EXECUTIVE SUMMARY

This study looks at foreign assessments of U.S. power over the next ten years, the primary drivers of such views, and the implications of these assessments for sustained U.S. leadership in the coming era.

Most see the United States in decline relative to rising powers like China but do not see a fundamentally new order emerging in the next decade. Foreign expectations of U.S. power remain great. Over the long term, the main worry is not U.S. capacity, but U.S. resolve and competency.

- In Asia, this study examines Chinese, Japanese, Korean, Indonesian, and Indian views of U.S. power. The United States is in a strong position in Asia although this is not assured. Countries are watching carefully the U.S. capacity for economic regeneration and Washington's enduring commitment to the region. Regional demands on U.S. power are only likely to increase during this period of increasing limitations and constraints.

- In the Middle East, this study looked at Israeli and Gulf views of U.S. power. The study finds that a powerful United States that deemphasizes the region could cause profound realignment, but a diminished United States committed to the region could shape order for decades to come. It is too early to know whether Washington's management of the Arab Spring, NATO's engagement in Libya, or the Israel-Palestinian conflict will dislodge Iraq and Iran as the main tests of U.S. power.

- In Eurasia, this study looked at Russian, Turkish, and German views of U.S. power. The alliance politics of the Cold War are clearly over. Germans and Turks have diminished faith in U.S. leadership. They do not deny U.S. capabilities, but they are more willing to challenge U.S. policy, which they view as misaligned with national objectives. Russians have tempered their pessimistic views of U.S. power and look more cautiously now at multipolarity. In Eurasia, U.S. policy is seen as the critical independent variable.

Few consulted for this study saw great likelihood in regional powers bandwagoning successfully against the United States in the next decade or a single regional power confronting the United States in a “Suez moment” in which U.S. power is shown to be lacking. China and Iran create their own antibodies, which push neighbors closer into Washington’s orbit.

The risks to the U.S. position associated with the rise of regional powers may thus be somewhat overstated. Similarly, few believed nonstate actors had the potential to erode U.S. primacy on their own in the next decade.

Recent events demonstrate, however, that the current order is not static or easily managed. Despite this turbulence, the world is still largely welcoming of U.S. leadership. It expects it, and it is afraid to lose it. The greatest challenge may thus come not from external forces, but from a divided, insular, less confident United States.
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On January 21, 2011, CSIS hosted a 50-person, day-long workshop entitled “Perceptions of U.S. Primacy: Drivers and Implications.” The workshop included current and former senior U.S. government officials. CSIS owes significant gratitude to NIC chairman Christopher Kojm for introducing the workshop, former deputy director and former acting director of the CIA John McLaughlin for providing an excellent keynote talk, and New York Times columnist David Brooks and Washington Post columnist David Ignatius for leading a fascinating lunchtime discussion. Insights from the workshop are found throughout the country studies and the introduction.

We owe thanks as well to the CSIS regional scholars who contributed chapters to this volume and did the bulk of the work: Bonnie Glaser, Michael Green, Victor Cha, Ernest Bower, Teresita Schaffer, Jon Alterman, Haim Malka, Stephen Flanagan, Heather Conley, and Andrew Kuchins. The depth of their experience and soundness of their judgment make this volume what it is. Thanks also to CSIS scholars James Lewis, who heads our Technology and Public Policy Program, and Maren Leed, who runs the New Defense Approaches Project, both of whom provided consistently wise advice from start to finish. This volume benefited greatly from the publication expertise of James Dunton and editorial assistance of Mary Marik, and overall leadership of Andrew Schwartz who runs CSIS’s external relations department. Thanks also to Josie Gabel, John Schaus, and Sarah Guthrie for help in countless ways.

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Craig S. Cohen

Perceptions matter. When Washington acts—whether to bolster an ally, eliminate a safe haven, or remove a terrorist leader or dictator—the stakes are high. The fruits of success or pains of failure are not limited to a single policy objective. With the United States, there is always a demonstration effect, a global reverberation that shapes views of American power abroad. This phenomenon is not limited to U.S. engagement overseas. Other nations watch U.S. domestic politics almost as closely as they watch their own.

