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EXECUTIVE SUMMARY

In his first term, President Donald Trump tried to overturn key principles of American foreign policy since the Second World War — alliances, free trade, and support for democracy and human rights. His effort was blunted by members of his own administration and Congress. But we are now at the point of no return.

If Trump is re-elected, he will be vindicated and emboldened. He will surround himself with loyalists and will act without constraint. The world may be irrevocably altered — alliances may come to an end, the global economy could close, and democracy could go into rapid retreat. On the other hand, if Biden wins, the US-led international order will be granted a reprieve. The question for Biden is not whether he will be different from Trump. That much is obvious. It is whether he will differ from President Barack Obama.

To answer that question, this paper studies the intra-centrist debate within the Democratic Party’s foreign policy establishment — between restorationists (those who would continue Obama’s approach) and reformers (who would challenge key elements of it) — and how that plays out on China, foreign economic policy, the Middle East, and democracy. The first half of a Biden term is likely to be defined by a struggle between these two worldviews.
INTRODUCTION

The election of 2016 plunged US foreign policy into its greatest crisis since the period immediately preceding America’s entry into the Second World War, when an internationalist president grappled with the original America First movement and an isolationist public over whether the United States should act to prevent a Nazi victory in Europe. In the current crisis, an America First president has rejected the fundamental principles of US leadership since the Second World War, including the US alliance system in Europe and Asia, free trade and an open international economy, and support for democracy and human rights. He has sought to radically change US foreign policy in line with his views over the objections of most of his national security team and the institutions of the state, including the Pentagon, the State Department, the US intelligence community, the US Congress, and the American public, which polls show has become even more supportive of alliances, free trade, and democracy during his term.¹

The president and internationalists within his own administration and Congress have fought to a stalemate so far. On one hand, US alliances remain intact, US forces remain forward positioned, and the official foreign policy doctrine of the United States is oriented around great power competition. On the other hand, the president has removed many of the constraints on his freedom of action, he is extremely critical of US allies, and the United States has abandoned any pretence to leadership in fighting the coronavirus pandemic, one of the greatest international crises of the past fifty years. Several former senior officials in the Trump administration believe that he could strike a devastating blow against internationalists in a second term, effectively dissolving US alliances and bringing the post-Second World War order to a formal end. This is what makes the election of 2020 even more important than 2016. It is the point of no return. The immune system of the postwar US national security state has been dramatically weakened. If the American people confirm their support for an America First president by giving Trump a second term, this system will break and be replaced by something else. Moreover, the international order is especially fragile, reeling from the COVID-19 pandemic and accompanying economic recession, along with continued uncertainty about America’s role in the world. If Trump is re-elected, the rest of the world will conclude that the United States has fundamentally changed and the period of postwar leadership has ended.²
Of course, opinion polls consistently show that President Donald Trump is likely to lose. If Democratic nominee and former vice president Joe Biden becomes president, the postwar US order will be granted a last-minute reprieve. Biden is an enthusiastic advocate of US alliances and American leadership. Although the questions surrounding a Biden administration will not be existential, as they would be in a second Trump term, they would nevertheless be of great consequence: will the United States be able to reconstitute the international order? Will Biden continue down the path of great power competition with China and Russia? Will Biden take advantage of the COVID-19 crisis to introduce major reforms to the international order, and what will the content of those reforms be? Most important of all, can Biden set the stage for a renewal of American leadership, or will history remember his administration as a brief and futile last gasp of the foreign policy establishment that was preceded and succeeded by a more durable nationalist alternative?

For some elections, it has been possible to argue that the two candidates would pursue different versions of the same foreign policy if elected. This is not so for 2020. The choice between Trump and Biden is so stark and consequential that the two outcomes are unlikely to bear any resemblance to each other. Therefore, this paper analyses each of the candidates on their own terms to narrow down the range of possibilities for their foreign policy if they were to be elected president. There are two principal findings:

There is no reason to believe that President Trump will follow in the tradition of Republican presidents like George W Bush and Ronald
Reagan and pursue a more multilateral and cooperative strategy in his second term. The best guide to President Trump’s foreign policy is to understand his psychology and disposition, not to study his administration’s formal policy documents and actions. In his first term, Trump systematically removed the constraints on his freedom of action and installed ultra-loyalists who would indulge his whims and preferences. This will continue and accelerate in a second term because he would view an electoral victory as an utter vindication of his approach. He will likely pursue his instincts on alliances, trade, autocrats, and the grandeur of his own role with vigour and few constraints. This could result in dramatic departures from America’s traditional postwar policy, including the effective dissolution of the North Atlantic Treaty Organization (NATO) and other alliances. His administration will continue to show more interest in signalling its conservative bona fides than in building an international coalition to advance US interests.

The question with Biden is not how he is different from Trump. That much is obvious. It is whether he will be different from President Barack Obama. Will his administration be a third Obama term, or will it be distinctive in its own right? The most significant and overlooked piece of evidence in answering this question is a series of substantive debates between centrists in the Democratic Party, which continues an earlier debate inside the Obama administration. This has taken place in parallel with the progressive-centrist debate, which received considerably more attention in the primary campaign. The intra-centrist debate has two schools — a restorationist group that holds to the Obama worldview, and a reform group that questions some of the basic assumptions of that administration, on China, globalisation, the Middle East, and the long-term future of the liberal international order. The first half of a Biden term is likely to be defined by a struggle between these two worldviews. The coronavirus crisis will cast a shadow over all of this and raise fundamental questions about the future of the global economy, cooperation with China, and the future of international institutions. The debate on these issues has barely begun.

