



CIGS Daniel Sneider seminar

“The U.S. Midterms: What Happened and What it Means for U.S. Foreign Policy”

(Summary of speech)

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Daniel Sneider, Lecturer in International Policy, Stanford University: I am going to give you some election analysis with polling data and so on, and then talk about the foreign policy implications. Let's start with the election itself. Looking at who voted and why they voted through the exit polling data, we see two Americas. First, we need to understand that a huge number of people voted. There was approximately 49% turnout for a midterm election. Usually the turnout for presidential elections is about 55% to 60% and for a midterm election only about 35%. There was tremendous interest in this election on both sides. The Democrats will likely win at least one, maybe two, senate seats. The net gain for the Republicans may only be one or two seats. It is okay but not huge. The net gain by the Democrats in the House may be as high as 40, which is very large.

Of the total votes cast, for the Senate, more than 57% were Democrat and for the House, almost 52% were Democrat. There is a very clear 3%-4% or more margin in favor of the Democratic Party. Geographically, it looks like most of the country is Republican, but this is mostly rural areas. In urban areas and suburban areas, where there are larger populations, people tended to vote Democratic. The Democrats basically now control most of the Northeast, the West Coast and the Southwest. They also regained a lot of control here in the upper Midwest.

The governor's races are important in the United States. Republicans have made a lot of gains in governorships and in control of state legislatures in recent years. This gives them a bigger political base and candidate pool, and also allows them to control the process of drawing electoral district lines. This has resulted in a very distorted map for electoral districts and gerrymandering by the Republicans to minimize the votes for the other party. Democrats gained seven governorships, especially in the Midwest. That is crucial because again this is the big battleground for 2020.

Another significant point is that lots of women ran in the recent elections and a lot of women won. There will be 123 women in the next Congress out of 535. Most of them are Democrats. A third of them are women of color. The Democratic caucus in the House of Representatives is now only about 35% white men. The rest is all women and minorities. The Republican Party, by contrast, increased to 90% white men. A very diverse group of people were newly elected.

In terms of gender, the exit polls show us that Republicans won the majority of men, but only narrowly 51:47. On the side of women, there is a large gap. Almost 20% more

women voted Democrat than Republican and they make up the majority of the electorate at 52%. That is a huge gender gap and was largely created by the president himself.

By age, young people up to 50 years old overwhelmingly voted Democrat. Older people are split pretty evenly. How people vote when they are young usually determines how they vote throughout their lives, and the younger people will obviously live longer than the older people. This is important when looking into the future.

In terms of race and race by gender, white men heavily voted Republican, 60:40. However, white women split evenly. Then, in every other race category, both men and women voted overwhelmingly Democrat. Race and gender will be very important for the Democrats and a problem for the Republicans going forward.

In terms of education, Republicans made gains among white working class voters, specifically those without a college education. Previously, highly-educated voters tended to vote more Republican than Democrat. This has shifted over time, and now the more educated you are, the more likely you are to vote Democrat.

By religion, white Christians, mainly Christian evangelicals, voted Republican 56:42. But every other religious group and those with no religion voted Democrat. Catholics are very important as a big group of working class Americans.

Existing party identification is very important. Democrats mainly voted Democrat and Republicans mainly voted Republican but Independents voted Democrat by a 12% margin. This is a growing part of the electorate, particularly among young people. In California, for example, more people register as Independents than Republicans.

As for income, traditionally, poor people have tended to vote Democrat and more wealthy people Republican. Those numbers have stayed the same over time while evening out a little bit.

Turning to issues, first I should point out that Americans do not generally care about foreign policy. It almost never shows up in the list of issues, except implicitly under say immigration. The issues are split between two heavily different camps. Republicans cared about immigration and economy, and Democrats cared about healthcare and gun control. Looking at foreign policy directly, Republicans think President Trump is

making things safer. Democrats think the opposite. Some people said that there is no difference. It is split on completely partisan lines.

Immigration was a huge issue because the President made it so. Democrats are opposed to a tough immigration policy and Republicans support it. For economic and trade policy, Republicans have historically been free traders and Democrats have tended to favor tougher trade policies. Now it has reversed. Republicans are now the party of protectionism.

Essentially, this election was a referendum on Trump. The votes are again split along totally partisan lines. Republicans approved of Trump, while Democrats disapproved of him. Almost two thirds of the electorate felt that Trump was the key issue in this election. Trump even said in his campaign that this is a referendum on him that he needs until he lost.

I would describe the results not as a wave but a realignment. Realignment means there is a long process and goes back to the 1960s and the shift of Southern Democrats. The Democratic Party used to have a base of support that was unions, urban areas, minorities, and the South. The South had traditionally been a stronghold of the Democrats but white southerners shifted over to the Republican Party after the passage of the Civil Rights Act of 1964. We have had a long period of gradual realignment. This has now intensified. In this election, most of the gains by the Democrats were in suburbs, which have traditionally been stronger areas for Republicans. This was heavily driven by women.

Democrats also regained ground that they lost in 2016 in the upper Midwest, which, until the last election, had always been a core area for them. In the next election, if Democratic Party can hold these states, they can win a majority of the Electoral College without Florida or Ohio. This is very important. Republicans, on the other hand, have huge support in rural and small-town America and areas that are heavily white. That is very good for the Senate because Senate seats can be determined based on a lot of rural votes. Even states with very small populations, such as Montana or Wyoming, have two seats in the U.S. Senate. Republicans will keep that advantage for a while. It will take a long time for Democrats to regain control of the Senate. That being said, Democrats made a massive effort bringing out voters. There was a massive amount of organizing, particularly among young people.

