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DISCUSSION PAPER

Trump's America: the ordinary superpower

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Executive summary

After four months in office, the Trump administration has not triggered a revolution in US foreign policy but is shaking up the *status quo*. The path-breaking decision to withdraw from the Paris agreement on climate change reflects the president's abrasive 'America first' rhetoric. On a range of other issues, long-established patterns and commitments have been challenged so far more in words than in deeds. However, the mix of nationalism and pragmatism, ideology and realism, improvisation and policy reversals that Trump's foreign policy approach displays has begun to significantly affect the profile and perceptions of the US in the world. Under Trump, the US is shifting away from its traditional role as ultimate guarantor of the international liberal order at increasing speed.

This paper reviews the main developments in US foreign policy since January 2017. While there is evidence of both a nationalist and a pragmatic track in the behaviour of the new administration, the former seems to engulf and overshadow the latter. Drawing the conclusion, from some reassuring messages, that Trump's foreign policy may prove to be more conventional than his campaign rhetoric suggested would be premature. The president defines American national interests more narrowly than his predecessors, sees international relations as predicated on power politics and strength, and takes an *ad hoc* transactional approach to external affairs.

Several internal factors shape Trump's political agenda and foreign policy, including competition between factions within the administration, ongoing investigations into Russia's interference in the presidential elections, relations with Congress as well as the mercurial personality of the president, who values unpredictability. On the external front, the realities of interdependence and power balances will put Trump's nationalist and unilateral instincts to the test. How this administration may react to sudden external shocks and crises remains unclear.

Beyond the tension between nationalism and pragmatism, this paper puts forward an assessment of Trump's foreign policy as another stage in a larger structural shift of the US role in world affairs. This is the shift from the US seeking to exert a global leadership role informed by liberal values and founded on alliances and multilateral commitments – the 'exceptional' superpower – to performing more like an 'ordinary' superpower. In other words, the US would continue to be the largest actor in the system but would rely less and less on a strategy of liberal order building and would pursue its interests through a mix of soft and hard means, unilateralism and multilateralism, competition and cooperation, as need be.

America's role in a post-hegemonic, polycentric international system has long been debated. President Trump's foreign policy approach can be seen as both a symptom of and an often puzzling response to this complex adjustment. In previous years, the Obama administration sought to anchor US influence in international partnerships and cooperation while being more selective on US global engagements. Future administrations may well adopt different recipes than Trump's to cope with the redefinition of America's role in the world. Based on this assessment, however, US partners should distinguish between the decisions of this administration, both disruptive and relatively more pragmatic ones, and the long-term trend at play. Europeans will need to sustain their support for the transatlantic partnership where possible, while taking much bigger responsibilities to advance their own interests and values and to foster a rules-based international order.

Introduction

As President Trump was sworn in on 20 January 2017, domestic and foreign observers grappled with many questions concerning the future course of US foreign policy and its impact on the international system. Having talked a nationalist talk and announced a drastic shift away from global engagement to put 'America first', would the new president walk the walk? The past four months have provided no definitive answers.

Conflicting messages (and tweets) have fuelled a frantic news cycle, often corroborating the impression of a polyphonic administration. Beyond the competition between the 'ideological' and the 'establishment' camp in the White House and other branches of government, the president and cabinet members have frequently struggled to put across a consistent line, including following the strikes in Syria. This raises the question of whether key decisions are framed by a shared definition of their goals. Some reports indicate that the foreign policy process is improving, not least thanks to closer cooperation between Defence Secretary Mattis, the National Security Adviser, McMaster and State Secretary Tillerson. Others, however, have reported of emerging tensions between Trump and McMaster and, more broadly, of enduring struggles between different factions in the White House.¹

The last few months have seen more continuity than upheaval in the approach to allies and partners from Europe to Asia, a less confrontational stance towards China and a freeze on a reset of relations with Russia. Concerning NATO, the latter may no longer be obsolete in the eyes of the president but Trump's recent visit to Brussels has failed to send a clear message of commitment to allies, fuelling further uncertainty. In relation to the European Union (EU), Trump has seemingly moved from open dismissal, grounded in his nationalist rhetoric, to an unsentimental transactional attitude. The latter is possibly driven by the recognition that, despite Brexit, the bonds that tie the EU together, and the links at the core of the transatlantic partnership, are not only very deep but also consequential for US prosperity. This evolution has gone together with a perceived rebalancing within the top ranks of the administration from nationalist ideologues to more realist conservatives, at least when it comes to security and defence matters.

However, it would be premature to draw from these developments any conclusion on a reversal from the drastic foreign policy shifts anticipated by candidate Trump to a foreign policy in line with the broad tenets of the US' grand strategy since the end of World War Two. The nationalist instincts of the president along with his mercurial personality and his taste for unpredictability, the fluidity of the power map in Washington, the impact of domestic challenges on Trump's international agenda and the administration's response to current and future crises are some of the variables that fuel overall uncertainty. The decision to withdraw from the Paris agreement on climate shows that 'America first' can mean 'America alone' and that Trump's foreign policy is heavily driven by domestic considerations. At a deeper level, the fundamental issue of the relationship between American power and the preservation of an open, rule-based international order is going to be a decisive variable to define Trump's foreign policy.