The rest of the world knows that the United States is entering a period of intense fiscal pressure. Even defense spending has entered a period of greater scrutiny. As Secretary of Defense Robert Gates remarked in Abilene, Kansas, in 2010, “the gusher has been turned off,” not to be turned on again for some time.¹ U.S. technological leadership may be assured for the near future, but there is an increasing feeling that the scientific foundation critical to U.S. economic and national security is eroding at a time when that of other nations is gaining strength.²

How the world interprets this new period has the potential to affect U.S. relations and standing in the world for decades to come. If other nations anticipate that U.S. power will be constrained in coming years, a new and potentially more dangerous strategic landscape could emerge for the United States. For example, if regional powers judge the United States to be weakened, they will be less willing to compromise on issues of importance to Washington. Similarly, there could be serious consequences to the United States if long-standing allies in Europe, Asia, or the Middle East begin to question America’s security guarantees or if they judge Washington to be unable or unwilling to solve regional or global problems.³

This volume looks at how tightening budgets and other key influencers on U.S. power could damage U.S. interests in the years ahead. How do foreigners perceive the likely trajectory of U.S. power over the next ten years, and what are their primary reasons for such views? The ten chapters that follow focus on how changes in thinking about the United States today could lead to changes in foreign behavior tomorrow in three critical regions. Given these changes, do we have the insight

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³. Brent Scowcroft discusses these possibilities in “Foreign Policy in an Age of Austerity: A Conversation with Brent Scowcroft,” American Interest 5, no. 3 (January–February 2010).
and skill to use our military, diplomatic, and economic capabilities to manage this turbulent period? How can Washington credibly signal strength in a time of greater austerity?4

Writing about foreign assessments of U.S. power is a difficult exercise given Washington’s global reach and the constant challenge of determining the significance of events to others. At the time of this writing, NATO planes are bombing Libya. Uprisings in Tunisia, Egypt, Bahrain, Yemen, and Syria continue at various stages of success. The Middle East peace process looks stalled. Japan is reeling from March's tsunami, still struggling to contain the nuclear radiation from its damaged reactors. European allies are financially weakened, and powers like China are on the rise. Despite the killing of Osama bin Laden, the Taliban and al Qaeda fight on, prolonging the U.S. commitment in Afghanistan. Washington teetered for months on the verge of a government shutdown, seemingly unable to reconcile necessary long-term austerity measures with near-term politics. For those looking for tests of U.S. capacity and resolve, one need not search far and wide.

In fact, the United States has been engaged in a robust debate since the end of the Cold War on the limits and uses of U.S. power.5 The collapse of the Soviet Union left the United States as the preeminent power, but it strangely was also a time of deep worry about U.S. decline.6 By the late 1990s, the nature of the current order had begun to take shape. The National Intelligence Council's first Global Trends report, issued in 1996 to forecast trends up to 2010, is illustrative of this period; it concluded that between 1996 and 2010 “no country, no ideology, and no movement will emerge on a global scale to threaten U.S. interests or to build and sustain an anti-Western coalition.”7 As the 1990s continued and the United States began to be perceived as the lone superpower, America attracted antibodies that were difficult at first to detect.

The Bush administration took office debating what to do with American primacy. U.S. allies were concerned that the United States would become less engaged globally, ironic considering the image of U.S. “hyperpower” that would come to dominate.8 Al Qaeda's attacks on September 11, 2001, fundamentally changed the equation. America’s response to these attacks—including the invasions of Afghanistan and Iraq and the global war on terror—threw in sharp relief the unipolarity of the current system and intensified the debate over U.S. power. At first, the quick toppling of the Taliban and Saddam Hussein's regime in the face of international opposition led to a rush of triumphalism and belief in America’s unfettered empire.9 This quickly receded as Iraqis responded to the U.S. intervention with a violent insurgency.

4. There are many recent efforts inside and outside of government looking at the implications of the financial crisis on U.S. power and international order, including the symposium at Princeton’s Center for International Security Studies in May 2010 and a workshop hosted by the Chicago Council on Global Affairs in October 2009, among numerous others.

5. For a first-rate historical look at this recent period, see Derek Chollet and James Goldgeier, America Between the Wars: From 11/9 to 9/11: The Misunderstood Years between the Fall of the Berlin Wall and the Start of the War on Terror (New York: Public Affairs, 2008).


8. French Foreign Minister Hubert Vedrine used this term to refer to a United States “dominant in all categories” and less interested in multilateralism.

The war in Iraq became a turning point in how the world saw the United States. The run-up to the war left allies with the impression that the United States would not be bound by rules it created. The execution of the postwar period made enemies aware of the susceptibility of American military power to asymmetric threats. The pictures emerging from Abu Ghraib damaged Washington’s moral authority that had been built up over decades. The intensity of focus on Iraq left other parts of the world feeling neglected or else free to act without American concert. And yet, efforts to gauge global attitudes toward the United States prior to the surge in Iraq in 2007 when things were at their darkest demonstrated that much of the world viewed U.S. power through their regional interests rather than through the lens of Iraq.

