THE NEW YORK TIMES – 15 GENNAIO 2025

Biden Promised to 'Turn the Page' on Trump. What Went Wrong?

Intervista a Jake Sullivan

This is an edited transcript of an episode of "The Ezra Klein Show." You can listen to the conversation by following or subscribing to the show on the NYT Audio App, Apple, Spotify, Amazon Music, YouTube, iHeartRadio or wherever you get your podcasts.

Jake Sullivan, Biden's national security adviser, looks back on the hopes and realities of Bidenism.

As the second Trump era dawns and the Biden era dims, it's worth asking: What was Bidenism?

One answer to that begins in 2016, when Donald Trump won his first presidential election. That win was a rupture for many Democrats. To them, Trump didn't win so much as they lost. How disillusioned did voters need to be with Democratic governance to consider someone like Donald Trump?

Jake Sullivan was Hillary Clinton's senior policy adviser in the 2016 campaign. That loss was a rupture for him. And he was one of the Democrats who, after that campaign, embarked on a very public effort to get the Democratic Party to admit it was doing something wrong — and it had to change.

One of Sullivan's main conclusions was that the Democratic foreign policy had become severed from domestic politics in a way that left both vulnerable. For too long, Democrats had understood their domestic policies as serving the middle class and their foreign policies as being part of a free-trade-centric, liberal world order that America led.

But the task now was to build a foreign policy that the American middle class saw as serving their interests. Because if you didn't, they would turn to strongmen like Donald Trump. You had to win democracy here at home before you could ever protect it abroad.

After that, Sullivan became a senior policy adviser to Joe Biden in the 2020 campaign. And you could hear Sullivan's thinking echoing in the way Joe Biden pitched his candidacy.

Archived clip of Joe Biden: *Ladies and gentlemen, political wisdom holds that Americans, the American public, doesn't vote on foreign policy. But I think that's an old way of thinking. In 2019, foreign policy is domestic policy, in my view. And domestic policy is foreign policy.*

Biden introduced a slogan that made their project explicit.

Archived clip of Joe Biden: *I will equip our people to succeed in the new global economy with a foreign policy for the middle class.*

Biden won that election, and Jake Sullivan was named national security adviser. From that perch, Sullivan was one of the key architects of what I think Bidenism will be understood to have been: A refocusing of industrial policy at the center of national strategy. A much more competitive approach to China. A belief that Americans had to see that you were putting their interests first.

But if there was one promise that Biden made to the country in that 2020 campaign — particularly when he won it — it's that he would turn the page on the Trump era. And I think we can say definitively that he did not do that.

So if Bidenism was a foreign policy for the middle class, meant to drain Trumpism of its appeal, what does it say that Trump ended up coming back stronger than ever? What then did Bidenism achieve — and what did it fail to achieve? Why?

I wanted to ask these questions of Jake Sullivan, with whom I spoke during his final weeks in the White House.

Ezra Klein: Jake Sullivan, welcome to the show.

Jake Sullivan: Thanks for having me.

I want to begin the conversation right after the 2016 election. You had led policy for Hillary Clinton's campaign. Then Donald Trump won. You did some very public soul-searching and rethinking. What was your theory then for why he won and how the Democratic Party needed to recalibrate?

During that campaign, I remember distinctly one episode where I went to Ohio to speak to a group of supporters. And in the course of my remarks, I referred to the "liberal international order" when talking about the future of the world and so forth. And somebody came up to me afterward and said, "I don't know what the liberal international order is, but I don't like any of those three words."

That stuck with me. It stuck with me through the primary, where Hillary Clinton took on Bernie Sanders, and it stuck with me through the general, where Hillary Clinton took on Donald Trump.

There's a variety of reasons Donald Trump won in 2016. And I don't have a unified theory, but I do think one important dimension of it was that people looked at the global financial crisis and its aftermath and said: This economy is not working for me. And they looked at America's position in the world, and they said: Part of why this economy is not working for me is that American foreign policy is not sufficiently focused on the needs of working people. And that was something that I took away as a main lesson of 2016.

This idea of a foreign policy for the middle class eventually becomes part of Joe Biden's campaign. What was substantively supposed to be different about that?

Because you also served under President Barack Obama. And if I had asked you then whether your foreign policy intended to serve the American middle class, I think you would have said yes.

So what was the intended divergence?

Well, Ezra, I do think I would have said yes. But I think I would have paused for a second and reflected before saying yes because it wouldn't have been instinctive.

When I sat around the Situation Room table during the Obama years, the question wasn't frequently put on the table: Hey, what does this mean for working people and working families in the United States?