If there is a unifying theme among these findings, it is that US foreign policy is in a crisis that is coming to a boiling point.
I: PREDICTING TRUMP’S SECOND TERM

To understand what a second Trump term would look like, it is necessary to understand the trajectory of his first term, which can be best thought of as occurring in four phases. This is not intended as just a history, but as analysis of where things are likely heading. Trump has already gone through several stages, has learned several lessons, and will, from his point of view, absorb and act on those in a second term.

Phase 1: The Axis of Adults

Trump has a set of visceral beliefs about the world that dates back to the mid-1980s. He is sceptical of America’s alliances, feels that free trade is bad for the United States, and has a fondness for authoritarian strongmen. These are the themes he has returned to again and again over a thirty year period. When he is stuck for something to say, or just riffing in front of a rally, this is where he finds his voice. However, when he unexpectedly won the presidency in 2016, he had a problem. He had paid no attention to how to convert these visceral beliefs into policy and there were very few foreign policy experts who believed what he believed, certainly none who were confirmable by the Senate. He was somewhat insecure. He had no intention of bringing back the so-called Never Trumpers, but he did need experience. So he turned to former generals and business leaders, men such as James Mattis, John Kelly, H R McMaster (after a brief and catastrophic couple of weeks with Michael Flynn), Rex Tillerson, and Gary Cohn.

Trump liked the idea of military leaders and CEOs, all deferential to him. But the ‘axis of adults’, as they were quickly labelled, were traditionalists. For the most part, they believed in alliances, democracy, and free trade. They saw their role as placing a check on the president, not satisfying his whims and desires. They sought to constrain his choices and box him in to a ‘normal’ foreign policy. When he rebelled — for instance, when he refused to endorse Article 5 in a speech at the new NATO headquarters — they prevailed on him to reverse course. The first six months were chaotic — and the ‘adults’, particularly Tillerson, deserve their fair share of the blame — but in retrospect those months were the most normal of Trump’s presidency in that there was a process of sorts and the agencies of the US government sought continuity with the postwar foreign policy tradition.
Trump was never going to accept a second fiddle role in his own administration and he grew resentful at being managed. As John Bolton notes in his book *The Room Where It Happened*, the adults were “so transparently self-serving and so publicly dismissive of many of Trump’s very clear goals (whether worthy or unworthy) that they fed Trump’s already-suspicious mindset”. He “second-guessed people’s motives, saw conspiracies behind rocks, and remained stunningly uninformed on how to run the White House”. A breaking point was reached on 17 July 2017 during an interagency meeting to decide whether to recertify Iran’s compliance with the Joint Comprehensive Plan of Action, an assessment that the United States was required to make every six months. Trump’s national security team presented him with three options, all of which involved staying in the deal. Trump was furious — he approved a recertification, but promised that it would be the last one. By the next deadline, he wanted the option to leave. A marker had been set. A second was laid down days later, at a meeting senior officials described as a “shitshow”, when McMaster, then national security adviser, spent considerable political capital to box the president into keeping troops in Afghanistan. Again Trump fumed. He would cave several weeks later and agree to keep troops there, but from that point forwards, he was determined to rid himself of these meddlesome priests of national security and go his own way.
Throughout the northern autumn of 2017, rumours swirled of palace intrigue and upheaval. Trump began to realise that as president he could do things even if his team disagreed. In early 2018, Trump forced out the axis of adults, replacing Tillerson, Cohn, and McMaster with individuals who placed loyalty to the president over their own independent judgment — Mike Pompeo, John Bolton, and Larry Kudlow. This ushered in the second phase of Trump’s presidency — the age of action.

Phase 2: The Age of Action

Trump now acted more freely, pursuing his instincts even when they conflicted with the advice of his officials. He announced talks with Kim Jong-un without consulting his cabinet. He moved the US embassy in Israel to Jerusalem. He pulled out of the Iran nuclear deal. He tweeted his response to Bashar al-Assad’s use of chemical weapons before talking with his national security team. He imposed tariffs on steel and aluminum. He held a summit meeting with Russian President Vladimir Putin in Helsinki and publicly accepted the Russian president’s word on election interference over the unanimous views of the US intelligence community. He started a trade war with China. He mused about buying Greenland. He even ordered a military parade over the objections of the Pentagon. Bolton effectively abolished the interagency process through which the Departments of Defense and State and other entities have formal seats at the table where decisions are made. The removal of constraints was complete when Mattis resigned in December 2018 following Trump’s pledge to withdraw troops from Syria.
For Trump, the age of action was exhilarating. It fulfilled his expectations of what it meant to be president. It was free-wheeling. He still gave orders that were not always followed, but less so than before, and none of his officials publicly defied him. On the rare occasion where a member of his national security team sought to undermine his policy, they were marginalised and excluded. For example, shortly after Bolton became national security adviser, he said in an interview that North Korea should follow the Libya model for denuclearisation. It was a remark intended to torpedo the US–North Korea talks before they got going. Trump took a while to notice, but when he did, he was furious. Bolton was subsequently frozen out of all policymaking on North Korea, and Trump was clear that if it were to happen again, Bolton would be out.

But it could not last forever. Trump's actions were always focused on the short term and what served his political interest or aligned with his long-standing instincts. They were frequently riven with contradictions. Things could change from one day to the next. There was never an end goal or a strategy for how to get there. He was often indecisive and insecure and could be swayed by pundits on cable news. The United States is a very powerful country. It can make mistakes for some time without incurring the costs that normal powers would experience. But it cannot do so indefinitely. This brought us to phase three.

