in discreet negotiations that avoid the spotlight and media exposure.

CONCLUSION

The first few moves of President Trump's second term indicate that he is ready to subvert the international system and to shake deeply-anchored U.S. foreign-policy traditions. He is threatening allies, including NATO allies. He has floated territorial expansion plans, including against key allies such as Canada and Denmark, and he does not hesitate in imposing pain on his allies. He has also shown that he is ready to use or threaten to use American might and power in order to reach his objectives. He has also clearly shown his readiness to use tariffs to extract concessions and reach his goals on issues unrelated to trade. Nevertheless, he has affirmed on several occasions—including in his inaugural speech—that he does not want to involve the U.S. in foreign wars, which is coherent with his long-standing position of refusing to consider the U.S. as the gendarme of the world.

President Trump seems also to have a wide agenda in his relations with the rest of the world, but very few specific objectives. He seems to be willing to launch grandiose ideas and projects, threatening his opponents and adversaries and even his partners and allies, and trying to make the best of each situation. His strategy is to ask, maybe even demand, as much as possible, exercise all kinds of possible and/or available pressure, and wait for a counter offer, based on which a negotiation can start. In this sense, the transactional President Trump of the first mandate is still there, but this time, at least so far, he is far less restrained and far more active than in his previous mandate.

Are we then in presence of a new corollary of the Monroe Doctrine, or is this the corollary of the Monroe Doctrine established by President Theodore Roosvelt, which took an expansionist interpretation of the Monroe Doctrine²? The latter seems to be the case, as the discourse regarding the Panama Canal seems to indicate at this early stage of the Trump administration.

Another alternative interpretation would be that this a corollary to Teddy Roosvelt's foreign policy in South America, which many refer to as the 'speak softly and carry a big stick' policy. Indeed, Trump seems to have added his own corollary to Teddy Roosvelt's Latin American foreign policy, since Trump seems inclined, at least for now, to have given up on the 'speak softly' part of Teddy Roosvelt's policy, while focusing on the 'carry a big stick' part. Or is it all transactional, without any grandiose doctrine, and maximal threats are used to extract maximum concessions? Only the future will show which of these alternatives is correct, or if either is correct.

^{2.} The Monroe Doctrine was articulated by U.S. President Monroe in 1823, when he declared the Western Hemisphere as out of reach for European powers, and that the U.S. would not tolerate any interference on the continent from its former colonial powers. Less than a century later, another U.S. president, Teddy Roosvelt, added his corollary to the Monroe Doctrine by stating that the U.S. would intervene by force to protect its interests, and to stop European interference in the Western hemisphere.

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ABOUT THE AUTHOR



NIZAR MESSARI

Nizar Messari is Associate Professor at Al Akhawayn University in Ifrane (AUI), Morocco. He served as Dean of the School of Humanities and Social Sciences, and then as Vice President for Academic Affairs at the same university. He was Rice Scholar at Yale University's MacMillan Center during the academic year 2021-22. Before returning to Morocco in January 2010, he was Assistant Professor at PUC-Rio, Brazil. He has published in journals such as Security Dialogue, International Studies Perspective, Refugee Survey Quarterly, The Journal of North African Studies, Cultures & Conflits (in French), Contexto Internacional and Politica Externa (both in Portuguese) as well as in edited volumes in English, Portuguese and French. He is the co-author with João Pontes Noqueira of Teoria das Relações Internacionais – Correntes e Debates (Rio de Janeiro: Elsevier/Campus, 2005). He is finalizing a book on security studies from a southern and critical perspective, with a focus on the so-called Arab world.

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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.

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Policy Center for the New South

Rabat Campus of Mohammed VI Polytechnic University, Rocade Rabat Salé - 11103

Email: contact@policycenter.ma Phone: +212 (0) 537 54 04 04 Fax: +212(0)537713154













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