Today, the burden to define and demonstrate American leadership remains great because it appears so frequently in question. It is common to hear from policy, academic, and media that the United States is overextended abroad and indebted at home and that U.S. primacy is receding as we move toward a multipolar world. In absolute terms, the evidence is mixed. Understandably, President Obama rejects this narrative, arguing frequently that the U.S. economy, military, and diplomacy as well as the ideational power of the American dream remain unmatched globally. Few politicians want to be associated with managing U.S. decline. To accept this fate risks charges of defeatism: forecasting U.S. decline tends to be characterized by opponents as a self-fulfilling prophesy.

Members of the Obama administration came to power believing the biggest problem they faced was this idea that the United States was no longer leading internationally. James Steinberg, the first deputy secretary of state in the Obama administration, said, “Our credibility and leadership were shot, either because we were too unilateral or we weren’t dealing with what we needed to deal with.” Obama’s team has actively sought to counter this idea, stressing its “different

10. Aaron L. Friedberg makes this argument in “Same Old Songs: What the Declinists (and Triumphalists) Miss,” American Interest 5, no. 2 (November–December 2009).
11. A review of polling during the Bush years supports these claims.
conception of U.S. leadership . . . [that] leadership should galvanize an international response, not rely on a unilateral U.S. response.” Critics have dubbed this “leading from behind.”

The extraordinary events in the Middle East in 2011 have only reenergized this debate on the character, capacity, and limitations of American leadership. Both parties have tried over the past two decades to use the fear of U.S. decline to argue for their own distinct policy preferences. There is historical precedent to this. Political leaders made similar arguments after Sputnik’s launch and during Japan’s economic success of the 1980s. Nothing sparks national ambition like the fear of falling behind. In this way, the United States is not facing anything new. But as former secretary of state Colin Powell has said, it is unprecedented that “a developing nation is now the financier of the richest nation on earth. That doesn’t mean we’re in decline, but it’s probably not a good thing either.” At such a unique and dynamic time, it is important to critically reexamine how we understand and anticipate events abroad, including the trajectory of certain key countries and their views and expectations of U.S. power.

Methodology

CSIS scholars conducted research for this study primarily during the second half of 2010 and concluded writing their chapters in early 2011. Current and former senior U.S. officials discussed scholars’ initial findings at a workshop in Washington in late January 2011. Discussion focused on how certain key allies and competitors see the trajectory of U.S. power in the coming decade.

Historically, state power has been measured by such criteria as size and territory, natural resources, economic strength, military force, and social stability. The traditional indicators of state power have thus been gross domestic product, population size, and defense spending. These are aggregate measures that provide some comparative basis, but they also fail to capture the full range of dimensions that determine a country’s power. How, for instance, to account for a country’s investments in research and development, decisionmaking ability, and “soft” or attractive power that proved so important for the United States during the Cold War? There is no broad consensus on a single framework for understanding and assessing state power. Some have even argued that the very nature of power has changed in today’s world.

Furthermore, the value of any objective assessment of state power is inherently limited. Leaders make decisions based in part on their perceptions of how power compares between countries. These perceptions may be shaped by objective measures, but they are also undoubtedly shaped—
rightly or wrongly—by historical legacies, by their own national politics and interests, and by which dimensions of power they and their countrymen value and which they do not. Leaders have different methods for assessing power, often predicated on views of their own national strengths. Chinese, for instance, measure “comprehensive national power,” while Indians prioritize the ability to convert innovation to productive capacity. Israelis view multilateralism as weakness, while Germany’s history makes it uncomfortable discussing concepts of national power. Domestic politics abroad are inextricably linked to views of U.S. power.24

Although this volume is based on foreign perceptions, it is not a polling effort. Plenty of good polling already exists and provides a valuable picture of how the United States is perceived abroad today and over time,25 and much of this analysis has been incorporated into country-level analysis in individual chapters. Instead, this study is meant to investigate in greater depth how foreign stakeholders assess U.S. power in all its dimensions—its relative strength or weakness as well as its character—and what its trajectory over the next decade is likely to be.

To conduct research for this effort, CSIS regional experts relied most heavily on interviews with a broad spectrum of foreign stakeholders, focused primarily on elites. As with mass polling, official government statements in some instances proved to be instructive, but because this study relied entirely on open source information, there were limits to knowing official foreign government views. Furthermore, recent events in the Middle East have reinforced the importance of tracking events and perceptions outside traditional corridors of power, and the chapter authors made efforts to reach beyond “elites” in the traditional sense of that word.

