

An Ally's Guide to Understanding Trump

[Wall Street Journal](#), by Brian Lee Crowley, March 21, 2026



Canadians demonstrate in Ottawa, March 9, 2025.

President Trump this week complained that America's allies hadn't stepped up to help break the Iranian blockade of the Strait of Hormuz. "Some are very enthusiastic about it, and some aren't," he said on Monday. "Some are countries that we've helped for many, many years. We've protected them from horrible outside sources, and they weren't that enthusiastic. And the level of enthusiasm matters to me."

Some U.S. allies—including my country, Canada—have enthusiastically antagonized Mr. Trump's America. In last April's Canadian federal election, Prime Minister Mark Carney's rallying cry was "Elbows Up, Canada"—a hockey term that means an aggressive style of play. That resonated with voters, who handed Mr. Carney's Liberals a victory in a contest they had long been expected to lose.

To understand how Mr. Trump is reshaping Western alliances and why the Canadian

attitude is a mistake, it's worth stepping back and looking at the broader historical context. We are in the twilight of the postwar era, which began with the world divided into two camps—the democratic, freedom loving West and the Soviet bloc, which sought to expand by subversion and intimidation.

In 1945 America was wealthy and powerful, Europe impoverished and weak. The U.S. accounted for half the world's gross domestic product, while much of the Continent was a smoking ruin. Europe's recovery might not have been possible without U.S. generosity. The Marshall Plan used America's wealth to rebuild its defeated former enemies. The U.S. opened its markets to imported goods, often on much more favorable terms than American exports got in return. And America took on the responsibility of defending the West from communism. In 1950, the North Atlantic Treaty Organization comprised a dozen countries, and the U.S. spent more than twice as much on defense as all the other members combined.

America helped make Europe wealthy again. The U.S. share of global GDP is down to 26%, while the European Union produces a respectable 14%. The NATO alliance has grown to 32 nations, but

America still accounts for two-thirds of their total defense spending. U.S. allies grew handsomely—and, freed from the need to defend themselves from external threats, they spent much of their newfound wealth expanding their welfare states.

Europe and Canada kept relying on American generosity long after the justification for it became obsolete. The Soviet Union collapsed in 1991. Russia's share of global GDP is a mere 3.6%, while China has climbed to nearly 20% and is America's chief ideological, economic and military competitor.

The failure to rebalance the costs and benefits of the Western alliance created an accident waiting to happen. Presidents going back decades have asked NATO allies to bear more of the defense burden. The difference is that America no longer asks nicely. That Europeans and Canadians resent being spoken to in this way is self-indulgent on our part. Mr. Trump seems to revel in giving offense, but he isn't wrong in returning to America's allies some of the contempt and condescension to which we have subjected America.

His offensive style is part of his strategy. "Sometimes it pays to be a little wild," he wrote in "The Art of the Deal." He relies on negotiating partners' taking his behavior at face value, losing their nerve and getting emotional. Driven to distraction by

his outrageous statements, they lose the capacity to focus on their own interests. Canada has repeatedly fallen into that trap.

Mr. Trump has at least three priorities. If you follow their logic and make allowances for his bombastic style, there is little that can't be understood about Mr. Trump and his actions. First, America must be the Top Nation, not merely "the dominant member of the Western alliance." China is the only serious rival and the main preoccupation in the White House.

Second, allies and friends have taken America for granted, with the collusion of past presidents and other Washington insiders. From illegal immigration and inadequate defense spending to organized crime and cozying up to China, Mr. Trump and his circle are determined that any accommodations granted to other countries be matched by concessions to the U.S. of at least equivalent value.

Third, at the forefront of Mr. Trump's political priorities are the Americans who have paid the price for decades of sacrificing the country's interests in the name of the "rules based" postwar order. These are the people immortalized in Vice President JD Vance's memoir, "Hillbilly Elegy," and derided by Democrats as "deplorables" who "cling to guns or religion." They regard Mr. Trump as their

tribune, and he will move heaven and earth not to disappoint them.

With them in mind, he wants to bring about an American economic renaissance, so that Americans who want work are able to get it and the despair that has fueled the fentanyl scourge is replaced with hope and optimism. That goal informs his tariff policy, however counterproductive it may be. Even more central to his economic agenda is the free flow of energy—the lifeblood of the economy and a source of growth that has been obstructed by a green ideology propagated by the elites Mr. Trump rejects.

To build on this foundational analysis of Mr. Trump's worldview, consider his policies toward Iran, Mexico and Greenland.

Iran illustrates how different he is from the old “neocons,” who sought to replace dictatorial regimes with democratic ones. Mr. Trump, by contrast, starts by appealing to the self-interest of antagonistic leaders, as he has also done with Venezuela and Cuba and more tentatively with Russia and China. He offers them a chance to make a deal that leaves the regime in place and opens the door to American trade and investment in exchange for dropping hostility to America and ending policies that damage American interests. His appeal amounts to saying: Let's get rich together.