I do think President Obama pursued a progressive economic agenda. But one striking thing is that while his domestic economic policy looked a lot different from George W. Bush's, his international economic policy really didn't. The Trans-Pacific Partnership, for example, was a Bush-era trade initiative that President Obama carried forward.

So, yes, I do think President Obama cared deeply about the American middle class. But I don't think we were as attuned to the needs of the American middle class in the Situation Room as we should have been.

Now, your question is, What does that mean substantively? For me, it means four things:

First, that foreign policy starts at home with major public investments in strategic sectors that help reinvigorate our industrial base and create jobs all over the United States.

Second, that we put in place a series of protections against the likes of China, whose policies led to a shock in the United States in the early 2000s and the deindustrialization of key communities.

Third, that we protect American technologies, especially technologies that have national security implications so that they can't be used against us by our adversaries.

And then finally, that a large part of the energy we put into our allies and partners is about organizing and coordinating an effort so they're similarly making these investments. And we are designing a coordinated approach to international economic policy that puts working people at the center.

And if you take those four steps, which I believe the Biden administration has, you create a long-term trajectory where the American worker has more-secure jobs, the potential for higher wages, where technology works for us rather than against us and, critically, where we have diverse and resilient supply chains that aren't dependent on any other country, especially a competitor like China.

This is something that Joe Biden runs on in 2020. He wins the election. You're named national security adviser. And part of this strategy is pulling out of foreign projects and entanglements.

One of the first major changes to American foreign policy that Biden makes is withdrawing from Afghanistan. That withdrawal was widely perceived as chaotic and underplanned. Biden's approval rating dips beneath 50 percent for the first time, and it never really recovers after that.

When you look back on this, what do you think the administration got right and got wrong there?

I believe that President Biden got the big thing right: The United States is better off today because we are no longer at war in Afghanistan. If we were at war in Afghanistan today, that war would be entering its 25th year of American service members fighting and dying in Afghanistan.

We got right that we could refocus our energy and attention elsewhere — on the competition with China, on supporting Ukraine and on building up the kinds of alliances and partnerships that I've just described.

And I would go further and say that the main arguments people made against leaving at the time have not borne out. One of them was that it was going to undermine us with our allies. Our alliances are stronger today than they have been at any point in modern memory.

A second was that it was going to lead to a massive upsurge of terrorism emanating directly from Afghanistan. We've recently seen a terrorist attack in New Orleans, and the terrorist threat remains real. But we have not seen that resurgence from Afghanistan. We also showed that we could take out terrorists in Afghanistan by taking out Ayman al-Zawahri, one of the architects of 9/11, even without boots on the ground.

They also said we wouldn't be able to get out our Afghan allies who supported us during the war. But in fact we've gotten out tens of thousands, even since the fall of Kabul, in August of 2021, making good on our promise to those people.

When I look back, one of the things I saw as something we could learn from is that we did not want to go out too early and start an evacuation, because we were concerned that doing so would precipitate the very outcome that came to pass: the collapse of

the government and the fall of Kabul. The government asked us not to move too rapidly because they were concerned that it would lead to a collapse of morale.

In hindsight, the collapse happened anyway. So we learned a lesson from that, and we applied that lesson in other places — like Ukraine, where in the run-up to the Russian invasion, we shut down our embassy and we got all the diplomats out of harm's way.

So a lot of the things that we did to prepare for the Russian invasion were direct lessons that we learned from Afghanistan.

I supported the withdrawal from Afghanistan. I still do. I think that a lot of people who helped continue that war pretended there was going to be an easy and painless way to end it. But I've thought a lot since about why it was such a sharp change in the way the American public viewed Biden.

One of Biden's real strengths in 2020 was running as a leader who could bring back order after the chaos of the Trump era. And there was something about that balance of order and chaos that began to crack in that moment. I'm curious if that feels true to you or how you would complicate it.

The way that I look at this is that we are in a moment of transition in world affairs that is the culmination of a lot of factors leading to this point.

The post-Cold War era is over. The period of American primacy from the '90s and early 2000s — that has come to an end. That came to an end before President Biden came into office.

So our time in the seat, our four years, has really been about a competition for what comes next. What does that look like? I do not deny that there has been turbulence, and I have the years off my life to basically affirm that there has been turbulence over these last four years.

And yes, when you end a 20-year war with all of the decisions that have been taken leading up to the point when it was handed off to us — with the Taliban in its strongest position, the United States at its lowest troop level since 2001 and a Doha agreement that had us have to leave by May 1, 2021. Yes, it was not going to be easy leaving that war. It was not.

But when history looks back at this period, where necessarily there is going to be change and upheaval in the world, the question is: Did we navigate through it in a way where we gave a stronger hand to the administration who's coming in than the one that we received? And I think that the verdict of history will be that we very much did.