**Phase 3: The Age of Reckoning**

The age of reckoning finally arrived on 21 June 2019, when Trump ordered air strikes on Iran in retaliation for its drone attack on a Saudi airfield, and then changed his mind. At this moment, the contradictions in his Iran policy were laid bare. Trump wanted to shred the Iran nuclear deal and impose maximum pressure on the Iranian regime. He also wanted to avoid embroiling America in a new conflict in the Middle East. He could not have both. But for more than a year, he pretended as if these two goals were not in conflict. Perhaps he believed the Iranians would surrender without a fight. Or that they would come to the negotiating table from a position of weakness. Or perhaps he did not think about the endgame at all until he had to. When push came to shove, he decided he did not want a new war in the Middle East. His hawkish team saw the climb down as humiliating.
The same dynamic played itself out with China. The administration was pursuing a tough and competitive strategy towards Beijing, but Trump was primarily motivated by trade and economics. He never bought into the idea of a full spectrum great power competition — the centrepiece of his National Security Strategy and National Defense Strategy. He did not care about regional equilibriums or human rights (according to Bolton, he twice told Xi Jinping he supported the building of concentration camps in Xinjiang). Just as he had railed against Japan in the 1980s for being an economic competitor to the United States, he focused his ire on China’s economy. All along he hoped for an economically beneficial deal that he could sell politically as a major win.

Trump has always had a dual narrative about his own prowess. He wants to be seen as the militarist — the toughest guy in town, willing to do things no one else is willing to do. He also wants to be seen as the dealmaker and negotiator in chief, someone who can reach agreement with the toughest foe. To Trump, rivals are like mountains to a mountaineer. They are there to be climbed. Thus his fascination with Vladimir Putin, Xi Jinping, Recep Erdoğan, and Kim Jong-un. The militarist and the dealmaker are not always in conflict with each other. On North Korea, one could argue Trump used the former to build up leverage and then cashed it in. But they are not always in harmony either. The two became contradictory in the northern summer of 2019. Trump would have to make a decision. With the election in sight, he chose to be a dealmaker so he could prevent his political opponents from describing him as a warmonger during the election campaign. He tried to strike deals even if the moment was not right. He sought talks with the Iranian leadership in September 2019. He tried to invite the Taliban to Camp David around the time of the 9/11 anniversary. He negotiated a trade deal with China. As an obstacle to this agenda, Bolton was forced out. Meanwhile, Trump continued to act as he wished, without any pushback from his team. Just to take one example, his compliant secretary of defence transferred funds from US forces in Europe to help build the wall on the southern US border.

**Phase 4: Götterdämmerung**

Throughout the first three years of the Trump presidency, both critics and supporters of President Trump added the caveat “assuming there is no crisis” to their analysis of his foreign policy. Trump’s personality and cognitive traits seem particularly ill-suited to a major crisis. In 2020, the long awaited crisis finally arrived and it was a whopper — a once in a century pandemic with an economic collapse to rival the Great Depression. This catastrophe could have been a political opportunity
for another president. Here was a chance to reset public opinion. The president could have set politics aside, told the American people he would focus solely on defeating the virus, levelled with them about the severity of the challenge, and presented himself as a can-do businessman who would reach across the aisle.

There is no mystery as to why he did not take that path. It is simply not who he is. In the early weeks, as the coronavirus spread through Wuhan, Trump prioritised the trade deal he had negotiated with China. It would be a key part of his election campaign — Trump the dealmaker. He dismissed the warnings from his national security and intelligence teams. He praised Xi and expressed the hope the virus would disappear, even though he privately knew it was a major and imminent threat to the United States. When COVID-19 became impossible to ignore, he reached for an eye-catching policy consistent with the Trump brand — the travel ban on China and subsequently on Europe — and declared victory. This took place on 31 January. He did almost nothing else on the coronavirus in the month of February.

The following few months were a horror show. As cases and fatalities rose, Trump oscillated back and forth between bashing China and declaring the crisis over. He showed no interest in convening the international community or coordinating a national response. He liked to highlight the tribulations of other countries to portray his own failures in a better light. He actively spread disinformation about the virus and ways of treating it. The United States became a warning to
others. Meanwhile, Trump continued to indulge his free-wheeling style and visceral instincts. With no rallies and very limited travel or capacity to host visitors, he grew more isolated and volatile on social media. He made an attempt to pivot back to the dealmaker narrative with the normalisation agreement between Israel and the United Arab Emirates in August 2020, and between Serbia and Kosovo in September 2020, but the crisis overwhelmed everything else.

This was the first major international emergency since the Second World War in which the United States played no leadership role. As chair of the G7 and a close partner of G20 chair Saudi Arabia, the Trump administration could have convened world leaders to coordinate travel and economic restrictions, share information, and work on a vaccine. Not only did they show no interest, but Trump administration officials actively undermined the efforts of other nations who tried to fill the vacuum. When France tried to mobilise the G7 and the United Nations Security Council, the Trump administration insisted that these forums formally blame China as a precondition for action —dooming the effort before it began.

Even more disturbing was the Trump administration’s attitude towards the World Health Organization (WHO). In January, when Trump was praising China, the WHO was privately alarmed. Internal documents show that senior officials were concerned that China was covering up the virus but that they could not say so publicly in case it reduced China’s cooperation even further. The United States had an opportunity to build a coalition, working with the WHO and the international community to press Beijing for greater transparency and cooperation. Instead, Washington did nothing. After the virus hit the United States, Trump blamed China and the WHO. He temporarily withheld funding from the WHO and set a 30-day deadline for talks with its leadership on reform. Just 8 days into the 30-day period, and unbeknown to his own officials, Trump announced he was withdrawing formally, dismaying America’s allies and empowering Beijing.

