

After Trump

By Uri Dadush

Summary

Whether President Trump is reelected or not, the United States will, sooner or later, revert to a traditionalist foreign policy of openness and alliances.

If Joe Biden beats Donald Trump on November 3, as he is expected to do, the United States will return to a traditionalist brand of foreign policy: one of openness, support for multilateralism, and constructive engagement with allies. But even if Biden doesn't win—which is possible—and four more years of Trump's America First policies are in store, powerful forces are at work that suggest his base is eroding and that his policies will be seen as increasingly out of touch with the times, and discarded. Similarly, a Biden win is highly unlikely to be followed by a revival of 'Trumpian' ideas. The implications for the policies of the United States' allies (and adversaries) will be profound and immediate.

The Election

The U.S. elections are already underway, with more than 7 million Americans having already voted by mail. The President, a third of senators, all representatives, a third of state governors, and thousands of local and state politicians will face the people. Although Joe Biden is the

clear frontrunner, and the Democratic Party is expected to make gains in many contests, including possibly regaining control of the Senate, the race remains open and difficult to predict. Donald Trump can count on the apparently unshakeable support of a large part of his base, consisting of less-educated white men and of evangelicals (a conservative anti-abortion assembly of Protestants, accounting for an estimated 18% of the electorate). The outcome of the Presidential election will be determined by the U.S. Electoral College system, which in practice means winning in several battleground states. In the two main battleground states, Florida and Pennsylvania, which may well determine the election outcome, Biden presently enjoys a significant lead. However, the polls, especially those at state level, can be misleading, and experience tells us that other surprises that influence the election (such as Trump's COVID-19 infection, which did not help his chances) will occur before November 3.

Closely run U.S. Presidential elections are not unusual. George W. Bush's victory over Al Gore in 2000 was

decided by the Supreme Court and hinged on a few thousand votes in Florida. Hillary Clinton in 2016 won the popular vote by 3 million, but a swing against her of fewer than 100,000 votes in a few battleground states cost her the election. But this time the public views the differences between the presidential candidates as extreme. When asked [whether it matters](#) who wins, 83% of American registered voters said yes, compared to just 50% in 2000 (Bush vs Gore), and 74% in 2016 (Trump vs Clinton). With such polarization, many fear a constitutional crisis and even violence should Trump lose a close election and dispute the outcome, which he would be sure to do.

Biden, if he wins, will revert to a traditionalist approach in foreign policy, building alliances, supporting NATO, strengthening trade and investment ties, promoting orderly immigration, supporting multilateral institutions, and returning the United States to the Paris Agreement on Climate change and—quite probably—the Comprehensive and Progressive Agreement for Trans Pacific Partnership (previously the Trans-Pacific Partnership). While Biden will take a tough line on China, he will be more constructive in actions and words than Trump, probably leading to a scaling back of tariffs.

If Trump wins, it is possible that a comprehensive [Phase 2](#) trade deal with China will be struck, mitigating the tensions. But it is just as likely that the cold war with China will escalate. Ultimately, the result may be an outbreak of violent clashes by proxy, in Taiwan, or over repression in Hong Kong, or over disputed islands between China and Japan, or over Kashmir. If these clashes intensify and multiply, it is possible, though unlikely, that China and the United States will be drawn into a conventional war in Asia, with unforeseeable consequences. As tensions build, the United States' European allies and Japan may be forced to choose between their trade and technology links with China and with the United States. Separately, during a second Trump term, the many contentious issues over trade between the United States and Europe, from steel to digital taxes, sanitary standards, data privacy, and car tariffs, could turn into a full blown trade war. Meanwhile, the United States is also likely to continue its policy of neutering the World Trade Organization, effectively abandoning it.

But, assuming that four more years of Trump does not lead to a cataclysm such as war with China, are his policies

likely to become the 'new normal', to be sustained decades into the future? My answer is no, because the same secular forces behind a radical faction—Trump supporters—gaining the upper hand, are now working against them.

Polarization

There is a profound gulf between Trump supporters and Biden supporters on both the issues and on which issues matter. A wide gulf separates them on sympathy towards blacks (9% of Trump voters vs 74% of Biden voters), support for immigration (32% vs 84%), hostility towards Islam (74% vs. 23%), and support for women's ability to get ahead (26% vs 79%). While supporters of both candidates agree on the importance of issues such as foreign policy and appointments of Supreme Court Justices, Trump supporters place far greater weight on restricting abortion, containing violent crime, and reducing immigration, while Biden supporters place far greater importance on healthcare provision, containing the coronavirus outbreak, reducing inequality, and mitigating climate change. Asked which international issues [worry them most](#), Republicans place China's rise, international terrorism, and immigration at the top of the list, while Democrats are most concerned about the COVID-19 pandemic, climate change, and racial inequality. Meanwhile, 63% of Democrats favor increased participation in international organizations and 59% favor increased international aid, while only 18% and 16% of Republicans answer these questions in the affirmative. On tariff policy—a crucial question for America's trading partners—43% of Republicans favor increased tariffs, while only 16% of Democrats do so, and 46% of Democrats would like to see tariffs reduced.