Our alliances are stronger, our enemies are weaker, the United States itself is not at war, and the basic foundations of American strength — our economy, our infrastructure, our innovation base, our defense industrial base — are considerably more powerful and more robust than they were when we took office. And as President Trump comes into office, we have teed up for him, in my view, opportunities — because the United States is in a position of considerable strength.

I want to go through some of the competitions and the initiatives you touched on there, beginning with China.

To me, the biggest surprise of the Biden administration was that, when it comes to foreign policy on China, there was more continuity between Joe Biden and Donald Trump than between Joe Biden and Barack Obama. The administration kept Trump's tariffs and added more. You laid down export controls on critical technologies.

When you came in and looked at America's relationship and competitive position with China, what did you think the Trump team, or Trump himself, got right? And where do you understand your approach diverging?

I think President Trump was right, and I actually said so at the time, even before we came into office. I said he was right about the basic proposition that the United States was in an intense long-term competition with China. And that the era that they called engagement — this idea from the '90s and 2000s that if you brought China into the international economic order, into the international system, they would somehow liberalize, transform, become a more responsible actor — had not borne out.

The evidence on that was pretty clear by the end of the Obama administration. So I think President Trump was correct in saying China is seeking to gain advantage in the international system at the expense of the United States, and the United States needs

to step up to push back because our interests and our values are at stake. I think he was right about that.

I think his execution of that was wanting in a lot of ways. But the most fundamental way was that he did not recognize the central importance of having strong allies and partners aligned with us in carrying out the competition with China.

A mere month before we took office, in 2021, Europe signed a comprehensive investment agreement, a major trade agreement with China, right at the end of the Trump administration. This, to me, was a profound failure of the Trump administration to pull Europe along with us in a common view on this subject.

And when we came in we said: We're going to put allies at the center of our strategy because a united front vis-à-vis China is much more effective for the United States. That trade agreement — it's now on the shelf. And Europe has actually joined us in taking economic countermeasures against some of China's nonmarket economic practices.

And in the Asia Pacific, if you look at what we've done with AUKUS — which is the U.S., Australia and the United Kingdom putting together a nuclear submarine initiative — or what we've done with Japan and Korea in a trilateral arrangement: We have brought our alliances to a new level in terms of our ability to both burden-share and deter China in the Indo-Pacific region.

And then there are other areas where I think President Trump talked the right game but didn't deliver. The fundamental investments in America's industrial and innovation base that President Biden has done over the last four years were things that President Trump suggested he would do — but never did — whether it's chips or clean energy or infrastructure.

And those have put the United States in such a profound position of confidence and capacity in the competition with China, while also engaging in intense diplomacy — so that the bottom doesn't drop out and we veer into conflict with China. We've managed the relationship stably while also competing, in my view, quite effectively.

Ezra, when we walked in the door, the conventional wisdom was two things: First, that China would surpass the United States economically within the next several

years. And second, that China, not the United States, was going to lead the world in artificial intelligence.

Because of what President Biden has done, nobody's talking about China surpassing the United States anytime soon, or perhaps ever. Second, the United States is the leading power when it comes to artificial intelligence — not China. And we intend to keep it that way.

I'm worried about that bottom dropping out. I understand the arguments for more competition with China. I understand the anger over the China shock and that freer trade didn't lead to a more liberal China.

But I have been surprised by the real rise in signaling over the past few years that we would go to war over Taiwan. President Biden made comments that were explicit about that in a way that was a break with previous policy.

The administration sort of walked those back. But Nancy Pelosi herself went to Taiwan. And in both parties there's been a rise in general hawkishness toward China that feels like more than just competition.

It feels like people are starting to imagine the possibility of war in a way that they weren't 10 years ago. So what changed?

I would say the main thing that has changed is China.

China is engaged in the largest peacetime military buildup in human history. Why? It doesn't face any particular acute threat. It has done so, in no small part, because it has signaled publicly that at some point it wants to ensure that Taiwan is part of China — and has put explicitly on the table that military force is an option to make that happen. That's just a reality that we confronted before we walked in the door, and we had to recognize that.

American policy toward China has been consistent over the course of decades: It is to maintain peace and stability across the Taiwan Strait and to deter the conflict you just described. Because that conflict would be absolutely catastrophic — economically catastrophic, catastrophic in terms of the loss of lives — and we should ensure it never happens.

Every day I sat in this seat for four years, I was determined to ensure it did not happen. And I believe it does not have to happen. It is not inevitable by any stretch of the imagination.

Now, taking a step back to the underlying premise of your question, which is, Are we veering down an incredibly dangerous road with China that inevitably leads to conflict? I also think the answer to that question is no.