The countries studied in this volume were chosen on the basis of three main criteria. First, we were interested in states important to U.S. interests, their region, and international security. Second, we looked at states whose relations with Washington might be prone to change over the next decade. Excluded were countries currently hosting large-scale U.S. military operations, both because of the level of U.S. government focus already on these countries and also because of the potential distortion effect of a massive influx of resources from Washington. Finally, we looked for countries that could be clustered to permit regional analysis. Certainly there are countries such as Brazil that are regional powers with reach outside their regions that ought to be included in any future study.

The report focuses on three primary geographic groupings: an Asia group made up of chapters on China, Japan, Korea, Indonesia, and India; a Middle East group that comprises a Persian Gulf chapter encompassing Iran and three Gulf Arab states—Saudi Arabia, the United Arab Emirates, and Kuwait—as well as a chapter on Israel; and finally, a Eurasia group comprising chapters on Russia, Turkey, and Germany. When there were important connections between countries in different groupings—such as for Turkey—chapter authors sought to bring in this cross-regional perspective.

Three main questions drove the country studies. First, how are foreign views of U.S. power changing? Second, what are the main drivers of these shifts? And third, what are the main implications for the United States? Rarely was there a consensus view within a country on the answers to any of these questions. Chapter authors provided their best judgment without losing sight of the inevitable diversity of views on a topic as complex as the nature and significance of U.S. power.

24. The country studies in this volume discuss which dimensions of state power each country’s elites prioritize and which they do not.
25. The leading example continues to be the Pew Global Attitudes project, http://pewglobal.org/.
Findings

What will readers find in this volume? Although most foreigners see the United States in decline relative to rising powers like China, there is significant variance between and within regions in how they judge the significance of this phenomenon. Most do not see a fundamentally new order emerging during the next decade. In fact, foreign expectations of U.S. power remain great indeed. Over the long term, the main worry is not U.S. capacity, but U.S. resolve and competence.

Asia

In Asia, Koreans and Indians are most confident in American leadership in the face of a more assertive China. Those in Japan and Indonesia see the United States losing ground to China but don’t believe this will fundamentally upset the current order. Chinese are less certain if the current order will hold. They believe a multipolar world is emerging, although there is no coherent view on the speed of this shift. Koreans, Japanese, and Indonesians all raised serious concerns about America’s enduring commitment to the region.

Where do these views of American power come from? In Asia, the main drivers of perceptions were largely tied to America’s capacity for economic regeneration. Those who believe in U.S. innovation and productive capacity are most optimistic about the future role of the United States. There is no denying, however, the pull of China’s economy in the region. Economic dependency worries those uncertain of China’s trajectory, even as America’s forward military presence tempers this worry for now.

What do these findings mean for U.S. policy over the next decade? The good news in Asia is that China’s neighbors are committed to U.S. primacy. The catch is that demands on U.S. power are only likely to increase during this period. The key question Washington faces is how to credibly signal strength in a time of austerity without overplaying its hand. Asians outside China saw Secretary of State Clinton striking just the right note at the ASEAN meeting in Hanoi in July 2010 when the secretary spoke out on freedom of navigation in the South China Sea.26

The United States currently finds itself in a strong position in Asia. There are risks to this position, though. The following events could fundamentally change this calculus: if China returns to its charm offensive and regains influence in the region; if North Korea implodes; if new leadership in Washington at the Departments of State and Defense deemphasize Asia; if U.S. resources are constrained to the point that the U.S. forward presence in the region is weakened; if the United States cannot develop a regional trade and economic strategy, particularly for Southeast Asia; if Afghanistan and Pakistan deteriorate further, owing to either U.S. action or inaction; or if the erosion of Japan’s capacity post-tsunami leads to a significantly diminished ally in the region. Some of these events are within U.S. control and some are not. No single item on the above list would have great effect, but the convergence of four or five could be significant.

Middle East

This study finds that citizens of countries of the Middle East are more apt to expect a weakened United States over the next decade. But there is also still a sense that the United States is the only actor with the ability to play the role of external guarantor of security for the region. It is the Israelis who question America’s will most sharply, as they believe that U.S. power plays an existential rather than merely a utilitarian role in their country’s future.

Until the current uprisings, Middle Eastern views of U.S. power were still largely tied to Iraq and Iran: how the United States struggled to shape Iraq’s future over the past decade, and whether the United States would be willing to deter Iran’s regional ambitions over the next. While Iran will likely remain the single greatest test of U.S. power in the region, it will be important to see whether the way Washington manages the “Arab spring,” the Middle East peace process, and NATO’s military engagement in Libya will eventually weigh more heavily than memories of Iraq or fears of Iran.

