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TRANSCRIPT

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"Previewing President Trump's Trip to Asia"

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Nina Prieur: Hello, everyone, and welcome to the CSIS Press Briefing "Previewing President Trump's Upcoming Asia Trip." I'm Nina Prieur, communications director here at CSIS. And I'm joined today by CSIS experts who will share their insights into what to look for going into the summit, what we can expect to come out of the summit, and more.

Just a couple of housekeeping notes before we get started. Each of our speakers will give several minutes of introductory remarks after which we'll turn to your questions. If you want to ask a question, please type it in the Q&A window or raise your hand to ask it out loud. We'll be distributing a transcript of today's call shortly after its conclusion. The transcript will also be made available on CSIS.org.

With that, let's go ahead and get started. I'll turn first to Victor Cha, president of the Geopolitics and Foreign Policy Department and Korea chair at CSIS. Victor, over to you.

Victor Cha: Thanks, Nina. Well, thank you all for joining today to discuss this trip. I'll just start out with an overview, because the experts on the call – Edgard, Ilaria, Gregory, and Heather – can fill in – sort of fill in the details.

So this is a – you know, these trips to Asia are big, long trips. I mean, this is both ASEAN and APEC. For any president, these are big, long trips. For presidents who don't like to travel, which would include the current one, these are extremely long trips. And they're usually very cranky by the end of the trip. It's unclear how – I'm sure the president's going to have to take a lot of questions about the midterm elections.

Just by way of advertisement, CSIS will be putting out later this week and next week, some work we have done on U.S. foreign policy for the 120th Congress, based on some polling that we did about U.S. foreign policy preferences of independent Democratic and Republican voters in seven swing states. So not the broad polls that AP or CNN do, but ones that were really focused on the swing states. So stay tuned for that. That is coming.

In terms of the trip overall, what I've been told is that the stop we should really be watching is ASEAN, because the administration is focused on trying to get some – make some deals there, some trade deals there. My understanding, and Greg and others can correct me, is that part of the aspiration, at least on the administration side – and I don't know whether this has been accepted among the Southeast Asian countries – is to try to get current or future commitments by ASEAN countries to incline themselves towards the U.S. AI stack, and the U.S. would incentivize that by leveraging development assistance. So it really is commercial diplomacy, as the administration likes to talk about it, at its finest, and that we should be watching that space.

At APEC, I feel like the administration has been trying to downplay expectations of the next meeting between President Trump and President Xi. They've described it more as a – as a short, a routine visit, not sort of like a big, major summit, where I think we would expect to see the continuation of the uneasy truce of tariffs for critical minerals, and then maybe there will be progress on this thirty-for-thirty trade deal, the Board of Trade and the thirty-for-thirty. But Edgard and Ilaria can speak to that – speak to that more. The more substantive meeting, I'm told, is the one that will take place three weeks later in Miami, where President Xi will be coming to for the – for the G-20.

And then, finally, there's a lot of buzz in the media about a potential trilateral, the so-called new Yalta meeting between Trump, Putin, and Xi. My understanding is that Trump really does want to do this meeting. I don't know if it's for the substantive value as much as it is for the media and TV shock value of it, and that Putin is also amenable to it but that the Chinese are a little bit hesitant since they are the hosts – they're the ones who determine the meeting, and they're a little bit hesitant because it's very unpredictable. It could go very poorly; it could go very well. As you all know, the U.S. wants to focus such a meeting on arms control as opposed to Ukraine or Iran, and I think that is also sort of a flashing red light for the – for the Chinese.

And then the last thing I'll say is that, you know, there's always speculation about when Trump is in the region whether there could be the fulfilling of his long-held desire to have more meetings with Kim Jong-un. No one can say – so I just got off, you know, a 15-hour plane ride, so maybe something happened when I'm on the plane, but I do think that chances go up of a meeting after the midterm elections in the sense that I think the president will be focused on many things, but one of them will be building his legacy. And that's not just in terms of physical structures in Washington, D.C., or golf courses, or renaming of airports, but also in terms of diplomacy. And clearly, one that he has personally staked a lot of time over two terms has been on North Korea. There's nobody else in the U.S. government that makes policy on North Korea except the president. So I think that he'll be focused on that sort of legacy issue.

And for the North Koreans, I think their plan, if they were going to entertain a meeting, was always to wait until after the midterms. They see Trump as weaker and therefore perhaps more vulnerable and an easier target. And I'm sure they have an abiding desire to at least, you know, touch base with President Trump so he doesn't do something unpredictable like he's done in Iran or in Venezuela.

So, Nina, let me stop there and hand it back to you.

Dr. Prieur: Thank you, Victor.

Next we have Edgard Kagan, senior advisor and Freeman chair in China studies at CSIS. Edgard, please go ahead.

Edgard D. Kagan: Thank you very much, Nina, and good morning to everyone. And thank you, Victor, though, you know, I'm not sure how much I should be thanking you since you – it's very hard to follow that.

Let me just say, you know, I agree with what Victor said. All the signals coming out of the White House are that, you know, they're terming that what – his contact was Xi at APEC as essentially being a courtesy call. They've, obviously, had two very long meetings in May and in April – and in September, and so it doesn't sound like there's a – that the real focus at APEC is going to be Xi.