The parties, if not the candidates, are evenly matched. A Gallup poll found that 29% of Americans count themselves as Republicans, 30% as Democrats, and 40% as Independents. But the divisions in American politics can be seen in sharp relief along social, racial, gender, and geographical lines. White less-educated males, evangelicals, and rural areas are predominantly Republican, while women, blacks, Latinos and other minorities, college-educated white males, urban areas, and the States on both coasts are predominantly Democrat.

Drivers of Polarization

How did America come to be so divided, with two large groups taking almost diametrically opposed views on major issues? There are many theories, but the common theme is that the United States has been buffeted by enormous changes over the last 50 years, during which large well-defined groups have seen their expectations dashed. While many have wanted change, been its agents, and drawn benefits from it, another large group, mainly less-educated white men, has fallen behind or, as in the case of many religious conservatives, found change to be abhorrent. When asked why the U.S. has been [successful](#), 68% of Biden supporters said the U.S. succeeds because of its ability to change, while only 33% of Trump supporters said so. Instead, 66% of Trump supporters said the U.S. has been successful because of its reliance on long-standing principles, underscoring their yearning for things to stay as they are.

Enormous changes have occurred in the United States over the fifty years to 2017 (Mehlman, Castagnetti et al). These changes are racial, social, and economic, and they have generally been least favorable to white, less-educated males, and most difficult to accept for evangelicals. In 1967, just 12% of Americans were non-white, but the share reached 38% in 2017, while the foreign born reached 14.9% of the population, versus 4.9% in the earlier period. On the social front, church membership dropped from 73% to 50%, while births to unmarried women increased from 8.5% to 40.3%. Economic shifts have been equally disruptive. Women increased their workforce participation from 41% in 1967 to 57% in 2017. Manufacturing jobs declined from 28% of the labor force to 9%, while trade increased from 9.7% of GDP in 1967 to 27.1% of GDP in 2017.

Adding to the grievance of those left behind, income and wealth inequality has soared. Whereas the middle quintile of the income distribution—where many white, less-educated men found themselves—saw its real income rise by just 6% between 1979 and 2019, that of the top quintile—typically highly educated—increased by 31%, and that of the bottom quintile, where many minorities found themselves, increased by 9%. The share of wealth owned by the top 1%, always huge, increased from 27% in 1967 to 42% in 2017.

American Exceptionalism

The United States is not the only rich country that has experienced the changes outlined above. Western European democracies, for example, have seen similar trends. The rise of a right wing anti-immigration, nationalist, and protectionist faction is by no means an American phenomenon. Similar movements in Europe long preceded the crystallization of these policies in the United States under President Trump. Yet, for all the difficulties and near misses, Europeans appear to have contained these forces. The political center has held in all the largest European countries.

Historians will long debate how the U.S. diverged, but three distinguishing American features clearly played a part in making the polarization in the United States especially stark. First, and most important, there is the virtual absence of strong safety nets to cushion the transition of those who lose out in a more globalized economy and diverse society. In countries such as France and Germany, workers can count on strong job protection, extended and ample unemployment benefits, universal health coverage paid for by taxpayers, and generous defined benefit pensions. But these features are largely absent in the United States, or are available effectively to only privileged groups. Second, the United States was, until very recently, the world's most open large economy, and continues to this day to be an economy in which the ease of doing business and, when necessary, of restructuring or offshoring, is greatest. In a globalized economy, the comparative advantage of the United States lies, more than in any other country, in its innovative and technological capacity, requiring high skills, while its high wages deter unskilled and labor-intensive manufactures. Third, the tax system of the United States treats income from capital far more generously than labor income. This combination of forces explains why inequality is greater and has risen faster in the United States than in other advanced countries.

Unlike Western Europe, the United States has no memory of the tragedies of fascism, a movement that is instinctively resisted by the European mainstream electorate. Moreover, the recent rise of right-wing nationalism and nativism in the United States was not characterized, as in Europe, by the arrival on the scene of a relatively new party, such as France's Front national (now Rassemblement national) or Italy's La Lega. Instead,

it was brought about by the takeover of the Republican Party, the Grand Old Party of the establishment and of business, a modernizing force which dates back to the abolition of slavery under Abraham Lincoln. I will leave to those more equipped than I to explore why this happened, but one thing is clear. Donald Trump was among the first to sense the opportunity to reach out to a large and disaffected electorate. He has effectively silenced the party's traditionalists who until recently espoused free trade, immigration, and a foreign policy based on asserting America's power through alliances and leadership of the international institutions.