Iran sees U.S. influence in the region in decline and continues to look for opportunities to exploit this. It is too early to know the extent to which the uprisings may provide opportunity for Iran to exert influence as well as the extent to which the protests are potentially destabilizing to Tehran’s clerical regime. Although Arab governments’ concerns about Iran remain quite high, public perceptions of the Iranian threat are low by comparison. To the extent the uprisings produce more democratic governments, this development might eventually alter regional threat perceptions in ways that could favor the United States or, in some circumstances, engender greater suspicion of American power.

Elites in the Middle East believe that demonstrations of U.S. commitment remain the critical factor. When President Obama explained the March bombing of Libya from the Oval Office by stating, “So for those who doubted our capacity to carry out this operation, I want to be clear: the United States of America has done what we said we would do,” he was speaking directly to those in the region who have diminished expectations of U.S. power and are distrustful of Washington’s willingness to use its power for objectives the region prioritizes. Middle Easterners believe that a powerful United States that deemphasizes the region could cause profound realignment. In contrast, a diminished United States committed to the region could still shape order for decades to come.

Eurasia

In Eurasia, the alliance politics of the Cold War are clearly over. Germans and Turks have diminished faith in U.S. power. There is no denying U.S. capabilities, but Turks find them misaligned with Turkish interests and decreasing relative to Turkey’s rise. Germans anticipate a decade of U.S. decline vis-à-vis China and are ambivalent about U.S. leadership, particularly on economics but increasingly on peace and security issues as well. Russians have tempered their views of U.S. power since Putin’s famous 2007 speech in Munich in which he welcomed the coming of a multipolar world.27 Russians look more cautiously now at multipolarity.

In Eurasia, U.S. policy is seen as the critical independent variable. The Russian reset has had a positive effect. Turks remain skeptical of U.S. policy toward Iran and the Middle East. Germans question their role as a U.S. ally. The economic crisis seemed to influence Russian and German views of American power in opposite directions, drawing Russians closer and pushing Germans further away. Turks see the United States unable to accept a world where rising powers have a say in regional and global affairs. In Eurasia, Russia, Turkey, and Germany are all quite willing to challenge U.S. policy. And, although there is a fair amount of cooperation with the United States, there is uncertainty over the durability of this cooperation over the next decade.

Conclusion

These findings offer a very brief snapshot of the rich analysis that is to be found in the subsequent chapters. Readers may be surprised to find very little in this volume on the threat posed by al Qaeda and affiliated groups, although this remains of massive daily concern throughout the U.S. government. Despite the shift in rhetoric away from the war on terror, the Obama administration is still massively engaged in stopping this threat, as the recent bold action against Osama bin Laden has made clear. Military and civilian agencies remain mobilized for large-scale stability operations in Afghanistan and maintain a large footprint in Iraq. Counterterrorism assistance to uncertain allies like Pakistan and Yemen continues at high levels. In addition to the places we hear about every day in the news, a network of partnerships has been built by the United States in lesser-known countries to eliminate safe havens and secure allies in the fight against violent Islamist extremism. It is undeniable that relatively weak nonstate actors have had great effect on the actions of a great power like the United States. It is worth noting, however, that few of the foreigners consulted for this study believed these groups have the potential on their own to erode U.S. primacy. To these observers, this may be the age of asymmetry, but conventional means of power are still dominant.

Similarly, the risks to the current order associated with the rise of regional powers may be overstated, despite all the hand-wringing that goes on when countries deviate from traditional patterns. Power is certainly shifting toward regional powers that will likely defer less to the United States in the years ahead. But few consulted for this study see great likelihood of powers bandwagoning successfully against the United States or a single regional power confronting the United States in a “Suez moment” in which U.S. power is shown to be lacking. The main future competitors to the current order—China in Asia and Iran in the Gulf—create their own antibodies in their regions, which push neighbors closer into Washington’s orbit.

This is not to say that the current order will be static or easily managed. Recent events in the Middle East come quickly to mind. Movement in the direction of multipolarity is bound to be messy. The challenge facing the United States may just be to avoid allowing the “messiness” to devolve into “nastiness”—in other words, to keep any of the current onset of problems from spinning out of control. What this volume will show is that the world is still welcoming of U.S. leadership. It expects it, and it is afraid to lose it. In this context, the greatest challenge to U.S. leadership may come not from the outside, but from within the United States—from a divided, insular, less confident United States that loses its openness, its innovative capacity, and its identity, which since its founding has been firmly grounded both in its economic success and its moral purpose.