You know, I would just step back and say that in addition to the significance of going to the ASEAN summit – which I think is very important because it signals that the U.S. is engaging on something that's very, very important to Southeast Asia, and recognizes that Southeast Asia continues to be an area of significant competition between the U.S. and China – it also recognizes that we have longstanding ties to ASEAN countries and that we've been working with ASEAN on a number of things in this administration as well as previous ones.

I was the U.S. ambassador to Malaysia last year when the president came for that meeting, and it was very impressive to see both the president's engagement with the ASEAN leaders – and I would note it was a very short visit, but he still worked very hard to connect with them – and also the degree to which the ASEAN leaders were wanting to engage with him. As Victor said, the administration is looking to highlight the strength of the economic ties, but also I think that, in terms of the relationship with China, in my view it is always good when a U.S. president goes to China to have engaged with key U.S. allies and partners in the weeks or even months beforehand.

And so in addition to having engaged with ASEAN countries, the president's also going to be doing a meeting of Quad leaders. The Quad, as you will remember, is the U.S., Japan, Australia, and India. This is significant, because this will be the first leader-level Quad meeting of this administration. There have been a number of foreign minister-level meetings, including the one that just took place in Atlanta. And it's also worth noting that this is something that Secretary Rubio did on his very, very first day as secretary of

state. Immediately after the administration – after the inauguration, he immediately met with the Quad leaders.

I think it's fair to say that there's been some disappointment at the lack of leader-level engagement. And that has gone hand-in-hand with friction between the U.S. and India. The administration's decision to do this meeting, and the president's decision to do this meeting, I think is very significant because it both is in the context of trying to restore some of the relationship with India, but it also gives a big lift going to China. Because I think it's fair to say the Chinese are not fans of the Quad. And doing this meeting, reminding Xi that the U.S. has some very significant relationships, and also I think doing this immediately before going to China, is a reminder that the president's working on the U.S.-India relationship. So that, in my view, will carry some dividends.

In terms of the trilateral meeting, it's interesting because this was originally a Putin idea, or a Russian idea. And the president expressed support for it, in the context of arms control – or, denuclearization and arms reduction negotiations. This is something the Chinese hate. And Heather will get into this in more detail. But I think it's fair to say the Chinese have do not want arms control discussions with the United States. And they certainly don't want to do it with the United States and Russia, because it suggests that they accept the framing that they are now a major nuclear power that should be subject to similar restrictions or reductions in its forces. And they do not like that at all. And it's very clear that this is something that has been a disincentive for them.

The latest is the Chinese have said they're working on this. The president, as I'm sure all of you saw over the weekend, talked about it again, for denuclearization and Iran. Those are not topics the Chinese will be thrilled about. I think the key for Putin was that this was very much about signaling a desire to talk to the president and talk to Chairman Xi in a way that suggests that they're making decisions on Ukraine, which obviously the Ukrainians and the Europeans don't like. And even as recently as a week and a half ago, according to the German president, the Chinese – Xi Jinping didn't seem that favorable to this idea of a trilateral, and suggested that if there was discussions in Ukraine, he thought the Europeans should be there. So that's going to be something to watch closely. I think one of the concerns from the Chinese is the risk that this overshadows the rest of the summit. And I think there's a similar concern about having Kim Jong-un. There's been speculation, as Victor said, about Kim Jong-un.

Just taking a step back, I've been with presidents immediately after midterm, both wins and losses, and it's always important. Doing foreign policy after a midterm, particularly the last two years of a two-term president's time, is very, very important. And it's – because it's something that reminds the

nation, it reminds foreign observers, that this is very much the president's bailiwick. The executive branch's authority over foreign policy is obviously dominant. And I think that this – going ahead with this trip, adding the ASEAN stop, adding the Quad meeting, all of these things highlight that the president still has immense authority over foreign policy.

So with that, let me hand it back to Nina and to the rest of the team.

Dr. Prieur: Thanks, Edgard.

Next we have Gregory Poling, director and senior fellow of the Southeast Asia Program, and Asia Maritime Transparency Initiative at CSIS. Gregory, please go ahead.

Gregory B. Poling: Yeah, thank you, Nina.

So I'll just reiterate some of the points on the Manila part of this trip. Which, you know, it's surprising at this point that we don't really know that much about what the actual engagements with ASEAN, as an organization, are going to look like, if any. I mean, that's nominally the reason for the trip. But what we know about, what the White House has talked about, is the Quad meeting that Edgard referenced. Of course, there's going to be bilateral engagements between President Trump and President Marcos, Jr. of the Philippines, as the host. And that, I think, could actually be more important to the Philippines than the actual Trump at ASEAN component. And that's because the U.S.-Philippine alliance is so important to Philippine national security, economics, and to Marcos himself.

They have had a surprisingly warm relationship so far. Some on the call might remember that President Marcos got the first Oval Office meeting of any of the Southeast Asian partners last year. And it was probably the warmest meeting we had seen President Trump have with any foreign leader up till that point. And on the numbers, I mean, the U.S.-Philippine alliance has continued to evolve in the same direction it was already moving in the previous administration. Steady pace, and actually increasing pace in in U.S.-Philippine military exercises, arms sales, and so on.