The starting phase of the Trump administration has been marked not so much by major disruptions relative to the traditional coordinates of US foreign policy as by oscillations and policy twists. The political insurgency that has taken President Trump to power has not generated the foreign policy revolution that many expected.² However, the past few months have exposed the tension between Trump's controversial narrative and the constraints of global interdependence and power balances. In other words, the gap between ideology and reality, rhetoric and action.

The big question is what will fill this gap over time. Will nationalist instincts and unilateralism erode interdependence and upset relations between the US, its partners and other major powers? Conversely, will interdependence and power balances, alongside moderate forces within the administration, mitigate nationalism and bring about a more balanced course of action than what Trump's campaign rhetoric and successive statements and tweets would suggest?³

Beyond these two scenarios, a third one can be advanced – that of the US becoming more of an 'ordinary superpower'. Under this scenario, the foreign policy of the Trump administration would not necessarily be disruptive but would not amount to continuity either. It would fit a structural shift in America's global role and take the US further down the path to becoming a country behaving more like the others as opposed to seeking to exert a global leadership role broadly informed by liberal values and channelled through partnerships and multilateral engagements, against the bedrock of American military power. That is, an international actor neither bent on undermining the international order nor willing to play a leading role therein, neither retreating into isolationism nor bound by global commitments, but focused on fostering its interests through soft and hard means, unilateral and collective action, engagement and confrontation, depending on the matter at hand.

This shift would reflect internal and external factors that cannot be reduced to the distinctive foreign policy approach of one administration. Successive administrations can considerably differ in the way in which they manage (and contribute to shape) this process, as evident in the transition from Obama to Trump. At its core, however, this is about adapting the US role in the world to a post-hegemonic, polycentric environment where wielding power and setting the terms of international cooperation becomes much more difficult.⁴ From this standpoint, both the structural adjustment of the US global role and Trump's unorthodox and often baffling approach to this evolution bear far-reaching consequences for America's partners in Europe and for the EU.

Pragmatism strikes back?

On a variety of foreign policy issues, revolutionary statements have not turned into a disruptive practice. The Trump administration has taken a mostly pragmatic approach to relations with key allies and other powers. Candidate and President-elect Trump has repeatedly questioned US alliances in Europe and Asia, seemingly making America's guarantees conditional on allies spending much more to provide for their own security and fuelling speculations of American retrenchment. President Trump has been more circumspect, while refraining from firmly underscoring an unquestionable commitment to European allies. At the same time, Vice-President Pence, Defence Secretary Mattis and State Secretary Tillerson have travelled to Asia and Europe to reassure allies about American engagement. Their message was overall much closer to America's legacy than to Trump's unorthodox positions. This raised doubts on who speaks for the administration, or if there is more than one administration operating in Washington.

When it comes to Europe, Trump said a few days before taking office that "Brexit is going to end up being a great thing", that other countries would follow the UK and leave the European Union (EU) and that the latter was basically "a vehicle for Germany."⁵ A month later, Vice-President Pence expressed in Brussels the strong commitment of the US to the partnership with the EU. Defence Secretary Mattis stated at the Munich security conference that "Transatlantic unity buttresses European unity" and confirmed on various occasions American support to NATO, which Trump had defined obsolete only to change his mind a few weeks later. In an interview in April, President Trump felt that "Brexit is a very good thing for the UK" but "the European Union is getting their act together" and the political centre is holding there.⁶ The political climate at the summit between President Trump and Chancellor Merkel in March was lukewarm and differences on issues from trade to migration were not hidden. However, some sort of working relationship was established between the two leaders – one that has been further tested by successive developments.

Expectations that the atmospherics of the relations between European partners and President Trump would improve when the latter visited Brussels at the end of May were frustrated. For example, the Europeans sought to dissuade Trump from withdrawing the US from the Paris agreement on climate change only to see the president announcing the decision to abandon the agreement a few days after the G7 summit in Italy. EU leaders had to acknowledge that positions on trade and climate issues differed and exchanges on Russia reportedly exposed a gap in perceptions, even if the US and Europe seem to remain on the same line on Ukraine-related sanctions. On the NATO front, President Trump cashed in the commitment of the organisation to join the coalition against the self-proclaimed Islamic State and step up its counter-terrorism

activities. However, he stopped short of explicitly restating American commitment to Article 5 (the collective defence clause) and scolded European allies for the "chronic underfunding" of the alliance, which "is not fair to the people and taxpayers of the US."¹⁷ On the ground, US forces and European allies continue to implement the measures agreed at NATO's Wales and Warsaw summits to reinforce NATO's Eastern flank, among other priorities. Politically, while all US administrations have insisted that Europeans should spend more on defence, it appears that Trump's pragmatism is overshadowed by a narrowly transactional view of alliances.