A Second Term

Trump’s first term followed a narrative arc of a president shedding constraints, becoming more comfortable wielding power, doing so in line with his own instincts and political interests, and persisting with this even as he encountered trouble and the catastrophic crisis the country is now engulfed in. There is absolutely no evidence from the first term that he will follow the historical trend of Republicans being more moderate in their second term, as was the case with Ronald
Reagan and George W Bush. As John Bolton concludes in his book, Trump in a second term will be “far less constrained by politics than he was in a first term”.8

Some analysts are more optimistic and believe that Trump will be less disruptive in a second term. They argue that his policy is rooted in a substantive shift towards great power competition that will continue if he is re-elected.9 The problem the optimists have is that they largely leave Trump out of the story. A re-elected Trump will feel fully vindicated. He will once again have defied the experts. His psychological make-up will be a more important driver of his behaviour than formal policy documents in which he has little involvement. Not without reason, he will believe that he represents the views of the public on foreign policy far better than those of the establishment or former members of his team who now snipe at him from the sidelines.

There are four specific predictions we can draw from this about his second term.

The first is that he will double down on his instinct. He will look to build on the beliefs he has held for over thirty years. He and his team will be more prepared, both bureaucratically and psychologically, than they were in 2017. They will be willing to push the envelope further. There is a parallel with the administration’s immigration policy — Trump began with opposition to illegal immigration, but over time this morphed into a larger assault on legal immigration. So what might this mean for national security? In his first term, Trump focused his criticism of America’s alliances on defence spending. In his book, Bolton confirmed that Trump wanted to get out of NATO, something former officials have verified to me off the record.10 In a second term, he could well try to unravel some of America’s alliances. He could unilaterally reinterpret Article 5 to effectively destroy NATO (for instance by saying he will not use force to defend any country that does not pay the United States directly for providing security). He could use the status of forces negotiation to withdraw troops from South Korea. While Trump got on well with Japan’s former prime minister Shinzo Abe, he could try the same tactic on new leader Yoshihide Suga.
Second, Trump will choose a team that enables him to behave in this way. There will be no axis of adults to constrain the president this time around. Trump has made it clear he values loyalty above all else. He has used little-known legal provisions to impose his loyalists into positions temporarily without Senate approval, for example when he moved Ric Grenell from the ambassadorship to Germany to become Director of National Intelligence. The White House personnel office has systematically tried to root out and remove officials in various departments and agencies who are not personally loyal to the president. In a second term, Trump has three pools of people from which to draw. The first are senior Republican politicians who have been steadfastly loyal to him, such as Senator Tom Cotton, Senator Lindsey Graham, Senator Josh Hawley, former UN Ambassador Nikki Haley, and, of course Mike Pompeo. He can also tap Republican governors who have been sufficiently loyal. These people also have some policy views that diverge from those of Trump, although they try to minimise them. The second are ultra-loyalists who have no real power base of their own and owe their influence entirely to the president personally. This pool includes people such as Grenell and retired US Army officers Anthony Tata, and Douglas Macgregor, who came to Trump’s attention through their commentary on cable news. It also potentially includes family members, particularly Jared Kushner, Ivanka Trump, and Donald Trump Jr. The third group are younger officials who will have gained experience in the first term. The end result will likely be a mix, but of the three groups, the second — the ultra-loyalists — is
poised to be the most influential. The problem with the senior Republicans is that many have preferences that diverge from those of Trump — on alliances and Russia in particular — while the third group are too junior.

Third, that part of the Republican foreign policy establishment that is still on good terms with Trump will try to make the containment of China the centrepiece of Trump’s second term, but it is not clear if the president has fully bought into it. They will do this partly because they believe it, but also because it is the only reed they have to cling to in Trump’s worldview. It is how they can, in their view, make lemonade out of lemons — they can persuade him to play a leadership role in Asia, and they can sell him on the utility of alliances, including in Europe. The problem they have is that Trump is mainly driven by concern about China’s economic role. He has no issue with the Chinese Communist Party’s domestic authoritarianism, and very limited interest in the geopolitical interests of US allies, including Taiwan. We can expect the Republican Party’s attempts to influence Trump to be focused on encouraging him to stay the course on China.

Fourth, a second Trump term will most likely mark the formal end of the post-Second World War and post-Cold War international order. By the end of Trump’s first term, US-led international cooperation has effectively ground to a halt. The administration is much more interested in signalling its conservative bona fides to its base than in organising
an international coalition. We may see bilateral initiatives, but the era of structured and sustained cooperation will be over. Other countries will adjust accordingly. Allies will simply stop looking to the United States for help. They cannot fill the vacuum, but they will try to limit the damage by working more closely with each other. This will most immediately be felt in the COVID-19 crisis — vaccine nationalism will prevail and there will be little effort to prevent the economic recovery from tilting in a protectionist direction. Adversaries will see an opportunity to erode liberal norms globally and to manipulate the American president through a mix of flattery and inducements.
II: PREDICTING A BIDEN ADMINISTRATION

In many ways, Joe Biden is a known quantity when it comes to foreign policy.11 He served as a US senator for thirty-six years and as vice president for eight. He took an interest in world affairs from the beginning of his career and was chair of the Senate Foreign Relations Committee. His son, Beau, served in combat and Biden immersed himself in the policy questions surrounding the wars that followed 9/11, including travelling to Iraq and Afghanistan multiple times. He has given countless speeches and written many articles on US strategy.12 He believes in American leadership, the liberal international order, democracy, alliances, treaties, and climate change. His track record is not without controversy. He has been criticised for lacking a coherent philosophy on the use of military force and for his proposal to partition Iraq in the mid-2000s.