When I talk about China, I speak about two truths. One truth is that China is trying to surpass the United States as the world's leading power — economically, technologically, diplomatically, militarily. President Xi Jinping has said so.

But we are also going to have to learn to live alongside China as a major power for the foreseeable future. That is also a reality.

So our policy has to account for both of those realities. And the best way to do that is to compete vigorously but manage that competition — so it doesn't veer into conflict — and to maintain communication.

I have spent — I think the technical term is "umpteen hours" — with my counterpart in multiple countries around the world to manage the competition, including on the question of Taiwan. So that we don't end up in conflict with one another, so that we have a degree of stability in the relationship and, crucially, so that we can work together with China on issues where our interests align, where we do have to work together — whether it's on counternarcotics and fentanyl precursors or it's on climate or it's on macroeconomic stability.

So if you look at, particularly, the last two years — where I've tried to intensify this channel, and where President Biden has met twice with President Xi to convey a degree of stability in the relationship: We have worked hard to create space to compete but also to create a floor in the relationship. We believe we've done everything necessary to do so, and we'll pass that off to the next team.

Something you suggested a minute ago definitely seems true to me — which is that China looks much weaker than it did six to 10 years ago.

This isn't to say they have not advanced to the frontiers of technology. They have. This isn't to say their industrial base isn't stronger. It is. There are things in terms of

national power, given China's size, that it's doing very well. But in terms of its growth rate, its productivity rate, the age structure of its people, things look a lot harder.

I'm curious to hear your reflections on what is different between managing the relationship, the opportunities, the risks, with a rising China — a China that is able to offer its people rapid growth, rapid increases in prosperity — and a China that is struggling. A China that might need to find support, unity, a sense of national ambition in nationalism, in expansionism, in some of the other things countries do when that promise of prosperity begins to break down.

It's a question I think about a lot. Because a China that is struggling domestically, as you suggest in your question, may be looking abroad to deliver some sense of national purpose to its people, including through military conquest, including through something like trying to seize Taiwan militarily. I think that's a distinct risk. It's something we're going to have to look at quite carefully.

But the jury is still out about how this will impact the leadership in China. Because, frankly, I don't think they have yet entirely wrestled with the reality you just described. I think they have not fully yet incorporated the economic slowdown and the demographic challenges, and they have a residual confidence that they can manage and overcome those things as they have over the course of the past decade. So I'm not sure we're going to see a dramatic change in their policy, at least in the near term, because they have this reservoir of confidence built up.

I also believe that the Chinese leadership is convinced that the United States is in secular decline. And that is because they misjudge a fundamental fact about America — which is our capacity for resilience and reinvention.

So their leadership is fond of saying, "The East is rising; the West is declining." And they can point to political turbulence and other challenges the United States surely has. But I don't think they were quite ready for the moves that we have made from the point of view of manufacturing and innovation: the robustness and resilience of our economy, the extent to which this is the destination people want to come to for investment. And they're grappling right now with that reality.

Coming back to the fundamental question you're asking, there is a distinct possibility that a domestically weakened China becomes more assertive and aggressive globally. But there is also a possibility that it leads them to adjust toward greater caution, as previous Chinese leaders have done.

Deng Xiaoping was famous for saying that the fundamental Chinese strategy should be "bide and hide": Hide your capabilities, and bide your time. President Xi really broke out of that in a big way.

Perhaps the result of the challenges that he is confronting will lead to some restoration of that basic mentality for a period. Or perhaps it will go in this other direction where nationalism really dictates a much more aggressive and assertive policy.

I think that has yet to be determined, and it will partly be determined by the policy of the United States and the actions of our allies and partners over the course of the coming years.

One reason people began to think differently about the question of Taiwan is that they watched Russia invade Ukraine. And so the idea that great powers sometimes invade the countries they have long said they intend to reabsorb feels more real.

That invasion was almost three years ago. How do you assess where the war between Russia and Ukraine stands right now?

I've said this a couple of times before, but I think it's a helpful thought experiment. A lot of people say: Hey, Russia's doing pretty well in this war. Isn't Putin kind of smart for having invaded Ukraine?

Let's imagine, in February 2022, that Joe Biden went on television and told the American people: I'm invading Canada, and I'm going to seize Ottawa in a week and replace the government. It's going to be not a war but a special military operation. It'll be done in a few days — and the Canadians will welcome us as liberators.

Three years later, the American army was in the wheat fields of Manitoba, grinding out mile by mile. Having lost dead and wounded 600,000 Americans. Having inflation near 10 percent and interest rates near 20 percent in the United States. Having

mortgaged our economic future technologically and in terms of our high-tech industrial base.