The Philippines got more development assistance from the State Department last year, after the closure of USAID, than any other country. And that's included things like global health. There's a huge push on the Luzon Economic Corridor, which is this big multilateral effort to build out key infrastructure in the Philippines. So the bilateral relationship has really kind of been enclaved from a lot of the other disruptions of U.S. policy in the region. And President Marcos is going to want to highlight that, right? The Philippines is going to want to hear some statements from President Trump before he heads to China referencing the strength of the alliance, even

though I don't think that we expect a lot of details on things like the South China Sea.

When it comes to the ASEAN engagement itself, I expect it to look something like last year's visit to Kuala Lumpur, in which the president joined a dinner with the ASEAN leaders but not really any formal summitry. That was highly unusual, but it's – I think, from the perspective of the ASEANs, it's better than nothing. And they'll dub it the U.S.-ASEAN summit, even though that's not really what it'll be. What we don't have this year in Manila is the kind of big, splashy anchor we had for the trip to Kuala Lumpur, which people might remember included the so-called Thailand-Cambodia peace deal, that was perhaps a little less than met the eye. But that's what the White House really wanted to focus on then. I don't see a similar big announcement, big deliverable, planned, or at least not one that we know of.

Victor at the top highlighted potential progress on trade deals. And under this – so far, under the administration you've really had, kind of, a story of two trade deals. You've had the trade deals with the Europeans and the Northeast Asian partners, which are heavily about things like getting more investment in the U.S. And then you have the trade deals with the Southeast Asian partners, which are more about constructing exports and reducing trade deficits. The big ones signed last year were Indonesia and Malaysia, neither of which are currently being implemented. There is also one with Cambodia that nobody pays much attention to.

The two big ones on the horizon, potentially, are Vietnam – which is in the top three of U.S. trade deficits, alongside China and Mexico and is a prime target of the administration. It seems like the Vietnamese feel like they've made their best offer on that, and are waiting for the White House. So it's possible that we see some public statements in Manila. But I'd actually look to the G-20. The Vietnamese are one of those who are not members of G-20, but have been invited to attend in Miami. So if there's some big signing, a breakthrough, I would expect it to happen on U.S. soil, not in Manila.

And then the Thailand one, which the Thais have also really wanted to push. I also am not sure that that one is going to get across the finish line. But those are two things we could be looking for. I'd also flag one other thing we know is not going to happen, despite a lot of speculation, is that there will not be any big signing or statement about this Pax Silica Economic Security Zone north of Manila. The U.S. ambassador has said that that's not going to happen. And that's become a real political hot potato in Manila. So I think the Filipinos are facing considerably more pushback domestically on this Pax Silica deal than they originally accepted.

Dr. Prieur: Thank you, Gregory.

Next we have Ilaria Mazzocco, deputy director and senior fellow for the Trustee Chair in Chinese Business and Economics at CSIS. Ilaria, please go ahead.

Ilaria Mazzocco: Thank you, Nina.

So I think I will be reiterating a little bit about what Edgard already mentioned, which is that there isn't a lot of expectation for big economic outcomes from this meeting. This has been certainly how – at least how – the signaling at this point. However, there are sort of several signposts that we might be looking for.

One, I think as Victor mentioned, is looking at whether we have any announcements on the operations of the Board of Trade, the thirty-for-thirty, right? So there's been – this was announced. This was – there was an agreement reached in September. But there – you know, these are not in place yet, these tariff reductions, right? So that would be certainly something to look out for, to see if there's any progress on that front.

The other big, you know, issue that is certainly top of mind for a lot of companies is the current truce on export controls between the two countries, which expires on January 10th, right? There was an – a three-month extension announced in September, but that will expire in January. Again, I don't expect that there will be any big agreement announced, but you know, some language around that might be interesting and probably welcome by companies.

The AI dialogue was the other big outcome of the September meeting. So, again, any sort of details on whether that is progressing or how that is progressing, how the countries are thinking about that, would also be significant.

But the biggest, I think, takeaway or outcome or signpost that one would want to look for is confirmation of Xi Jinping traveling to Miami for the G-20 in December, right? This was – this is where many of these, you know, agreements will probably – there will be actually more deliverables, hopefully, certainly for the, you know, extension of the economic truce. That would probably be the place where it would take place. So that's certainly something to keep an eye on.

The other thing that's worth noting is that both leaders are coming to this meeting after pretty big political events, right? Certainly, the midterms have been extremely significant and momentous for Trump. Unclear exactly how this will affect his thinking about his relationship with – you know, with Xi Jinping and certainly U.S.-China relations, as well as, you know, other countries, I think as my colleagues have discussed. But you know, economic

issues/affordability have been top of mind for voters, so that's maybe a push to sort of get more of the progress on the Board of Trade side of things, although unclear that – again, that that's going to be, you know, the biggest driver at this point in time. Xi Jinping also comes after the – into this meeting after the Fifth Plenum, which has been really focused on party discipline, a lot of purges in the – in the party. So it's just going to be interesting the optics of these two leaders coming in after very different sort of political events that reflect differently, I think, on their leadership and where they stand within their political systems.