In this election, these quibbles have faded into insignificance. Biden represents a return to America's traditional post-Second World War foreign policy. He has built a tent large enough for Republican Never-Trumpers, Democratic centrists (of whom he is one), and progressives. He will seek to undo much of what Donald Trump has wrought — he will quickly rejoin the Paris Agreement on climate change, he will try to revive the Iran nuclear deal, he will work with other nations on combatting COVID-19, and he will resume US support for its allies.

But in other ways, Biden is an enigma. If he becomes president, his differences from Trump will not suffice as an organising principle for his foreign policy. We know he will be different from Trump, but will his presidency differ in significant ways from that of Barack Obama? There is very little way to know the answer to this question from the campaign. There have been hints. Biden has called Saudi Arabia a “pariah state”. Does that portend a significant change in America’s posture in the Middle East? He has taken a tough line on China. So, will he buy into the concept of great power competition? He has argued that globalisation must serve the middle class. Will he be more open to progressive reforms to the global economy? He is an avowed transatlanticist, but will he continue Obama’s policy of pushing Europe to spend more on the military, even as the pandemic exerts downward pressure on defence budgets?

It is difficult to answer these questions because to draw a contrast with Trump, Biden only needs to paint in broad brushstrokes. He knows his connection to Obama is an asset, and no political benefit exists in distancing himself from the former president. There may not be much...
to learn from the formal foreign policy debate between the candidates, but there is a second parallel debate occurring in plain sight that is revealing. This is the intra-centrist Democratic debate on foreign policy between two groups — restorationists who generally continue to support President Obama’s worldview and foreign policy, albeit updated for recent events, and reformers who question some of the assumptions underpinning it and favour significant changes. This debate actually started during the Obama administration and it was fairly heated by the end. So much so, that it was widely believed Hillary Clinton would chart a course correction, focusing more on geopolitical competition.

President Barack Obama jokes with Vice President Joe Biden in the Oval Office, 9 February 2015. Image: Pete Souza/Official White House photograph/Flickr
This debate continued throughout the Trump years and evolved in interesting ways. It is rarely explicit in critically referencing actions taken during the Obama administration, but some of the analysis is noteworthy for future policy. Few outside Washington have paid much attention to the debate among centrists. The progressive left tends to dismiss centrist thinking as unchanging from the Clinton or Obama administrations, but new strands of thought are evident in foreign policy journals, think tank reports, and the work of National Security Action, an umbrella organisation established in 2017. Understanding this centrist debate sheds light on how a Biden administration might see the world. Biden’s record as a senator, vice president, and presidential candidate strongly suggests he will have an open mind about how to implement his worldview — he will likely encourage and adjudicate the debates in his team.

One additional school of thought that is significant is progressive foreign policy. The progressives developed a critique of centrists during the primary campaign and were closely associated with Elizabeth Warren and Bernie Sanders. Many of the progressive experts have joined the Biden team as advisers. The progressives focus on the linkage between progressive goals at home and foreign policy, particularly relating to the global economy, which they want to reform. They want to reduce America’s military commitments overseas, but also to compete with autocratic and kleptocratic regimes and movements in non-military ways. The progressives will have influence in a Biden administration in particular areas — such as foreign economic policy, where they and the reformers see the issue similarly — and in Congress where an increasing number of representatives and senators identify as progressive. The progressive centrist divide has already been widely discussed. However, the intra-centrist debate, which will be embedded in a Biden administration, has been almost completely overlooked.13

The Obama Baseline
President Obama’s worldview often appeared contradictory. He was a liberal who believed in progress and the necessity of American leadership in bringing it about. He was influenced by Samantha Power’s writings and hired her and other liberal internationalists as key members of his team. Obama was also a student of the theologian and realist scholar Reinhold Niebuhr, and of former president George H W Bush. He had realist instincts; he worried about US actions creating more problems than they solved. He was unsentimental about the country’s commitments. He believed the foreign policy establishment frequently inflated threats and had an unthinking bias towards action.
In the early years of his presidency, these conflicting impulses and pressures clashed, and the outcome was often uncertain. By the end, it was clear the classical realist impulses had prevailed, at least when it came to military intervention and great power competition.

Obama had become wary about military intervention, seeing his support for operations in Libya as a mistake. He was proud of his decision not to strike Bashar al-Assad’s forces after they crossed the red line in using chemical weapons in 2013. He would privately say his policy was “don’t do stupid shit”. Others who served in his administration, including Clinton, were frustrated — “Don’t do stupid stuff” is not an organizing principle”, she said, much to Obama’s annoyance. The spat was trivial in a sense, but in another way it was revealing — as his presidency progressed, Obama, and some on his team, harboured a hostility to the Democratic foreign policy establishment, or what deputy national security adviser Ben Rhodes called ‘The Blob’. This extended beyond the Middle East, to the question of sending lethal assistance to Ukraine to repel Russian-backed forces. When confronted with such choices, Obama would always ask about the long-term effect — was there a risk his decision could start an escalation ladder that might result in a drawn out conflict involving Americans in the months or years to come?
In some ways, Obama’s scepticism of American activism stemmed from his optimism about American power. He believed that if the United States got its own house in order and acted responsibly on the world stage, China, Russia, and other potential challengers would not be able to compete. He believed in “the long game”. In a sense, Obama was a Zen master—counting on America’s adversaries to knock themselves out. Russia would get bogged down in Syria. China would create the antibodies to its own rise. He was wary of those who saw these challenges as existential. He routinely described Russia as a regional power that could not rival the United States. He toughened America’s China policy, but also wanted to preserve cooperation with China on shared challenges such as climate change and pandemic disease.