Countertrends

Ironically, some of the trends that created the Trump phenomenon in the first place are also those whittling away his base, and eroding the support for his policies. Despite the limits imposed on immigration, demographic trends point to the United States becoming more diverse, with minorities [projected](#) to make up over half of the population by 2045. Women, almost two-thirds of whom support Biden, are on their way to be a bigger force in the country's leadership than in the past. In 1967, just 7% of American women had a college degree, versus 13% of men. In 2019, nearly 36% of American women had a college degree, a slightly higher share than men. In 2017 women represented 57% of College enrolment. In 1965-1967 just 12 women served in Congress, while 75 served in 2000-2001. Presently, [127 women](#) serve in the US Congress, 105 Democrat and 22 Republican, representing one-quarter of members of both parties. For the first time, a woman is Speaker. It is difficult to imagine that today's young women, most of whom have few children and bear children out of wedlock or eschew marriage altogether, will accept a regime that obstructs abortion or makes it illegal.

About two-thirds of Americans under 30 support Biden. Tomorrow's decision-makers are the biggest supporters of climate policies and of the emancipation of minorities, participating in movements such as Black Lives Matter. Both the current presidential candidates are septuagenarians, but new members of Congress are younger than past cohorts, especially on the Democratic side of the aisle. Even as college enrollments have slowed, retirement of the baby boomers means that the average American worker will be more educated in 2030 than he or she is today.

Technological advances, especially those in information and communications, are bringing the world closer together in ways that were not imagined a generation ago, and make policies of protection and withdrawal ever more obsolete. Although the COVID-19 pandemic immediately triggered a 'me first' response causing nations to stop exports of medical products, that phase was short-lived and gave way to a surge in trade in medical products. The pandemic has underscored the world's interdependence, making it quickly evident that no country can fight the pandemic on its own. International collaboration on the development and production of vaccines and treatments has been intense. Of the five vaccines considered front runners, two are American, one is a joint venture between American and German companies, one is British, and one is a joint venture between French and British companies. Meanwhile, as fear of an uncontrolled epidemic caused distance travel to suddenly stop, global supply chains in manufacturing, agriculture, raw materials, and services continued to operate almost normally, facilitated by platforms such as Zoom. This has happened even as corner shops, and local restaurants and bars struggle. Ironically, many of the innovations that enable the operation of global value chains originated in the United States, which is also among the nations best positioned to benefit from them.

As China (the only country expected to grow this year) continues its rise, and the United States increasingly competes with China for global influence, lessons are being learnt. First, there is a limit to the hostilities, because outright war with China is unthinkable, and nobody in their right mind wants to provoke it. Second, there are big costs to 'decoupling' from China, as thousands of lawsuits launched recently by American firms against the Trump Administration's China tariffs show. Third, to contain the worst manifestations of China's rise, the United States cannot go it alone. It needs allies and it needs a set of multilateral institutions within which China can be coopted to play a constructive role. In the final analysis, China—a dynamic nation of 1.4 billion people—will not be held down; it can only be lived with, and 'managed'. In the long run, the only rational policy is to compete with China by raising America's own game, i.e. adopting reforms that accelerate American technology and economic potential. The return to a more cooperative stance towards China should be easier made easier politically by the fact that the big 'China shock' appears to have waned. The huge increase in China's share of U.S. and world markets was a feature of the 30 years or so prior to the Great Recession of 2008-2009, but appears to be behind us.

Policy

This analysis suggests that America's partners and adversaries should not assume that America's foreign policy and economic diplomacy has taken a permanent turn towards protectionism and withdrawal. Over time, domestic constituencies that favor constructive engagement with the world—productive collaboration with China, return to civility and adherence to international rules, an open and predictable trading system, the provision of global public goods such as control of carbon emissions and of infectious diseases, and support for multilateral agencies—are likely to become more numerous and powerful, while those that oppose this stance will decline in numbers and gradually lose influence.

Given the disproportionate influence of the U.S. in the public discourse, many politicians have seen in recent American policies a license for them to erect protectionist

barriers, ignore or flout international norms, engage in populist policies, disregard environmental constraints, substitute chest-thumping propaganda for honest communication, and engage in military adventures abroad. A return of the United States to the policies and stance familiar over the 70 years following the Second World War until 2016 will make the international landscape less receptive than it is today to right-wing populism and adventurism.

Allies in Europe, Japan, and throughout much of the world, who have witnessed with great alarm the deterioration in America's commitment to them, and to the principles that underpin the liberal democratic order—even causing some of them to explore how the U.S. can be contained—should stay the course and bide their time. They must continue to support the international institutions, laws, and norms that represent the bedrock on which global economic prosperity and peace rest. The United States, I expect, will be back.

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The Policy Center for the New South: A public good for strengthening public policy. The Policy Center for the New South (PCNS) is a Moroccan think tank tasked with the mission of contributing to the improvement of international, economic and social public policies that challenge Morocco and Africa as integral parts of the Global South.

The PCNS advocates the concept of an open, responsible and proactive « new South »; a South that defines its own narratives, as well as the mental maps around the Mediterranean and South Atlantic basins, within the framework of an open relationship with the rest of the world. Through its work, the think tank aims to support the development of public policies in Africa and to give experts from the South a voice in the geopolitical developments that concern them. This positioning, based on dialogue and partnerships, consists in cultivating African expertise and excellence, capable of contributing to the diagnosis and solutions to African challenges.

The views expressed in this publication are those of the author.



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