

The revenge of geopolitics

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Study group dates. Each session will be on a Thursday between 2pm and 3.30pm. The Fall dates will be September 12th, October 3rd, October 17th, November 14th and November 21st. I will be available for office hours following each session.

Outline. People over 30 grew up in a world in which globalization and economic integration were presumed to be humanity's chief driving force. People in the age bracket of a contemporary college student have emerged into a far less optimistic era in which confusion, risk and uncertainty have displaced the so-called Washington consensus that had prevailed since the end of the Cold War.

This study group will look at what this more dangerous and competitive new global era means for the future of the west, the survival of US democracy, the risk of war and US-China decoupling, and what the original Cold War between the US and USSR can tell us about the new one between the US and China.

The goal of this study group is to help you understand the radical uncertainty of the world into which we are headed. We no longer have the luxury of ignoring geopolitics. To paraphrase a famous thinker: "You may not be interested in geopolitics, but geopolitics is interested in you." I will invite prominent guest speakers to at least two of the sessions to help stimulate the discussion. I include recommended reading material for each session. These will not be too onerous. But I will usually ask each of you to submit two or three questions for each session (after the first) to help kick off discussion.

My background. I am the chief US commentator and columnist for the Financial Times based in DC. Previously I was Washington bureau chief, New Delhi bureau chief, Philippines correspondent and capital markets editor. For a year between 2000 and 2001, I was speechwriter to the US Treasury Secretary, Larry Summers in the Clinton administration. I am the author of three books – *In Spite of the Gods: The Rise of Modern India* (2006), *Time To Start Thinking: America and the Specter of Descent* (2012), and *The Retreat of Western Liberalism* (2017). My next book in May 2025 is a full life biography of Zbigniew Brzezinski, one of America's leading Cold War Strategists (Simon & Schuster). I appear regularly on MSNBC, CNN, BBC and other major broadcasters. Since I will be covering and commenting on the 2024 US presidential election, and the global implications of its aftermath, this is also an opportunity to evaluate and critique the traditional media's coverage of elections and foreign policy in an age of social media. I will share what I write throughout the semester.

Session 1 (Thursday September 12th). Why geopolitics is back.

The somewhat naïve expectation that the rest of the world would become more like us – the west in general, America in particular – has died. What used to be called "great power competition" is

now the norm again and will be for the indefinite future. Some trace the end of Pax Americana to Washington's response to the 2001 attacks on the Twin Towers – the 2003 Iraq war and the war on terror overreach. Another break point was the 2008 global financial crisis, which exposed the stagnant prospects of much of the western middle class and lit the fuse for populist backlash. It also discredited the Washington consensus. Others would date the end of Pax America to the far more recent February 2022 Russian invasion of Ukraine. Whatever the date, nobody disputes that America's unipolar moment is over along with many of the ideological precepts that went with it – free trade, increasing integration, the spread of democracy, and the end of ideological competition. What will a post-American world look like?

This is the longest essay I'll give you to read – Francis Fukuyama's famous/infamous "The End of History" – but it is well worth your time. His essay continues to be cited as often as it was when published in the summer of 1989. It will help you understand the case that was once the consensus that now everyone loves to trash.

https://www.jstor.org/stable/24027184?read-now=1&seq=2#page_scan_tab_contents

Fareed Zakaria's 2008 book, *The Post-American World*, supplanted Fukuyama and also entered the vocabulary alongside *The End of History*. This New York Times review gets its essence:

<https://www.nytimes.com/2008/05/11/books/review/Joffe-t.html>

My own 2014 FT column "Uncertainty, not China, will replace US power" gives you one mainstream idea of how the debate evolved:

<https://www.ft.com/content/b7a1964c-d121-11e3-bdbb-00144feabdc0>

And to bring us up to date a final reading from earlier in 2024 by Anne Applebaum in the Atlantic on how autocracies are making common cause against the west:

<https://www.theatlantic.com/magazine/archive/2024/06/china-russia-republican-party-relations/678271/>

Session 2 (Thursday October 3rd). The New Cold War and the risks of US-China decoupling.

The Biden administration says it is "derisking" the US economy from China but is unable to draw a clear line between that and full-blown "decoupling". The suspicion in DC is that China wants to supplant American hegemony. The fear in China is that America wants to keep it permanently down and ring-fenced. Both paranoias are partly true and self-feeding. Whichever party controls the White House, this new Cold War will persist. We will discuss whether there is any plausible non-military end in sight for this mother of all great power struggles.