When it came to foreign economic policy, Obama was something of a traditionalist. He was proud of the role his administration played in responding to the financial crisis in 2009. He championed new free trade agreements, justifying them to progressives by ensuring these agreements better reflected their concerns on labour and environmental standards. Ultimately, though, he was a believer in globalisation and did not seek to radically change or reverse it.

One group of Democrats continues to believe in this approach and has not fundamentally changed their worldview since the Obama administration. For sure, they have updated it to incorporate new challenges—they want to protect American democracy against foreign interference, they are more wary of Russia, and they recognise COVID-19 as one of the most severe crises to hit the United States and the international order over the past fifty years. But they also continue to believe that the arc of history favours the United States, they are sceptical of military interventionism, they do not want US foreign policy to be defined or constrained by geopolitical competition, even though they accept the United States must stand up for its interests against China, and they continue to believe in the economic and geopolitical benefits of globalisation. This group can be described as restorationist.

There were those within the Obama administration who disagreed with the president on a number of these issues. It is now well documented how Victoria Nuland and Celeste Wallander pressed Obama to do more to deter Russian interference in the 2016 presidential election. Samantha Power and others made the case for intervention in Syria. Less publicly, there were a considerable number of officials who argued for a tougher stance towards China.
In the past four years these debates have expanded and deepened. A number of leading Democrats have questioned some of the basic orthodoxies that underpinned Obama’s foreign policy. They see Trump as an existential threat to American democracy and the international order, but they are not preoccupied with him when it comes to future foreign policy. They believe that the world has changed in fundamental ways in the past eight years since Xi Jinping came to power in China, Vladimir Putin returned as Russia’s president, and Obama was re-elected. Nationalist populists have gained power in several countries, leading to a weakening of democratic institutions and an existential crisis for centrists. Authoritarian regimes have used new technologies to modernise the tactics and tools of repression and control. Autocratic leaders have become more assertive and aggressive internationally as the domestic and international constraints fell away. Shared problems, such as climate change and pandemics, have worsened, but international cooperation has become harder to achieve and to explain to domestic audiences. The conviction that the world has fundamentally changed has led this group to revisit the core tenets and assumptions of Democratic foreign policy in at least four areas: China, cooperation among democracies, foreign economic policy, and the Middle East. They can be called the reformers.

China

No issue has been more controversial or widely discussed than how the United States should approach China. In 2018, Kurt Campbell, the assistant secretary of state for East Asian and Pacific affairs during the Obama administration, and Ely Ratner, Biden’s deputy national security adviser in Obama’s second term, published an influential article in *Foreign Affairs* arguing that some of the key assumptions underpinning China policy in successive administrations — for instance, that commercial engagement with China would lead to economic liberalisation, and that China would become a responsible stakeholder in the international order — were wrong.\(^\text{17}\) A year later, Campbell co-authored another article, this time with Jake Sullivan, who held several senior positions in the Obama administration, on how the United States could take a more competitive approach to China while avoiding confrontation.\(^\text{18}\)

Although there is a spectrum of opinion among reformers on China, some generalisations are possible. They generally believe, for example, that under Xi, China has become more of a dictatorship than an autocratic system where power is shared or at least somewhat limited by a politburo. They also consider that China is becoming more
repressive, as demonstrated by the deployment of facial recognition technologies and social credit systems, the widespread use of concentration camps in Xinjiang, and the destruction of Hong Kong’s ‘one country, two systems’ model. What they are unsure about is the degree to which this will transform China’s behaviour internationally, which brings us to the second generalisation.

The reformers want the United States to adopt a much more competitive strategy than the Obama administration did, but they are preoccupied with the question of how to blend competition and diplomacy so rivalry does not turn into confrontation and conflict, and so some cooperation on shared interests remains possible. Both parts of this equation are important. The reformers are more willing than the Trump administration to invest in diplomacy with China, but they will not dial back competition in exchange for cooperation on shared problems, as the Obama administration was sometimes willing to do.

The reformers worry that the United States is falling behind technologically and economically, and they believe major changes to US policy are required to get back into the lead. They want to see competition with China at the heart of America’s alliances, including the transatlantic alliance, and they are generally willing to use the China challenge to advocate for domestic policy changes. They are open to the possibility of a limited decoupling between the United States and China, particularly on technology and supply chains for critical health supplies and other strategically important parts of the economy.
By contrast, the restorationists tend to be less willing to accept that Xi has transformed China into a different type of regime that is inherently unreasonable and dictatorial. They stress the continuity of today’s China with the early and pre-Xi periods. They are less pessimistic about the changes in the distribution of power and oppose using the China threat to mobilise the political system behind domestic changes. They are highly sceptical of any decoupling between the United States and China. They do not believe that with the benefit of hindsight Obama got China wrong — as they see it, he did stand up to and compete with China.

Cooperation among Democracies

If the Democrats have one big idea, it is that the United States must deepen its cooperation with other democracies. At first glance, this is not new. Proposals for a concert or league of democracies have been around for at least 15 years, but the Trump administration has given them new life. Its infringement of democracy at home, combined with the president’s preference for authoritarianism overseas, makes cooperation with other democracies an obvious and necessary corrective to the Trump years. However, the question is what form will this take?

