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Good morning everybody. Thank you Steven for the introduction, thank you Thierry for hosting me. I am proud to be one of the two Australians here. We are on the cover of the *Economist* this week, but we are thin on the ground in Morocco.

What I would like to do is to make an argument about the foreign policy consequences of President Trump, and I will touch on four points: first of all, his foreign policy instincts, secondly his actions in office, thirdly the limitations on his actions, and fourthly, reasons to be concerned.

Firstly, on his instincts, starting where Steven finished, people often say lazily that Mr. Trump is stupid and his views are incoherent, but in fact for three decades he has had extremely coherent views on America's role in the world. He came to office with more coherent views on America than other recent presidents, including Obama and Bush. He has held true to four core beliefs for decades, and I have come to think of them as the Four Horsemen of the Apocalypse.

The first instinct he brought to office is that he was sympathetic to isolationism, or if isolationism is too strong a word, then certainly a desire for retrenchment. We heard this during the campaign when he spoke of walling America off from its southern neighbour and reducing America's international commitments. Since the 1940s, American presidents have been seized of the advantages of global leadership; Mr. Trump is oblivious to them.

Secondly, he was unimpressed by the alliance network through which America has traditionally projected its influence, and this is odd, because China and Russia would dearly love to have an alliance network as powerful and cost effective as that of the US.

Thirdly, as Steven intimated, he was hostile to free trade agreements, or at least those that had been negotiated by others – of course, he could negotiate them much better than anyone else. Finally, even before he came to office, we noticed his weird affinity for strongmen such as Vladimir Putin; by contrast, he was notably lukewarm about democratically elected leaders, including in the European and Asian countries, to which the US has been allied.

Those are the four instincts he brought to office, the Four Horsemen of the Apocalypse. Secondly, I would argue that in office those instincts have, in many important respects, informed America's policies. This was an argument I had with a lot of analysts at the time of his election. Lots of my colleagues said that the American system would wrap its arms around Mr. Trump and he would end up as a much more orthodox foreign policy president than might have been imagined. However, as a friend of mine said, 'Never underestimate the impact of Mr. Trump on Trump foreign policy.'

Let me go through those Four Horsemen of the Apocalypse and point out where his instincts have informed his actions. First of all, his instinct for retrenchment – we saw that in his junking of the Iran deal, pulling out of the Paris Accord, or even in the last week, the INF treaty. Secondly, his scepticism to alliances we see all the time – he refused to endorse the collective security guarantee of the NATO treaty for many months, and later threatened that the US could go its own way if delinquent allies did not meet spending demands. He ran down bilateral treaties with countries such as South Korea and Australia. Regarding free trade, he withdrew from the TPP on his first full day in the White House and imposed hundreds of billions of dollars of tariffs on China. Finally, on strongmen and his preferred interlocutors, he has pursued his fixation on Putin to a degree that is difficult to understand, refusing to stand up for American democracy, accepting Mr. Putin's word over that of his own intelligence community, blaming all the problems with US-Russia relations on America, on past American behaviour, rather than on Mr. Putin or indeed his interference in the 2016 election.

Mr. Trump enjoys hanging out with a posse of authoritarians, including Mr. Duterte, Mr. Orban, Mr. Salvini, and Kim Jong-un, who is running rings around a lovesick president. That is my second argument, that his instincts have largely informed US foreign policy.

However, thirdly, there are important limits on his actions. The President's writ does not run everywhere, and two factors in particular have limited the Trump influence on his own foreign policy. The first is much discussed, and that is opposition within his own administration, the so-called deep state, the adults in the room who have to some extent prevented the President from doing irreparable damage to America's alliances and foreign relationships. They have authored strategic documents such as the National Security Strategy and the National Defence Strategy that reflect orthodox rather than Trumpian policies and somehow got Trump to sign off on them. Thank goodness for the deep state, I say.

However, most of the adults have now left the room, and there are persistent rumours that the last two standing, John Kelly and Jim Mattis, will soon follow the others out the door, perhaps in a couple of weeks. That is the first limitation.

Secondly, and this is less discussed, the President lacks the patience, discipline and interest to implement his will. The truth is, President Trump is not really interested in solving policy problems; he is interested in being seen to win. His style is to make a bold and unexpected move, declare victory and move on. Few believe that not having an Iran nuclear deal is a better way of preventing the Iranians from acquiring nuclear weapons than having one. Few really believe that North Korea will denuclearise, but that is to miss the point about President Trump. He is not interested in having victories; he is interested in being seen to win.

Therefore, the deep state's resilience and the President's lack of interest have combined to limit the damage that Mr. Trump has done. He has put American interests in jeopardy, he has damaged international society, he has run down America's prestige, but he has not yet done irreversible harm. However, let me finish on this point. There are two reasons we should be a little nervous.

First, Mr. Trump has not yet faced an externally-generated crisis. Most of his problems have been internally generated. Sooner or later he will face an externally-generated crisis. We remember that President Obama came to office right in the teeth of the global financial crisis. Can you imagine if we had a similar crisis now and our last line of defence in the Oval Office was Mr. Trump? Secondly, he could be goaded into making the kind of catastrophic error he has not yet made, such as starting an unnecessary war. Those are the reasons to be nervous.

Let me finish on one final point. I gave a series of public lectures in Australia in 2015, and I was concerned then about the fraying of the international order. I called the first of these lectures 'Present at the Destruction', and this was a play on Dean Acheson's memoir about the establishment of the post-war order, 'Present at the Creation.' I argued then that the country around which the post-war order was created, the US, was stepping back from the world, other countries such as Russia and China were stepping in, the pillars supporting the order were weak, and the principles that define the order were under challenge. I said that the order was not necessarily finished but was certainly fraying.

I was criticised at the time, including by the Australian Prime Minister, for being overly gloomy; as is the way with Australian prime ministers, he has now left the stage. However, three years later, after Brexit and the election of many other leaders, including Mr. Duterte and others, and the election of Mr. Trump, no one is now saying that I was too gloomy.

Steven ERLANGER

That was a really fine overview and much appreciated.