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Reflections on the 2016 U.S. Presidential Election

Few polls or pundits predicted Donald Trump's victory over Hillary Clinton. Trump won anyway, or at least he won the electoral vote, despite polling more than two million fewer votes than Clinton in the nationwide popular vote.

Trump won because he appealed to a half of America that lies mostly hidden from media gaze, an America that lives in declining rustbelt cities and towns that used to be thrived factory centers, a more rural, small town America that feels deeply estranged from the increasing ethnic diversity it sees encroaching on its more traditional world, an America' that feels left behind by the new financialized economy that has brought oases of gentrification and affluence to cities like Boston, New York, Washington, San Francisco, Portland and Seattle. Those cities are all found on America's east and west coasts. Trump's victory margin was built in the interior states where votes are weighted more heavily by the peculiarities of the American electoral system.

Yet Barack Obama twice won many of these same interior states handily, in 2008 and 2012. They went to Trump this time because the Democrats ran a candidate without Obama's popular appeal, a candidate perceived as standing for the status quo in a year the voters wanted change. They wanted change not so much because economic conditions in America were getting worse. They weren't. But this was the election

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cycle in which the American electorate concluded that the end of the Great Recession was not going to mean an end to the new economy of precarious jobs, increasing health care costs and stagnant earnings. They were not looking for technocrats who knew how to manage the new economy. They were looking for a wrecking crew to smash the new economy in the hope that the old economy would then come back.

That was what Donald Trump said he would do. And that persuaded enough former Democratic voters to switch parties and elect him to be the next president. Will he live up to those campaign pledges? Did he mean them? Is restoring the old economy even possible? We shall soon see. Trump cannot afford to walk away from those voters he wooed because doing so would leave him politically hostage to the leaders of the congressional Republican Party, people he does not care much for and who do not care much for him.

Meanwhile, if the Democrats hope to make a comeback in the congressional elections of 2018 and the presidential election of 2020, they need to understand why they fell short this time around and what they can do to recover. They did not fall all that short in 2016. They won the national popular vote and gained seats in both houses of Congress. For the past 25 years or so, the Democrats have been the majority party in America, if not in the American government. They have won the popular vote in six of the past seven presidential elections and have often outpolled the Republicans nationally in congressional contests.

But that will not be enough to bring them back to government. America's skewed electoral system is not going to change. To come back, the Democrats will need to swing back their way the roughly one percent of the vote in the key rustbelt states of the American Midwest, like Wisconsin, Michigan and Pennsylvania, that they won with Obama but lost to Trump. Had Clinton won those three states that she narrowly lost, she would have won the presidency.

To win back those states, and other rust belt bastions like Ohio (won twice by Obama but lost by Clinton by a more decisive margin), the Democrats will have to reshape their national electoral coalition. Right now that is a "rainbow coalition," offering strengthened legal protections to women, immigrants, Latinos, African-Americans, gays and other vulnerable groups. And while those groups, if they voted 100 percent Democrat, would add up to a majority of the U.S. electorate, they never have and never will vote 100 percent Democrat. The U.S. is too politically diverse for that. To come back from this defeat the Demo-

crats will have to win back support from one very large group which is not part of their present rainbow coalition but whose votes they have won before and could win again – the white working class. Characterizing these voters, as Clinton did, as a "basket of deplorables," is not a promising way to win back their votes. Addressing the economic issues that affect these voters, from the outsourcing of jobs, to mortgage relief to the cost of health insurance and college tuition might. That would certainly ruffle feathers among big Democratic donors on Wall Street. But ultimately political parties can only prosper by winning elections. So the Democrats now face a tough choice on which direction, and how far, they will go.

Meanwhile, Americans, and the world, face the uncertain and potentially dangerous specter of a Trump presidency. Rarely has an American president taken office so unprepared by experience and by character, to govern the United States and direct its global policies. Trump's initial choices for cabinet officers and key White House advisors show little promise of compensating for these deficits.

The problem is not so much that Trump promises a radical change in America's long dominant economic policy and foreign policy paradigms. The same could have been said about Franklin D. Roosevelt or Ronald Reagan. The problem is that Trump's promised changes seem not to have been coherently thought out nor their larger implications fully understood.

Take, for example, economic policy. Broadly, Trump has been talking about pushing working class real wages upward by a combination of deficit spending on infrastructure projects, and tightening labor markets by expelling illegal immigrants. He has also hinted at protectionism by means of ripping up existing trade agreements and imposing punishing tariffs on Chinese and other imports. But his cabinet choices and Republican congressional allies are mainly people who want to weaken unions and keep wages down. Even if Trump succeeds in reemploying rustbelt workers at higher wages through infrastructure projects and immigration enforcement, if those workers then spend their fatter paychecks at Walmart buying imported goods,, most of that deficit spending stimulus will not be recaptured by the U.S.. tax system and those initial wage gains could be lost to inflation or higher interest rates. And if China wants to push back on Trumpian protectionism (or Taiwan policies) it has a formidable weapons for doing so in the roughly $1.2 trillion of U.S. Treasury debt now held by Beijing. By selling off that

debt, China could sharply push up U.S. interest rates and stall the U.S. economy.

Now look at foreign policy. Trump is an America-Firster, a nationalist and a unilateralist. Fine. Maybe the U.S. is a little over-extended anyway and committed to defending more foreign allies than it needs or can afford. Maybe some cold war era alliances no longer serve American interests. Maybe, as Trump says, they cost more than they are worse.

But what happens when Trump hints that the U.S. no longer considers Article Five of the North Atlantic Treaty as a U.S. pledge to defend any NATO member country subjected to outside aggression? That tells countries like Estonia and Poland, who feel threatened by Russia, to shop for security guarantees elsewhere. One place they might shop is Germany. Does Trump or America really want to see an armed Russian-German rivalry over the future of central and Eastern Europe? We have all seen where that has led in the not so distant past. And once again, I need not remind readers of this journal, the geopolitical fault line would run right through the Balkans. NATO was originally conceived to "keep the Americans in, the Russians out and the Germans down." Devaluing America's NATO security guarantees could easily lead to easing the American out, the Russians in and the Germans up.

Similar destabilizing prospects loom in East Asia. Trump has suggested that rich countries like Japan and South Korea should take charge of their own security, even to the extent of developing their own nuclear bombs.

Twenty-five years after the cold war, and following the fiascos of Iraq, Afghanistan and Libya there is ample reason for the United States to scale back its global interventionism and commitments. But in a world grown used to an American security blanket, any scaling back must be handled with skill and care. Looking around Donald Trump's national security team in formation, it is hard to see who might supply those essential qualities.

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