In its most basic form — one to which Biden has already publicly committed — the United States would convene a summit of democracies, modelled on the Nuclear Security Summit, in which members commit to strengthen democracy at home and overseas. The United States would also deepen its engagement with democratic allies. However, the reformers have a more radical version in mind.

The reformers see democracy versus authoritarianism as a fault-line in world politics, a view they share with the progressives. They want the United States to make democratic cooperation an organising principle of its foreign policy, partly as a means of competing with China, and partly because they believe that democracy itself is at grave risk. They want democracies to become collectively resilient, including partially decoupling from authoritarian countries. They want to work with other free societies to promote liberal norms and to compete with China and Russia in international institutions.

Restorationists, on the other hand, worry about creating an ideological fault-line in world politics that exacerbates competition with China. They see cooperation among democracies as just one piece of a larger diplomatic strategy. They tend to be more optimistic about the fate of
democracy in the medium to long term. They will certainly support
democracy, but they do not necessarily see it as an organising principle.

**Foreign Economic Policy**

In an article in early 2020, Jake Sullivan, Biden’s former national
security adviser, and Jennifer Harris, a former Obama-administration
official, documented new ways of thinking about global economics and
trade. Moderate domestic economic thinkers, they said, are currently
reckoning with ideas that neoliberalism got wrong over the past
decade. The foreign-policy world needs to do the same. Sullivan and
Harris argue for reforming trade deals to target tax havens, prevent
currency manipulation, improve wages, and generate investment in the
United States. Industrial policy should be used to compete with China,
particularly in new technologies, and foreign policy should be a part of
the antitrust debate on breaking up big tech.

The Sullivan–Harris agenda is generally aligned with thinking on the
progressive side of the Democratic Party, where experts like Ganesh
Sitaraman, who advises Elizabeth Warren, argue that US foreign policy
should take geo-economics much more seriously. Authoritarianism,
the progressives argue, thrives on corruption, oligarchy, and
kleptocracy, and it poses a threat to democracy from within as well as
from without. To counter it, the United States must root out corruption
and reform the global economy, including eliminating tax havens,
regulating global finance, and tackling inequality.

Reformers are also willing to use the China challenge, which they
believe is real and daunting, to mobilise support for an ambitious
economic agenda domestically and internationally. They see China as
the glue that could hold together a coalition for reform, facilitating a
greater role for government investment and much greater economic
cooperation and coordination between democracies so they can
present Beijing with a united front.

The restorationists tend to favour re-engaging in free trade deals, such
as the Transatlantic Trade and Investment Partnership (TTIP) and the
Trans-Pacific Partnership (TPP), however they are reluctant to use
responding to China as an organising principle for the policy, and they
are more incrementalist on reforms to international finance and the
global economy.
Middle East

The final area of debate is on the Middle East. Centrist Democrats now openly question whether the region is worth the high levels of military engagement the United States has maintained for decades. In an article for *Foreign Affairs* in early 2019, former Obama administration officials Tamara Wittes and Mara Karlin argued that “[a]lthough the Middle East still matters to the United States, it matters markedly less than it used to.” In early 2020, Martin Indyk, Obama’s envoy for Israeli–Palestinian peace, wrote in *The Wall Street Journal* that after a lifetime of supporting a very activist US role in the region, he is now of the view that it is no longer worth it. All three favour a significant reduction in US goals in the Middle East. This is not only about avoiding unnecessary military interventions. Indeed, some reformers acknowledge the need for continued operations against ISIS or its affiliates even as they want to avoid more protracted and large scale interventions. It is also about downsizing America’s traditional commitments, including to the Gulf Arab allies. There are dissenting views within the reformist camp. Sullivan and Daniel Benaim, who also served in the Obama administration, have argued for a much more ambitious and assertive diplomatic initiative to forge an agreement between the region’s major powers, including Saudi Arabia and Iran, that would make more use of leverage than the Obama administration did, including making US support and assistance for Gulf Arab states conditional on their behaviour.
On the Middle East, the restorationists have been relatively silent. One can assume that they will seek to restart where Obama left off — resurrecting the Iran nuclear deal and working with US allies to push back against Iran and counter ISIS. There may also be a renewed effort to save the two-state solution, albeit without using leverage to dramatically increase pressure on Israel.

In each of the four areas — China, cooperation among democracies, foreign economic policy, and the Middle East — the debate is between those who see little reason to change the principal assumptions underpinning Obama’s approach, and those who do. Some of this divide is generational, although the lines can be blurred. The reformers tend to have the urgency of a group that believes the world is slipping away and can only be salvaged with major changes in approach, not just from Trump, but from Obama too. Both approaches are compatible with Biden’s worldview. Restorationists and reformers are both likely to be represented in his administration and he will adjudicate between them.

Those who would likely represent some continuity with the Obama administration’s worldview include Susan Rice, who has been mooted as Secretary of State, and Tony Blinken, who is widely tipped as National Security Adviser. They served as Obama’s National Security Adviser and Deputy Secretary of State respectively. Those more likely to challenge some of the assumptions underpinning Obama’s foreign policy include former Biden rivals Pete Buttigieg, who could be named to the post of UN Ambassador or the State Department, as well as some of those who authored the articles cited above.

The most likely outcome is that these dividing lines continue into a Biden administration, imbuing it with a creative tension and shaping the internal debates and discourse. This should not prevent it from moving quickly as there is much that restorationists and reformers agree on. A Biden administration could take a series of rapid and far-reaching actions early in the term, particularly on climate change, tackling COVID-19, immigration, and multilateralism. But over time, it will be forced to come to grips with the trade-offs and compromises that these different approaches entail.