Would anybody say: Hey, America's doing pretty well there — Joe Biden's a smart guy? Absolutely not.

Fundamentally, Russia's strategic objectives in this war have failed. They failed to take Kiev. They failed to destroy Ukraine. They failed to break NATO. So now the question is: How do we drive to a just and sustainable peace that allows Ukraine to emerge as a free and independent viable nation rooted in the West?

I think that opportunity is present. And I think our job right now is to continue to supply Ukraine with the leverage they need to get a good deal at the negotiating table. That is what we're trying to do in our waning days before passing the baton to President Trump.

Does Ukraine want a deal at the negotiating table? President Volodymyr Zelensky has been clear that he wants victory and Russia ejected from Ukrainian land — an aspiration that I think is both just and quite unlikely.

There's been frustration that America has not put more pressure on for negotiations. What is that deal you're talking about look like — and what would change to push the different players to the table?

President Zelensky has said publicly that this war has to end in diplomacy. He recognizes that, and he accepts the basic American proposition that our job is to put them in the best possible position on the battlefield so they are in the best possible position at the negotiating table.

And, in fact, in September, he came to Washington to see President Biden, and Zelensky brought with him what he called his victory plan. That victory plan, in part, was a plan to put him in a position to be able to negotiate a just outcome to this war.

So even before the election, the idea was that whoever won — whether it was President Trump or Vice President Harris — there would be a turn into negotiations at some point, such that Ukraine would have the necessary leverage to get the outcome that it needs. And that outcome has a critical element to it — which is

sufficient guarantees for its security. So that if there is some kind of deal, Russia can't just wait a year and turn around and do it all over again.

But it is fundamentally up to Ukraine to choose both when to engage the negotiation and what the ultimate outcome of the negotiation will be.

I've heard the critics who say: Why doesn't the United States just make Ukraine accept a deal? And my answer to that question is: This is Ukrainian land. These are Ukrainian lives. It should be up to the democratically elected Ukrainian government to make its determination about whether to bring the war to an end or whether to continue it.

So for me, the real issue is not: Hey, Washington, why don't you just squeeze Zelensky until he gives up X amount of land? The real question is, How do we make sure that President Zelensky has sufficient leverage and is in a position to get to the negotiating table to do a deal?

One critique I hear from the foreign policy community — including from Richard Haass, the president emeritus of the Council on Foreign Relations — is that, yes, it is Ukraine's decision, but it is American money and American weaponry that is making the defense possible.

So the idea that this isn't really up to us just doesn't feel quite right. If you've got to keep going to Congress to ask for more money, then it's at least somewhat up to us. And we should be using that leverage.

Now I doubt you feel you haven't used your leverage, but walk me through the distinction between these two positions. Because, obviously, when we're the armory, we do have a say.

You made a really important leap in the analysis underpinning that question, and it's a leap I wouldn't make.

You said: Obviously we have a say because we're giving weapons. And then you implied: So we should go tell them to stop. And it's that leap I don't want to make.

It's true we could cut Ukraine off. We could say: You get nothing more unless you accept that Russia gets X percent of your territory.

That is an option available to us. So, empirically, I agree with you on that analytical point.

But on the prescriptive point, should we do that? I do not agree. I don't think that the United States should tell Ukraine: You just have to give up. We're done unless you give up.

That, I believe, is an inappropriate use of American leverage.

But isn't there a difference between just giving up and moving into some kind of negotiated peace process?

Over the course of 2023 and 2024, I was engaged in a variety of formats around the world — in Jeddah, in Malta, in Copenhagen, in Kiev itself — around trying to put together the principles of a just and sustainable peace. We were feeling our way through what it might look like to get to an ultimate solution to this war.

But what I don't think is right is for the United States to dictate to a country that's fighting for its very survival what the exact terms or shape of a negotiation should look like — unless it's going to drag us into war. And it hasn't dragged us into war.

What it has asked of the American people is what I believe is a very sustainable thing for us to give — which is the supply of weapons and intelligence and support. And I don't believe that it is at sufficient cost to the United States to continue to do that, that we should compromise our moral support for a country that is being attacked and that is having its sovereignty stripped of it.

So for me, the argument doesn't stack up that because we're supplying weapons to Ukraine, we, the United States, should dictate the outcome to Ukraine.

And I would add one further point: One of the hallmarks of the Biden approach on Ukraine that I don't think gets enough credit is our capacity to hold the unity of the alliance together. President Putin, at the beginning of this, bet that he would break the North Atlantic Treaty Organization, that he would divide Europe. We have held together a coalition of 50 nations through thick and thin. The United States coming along and telling Ukraine, "This is how it's going to be" would surely shatter that unity.