Despite considerable uncertainty on both fronts, US relations with China and Russia have taken different trajectories. In both cases, Trump's early positions have undergone a significant evolution. Candidate Trump bashed Beijing for the staggering levels of American trade deficit with China, threatened to declare it a currency manipulator and questioned the long-established one-China policy. However, US commitment to the latter was confirmed in the run up to the key summit with President Xi Jinping in April when, according to Trump, "goodwill and friendship was formed."¹⁸ The atmospherics of the meeting were overall positive. The US and China agreed on a 100-day plan to find ways to address bilateral trade imbalances, including prospects for greater access to the Chinese market for US financial investment and agricultural exports. With tensions rising between the US and North Korea over the latter's nuclear programme, the strategic value of cooperation with China when dealing with Pyongyang is apparent. Trump bluntly stated that "if China is not going to solve North Korea, we will."¹⁹ While a sudden spike in the crisis cannot be excluded, however, the administration has sought to pile up diplomatic and economic pressure on North Korea's regime by engaging Beijing and working with allies in the region.

Conversely, expectations of an ambitious reset in US-Russia relations, based on Trump's appreciation for President Putin and objective to join forces against terrorism, have quickly dissipated. Domestic and international factors, notably the major political turmoil generated by the ongoing investigations on Russia's interference with the US electoral campaign in 2016, the scepticism about a rapprochement with Moscow by a majority of Republicans and Democrats in Congress, the confirmation of US opposition to the annexation of Crimea and commitment to the Minsk process, and the controversy that followed the US strike against Assad in Syria, have led to a freeze in relations between Washington and Moscow.¹⁰ The first bilateral meeting between Trump and Putin has been postponed from late May to July, on the side-lines of the G20 summit. Secretary Tillerson said that US-Russia relations are at the lowest point since the end of the cold war, and spiralling down. He also stated his commitment to change that, while recognising that prospects are uncertain.¹¹ Current challenges do not necessarily preclude dialogue and perhaps future cooperation on specific issues (Russia's Foreign Minister Lavrov met President Trump in the White House in May). However, they make it much harder to envisage progress towards a broader alignment between Trump and Russia. Beyond the dichotomy of collusion or collision between the US and Russia, "under Trump and Putin, the US-Russia relationship is likely to be first and foremost messy and confusing, and prone to frequent changes of tone."¹²

The common denominator of these and other developments may be that "American Presidents adapt to reality because American interests endure."¹³ This would explain the continuing commitment to alliances that amplify US influence and global strategic outreach (although a rather uninspired commitment, notably in the case of Europe), the so far relatively prudent management of the relationship with China through the mix of engagement and balancing practiced by Trump's predecessors and the stalemate with Moscow, whose priorities jar with American ones in various theatres. As a result, some felt that the "administration appears to be settling into an approach to foreign policy that exhibits more continuity with past administration than divergence."¹⁴ In a similar vein, it has been argued that Trump's "unorthodox presidency may yield a more traditional focus on deploying American power for broader ends."¹⁵ This scenario cannot be ruled out but assessing the prospects for Trump's foreign policy requires reflecting on more than distinct moves or initiatives. It needs to consider the larger political coordinates guiding the President and his administration on the global stage. Alongside pragmatic adjustments, the underlying nationalist and hard power-driven worldview of President Trump seems to still frame much of the administration's approach to international affairs.

America is still first

Former Deputy Secretary of State William Burns warned against taking Trump's policy reversals as evidence that US foreign policy would switch back to mainstream patterns. While it is "tempting to conclude that convention is ascendant", he argues, "more troubling trends" lie beneath the surface.¹⁶ According to this view, Trump's approach risks undermining the three pillars of US leadership on the global stage, namely the idea of America as an open society and economy, the US initiative to marshal collective action and the institutions that sustain American leadership, such as the State Department.

At the start of his tenure, Trump sought to showcase a discontinuity with the previous administration/s and to demonstrate he was prepared to turn electoral words in presidential deeds. His inaugural speech in January read as a confirmation of his nationalist and protectionist electoral agenda. The overall message was that he meant what he said. Power would be transferred from Washington and the elites back to the people. Nations exists to serve their citizens and all nations have the right to put their interests first. The new president promised that, instead of making other countries rich while the strength and confidence of the US waned, 'America first' would translate in 'buy American and hire American'. Overall, America would start winning again.¹⁷

Within a few days in late January, the withdrawal of the US from the Trans-Pacific Partnership (TPP) trade agreement, the imposition of a travel ban (which US courts struck down) on citizens from a range of Muslim-majority countries and the diplomatic crisis with Mexico over the envisaged border wall powerfully exposed the nationalist and unilateral instincts of the new president. These are particularly pronounced on international economic and climate issues.

Trump has taken an overtly protectionist approach to international trade, focusing squarely on the reduction of the massive US trade deficit and favouring bilateral deals over multilateral ones. He has defined the World Trade Organization (WTO) 'a disaster' and some of his top trade officials have long been critical of the WTO dispute settlement mechanism. Bilateral deals would instead offer greater leverage to the US and would be easier to review, not least based on their impact on trade imbalances. President Trump and his top trade officials argue that they do not want to undermine free trade but can no longer accept 'bad deals' – they want free *and fair* trade.¹⁸ In early April, Trump launched a 90-day review of the United States' trade policy and relations with trade partners to investigate the causes of its trade deficit.