Final element to keep an eye on is the unfolding Nvidia scandal, the Nvidia story with Jensen Huang now under investigation by the Nvidia board. It doesn't seem like this is affecting President Trump's confidence with – in Jensen Huang, so I don't think that this is actually going to have a huge impact on the APEC meeting in Shenzhen. But you know, it's just – it's going to be in the background. It's certainly going to be in the minds of many as, generally, I think negotiations happen. And again, I think that could have a bigger impact down the line during the meeting in Miami or, you know – or even further down the line, given its, you know, relevance for export controls and other restrictions that the United States has in place on semiconductors.

I'll stop there.

Dr. Prieur: Thank you, Ilaria.

Let me just mention that after our next expert we're going to be turning to your questions. So if you want to ask a question, please type it in the Q&A window or you can always raise your hand to ask it out loud.

Next, we have Heather Williams, director of the Project on Nuclear Issues and senior fellow in the defense and security department at CSIS. Heather, please go ahead.

Heather Williams: Thanks, Nina, and good morning to everyone.

I have three points to make about a potential trilateral dialogue on, quote, "denuclearization." But here's the bottom line I want to get across: This meeting is not yet confirmed. It's looking increasingly likely or possible. However, an ambitious arms control agreement does not look like a likely outcome from this. If Trump, Putin, and Xi do meet to discuss denuclearization, I would say expect modest risk reduction steps at best and, in particular, watch for friction with U.S. allies.

To my first point, Trump really wants to talk about denuclearization. Negotiating some sort of an arms control agreement has been a personal ambition of him since at least the mid-1980s, and this might be one of his

last chances to achieve some sort of arms control or even any sort of nuclear agreement, however formal or informal that might be, while he's still in office.

But Putin and Xi will have other ambitions for any trilateral meeting. In terms of the likelihood of the meeting, as Edgard said, the Chinese foreign ministry confirmed last week that they were in talks with Russia and the U.S. to try to make it happen, so it is looking more likely.

The agenda is still very unclear. Russia's position on this is that Putin has indicated he wants the talks to deal with Ukraine. Trump has said that he would be OK not having Zelensky at the table for those discussions. But China has said this is a European issue that should be among the Europeans.

With regards to Russia's position on nuclear talks, Putin has repeatedly insisted that the U.K. and France have to be included in any arms control, going forward, which would be deeply problematic for London and Paris. But there might be some prospects for something bilateral, especially since Trump is so eager for a deal. But this trilateral meeting would not be the place where that happens.

In terms of China's position, adding to Victor and Edgard's comments on this, China might want to host such a trilateral meeting, partially for prestige value. It also could score them some points in the NPT. But China has also said repeatedly they will not participate in any disarmament talks on the grounds that U.S. and Russian arsenals need to come down first.

Of course, China has been massively expanding its strategic arsenal in recent years. But there are some signs that China might be open to some sort of more informal agreement or statements. They participated in a bilateral dialogue with the Biden administration. There was no formal outcome, but the talk happened.

Also, there are reports of an agreement between China and the U.S. for reciprocal site visits. So this might be to national labs. It might be to former nuclear test sites. And China is also doing more on informal nuclear risk reduction such as giving notice on missile launches. They aren't giving a lot of notice but they're giving notice.

So what to expect if the talks do happen? First and foremost, as I said and want to keep stressing, this will not be something very ambitious. This is not going to look like a follow-on to the New START treaty, for example.

But some things that I think might be likely, the first would be a joint statement among all three saying a nuclear war cannot be won and must never be fought. Their countries have already agreed to this in the P-5

setting. But within the nuclear community, this phrase means a lot and carries a lot of weight. So they might just restate that or something similarly informal.

Another thing to watch for would be some sort of agreement on human control of nuclear weapons – nuclear command and control. Trump and Xi have talked about superintelligence. Biden and Xi discussed human control when they met in – I believe it was '24, I think.

And then the other thing would be on missile launch notifications. The missile launch notification seems like the lowest-hanging fruit to me, and so if there is any trilateral agreement that is substantive, that's the thing I would watch for.

A couple other things that are less likely but possible, one would be prohibiting cyber or AI attacks on NC3. There has been growing pressure for this. Another would be agreeing to a standing dialogue with a future date for another meeting, and then another – this seems unlikely but it's coming up a bit more, is a recommitment to a nuclear testing moratorium.

A few wild cards to watch. I'm going to go through these really quickly because I don't think they're likely, but I'm happy to go into more detail in the questions.

One would be some agreement on space. China isn't interested in nuclear arms control, but they are very interested in some sort of limitations on competition or nuclear deployments in space.

Another one is Iran. Trump will probably try to get some sort of a statement from all three saying that Iran can never have a nuclear weapon. And then last, this might seem, like, fluffy, but it's something that all three countries have been pushing and something that we work on a lot at CSIS, is next-generation engagement on early career folks getting involved in nuclear policy.

Third and final point is something to watch for, which will be reactions and challenges from U.S. allies. In Europe, Zelensky has called this Yalta 2.0. And even negotiating with Putin could legitimize his position and be bad optics for the Trump administration. So I would say watch really closely how European allies respond. Another one will be Japan. The Takaichi government has expressed an interest in revisiting its three nuclear no's, which may be part of the forthcoming national security strategy. And in recent months, China have doubled down on calling out any potential changes to the three no's, and in July said that this would be a red line for them. So how Japan responds to this could also be telling. And then lastly is if

the talks call for any other nuclear possessors, like the U.K. and France, to get involved going forward.