And one good metric for whether the Haass position is a position that could gain purchase is: Are there a bunch of allies out there — significant allies of the United

States and Europe — who are saying: Hey, America, go force Ukraine to the table and make them do a deal? There aren't.

And for those who say: Well, this is a very passive approach — I can just tell you the sheer number of hours I spend every day helping continue to corral the broad base of international support for Ukraine, the work that we do to supply them with the necessary munitions to stay on the battlefield and the work that we have done to discuss the shape of diplomacy in this series of engagements over the course of the past two years. This has been a highly proactive, highly effective strategy to frustrate Russia's ambitions and to keep Ukraine a sovereign, viable nation.

I believe we have succeeded in doing that. And I believe that there is the possibility for a deal to be done and that when Ukraine is ready to sign on the dotted line of that deal, we can hold our heads high that we did not impose a dictated outcome on a sovereign and free people.

In April 2023, you went to the Brookings Institution and gave a speech arguing that industrial policy and the onshoring of supply chains were critical for strengthening both the middle class and national security.

This is building on your approach to competition with China. It's also building on vulnerabilities we had seen with the United States relying on China for goods during the pandemic, as well as Europe relying on Russia for natural gas.

You present this as a break with the consensus — and I think it's one of the more important ideological breaks of the Biden administration. What was the consensus that you were challenging there — and why?

The consensus was rooted in the idea that international economic integration — the free flow of capital across borders, the bringing in of every country in the world to a single international economic system — would lead to greater efficiency, greater responsibility of action by all of those players, and that everyone would ultimately benefit from that.

This was essentially the thesis of globalization through the '90s and the 2000s: that markets efficiently allocate capital at all times. That, fundamentally, all growth is good growth. It's all the same. It doesn't matter what type of growth it is, whether it's the

growth of the financial sector or the growth of the industrial sector. And that bringing in China or Russia to the World Trade Organization would make those countries play by the rules.

At its core, a lot of the elements of the international financial and economic system were sound and helped deliver robust top-line growth and technological progress in the United States.

But it also created these huge vulnerabilities. Supply chain vulnerabilities. A lack of allocation of capital to the great crises of our time, like the climate crisis. A greater inequality and the hollowing out of our industrial base in the United States. Those were the kinds of things that we needed an updated international economic policy to try to address.

I was surprised to see the blocking of the Nippon Steel deal. There's been a lot of controversy over that. Japan is very much an ally of ours. Tell me how you think of that in this framework.

Why would having a deep ally owning an American steel company, and upgrading it, fall in the wrong line of this test?

The Nippon Steel deal is a very specific national security question. And in fact the Committee on Foreign Investment, which looks at these questions of foreign acquisition of major strategic domestic industries, was unanimous in saying it does pose national security risks. Because if a foreign entity, even an allied entity, is not as invested as the United States is in making sure that we maintain the level of steel production in the United States that we feel is necessary for our national security, that's a risk.

The real debate within the committee was over whether there were sufficient steps that could be taken to mitigate that risk. President Biden ultimately decided that, fundamentally, there has to be some percentage, some element of the American steel industry that is American owned, American operated and driven by American workers. And that was a judgment he made.

I do not think one should look at that deal and say: OK, that means President Biden isn't going to work with allies and partners. Because the record is replete with

instances where we're working with Japan on critical minerals, semiconductors and so many other things. But the Nippon Steel deal was rather a unique case that was looked at hard on the merits, and the president reached a judgment.

In your Brookings speech, what I understood you would be arguing was that when you look at this competition between autocracies and democracies, the way for democracies to win was to show they could deliver. And you were connecting that to industrial policy. That the Democrats need to use industrial policy and trade policy to deliver first and foremost if they were going to make democracy look like the winning bet in the world that we now live in.

Is that fair? And how did it play into the speech?

There's a professor named Dani Rodrik who writes a lot about international economic policy, and 15 or 20 years ago he described what he called a trilemma.

He said that when you look at the international economic system, you can't have democracy, national sovereignty and globalization — one of the three has to give. He describes various times in history when democracy gave so that you could have both national sovereignty and globalization, and times, like with the European Union, where national sovereignty gave. But he says you basically can't have all three.

I have thought a lot about that. And what I laid out in the Brookings speech is an effort basically to solve that trilemma.

It's to say: How do you have America at the center of an international economic order that is open and transparent and allows for trade and investment but at the same time allows for a strong industrial and innovation base in the United States, does not allow for supply chains to be choked off by competitors or leveraged to punish us, and that delivers actual benefits to working- and middle-class people, so that you don't end up with massive inequality? How do you build that?