It remains unclear how far the administration is prepared to go in introducing unilateral protectionist measures and whether these would be compatible with WTO rules. Peter Navarro, Director of the National Trade Council, said that "it is in the interest of national security to reduce these [trade] deficits in a way that expands overall trade."¹⁹ President Trump subsequently launched an investigation into steel imports on grounds of national security, which could lead to introducing tariffs and hit China adversely. Congress and the administration have been debating the introduction of a 'border tax adjustment' that would support US exports and hit imports, even if it appears that this measure is shelved for the time being. US representatives have prevented references to counter trade protectionism from being included in statements from the G20, the International Monetary Fund and the G7. In April, President Trump has threatened again to withdraw from NAFTA, only to switch back to re-negotiating NAFTA a couple of days later. He has also called for renegotiating or terminating the "horrible deal" with South Korea (and for Seoul to pay more for the missile defence system deployed there), amid a tense standoff with North Korea.²⁰ Meanwhile, Commerce Secretary Ross has voiced the US interest in renegotiating trade deals with Japan and the EU.

Overall, there seems to be no united front among Trump's top trade officials and US protectionist measures would likely meet reciprocation.²¹ Serious doubts also exists on the impact the envisaged trade measures would have on imbalances (were for example a concurrent rise of interest rates trigger an appreciation of the US dollar). More fundamentally, it remains unclear whether trade deficits can be attributed to trade policy itself as opposed to broader economic parameters, such as a country's balance between savings and spending or its overall competitiveness.²²

That said, the Trump administration's approach to trade issues is indicative of the broader suspicion or intolerance that parts of it harbour towards international rules and institutions perceived as penalising the US or delimiting its sovereignty. Trump's chief arguments for withdrawing from the Paris agreement on climate change at the end of May have been the damage that it would allegedly produce to American economic interests and the limitations it would set to US sovereignty. The announcement of this decision by the president has been framed in nationalist and populist terms that speak to (much of) his electoral base. The familiar message about other countries taking advantage of the US through unfair deals was also part of the narrative. Trump's decision is consistent with his domestic priorities, notably the ongoing reversal of Obama's Clean Power Plan – the centrepiece of the climate change mitigation agenda pursued by the last administration.

Resource allocations also provide evidence of policy priorities. It is telling that under the budget proposal for 2018 the State department has been instructed to find ways of cutting 50% of US funding for UN programmes and agencies.²³ The Director of the White House Office of Management and Budget, Mick Mulvaney, spoke of a "hard power" budget, intended to put Trump's words into numbers.²⁴ The plan foresees a 9% increase in the Pentagon budget (\$54bn) and a 7% rise for Homeland Security, alongside a drastic 31% cut to State Department and USAID funding. The administration is reportedly considering merging USAID – the development agency – with the State Department and slashing development assistance by about one third, with cuts targeting global health, food security and climate change programmes, among others.²⁵ As a result, funding for diplomacy and development would fall back at about 0,2% of GDP.²⁶

The budget plan has met with strong opposition from both Democrats and Republicans in Congress. Many have argued that it would undermine US international presence and soft power, while others worried about its fiscal sustainability in conjunction with the substantial tax cuts envisaged by the administration. Yet others, such as Senator McCain, criticised the proposal for not allocating enough to the military. The plan is therefore unlikely to be approved in its original shape. However, it signals the administration's relative disinvestment from multilateral frameworks and the emphasis on a renewed military build-up following the budgetary ceilings imposed under the Obama administration.

The role of the military in Trump's foreign policy is more pronounced than under Obama. The main difference is not about preserving the US military edge on any competitor – a widely shared goal by successive administrations and across party lines. It is rather in the emphasis put on the role of the military in US foreign policy and, potentially, in the readiness to use it. Except for the expansion of drone attacks, president Obama adopted a restrained approach to deploying US military might. Candidate Trump ruled out humanitarian interventions and questioned that the US should defend allies that he considered unwilling to invest in their own defence but he consistently asserted the priority of preserving an unrivalled military. From this standpoint, military might is a primary dimension of national power and prestige and should be used decisively to defend national interests. Secretary Tillerson recently spoke of "a posture of strength" underpinning US foreign policy.²⁷ As with previous presidents, Trump's approach to the use of force will at least in part be shaped by the crises that will confront his administration.

While the circumstances are different, the missile strike on Syria following a chemical attack on civilians by Assad's forces and the unprecedented use of the most powerful conventional bomb in the US arsenal against ISIS in Afghanistan have been interpreted as signals that the US is determined to back its words and interests with force. President Trump is considering plans for a small surge in US troops in Afghanistan to support local forces and a possible review of the rules of engagement for American forces there, leaving more leeway to the Pentagon. Trump's muscular attitude was also on display when he boasted about the dispatch of an air carrier group towards the Korean peninsula, which was later joined by a nuclear submarine. This was meant both as a deterrent against Pyongyang and as a message to Beijing that, in the absence of cooperation in putting political pressure on North Korea to stop its nuclear programme, the US would keep all the options on the table. In March, State Secretary Tillerson had already conveyed to Beijing that the policy of "strategic patience" on North Korea was over. President Trump has restated that "There's a chance that we could end up having a major, major conflict with North Korea" but the administration is seeking to work with China and others to scale up political and economic pressure on the regime there.²⁸

While in the process of establishing its hard power credentials, it remains unclear how the Trump administration intends to link the threat or use of force to broader strategic ends and what the latter are. Both in Syria and *vis-à-vis* North Korea, the use or show of force has so far not significantly altered the terms of these geopolitical crises. In some cases, mobilising the military can affect the calculations of others and create space for political dialogue. However, excessive reliance on hard power can also lead to miscalculations and stiffen the resolve of adversaries to test how far America is prepared to go. Besides, other powers may or may not accept to be pushed into cooperation, leaving the US with a dilemma between taking military action or shelving the military option after having brandished it.