Many commentators see his practice of making nice with bad regimes as weakness. I venture to say that Nicolás Maduro disagrees. So would Ali Khamenei if he could.

As Daniel McCarthy has written, in Mr. Trump's second term he has developed a new activist ideology marked by a willingness to use military force to compel adversaries into making deals. His aim is to bring about their submission to America's interests, not to its ideals. His offers to make nice with nasty regimes carry the implied threat that he can engineer the replacement of leaders who resist with more compliant ones.

Lurking in the background is Mr. Trump's long-term aim of weakening China and cementing America's status as Top Nation. China's greatest allies have been Russia, Venezuela, Cuba and Iran. Not only are these regimes either decapitated or on notice; they are also losing their ability to supply heavily discounted oil, and it is becoming clear to them that Beijing's patronage is no guarantee of regime survival. The clear superiority of American arms against forces wielding Russian and Chinese weapons has severely undermined Beijing's prestige and authority.

As for Mexico, the U.S. recently opened negotiations on the renewal of the free-trade arrangement between the two countries. Pointedly, America hasn't

opened formal talks with Canada. Why? Because Mexico has learned not to get distracted by Mr. Trump's showmanship, threats and disrespect. Its leaders have instead focused on its national interests and shown respect and even deference to Mr. Trump. Mexico's cooperation in challenging drug cartels and even taking out one of their principal leaders was a price Washington exacted and Mexico willingly paid.

Under previous U.S. administrations, Mexico's attitude toward the U.S. was far more elbows-up than Canada's. But Canada has swallowed the Trump shtick and fallen into the trap of being offended and outraged by his negotiating strategy—never mind that we need America far more than it needs us. For the U.S., Canada is nice to have. For us, the relationship is existential, and no trade mission to China or fanciful talk of EU membership will change that.

Economists have concluded that about 80% of trade is explained by proximity. All the countries with which the Canadian government is desperately trying to expand trade are thousands of miles away. Moreover, the bulk of trade across the Canada-U.S. border is intrafirm trade, in which different parts of the same company trade with each other. These trading relationships are quite indifferent to any trade-opening efforts with other parts of the world.

Yet even though our two countries are inextricably bound together, and despite the existential nature of Canada's reliance on the U.S. market, we have maneuvered ourselves into a self-defeating elbows-up mentality. When we are offered an opportunity to do something that Mr. Trump would really value—like backing his Iran campaign by sending a frigate or even simply offering unequivocal rhetorical support—we can't deliver and end up prevaricating all over the place.

Even if we get our act together on Iran, we have already confirmed Mr. Trump's view that we are a weak and unreliable ally that has little in the way of hard military power and that has squandered its energy potential over a decade of climate obsession. We reap what we have sown.

In the case of Greenland, the crucial point isn't that Mr. Trump offended allies or displayed historical ignorance, although he did. It is that what he was willing to settle for was far less than what he initially demanded. He neither invaded nor annexed Greenland. He has more or less carte blanche to use the Danish territory for security purposes and simply stopped talking about it. He doesn't give a damn about the hurt feelings on the other side, and NATO allies now tread even more gingerly around the White House, which suits him fine.

Canada has a lot to offer America—if only we had a government clever enough to do so. We could make it clear to Mr. Trump that we want to work with him to make North America the world's dominant energy power. That would relieve our partners in the Indo-Pacific region from reliance on dangerously unstable and vulnerable sources in the Middle East. It would reduce Russia's ability to finance mischief in Europe. It would make possible a massive shift from coal to clean natural gas in Asia.

If the U.S. had to supply its own oil needs entirely from domestic production instead of getting 4 million barrels a day from Canada, it would have to cut its exports and their geostrategic weight nearly in half. At a time when the fracking revolution's increase in U.S. oil supplies may be tapering off, the Canadian oil sands' exceptional longevity would go a long way to fulfilling Mr. Trump's dream of world energy dominance.

We could add to that an offer of a comprehensive bargain codifying Canada's commitment to resolve the full range of issues that plague the Canada-U.S. relationship: compliance with our NATO commitments, becoming the indispensable partner in defending the Arctic, tightening our border security, ending Canada's status as a money-laundering haven for organized crime, and ending our toleration of terrorist

movements and nefarious activities by authoritarian states on our territory.

Canada is both blessed and cursed by its proximity to America, but we have little practical alternative to making the best of our relationship. Donald Trump's America isn't isolationist—on the contrary, it seeks escape from reliance on unwieldy alliances so that it can act unencumbered on the world stage, with the support of willing allies when possible. If Canada establishes itself as a reliable and committed partner and refuses to be bamboozled by the president's bombast, it could set an example for the rest of the free world on how to deal with America and Mr. Trump.

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