The very final point I want to make is that the president isn't always disciplined in his commentary on nuclear issues. And so I wouldn't be surprised as well if there are a couple off-the-cuff remarks about things like the three no's, the South Korean submarine deal, or even AUKUS, following this dialogue, if it does take place. I'll stop there. Thanks, Nina.

Dr. Prieur: Thanks, Heather. And thank you to all of our speakers.

At this time we'll go ahead and open it up for questions. And as a reminder, if you want to ask a question please type it in the Q&A window, or you can raise your hand to ask it out loud.

We'll kick off here with a question we have from Oliver Ward. Oliver says: Folks mentioned that the Quad leaders meeting would help U.S.-India relations. Are analysts expecting any movement on a long-awaited U.S.-India deal during the trip?

Edgard, I know you're tracking this one. Would you like to kick us off?

Mr. Kagan: Sure. The short answer is no. I don't think this is part of a bigger deal because, from at least what I've heard from folks associated with this, is that that's still – that's still a work in progress. There's still some real challenges. And, you know, both in terms of U.S. asks and U.S. expectations, but also India's positions on a variety of issues. And, you know, it's worth noting that what we are asking for is politically very challenging for the Indians. My sense is that a Quad meeting is much more about showing that we're working together again on foreign policy.

And there is a history in the Quad. Modi has embraced it very much over the years. And I think that it's clear the Indians were disappointed that there wasn't a Quad meeting so far in the administration. And that was one of the things in the Indian strategic community that was sort of used as an example of the U.S. turning away from India. So I don't expect something much more substantive in terms of a grand bargain, but I think that the optics of something like this are actually quite important, and they will help – they will help our ability to work together.

So I think that the key things are that – are also going to be what kind of statement comes out. And in the Biden administration, when the Quad was first taken to the leader level, one of the things that was decided at the very beginning, which was something I worked on, was that the Quad would – to avoid the idea that this is about competition with China and militarization or security – that the Quad would provide public goods for the region. And so

the question is going to be, is there an outcome along those lines? It's worth keeping in mind, this is very much something that Japanese Prime Minister Takaichi encouraged the president to do.

And so this is, I think, to some degree, a reflection of both her influence, but also a recognition that the Japanese are feeling very much on the defensive because of the Chinese pressure. They're relieved that China's efforts to paint them as militaristic aren't getting traction in the region, but showing that Takaichi is meeting with the president and with Modi and with Australian Prime Minister Albanese, is actually a very important thing for Japan.

So I think I don't want to suggest that this is being done to support Japan, but I think it reflects her influence. And it also reflects the president embracing now the idea of something that he really was one of the driving forces for. While the restored Quad was very much a Shinzo Abe idea, the president embraced it in his first term. And I think there's been surprise that he's – as on other things – that he's distanced himself from it this term. So I think this is a very, very positive development.

Dr. Prieur: Thank you, Edgard. Would anyone else like to comment on that question before we move on? All right.

We have a few questions here in the chat asking about this visit coming shortly after the midterms in the United States. George Condon says: Victor mentioned that the midterms could have left the president looking weaker and more vulnerable. And Edgard mentioned the election. Can you elaborate on this? How much did the other leaders pay attention to the election? How damaged is he? And what are they looking for from the president now, to show they're not dealing with a lame duck? And Howard LaFranchi comes on top, saying that Ambassador Kagan said such visits post midterms are always important for the president for sending messages. How do others expect Trump might use this trip for post-midterm message sending?

Victor, would you like to kick us off with some more elaboration on any of the parts of those questions? Edgard, anything from you?

Mr. Kagan: Yeah. I think this is – this is a big deal. This is – typically after bad midterms, this is how presidents reset and remind other leaders that this is – that they're still in charge on foreign policy. Also it's useful for sending messages domestically because one of the advantages of doing foreign policy, doing foreign trips, is that is something that no domestic opposition can do, or certainly not in the same way that a presidential trip looks. And I think that, you know, there's a question about how much do foreign leaders pay attention to this. They pay incredible attention to it. And they always have. I will tell you, you know, I was around when "West Wing" started being syndicated internationally. One of the things that "West Wing" did is it made

every foreign leader feel that they were an expert on how elections work in the U.S. (Laughs.) They love this stuff.

I mean, most leaders follow domestic politics of other leaders. And I can tell you, President Trump certainly does. Previous presidents, President Biden, President Bush, President Obama, all followed these things very closely. President Clinton used to, like, sit down and talk about, like, you know, mayoral elections in Israel when I was there. So this is – you know, they follow this stuff, and it really matters in terms of how they size each other up. I think the president's going to want to show that he is not weakened, and that he's still very much in charge. And he's going to want to show that as much domestically as he's going to want to show that to other leaders.

Dr. Cha: So, Nina, it's Victor. Sorry, I was muted and I couldn't find the screen. It was buried beneath many other screens. (Laughs.)