Trump's coordinates in international affairs

The co-existence of nationalism and pragmatism, ideology and realism, tough posturing and opportunism in the Trump administration makes a diagnosis of its foreign policy to date difficult. At this stage, three considerations can be put forward to assess the basic coordinates of Trump's approach to international affairs, and what they mean for America's global role.

First, President Trump aims to make America 'great again' but defines greatness in different terms from his predecessors. Crucially, he wants to preserve and enhance US primacy but does not think that the latter depends on America playing a leading role in the preservation and expansion of the liberal order that the US were pivotal in creating. His statements suggest instead that, in various respects, he sees it as detrimental to US interests.

Some have warned that President Trump represents an existential danger for the liberal international order: "the world's most powerful state has begun to sabotage the order it created. A hostile revisionist power has indeed arrived on the scene, but it sits in the Oval Office."²⁹ On the opposite side of the debate, Michael Anton, the current Director of Strategic Communications at the National Security Council, argued that the liberal international order served US interests well after World War Two but that circumstances have changed: the order requires reform. Trade deals that disadvantage the US need review and alliances such as NATO require updating. Furthermore, the expansion of the liberal order is not necessarily in the interest of the US.³⁰ Yet others believe that, despite the populist surge and the transactional attitude of the Trump administration, the order is resilient and interdependence runs deep: there are too many bonds and buffers for the system to unravel into chaos.³¹

Second, power politics seems central to Trump's worldview. International affairs are essentially the business of great powers and relations among the latter are based on strength, which, in turn, brings prestige and respect. Where there is competition, the US must be in position to win. Where deals can help advance national interests, they should be pursued. "Trump has made clear that he respects leaders who can manage their country and that he looks forward to relationships built on mutual respect" argued Philip Zelikow.³² According to Niall Ferguson, "Trump wants a world run by regional great powers with strong men in command."³³ In his view, the strategic approach of President Theodore Roosevelt in the early twentieth century, grounded in national interests, the balance of power and a strong military, would match Trump's instincts and offer good guidance to his foreign policy.

After a few months in office, the prospect of the Trump administration striking deals with big powers over the head of US allies has receded. While the president may feel uneven attachment to long-standing alliances, key cabinet members know by experience the importance of alliances for American power and reputation and have so far contained the impulse to challenge them. In a recent article, two top officials confirmed the American commitment to alliances and NATO in particular after the controversial visit of the president to Europe. At the same time, however, they confirmed the power- and interest-driven outlook of the administration. In particular, they stressed that Trump "embarked on his first foreign trip with a clear-eyed outlook that the world is not a "global community" but an arena where nations, nongovernmental actors and businesses engage and compete for advantage." In this context, strength matters: "Rather than deny this elemental nature of international affairs, we embrace it."³⁴

The emphasis on interest-driven power politics also entails that the US should not be primarily concerned with how others manage their internal affairs. Secretary Tillerson spoke of the challenge of balancing interests and values, arguing that making US foreign policy too conditional on others respecting fundamental values would hamper the pursuit of American national and economic interests. In short, sometimes that linkage can be made, sometimes not.³⁵ On the one hand, this statement reflects the reality of international affairs, where relationships are not merely contingent on normative considerations and engagement with the un-likeminded can be required. On the other hand, this argument was explicitly framed as an expression of the 'America first' approach to foreign policy and can hardly be de-linked from President Trump's openly agnostic and at times embracing attitude towards illiberal or authoritarian leaders.

Third, transactionalism is the flavour of the day in Washington, whether in dealing with partners or potential challengers. But transactionalism without a sense of strategic direction has its limits.³⁶ The management of mutual relations between the US and other powers through a fluid mix of cooperation and soft and hard balancing seems to be on the cards. As to actual or potential challengers, the inherent risk of a transactional approach is that relations might quickly deteriorate if deals are not reached or do not deliver. As to allies, the often-dissonant messages coming from the Trump administration and the temperament of the President have fuelled the perception in Europe and Asia that US engagement will be more contingent. After Trump's trip to Brussels and the G7 summit in Taormina, Chancellor Merkel said that Europeans must be prepared to rely more on themselves as they can no longer fully count on others. This is not the first time that the Chancellor (and other European leaders) have stressed that Europeans should pull together in the face of a challenging international context and a US ally seen as less dependable. Besides, Merkel's speech in Munich needs to be seen with reference to domestic politics, where the Chancellor wishes to profile herself as a steady hand in stormy waters in the run up to national elections in September. That said, her statement signals a widening perception in Europe that the partnership with Washington is going to be selective and issue-based.