Joe Biden's US national security advisor, Jake Sullivan, gave this seminal speech in April 2023 on how to counter China with his "foreign policy for the middle class".

<https://www.whitehouse.gov/briefing-room/speeches-remarks/2023/04/27/remarks-by-national-security-advisor-jake-sullivan-on-renewing-american-economic-leadership-at-the-brookings-institution/>

I wrote about that theme the week before Sullivan spoke – "The new Washington Consensus"
<https://www.ft.com/content/42922712-cd33-4de0-8763-1cc271331a32> My colleague Martin

Wolf also wrote about how America is feeling “buyer’s remorse” for the world that it built:
<https://www.ft.com/content/77faa249-0f88-4700-95d2-ecd7e9e745f9>

Finally, Dmitri Alperovitch in Foreign Policy on “How the US can win the new cold war”.
<https://time.com/6971329/us-china-new-cold-war/>

Session 3 (Thursday October 17th). The 2024 US presidential election and its impact on geopolitics.

What happens at home here in the US, particularly on November 5th has profound implications for how America navigates the challenge to its primacy. Great power competition is driven by a mix of economic and military power of the competing nations, their diplomatic effectiveness (including their ability to form alliances), and the stability and character of their political systems. America’s political future is at a radical crossroads depending on whether Trump or Harris wins. What does the US election mean for the world and US democracy?

In the interests of keeping the material as current as possible, I will email the reading list to the group the previous week.

Session 4 (Thursday November 14th). Can the west survive as a coherent idea?

This study group takes place after the US election. If Harris wins, Washington will at least be formally committed to the transatlantic alliance. Trump, on the other hand, openly denigrates the very idea of the West. But what is the West? Europe and the US are largely on the same page about Russia’s threat to Ukraine. But they are very far from forging a common stance on China – and are never likely to do so. The West is a tired concept that has lost force from within. Do western “values” have any legitimate meaning in today’s world?

Wolfgang Münchau in Eurointelligence earlier this year says the west no longer has the necessary attention span: <https://www.eurointelligence.com/column/why-the-west-is-in-decline>

From the opposite end of the spectrum, here is a conservative voice, Adriel Kasonta, on “This is the way the west ends” – also from earlier this year.
<https://asiatimes.com/2024/03/this-is-the-way-the-west-ends/>

Here are two different FT perspectives on what the west means, from my colleague Gideon Rachman: Xi Jinping’s China and the rise of the ‘global west’”
<https://www.ft.com/content/d885aecf-4202-41cd-ad3f-476ffb19631e> and also my essay reviewing books assessing the life expectancy of the west: “Contested Future: What’s next for the West?” <https://www.ft.com/content/8a4dfeef-eb91-4ab5-b1f2-073373baee78>

Session 5 (Thursday November 21st). What we can learn from the original US-USSR Cold War on how to navigate the new Cold War between the US and China.

America won the first Cold War comprehensively. An economically stagnant Soviet Union – essentially the Russian empire in Marxist clothing – peacefully unraveled into its constituent

nationalisms. Putin called the dissolution of the USSR the “greatest geopolitical tragedy of the 20th century.” He is now trying to reverse some of that. The US contest with China is very different. China largely inhabits its historic borders and is a powerful economic force. Unlike the ideological Cold War with Russia, US-China rivalry is likely to persist regardless of the political character of China, or the US. Bipolar world might be a better framework to view our future than New Cold War.

Yale’s Odd Arne Westad explains in the New York Times how the first Cold War ended with “America’s delusion of victory”.

<https://www.nytimes.com/2017/08/28/opinion/cold-war-american-soviet-victory.html>

Vox canvassed some of today’s leading IR brains on the difference between this Cold War and the last one. Not all of them agree we are in a new one.

<https://www.vox.com/23568071/are-we-in-a-new-cold-war-russia-ukraine>

My appreciation of one of America’s great Cold War strategists, Zbigniew Brzezinski, addresses what it took for America to win the first cold war.

<https://www.ft.com/content/54a7af64-4530-11e7-8d27-59b4dd6296b8> I also wrote about the death of Kissinger last year and his cold war legacy:

<https://www.ft.com/content/02ce3837-41ea-4c05-bc7a-8329b285ed54>