So I agree exactly with what Edgard said. I just came back from the region today. And everybody was asking this question. It was the only question – that, and also what a Democratic Congress will do on datacenters. Those were the only two questions that people were asking. So, yes, I think they see – they follow very much our domestic politics. And with as such a strong a leader as Trump was in his first two years, there's lots of interest in knowing whether all of these trade and investment deals that were reached in the aftermath of liberation day, whether they will still hold, what will happen with the section – you know, the USTR and Commerce investigations, these sorts of things.

Again, I will say that, you know, we have looked at this from the perspective of the voters, in the sense that we did some polling on foreign policy preferences in the swing states, in seven of the swing states. And I know that there have been foreign policy polls before. I mean, AP did, and CNN did, I mean, exit polling on foreign policy. But these were very short polls, largely on the war in Iran. And we did something that was much more in depth. And I'll just tell you that, based on that, and to the extent that Congress or the administration cares about what the voters think about this in this past election, is there is widespread not just plurality but majority opposition to the tariff policies, and a desire in the 80 to 90 percent range to be working better with allies and partners, and to – and to pay – and paying a lot of attention to foreign policy. Eighty-five percent said they pay attention because it directly affects their daily lives in terms of prices at the grocery store and at the – at the gas station.

So I think, you know, it does raise the question of what the foreign policy inclinations for the 120th Congress will be and whether the administration will be responsive to it. But the message is, at least based on what we've looked at, there is a consensus among independents, Democrats, and

Republicans for a much more globalist and centrist foreign policy and engagement by the United States in the world.

Dr. Prieur: Thanks very much, Victor and Edgard.

We have a question here from Chris Buckley. Chris says: Heather discussed the possibility of a Trump-Xi-Putin meeting coming out with a statement about keeping decisions on the use of nuclear weapons in human hands; i.e., not in the hands of AI. Can she please tell us more? A, where is Russia on that issue these days? Would Putin be open to the idea? B, would any statement most likely be a repeat of what Biden and Xi reached in 2024, or would it go beyond that or differ somehow? Heather, you want to kick us off?

Dr. Williams: Yeah, sure, and thanks for the question.

So, to the first point, on Russia's position, Russia has consistently been the holdout on a statement about maintaining human control in nuclear decision-making. This is partially for legacy reasons, because of their Dead Hand system, but also there are concerns that there may be automation in some of their current systems as well. And when I say that they've been a holdout, this has mainly been in the P5 process, which is a group of the five recognized nuclear possessors within the NPT. So this is not P5 in the Security Council context, but in the NPT context. And the five countries meet semi-regularly, usually a couple times a year. And from what I've heard and what I know about these meetings is that this question about a P5 statement on maintaining human control comes up consistently, and all – the other four are fully onboard with it and would really like to do something, and Russia always kind of waffles.

What I have heard is that in recent years Russia seems a little more willing to discuss it. So I don't think it would be some really – it's not going to be a big, ambitious statement if it does happen, but it seems like this might be an area for potential cooperation.

Part of the other reason I think this might be possible now is the president seems really committed to doing some sort of cooperation on superintelligence, as he calls it. This was a focus of his previous meetings with Xi, and they've set up a new dialogue on that. And so if this is a priority for the president, then it's something I would expect to at least be on the agenda for discussion.

In terms of what it might look like, the – interestingly, the Biden-Xi statement, it wasn't a joint statement; it was a readout, which to me sounds – strikes me as important, though maybe Edgard or Victor can comment on that. If it was a joint statement, then that probably would have been very – much more carefully worded, whereas the readout was unilateral, and so,

thus, a little bit less ambitious. But I would expect the language to be similar, but not identical – partially for political reasons this administration would want to do something different than its predecessor, which makes sense, but also to get that term "superintelligence" in there.

Just two other very quick observations on this for context that might help – or, help or be useful. The AI issue – AI in general is really sensitive in nuclear policy and the nuclear community. The multilateral nuclear diplomatic community for the most part does not want to touch AI. They don't want to talk about it. They worry that it'll be a distraction from progress on disarmament, which isn't happening. But it – and so there isn't a lot of pressure being put on U.S., Russia, China, or the P5 in general to really make – to really do anything on AI, whereas there is a lot of pressure on other issues like crisis communication channels, transparency, and whatnot. So this isn't the most pressing issue, I would say, for the nuclear crowd.

The other contextual point, going back to the question earlier about the impact of the midterms, I don't know how the results were read in Russia or China, but I wanted to double down on a point I made earlier that the president really wants an arms control deal and his time is running out. So I would expect some sort of an agreement to be a foreign policy priority. And other than this upcoming meeting, if it happens, it's really not clear how many more opportunities he'll have. And this would be part of his legacy that he's trying to create as a dealmaker, as a peacemaker. And so I would just say don't – you know, don't take your eye off the denuclearization thing and the president's comments on it, even if the meeting doesn't happen.

I'll stop there.

Dr. Prieur: Edgard, please go ahead.

Mr. Kagan: Yeah, this is Edgard. I would just add – and I mean, look, Heather knows this stuff better than anyone else I know – (laughs) – so I agree with her. I would just say one caveat.