What are the lessons to be drawn? Trump believes the lesson is that people who identify themselves with him won and the people who distance themselves from him lost. That is not true but he will continue to push those themes in his governments because he believes those are essential to him winning the election in 2020. He will continue being hardline on trade and immigration, putting America first, etc. In some cases, they did help him win Senate seats. Democrats, meanwhile, are split between left and right, and maybe progressive and center. There is a debate inside the party over which is more effective at mobilizing voters. In fact, both were.

Even though the centrists are in control of the leadership of the Democratic Party, many themes and ideas came from the Sanders wing, such as Medicare for all, minimum wage increases, climate change, and so on. The Democratic Party was really effective in not talking about Trump during the election, but they did not have to since everybody knew the election was about Trump. They talked about the issues. That will be true again.

I think Democrats are going to aggressively use the House to challenge the administration on all sorts of issues. They probably will not try to impeach the president, unless Robert Mueller produces an incredible report and starts a massive wave of indictments. No major legislation will be passed in the next two years. We have entered complete political warfare and it will continue for the next two years. It will be very difficult to pass a budget bill. However, one area where the President always has power and mostly does not have to deal with Congress is foreign policy and trade policy. I think he will shift his focus to those areas, to some degree.

There are four areas of interest regarding foreign policy: Iran and the Middle East, trade, China, and North Korea. Some of the key people in foreign and national security policy in the administration are unified on wanting to confront Iran. It makes sense politically as white Christian evangelical voters are very supportive of this anti-Iran campaign. It is also somewhat popular in the South. The strategic axis of the Netanyahu government in Israel, the Saudi monarchy, and the Gulf States other than Qatar are all united in this confrontation with Iran. The goal is regime change through the resumption of sanctions. However, specialists in this area believe that is an illusion. There is a danger of triggering an escalation of conflict that can lead to unforeseen consequences.

As for trade, Trump will continue to pursue an economic nationalist policy, involving the punitive use of tariffs as a weapon to force bilateral agreements. He believes that trade balance is a measure of national strength and does not really understand the

difference between goods and services. He keeps citing the trade figures for goods and ignores services, even though people try to correct him. He believes manufacturing and goods trade are essential. He does not care about global supply chains or access to financial markets. Lighthizer is a very intelligent and competent trade negotiator, with a more sophisticated understanding of these issues, but works very closely with the President. We have seen Trump's model for trade in the NAFTA negotiations and the proposal of the USMCA. It has not been approved by Congress yet and may not be approved by Congress because Democrats have very little incentive to give the President a victory. For Japan, I believe the main issue will be automobiles. Lighthizer is said to not really care about agriculture or financial services, but is happy to use those issues as a pressure tactic. He will give the Japanese government a victory on those issues but not a deal on automobiles.

As for China, the administration takes an anti-China policy. The current policy combines the traditional geostrategic aspects with economic aspects. The economic argument is that people no longer believe that China will become a member of the global system, learn to play by the rules and gradually be transformed into a market economy. Instead they just believe that China is seeking regional if not global hegemony and also technological superiority. They believe American firms should decouple from China to break up the supply chain dependency on China and to block the Chinese from moving into areas of high technology. This thinking is shared among European firms, Japanese firms, Korean firms, etc., who face the same challenge from China. The threats by the Trump administration to impose further tariffs on China are quite real. The only way this may be reversed is if there is a backlash inside the United States because the tariffs trigger inflation or cause supply problems.

Regarding North Korea, I never thought negotiations would bring about the denuclearization of North Korea. That was always a fantasy. We have already reached an inevitable point in that the North Koreans are not going to take clear steps to dismantle their nuclear program. That opens up a gap not only between the United States and North Korea but between the United States and South Korea because the South Koreans want to engage with the North. The North Koreans do not want to negotiate with U.S. national security bureaucrats because that would be real negotiation. They want to negotiate with the President because they can get what they want without giving very much. Then the question is, will the President lift sanctions and so on in exchange for some symbolic steps on nuclear weapons or will the national security apparatus of the United States stop him. Many of the people underneath the President in

the State Department, the CIA, and so on do not want the President to have another meeting with Kim Jong-un. They want to have a real negotiation first. If talks collapse, we could be back to the brink of war again.

Going forward, I believe we will have more cabinet reshuffles. Some cabinet members are very vulnerable. I know many people in Tokyo and around the world feel James Mattis is the last so-called “adult” in the room who can restrain the President from doing something really stupid and crazy. It is still not clear if he will remain a member of the cabinet. More importantly, Mueller is now on an accelerated timetable to file the report on his investigations. I think the President is going to move to try and fire him, maybe very soon, which will result in a massive constitutional crisis. The most important issue will be who in the Republican Party leadership is not completely under the control of Trump. I think one of the consequences of the election is that the Republican Party has definitely become the party of Trump. The moderate figures are all gone. I expect there to be massive political chaos if not crisis in the next months, if not the next two years.

Regarding the economy, everybody has been anticipating a slowdown. We have had so many years of growth and the likelihood of recession becomes greater with such political gridlock and, for example, a budget crisis. If the effects of tariffs turn negative, the stock market could also be impacted. Under those circumstances, an important question is if Trump will use foreign policy to distract the public from his domestic political problems.