The Biden approach — the foreign policy for the middle class that I laid out — is an ongoing, generational effort to sustain democracy and national sovereignty while not ending up back in the protectionist and nationalist mistakes of the 1930s.

Will it succeed over the long term? I don't know. But I think we have put some events in motion here that — regardless of who's in the White House, unless they're just

completely ripped away — will end up serving the United States and the international economic system well over time. And now we have to see what Donald Trump does with it.

That Brookings speech was in April 2023. A few months later came Oct. 7. And in the 15 months since Oct. 7, Hamas — I think it's fair to say — is destroyed as a significant military force. Its leader, Yahya Sinwar, is dead.

It would seem like Israel's war aims are largely achieved, but there's still no plan for who will govern Gaza except for Israeli occupation. There's an ongoing and horrible humanitarian crisis in Gaza — you have infants dying of hypothermia.

The administration just approved $8 billion more in arms deals for Israel. How does this serve U.S. interests?

First, I would start just on basic principles. Why did this war start? This war started because Hamas committed the worst massacre of the Jewish people since the Holocaust, and Israel responded to try to root out the threat that Hamas could do that again — as its leader said it wanted to do again and again and again.

Second, the way that Israel has had to prosecute this campaign has been unprecedented in history. Because you are talking about an area with hundreds of miles of military tunnels underneath, with Hamas using hospitals and schools and mosques for military purposes, and with a highly, densely populated area where, unlike in almost any conflict anywhere, those people were not allowed to go anywhere else.

Now that does not lessen Israel's responsibility to minimize civilian harm. Too many civilians have died in this war, and too many civilians have struggled to get the necessary lifesaving sustenance, food, water, medicine, etc. And we have pushed hard — and I believe have made a substantial difference — in the delivery of humanitarian aid to Gaza to stave off the worst effects of famine that were predicted over the course of many months.

Sitting here today, it is true that Hamas's military formations are shattered. Its leader, Sinwar, is dead. And yet it continues to hold hostages, including American hostages,

and it continues to fight and continues to assert that it will represent a long-term threat to Israel.

Over the course of the past several months, we have been trying to work to get to a cease-fire and hostage deal so that hostages begin coming out, humanitarian aid can surge in, and we can get to an end to the war. Alongside that, we have also been working with all of the key players in the region on a day-after plan.

You say: It's been 15 months — that's so long. But it's been years, decades, that American presidents have been trying to deliver an ultimate political solution to the Palestinian question, and no American president has been able to do it.

But I'm not asking about that. Just to be very clear, I'm not someone who believes there is an ultimate solution to the Palestinian-Israeli question on the table in any foreseeable near future. I'm a realist about this.

But people working on humanitarian aid in Gaza are just unfathomably furious about how hard it is to get aid in. And I know you all have worked on this with Israel — and criticized Israel publicly on this.

But this goes back to the question: What leverage and responsibility does the provision of U.S. arms give us? Many people — and at this point I'm one of them — think: At what point do you not want to be party to this level of suffering? At what point is enough, enough?

At what point is there too much collective punishment for the threat that the remnants of Hamas still pose to Israelis?

One of the things I would point out to you is that, over the course of the past 15 months, Israel has not just been fighting Hamas. Israel has been fighting Hezbollah. Israel has been attacked by the Houthis. Israel has been attacked by the Shia militia groups in both Iraq and Syria. And Israel has been attacked, directly, by Iran.

So to talk about the cutoff of American military assistance to Israel is not just a question of whether we have leverage over them in Gaza. It's a question about our obligation to help Israel defend itself against myriad enemies, many of whom are our enemies, as well.

There is complexity in someone sitting down and saying: OK, I get all that. But because of Gaza, I'm not sending them any more of the kinds of weapons that they've had to use to actually fight those various foes.

So that's one thing to keep in mind. A second thing —

Before we get to the second thing — it's true that Israel faces significant external threats. But wouldn't that make it more important that Israel listens to us and treats us as a partner?

It seems strange to argue that's why we don't have the ability to negotiate with our partner — to insist that there has to be some transition out of the war in Gaza, as well as a level of humanitarian aid that is completely unlike what they have been letting in thus far.

Because they are dependent on us, and their threat is not just Hamas.

Look, I just want to be clear, Ezra — I wasn't just trying to put forward an argument. What I'm trying to do is just give an explanation of the complexity of the decision-making when you sit in my seat. That, when the proposition comes in — Just cut off arms — what are the things we have to think through?

I'm not here trying to engage in a polemic and say this justifies that or the other thing. I'm just trying to explain that one reality we contend with is that the cutting off of arms has consequences for Israel's security well beyond just Gaza.