Perceptions are different among the rulers in the Arab world. US partners there have welcomed Trump's emphasis on fighting the self-proclaimed Islamic State and containing Iran after what they perceived as the relative estrangement of President Obama. The president's visit to Saudi Arabia at the end of May underscored his transactional and value-free approach to foreign policy. The meeting delivered a substantial package of armament deals (some of which dating back to the Obama administration but delayed or suspended) and other potentially large investments, which Trump announced as a source of new jobs in the US. The president also showed total alignment to Saudi's foreign policy in the geopolitical struggle that opposes Riyadh to Teheran and stressed in his speech to the leaders of the Muslim world the need for a common front in the fight against terrorism – a fight between all civilised nations and barbarism. US presidents have of course long cultivated close relations with Saudi Arabia but Trump's visit stood out for the absence of any critical reference to the factors at the roots of the endemic instability in the Middle East, such as political repression and lack of prospects for the youth, and for the president's stark reversal relative to his earlier statements on Islam hating "us".

While the president has showed different sides of his transactional agenda at different steps of his first trip abroad in May, the impression remains that much of what this administration says or does is tactical, not strategic. A transactional approach might help avoid complacency among allies and urge them to show their value for the US or to become less reliant on Washington.³⁷ However, over time, it can also create a problem of confidence and push them to hedge their bets. This relates to yet another feature of Trump's foreign policy, namely the improvisation that seems to inform important aspects of it. President Trump's frequent twists and turns raise the question whether this is part of a deliberate tactical approach, evidence of lack of knowledge and direction or a sheer reflection of his eccentric personality – these possible explanations not being mutually exclusive. Trump has openly extolled the virtues of unpredictability. He has also described himself as flexible, open to change. Some believe that the president simply "has no idea where he is going."³⁸ Brands and various others argue, therefore, that the problem with Trump is not radicalism but incoherence and incompetence. Even when reversals can be welcome in terms of policy substance, they fail to reassure: after all, reversals can be reversed.³⁹ According to a different interpretation, Trump's apparent lack of strategy could be interpreted as a different strategic approach, borrowing from the business literature the notion of 'emergent strategy'. The latter would build on incremental learning and trial and error. It might prove better suited to adapt to a complex environment than grand strategic plans or fixed policy guidelines, provided that adequate decision-making

arrangements are established to channel policy adaptation.⁴⁰ By yet other accounts, Trump would deliberately seek to gain better terms of engagement by threatening disruptive moves, unsettling third parties only to then go back to negotiations from a position of strength. In other words, 'The Art of the Deal' applied to presidential office.

Trump's impromptu approach to foreign policy has engendered much concern. It risks affecting the reputation of the US as a reliable partner and may lead to poor decisions under stress. "Trump's policies may be tempered – but Trump himself will remain temperamental" noted Hamilton, who added that the "tension between temperance and temperament is likely to characterise US foreign and security policy during the next four years."⁴¹ When trying to assess the future direction of US foreign policy, however, a distinction should be made between the President's perplexing style and the basic coordinates of his worldview as outlined above. The interplay between the latter and internal and external factors will broadly define Trump's foreign policy and offer important insights to navigate tweets and swings, in the attempt to detect the deeper trends shaping America's global role with Trump and beyond.

The US: an ordinary superpower?

Having sketched out the broad parameters of Trump's worldview, the assessment by which Trump's foreign policy will take an overall conventional orientation should be put into perspective. Relative to the prospect of a foreign policy revolution, which has not taken place, the record so far suggests less a reversal to the traditional tenets of American grand strategy than a (further) step in a much larger pattern towards the 'normalisation' of US foreign policy. In a nutshell, the US may be in the process of becoming an 'ordinary superpower'. It would remain by far the largest player on the international stage but it would no longer rely on the grand strategy of liberal order-building that has underpinned much of American foreign policy for decades. To be sure, this would not be a full swing from one extreme – a consistently value-driven foreign policy – to the other – a ruggedly realist one. There have always been both an idealistic and an instrumental component in US foreign policy. It would rather be a shift in the balance between these two dimensions, from the former to the latter.

This development would amount to an intermediate course of action between the two main approaches informing the debate on America's strategy and international role.⁴² Advocates of so-called off-shore balancing or restraint call for downscaling US international commitments and focus on a more limited set of core American interest. They maintain that the pursuit of US liberal hegemony has fallen well short of ambitions, when it has not contributed to international instability, and that domestic support for US global projection is waning.⁴³ Those in favour of sustained American global engagement point out that the US gains huge influence through alliances, partnerships and multilateral bodies. Supporters of deep engagement cover a wide spectrum of political positions, from the liberal internationalists who stress the value of multilateral frameworks to conservative internationalists who favour a robust approach to foreign policy, grounded in a strong military posture. All of them, however, argue that a retreat from global commitments would both dramatically weaken the international liberal order and invite geopolitical rivalry, as competitors would seek to fill the vacuum left by the US.⁴⁴

Evolving into an ordinary superpower would not mean that the US would retrench into isolationism or opt out of multilateral cooperation across the board. It means, however, that American 'exceptionalism' – that is, the notion that the US has a unique and indispensable role to play to shape an open international order in line with the values that underpin its political system – would be progressively replaced by a narrower focus on pursuing national interests through a variety of means, hard and soft, unilateral and multilateral, depending on circumstances.

The US has global reach, global interests and partners worldwide. It will not abruptly scrap alliances and it will maintain a strong influence in key regions of the globe. The overarching American interest to prevent hostile powers from taking over Europe, the Middle East or East Asia will endure. In short, the US would not

acquiesce to others establishing exclusive spheres of influence but it would be prepared to live with overlapping ones, seeking to maintain a difficult equilibrium of interests through bargaining and soft or hard balancing, as need be.