I think she made a very good point on the thing – the 2024 was a unilateral statement. I would be shocked if there were a joint statement that came out of this meeting that said anything about denuclearization. And the reason for that is that the Chinese clearly are uncomfortable with the idea of any discussion of denuclearization, any discussion of arms control at this meeting. I think that they may accept that, you know, the president will raise it, but the idea that they would sign onto it I would be shocked by because it essentially then establishes a precedent for the idea that we should be discussing these things trilaterally. And unless something has changed immensely in Beijing in the last few weeks, I cannot see them being ready to do that.

Now, at the same time, agreeing to do this meeting moves us in the direction that Heather said. And you know, I think it's something the president is very focused on. I just think that they will – they're nowhere near the point at which they would be ready to do that. Over.

Dr. Prieur: Thanks, Edgard.

We have a question from Darlene Superville: ASEAN meetings always come after U.S. elections, midterm or presidential. Can anyone offer a few examples of how past presidents who suffered staggering midterm losses – Obama comes to mind with the, quote/unquote, "shellacking" – handled themselves on the world stage after such a drubbing?

Greg, you do you want to start with the hook here on ASEAN?

Mr. Poling: Yeah. I can – I can start, and others – maybe Edgard – who have had hands-on experience might want to weigh in.

So I don't know that we have a great parallel here because, I mean, there's only two times, I guess, when we – in recent memory when we've seen a similar, quote, "drubbing," right? And that would be the 2010 midterms and the 2018 midterms. 2010, the U.S. wasn't part of the East Asia Summit yet, so wasn't attending these.

Now, we had – President Obama had held the first-ever U.S.-ASEAN leaders meeting the year before in Singapore, and then he did hold the second-ever U.S.-ASEAN leaders meeting in I think it was New York in 2010. And then the U.S. started attending the ASEAN summits in 2011. I don't think there's any clear connection to the election timeline because for the remainder of the Obama presidency the president attended every single one of the summits except for the – I think it was 2013 during the government shutdown, when he had to at the last minute cancel the trip. So it was much more about the administration's kind of central pivot toward ASEAN, unconnected to the midterms.

In the first Trump administration, the president attended in 2017 in Manila – so, you know, this will be his second time going to Manila – but then he skipped 2018, 2019, and 2020. Even though 2020 was virtual, he still didn't join. So, again, I don't think that's related to the midterms; I think it's that the first Trump administration did not have the same priority on ASEAN that the Obama administration did. And I think we're seeing something similar now, where the president is – uses the ASEAN meetings as an opportunity for bilaterals, and I think that's where the focus of the messaging will be, but isn't particularly invested in ASEAN as an institution.

Dr. Prieur: Would any of our other scholars like to chime in on this question?

Mr. Kagan: Well, this is Edgard.

I'll say that it's worth keeping in mind that, you know, as Greg said, it's really under the Obama administration the U.S. started attending the ASEAN summit. But if you go back to other examples, it used to be APEC was the big event after midterms. So after the '94 midterms, President Clinton went, and it was in Indonesia at that time. And they came out with a fairly big, sort of ambitious thing called the Bogor Declaration which was talking about free trade. And so President Clinton very much used this to establish himself on the world – or, to remind people that – of his continuing control of U.S. foreign policy and that foreign policy mattered. The administration made a big effort to tie it to the domestic economy, saying this would expand trade opportunities. I was in Israel when President Clinton came in 1998. Those were very good midterms. That was one of the very rare midterms where the party in power actually gained seats. So, obviously, that was a huge lift.

Victor, I don't know if you were with President Bush in 2006, but 2006 APEC happened a week or so after the midterms. And it was in Vietnam. And so I think President Bush used this as an example – as an opportunity to highlight both the strategic case and that the U.S. was working on relations with Vietnam, working on relations with Asia, did a series of bilats and highlighted that. And I was with President Biden in 2022 in Cambodia. In those midterms, the Democrats lost the House, but the general sense was that the Democratic Party had performed much better than people expected. That was a big lift. And, you know, you could see the other leaders responding to Biden in, I think, a more positive way.

I would just say that, in general, foreign policy and presidential trips are something only the president can do. There is pomp and circumstance. There's a focus on it. And so it's always a good way – and this goes back, actually. And the original architect of this was Mike Deaver, doing this for Reagan in 1982, really leaning into foreign travel after the 1982 midterms. And so this is a long-standing tradition. And it's something that White Houses are very aware of. And, you know, this is – this is a way in which you start changing the narrative, and remind people that, you know, the president is still the president.

Dr. Cha: Yeah. This is Victor. I think, Edgard, that was – Edgard gave a very good answer there. The only thing I would add, I think, with regard to this particular midterm, again, from being in – just recently being in the region, is that there is – there is obviously a lot of focus on markets around the world, and the drop in markets as a result of this election. But there really is focus on – sort of, because the president – you know, this president was so strong

in negotiating tariff reductions and investment deals with allies and partners, as well as being very forward-leaning on datacenters and AI.

And so the big question is, like, to what extent his authority to do these things is going to be circumscribed by a much more powerful Congress? You know, I think that's the main thing that people are looking for. Aside from the fact that, you know, it was a big loss for him and for the party, in terms of policy, that's, I think, what they're very focused on right now. And we don't know the answer to those questions yet, but that's certainly the ones they're asking.

Dr. Prieur: Thank you.