Of course, looming over all of this is the coronavirus crisis, which is not just a public health emergency but also an economic crisis and a massive foreign policy challenge. The coronavirus seems to have persuaded the Biden team that their presidency will require a transformative foreign policy in several respects — fighting the virus...
globally, including developing and fairly distributing a vaccine, reforming and rebuilding international institutions, rebuilding the national and international economy, and coming to terms with the fact that over a decade and a half of cooperation with China on public health did not noticeably improve its response from the SARS pandemic of 2003–04. These aspects to the debate have yet to be fully absorbed into the wider foreign policy discourse.
CONCLUSION: THE POINT OF NO RETURN FOR THE INTERNATIONAL ORDER

If Trump wins a second term, the rest of the world will conclude that the United States has fundamentally changed and is no longer committed to the traditional leadership role it has played since the Second World War. After the 2016 election, other governments knew this was a possibility, but they also knew it could be reversed in the 2020 election, and they were not sure how strong the institutional pushback would be in Washington. Another Trump win will remove any doubt. It will be compounded if Trump doubles down on his instinct and ramps up his opposition to America’s alliances; but even without that, other countries will be forced to adjust to a superpower that is transactional, inwardly focused, and unreliable.

A second Trump term will play out differently across regions and issue areas. In Asia, the big question will be whether Trump sticks to his tough China policy or, with the election out of the way, try to resurrect his trade deal with Xi while also pulling back from America’s alliances with South Korea and Japan. If he persists with his China policy — a position that has broad support on Capitol Hill and among the Republican foreign policy establishment — it will provide an anchor for US policy in Asia, although Trump’s brand of containment will create as many dilemmas and problems as it will solve. America’s allies are concerned that it will preclude any possibility of cooperation with China on shared challenges and that decoupling on the scale that some Trump administration officials envisage is impractical and costly for countries that rely on China economically.

The impact of a Trump victory would be particularly acute in Europe. Transatlantic cooperation has fallen off a cliff in the past year — whether it has been over Iran, COVID-19, the International Criminal Court, or the global economy. Trump’s re-election would be interpreted by many Europeans as the end of the transatlantic relationship and

Trump’s re-election would initially be broadly welcomed in Israel and the Arab world, where leaders accept his maximum pressure campaign on Iran. His indifference towards democracy and human rights, and his transactional nature. However, Trump has made it clear that he hopes to strike a deal with Iran on its nuclear program and has little commitment to supporting the regional order.
would serve as a wake-up call for European sovereignty and strategic autonomy, moves which are already slowly underway. On the global stage, the United States is unlikely to participate in efforts to cooperate on shared problems, raising the question of whether other nations can sustain the multilateral system on their own, or whether it will fall apart.

A second Trump term would also mark the end of the old, and confirm that we are in a new, more nationalist age. It would serve as a boon to other nationalists and populists, including Brazil’s Jair Bolsonaro, Hungary’s Viktor Orbán, and India’s Narendra Modi, as well as populist opposition figures.

Australia is something of a unique case. Along with Abe’s Japan, Australia has handled Trump better than any other liberal democracy, albeit after a rocky start with the terse phone call between then Prime Minister Malcolm Turnbull and Trump. Australia has benefited from the fact that it has a trade deficit with the United States and it also spends in excess of 2 per cent on defence. As a conservative, Scott Morrison worked well with Trump administration officials and Australia was an early mover on pushing back against Chinese political interference and in placing restrictions on Huawei. However, the uncertainty around Trump’s commitment to maintaining the regional order in the Asia Pacific is a concern for Canberra about a second term, and only a third of Australians express confidence in Trump.27

If Biden wins, he can be expected to continue to deepen the US alliance with Australia. This is something restorationists and reformers can agree on. Democrats, in particular, feel that there is much to learn from Canberra when it comes to tackling political interference. They are also keen to deepen relations between democracies in Europe and Asia, and Australia will play a key role in that effort. The Australian government is likely to favour Biden taking a tougher approach to China than did the Obama administration, so it may find itself weighing in to the restorationist versus reform debate.

More generally, a Biden victory would be widely, albeit not universally, greeted with relief and enthusiasm internationally as America’s democratic allies will see the United States as returning to its traditional role. However, they would also assess that Trumpism could make a return in the 2024 election, unless the president is defeated by an overwhelming majority. The challenge for a President Biden will be whether he can make good use of these four years to firmly place American leadership on a more sustainable footing nationally and internationally. Otherwise, his victory may just be a stay of execution for the postwar order.
NOTES


2 Whether this is a good or a bad thing depends upon one’s point of view, of course. This paper takes an internationalist position. Over the past few years, there have been a number of critiques of the liberal international order, which see it as a relic the United States and the world must move past. For instance, see Patrick Porter, The False Promise of Liberal International Order, (London: Polity Press, 2020).


7 The Room Where It Happened, 312.

8 John Bolton, The Room Where it Happened, 489.


10 Ibid, 58.
11 Parts of this section are also published in Internationale Politik, Deutsche Gesellschaft für Auswärtige Politik, Berlin, Fall 2020.


16 Michael Isikoff and David Corn, Russian Roulette: The Inside Story of Putin’s War on America and the Election of Donald Trump (New York: Twelve, 2018).


When the United States withdrew from the TPP, the remaining countries incorporated its provisions into a new agreement, the 2018 Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).


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