Becoming an ordinary superpower would not mean subverting the international order either. The Trump administration is uncomfortable with various aspects of it, including trade, economic issues and climate change. It might well take decisions that generate instability and weaken the multilateral system, such as the recent drastic withdrawal from the Paris climate deal. But beyond the instincts of the current President and some in his team, and the damage they can produce, the US is unlikely to turn into a revisionist superpower intent on undermining the international order. What can be expected, however, is that Washington opts out of the leading role it has often played to marshal international cooperation or that it exercises its leadership in much more selective ways, around issues central to US interests. In this context, the US would also reappraise the objective of expanding the scope and depth of the international liberal order and would downscale the place of values in defining its foreign policy.

As noted above, some have argued that this foreign policy direction would broadly fit Theodore Roosevelt's approach to America's role in the world (an approach itself inspired by the Jacksonian tradition of US foreign policy).⁴⁵ Ferguson refers to Kissinger's argument that Roosevelt "started from the premise that the United States was a power like any other, not a singular incarnation of virtue."⁴⁶ The reference to Roosevelt offers useful insights but should not be stretched too far as a framework to anticipate the course of American foreign policy under Trump and beyond. That is because the US today is not in the same place as under Roosevelt – a rising power in a world of empires with few if any structures and norms to manage interdependence and competition.

America is currently at the centre of a thick system of formal and informal institutions that it has largely contributed to establish and that broadly reflect its core political values. These rules and structures may not always work to America's advantage and the US has unilateral means to advance its interests (at least in the short term). However, they are an integral dimension of American international influence. Relinquishing US exceptionalism does not necessarily amount to withdrawing from multilateral engagement, but the latter will likely be much more instrumental and utilitarian than in the past. For the US, becoming an ordinary superpower would rather mean a shift from being the chief operating officer of the system to working as one of its top managers, or from ultimate guarantor of the system to a contributor to it.

It is important to point out that the potential evolution of the US into an ordinary superpower does not start with Trump and will not end with him. Besides, this trend does not depend on Washington only. The US can no longer perform the hegemonic role that it has long played in shaping the international order because this role is no longer accepted by various key powers, such as China and Russia, whose clout has been growing in the last two decades. As Ian Clark put it, the United States "has helped shape a world that is no longer amenable to hegemonic direction."⁴⁷ This does not mean that emerging powers want to overturn the system or pull out of it. However, many of them are jealous of their sovereignty, reject norms and rules that they see as interfering with domestic affairs, contest the fairness of the system or parts of it and openly question American leadership therein. There is therefore a serious doubt on whether the US could continue to guide the multilateral order, together with its partners, even if it wished to do so.⁴⁸

Well before Trump was elected, the repositioning of the US in a more complex and diverse international system has been central to Obama's foreign policy. Like his predecessors, President Obama regarded the US as the 'indispensable' country for the functioning of the international order and placed the support of that order and of related values at the centre of its international discourse. However, he was also aware of the limits of American power, of the need to select priorities in a more parsimonious way and of the necessity to come to terms with the interests of powers opposing American influence and a liberal worldview. Hence the tension between principles and pragmatism, liberal instincts and realist considerations that has marked Obama's foreign policy. What president Obama did not do, however, was

to question the merit of the liberal order for the US. Supporting that order may require compromises, deepening it may prove laborious or out of reach in some areas, such as cyber and space governance, but seeking to do so would continue to be a primary dimension of America's grand strategy.

The biggest discontinuity between Obama and Trump is that the liberal instincts of the former have been replaced by the nationalist ones of the latter. While realism and pragmatism delimited Obama's internationalist agenda, they might now act as a brake on Trump's nationalist reflexes. Obama valued multilateral cooperation and acknowledged power politics while not endorsing a zero-sum logic of world affairs. Trump apparently feels no attachment to the liberal order and sees power politics as the natural state of international affairs.

Despite their profound differences, the Obama and Trump administrations could be considered successive stages of the same structural trend, namely the redefinition of America's role on the global stage following the demise of its hegemony.⁴⁹ Obama thought that partnerships and institutions could help anchor US influence even as American power was growing more constrained. Trump seems to believe that if the US is in no position to win, it should not play the multilateral game but rather pursue distinct interests through ad hoc deals. For the foreseeable future, the US will likely work less through multilateral structures and alliances and more through unilateral action and occasional coalitions. Future administrations may swing between these two approaches or practice a different mix of them. Motivations and beliefs can change but current developments can be understood as being part of a larger trend – the evolution of the US from exceptional superpower to ordinary one.

Concluding remarks

The first few months of Trump's foreign policy have revealed not so much a discrepancy between an ideological, nationalist discourse and a pragmatic, conventional practice but the co-existence of a nationalist track and a pragmatic one in the administration's approach to international affairs. The interplay between these two dimensions fuels much uncertainty and speculation on the future direction of US foreign policy. The mix between nationalism and pragmatism is contingent on the issues. Broadly speaking, the administration has adopted in practice a relatively conventional course of action on politico-security affairs, even if punctuated by the President's stark reminders to allies that they cost the US too much, including at the recent NATO summit in Brussels. Nationalist measures, whether adopted, announced or debated, have been more prominent on economic issues and on the multilateral front, including the withdrawal from the TPP, cutting funds for international bodies under the 2018 budget proposal, and the decision to withdraw from the Paris agreement on climate change.