A question here from Nayan Seth, from South China Morning Post: How does the Nvidia scandal impact U.S.-China relations, including the existing H200 chip exports to China? The timing is interesting, as it comes just days before Trump's meeting with Xi. Do you expect the administration to take a tougher stance on chip exports to China as a consequence of the scandal?

Ilaria, I know you spoke to some of this in your opening. Do you have anything further to add here?

Dr. Mazzocco: Yeah. I think that's an excellent question. And I think that is the question. But it's still a little early to tell. I also think we should just keep in mind that, ultimately, we are in this sort of truce between, you know, the U.S. and China, because both countries have found that – you know, that they have weapons that sort of put a backstop on just how much they can – they can use these tools, right? So, ultimately, China could always reintroduce or put in action its export controls on rare earths, which would put a lot of pressure on the United States from an economic standpoint, and the rest of the world. So I think that's just – you know, that could put some constraints on just how much more the U.S. can act on restrictions.

Now, that said, I do think it's – that we're going to see in Washington renewed calls for more restrictions on semiconductor exports to China. So I think this is definitely an area to watch, but I think it's an evolving situation. President Trump just, you know, said, you know, very recently that he is still very much willing to take Jensen Huang to China with him on his trip, and that he has his full confidence. So I think at this point in time it does not seem like things have significantly shifted in the president's mind. But, you know, this could change very rapidly. As we said, this is an evolving story.

Mr. Kagan: This is Edgard. I'd just jump in to say I agree with Ilaria on the H200s. I think that, you know, the president sending a very clear signal of what he wants. But I would just take a step back and say two things. This is an area, as Ilaria said, the Chinese are watching closely. Because this is something where they

know that historically there's been fairly broad bipartisan support for tougher line on export controls, particularly on high-end chips, from Congress. And so they'll be watching the dynamic, because they obviously recognize the administration holds a lot of the cards on this. But this is something Congress can legislate on.

I think the other thing that's very interesting, with regard to this trip, is that we're starting to see much stronger messaging coming out of the administration from senior levels – including particularly Secretary of the Treasury Bessent, who is the person who's really working the nuts and bolts on this – raising concerns that China is not fully implementing the agreement reached last year at Busan on rare earths, on rare earth exports. And so I think that the fact that that's been coming out before this trip is both a sign that there is friction and a willingness to acknowledge it, and that the U.S. is not completely satisfied with the status of the trade in rare earths and Chinese exports.

And also, I mean, it's worth noting, that there's a lot of complaints coming from key U.S. allies and partners. Japan first and foremost, but also a number of others. I mean, the general word is that exports of rare earths from China are slowing down, have slowed down significantly, haven't been fully restored. And that's something that, obviously, has implications for the U.S. So I think that the economic issues continue to be important. There's a question on the G-20. My sense is that we're going to punt them from the APEC meetings in Shenzhen to the G-20 meetings in Miami. I would expect that there would be some kind of agreement, if only to further extend the trade truce. Because, as I think everyone knows, in September – they only agreed to do it for a few months longer, with the implication that there was going to be a broader agreement that might also talk about the thirty-for-thirty.

So across the board, I think you can see that there is a greater willingness on the part of the administration to acknowledge some friction in this area. It may be a negotiating tactic, but I think that it probably does reflect their sense that it will be important for China to show that it's following through on its commitments. And it's worth noting that the administration's additions to the construct of constructive strategic stability were based on fairness and reciprocity. And I think that, from the administration's standpoint, this continues to be a very, very important issue. China needs to follow through on its commitments. Over.

Dr. Prieur: Thank you, Edgard. We're just about to hit time here, but I'd like to try to squeeze in one last question. I'll say in advance that I am sorry to those whose questions we couldn't get to. Please feel free to reach out via email or phone, and we'll be happy to connect you with our experts for any follow-up.

Really quickly here in our last two minutes, Darlene Superville asks: One of the speakers – Ilaria, I think it was you – said to expect more from Trump and Xi at the G-20 in Miami. What are some of the things we should be watching for out of that summit in terms of the U.S. and China?

Anyone want to offer any thoughts looking ahead here, in our last two minutes? Victor, anything from you?

Dr. Cha: Well, I think we spoke to some of them already. I mean, so if they actually do make progress in the Board of Trade and the thirty-for-thirty, if there's more progress on the AI safety dialogue they kind of stood up at the last meeting, you know, if there's any discussion on Iran or North Korea, I mean, I think these are some of the things. I mean, like, I think it was Edgard who said it earlier, the administration has really been trying to play down expectations of the meeting in Shenzhen. In other words, like, don't expect anything. You know, well, I mean, I think administrations always play down expectations of the press and experts before they meet. But in this case, I think they were pretty clear that they were seeing Miami as giving them more time to try to make progress on some of these things. And it could be on what Edgard talked about earlier, which is Bessent's complaints that the Chinese are not fulfilling their part of the deal on the Busan agreement. Over.

Dr. Prieur: Thank you, Victor.

We are, indeed, at time here. I want to thank our speakers and all our participants for joining us for this call. Please do reach out for anything. We would like to be a resource for you on this issue. We're here to help. And, as I mentioned at the top of the call, we'll have a transcript distributed to all of you, and it will also be available at CSIS.org. So, with that, I hope everybody has a good rest of the day. And thanks again for joining.

(END.)