Nobody knows whether either foreign policy dimension will prevail or whether an unstable balance of the two will continue to define Trump's action on the international stage. It may be that internal and external constraints will tame nationalist instincts. But much of foreign policy is shaped by crises and it is unclear how the president and his team would react to sudden shocks, set-backs or to friction with other actors. It might well be that, under pressure, nationalist instincts will be unleashed, not least with an eye to harnessing external crises to boost approval ratings. Conversely, domestic challenges (from current investigations on Russia's meddling in US elections to obstacles to key legislative bills) may urge the president to divert attention from contested internal politics to international crises, where he could posture as a tough champion of American interests.

Beyond the tension between nationalism and pragmatism, this paper has sketched out another possible interpretation of Trump's foreign policy. Trump's agenda would represent both a symptom of and a response to internal and external challenges to the traditional role of the US in international affairs. At home, Trump has leveraged the sense of vulnerability to economic globalisation, social and cultural changes and trans-national threats felt by a large share of US public opinion. Abroad, he sees little benefit in taking a leading role to support international cooperation in an increasingly diverse and competitive international system where, in his view, what really matters is strength. The result is the overarching 'America first' rationale driving Trump's foreign policy. To be sure, Trump's approach is not the only possible one to steer the US through the difficult adjustment of its global role. His successors may well reject his harsh nationalist posture. However, based on the assessment advanced here, the fundamental strategic question facing Washington is how to manage the ongoing shift of the US from exceptional superpower to ordinary one.

The implications of the 'normalisation' of US foreign policy for the future of the liberal order and for US allies and partners would be profound. As the US progressively disengages from its leading role in multilateral affairs and in providing global public goods, there is a danger that international order may wear out, and parts of it collapse, not by design but by default. Even if the Trump administration avoids further major polarising moves such as withdrawing from other international treaties, it may trigger multiple disputes, for example on trade matters, while quietly disinvesting from other multilateral regimes. Given the normative disconnects that already hamper international cooperation, there is a significant risk that others would feel less bound by rules and institutions the largest power no longer champions. The likely outcome would be the emergence of competing multilateral structures and more or less institutionalised regional spheres of influence – a process that can already be observed.

This scenario presents Europe with a complex set of long-term challenges. Trump's political instincts run counter what the EU stands for on two levels. First, nationalism and nativism are the antithesis of the principles driving the European project and the core ingredients of the populist agenda that fuels opposition to European integration. Second, his distrust or disregard of multilateral cooperation undermines the long-standing commitment by the EU and its member states to build a rules-based international order, more often than not in close partnership with the US.

President Trump seems to have stopped dismissing the EU and openly siding with anti-European forces. He and his team may have realised that the EU is a necessary interlocutor on many issues. Antagonising Brussels, Berlin and other capitals would not be a good deal. That said, how the new administration intends to relate to Europe and the EU beyond generic statements about lasting bonds, remains unclear. Many Europeans regarded Trump's visit to Brussels in May 2017 as a chance to build confidence and restate shared values and mutual commitments but the meetings at the EU and NATO headquarters reflected gaps in perceptions and priorities. The president's failure to explicitly restate American commitment to Article 5 has raised more frustration and perplexity among allies in Europe. Besides, Trump has repeatedly targeted his criticism to Germany, whether in matters of trade or defence spending. There is a sense that transatlantic relations are on automatic pilot: nobody is clear on what would happen if the partnership ran into obstacles down the road, whether a security crisis or a serious trade dispute.

On a bilateral level, even assuming that Trump's foreign policy and approach to Europe will be more pragmatic than many feared, the transatlantic partnership will have to adjust. The more the US will behave like an ordinary power, the more the partnership will become a transactional one. Short of major upsets, this partnership will likely remain of unique importance to Europe, whether in terms of security guarantees or economic prosperity. However, it will be more unsentimental and asymmetric than in the past – thick on some issues and shallow or contested on others. Europeans should calibrate their engagement accordingly. Internal political cohesion will be crucial for the EU to stand firm against Trump's nationalist narrative, roll back populist forces in Europe, fend off possible attempts to divide EU member states and be an effective partner, when transatlantic cooperation can be fostered. Europeans need to work out a shared way forward, neither in alternative to the transatlantic partnership nor dependent on it, but aimed to fulfil their own values and interests.

On the global stage, as the US adjusts its role in a post-hegemonic international system, Europe will be faced with a major strategic question about its own part in a polycentric, connected and contested world. This is an environment where no major actor will be in the position to lead international cooperation but all will be vulnerable to the decisions of others. A context where zero-sum politics risks to undermine governance frameworks if key powers have no trust in the others playing by the rules. In this strategic landscape, it will be essential for the EU and its member states to send a strong signal of their resolve to both preserve and, as the EU Global Strategy puts it, transform the rules-based international order. Europeans should wherever possible channel their response to external challenges through multilateral channels and diversify their partnership portfolio to build strong coalitions in support of their priorities.

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