The second point goes to the nature of a friendship and alliance. The broad-based cutting off of arms in the middle of a war is a truly dramatic act that has far-reaching consequences. And for that reason, President Biden has been very reluctant to think of our relationship with Israel in the transactional, leverage-based terms that you've just described.

Now there have been targeted instances where the president said, for a particular type of weapon system, it just doesn't make sense. So he paused the supply of 2,000-pound bombs because he said the military utility of these in densely populated areas, compared to the civilian harm, is just out of whack. And that he said no. But the broad-based cutoff he has not been persuaded makes sense in light of our relationship with Israel and in light of the circumstances in the region as a whole.

But if you actually look at what the United States has done on the question of humanitarian assistance over the past 15 months, we have made a considerable difference from a period when Israel said it was not going to allow anything into these guys, because Hamas was going to take it. To today, where we do have trucks going in on a daily basis, thanks to the kind of sustained American pressure that has, in fact, produced results.

Not everything we wanted. And you're right: There have been periods that have been really far from what is acceptable — which we have called out.

But I would just say to you that the president's mind-set, his approach on this, has been an approach that says: We are going to speak to our values, and we are going to call out that the Palestinian civilians in Gaza are going through hell, that there has been too much dying, too much suffering.

But, at the same time, at the end of the day, we have an ally who is basically being attacked by all sides, by multiple different directions. And a full cutoff of weapons to Israel in these circumstances is simply not a policy that President Biden decided to pursue.

Many people I speak to who are engaged in this believe that assistance should be much more sharply conditioned, that there should be things that speak to our interests in the region, both moral and strategic.

You just had Moshe Yaalon, who served as the defense minister under Benjamin Netanyahu until 2016, saying that the path Israel is on is an ethnic cleansing.

We know that annexation and settlement building in the West Bank has accelerated. That makes any question of Palestinian statehood and any kind of solution in the long run much harder.

Maybe you believe Israelis would sacrifice its own security and say no to our weapons rather than abide by what our limits were. But would that not be its decision as opposed to your decision?

First, I think there's something a bit metaphysical about whose decision it is, because it would be us who were saying: We're going to cut you off if …. So the leverage and transactional determination would be taken from our side.

I've heard this argument from people of good faith, people I respect deeply and people who I know feel deeply about the plight of the Palestinian people. But I've also heard the argument from the other side that the Biden administration has been insufficiently supportive of Israel, that withholding 2,000-pound bombs and calling out Israeli excesses and speaking about our concerns has been empowering of our enemies and harmful to Israel. And that is not a small constituency in this country. So sitting in my seat, we get it from both sides.

What we have tried to do is adopt a policy that says: We are going to continue to support Israel in its attempt to defeat terrorist enemies and to deter Iran. We are going to do so, including through the provision of military assistance. At the same time, we are also going to be unflinching in our critique of Israel, where we believe they have gone too far. And we are going to push them to a better place on things like humanitarian assistance.

We have stood by those basic principles throughout this conflict. But the question of Gaza obviously continues to be a daily struggle, in part because we are trying to deliver this cease-fire and hostage deal.

And just having Israel say: OK, we accept the cease-fire. We have to just stop — at a time when all of these hostages are being held — that doesn't wash.

When the war widened to involve Hezbollah, Iran and the Houthis, there's been a sense that the map of the Middle East has been remade in ways that are positive for Israeli security, maybe even American security.

What is possible now that you wouldn't have said was possible before the war widened? And what is a risk right now?

Things are unfolding so rapidly in the Middle East right now that it's difficult to give you any kind of confident answers to those questions. I'm reminded of my fellow Minnesotan Bob Dylan's song, "The Times They Are A-Changin'."

Iran is weaker than it's been since the Iranian revolution. And yet a weaker Iran still represents a genuine threat, because a weaker Iran could decide it has no choice but to go nuclear, and that's something we are going to have to contend with.

In Syria, the fall of a brutal butcher, Bashar al-Assad, is a good thing. That man had no business ruling over a people that he has massacred at scale over the course of many years. On the other hand, it has created a genuine threat of extremism and terrorism that is going to have to be managed and contained over the coming months and years.

I will point out one concern I have that's quite immediate. Our biggest counterterrorism partner against ISIS was the Kurds, a group called the Syrian Democratic Forces.

There is a threat now against them from both Turkey and Turkish-supported opposition forces in Syria to take territory that the Kurds hold in Syria. If they do so, it could lead the Kurds to take their eyes off the prisons where thousands of ISIS fighters and ISIS families are being held.

And if that happens, you could see prison breaks that lead to this huge number of ISIS fighters running free. And so on and so forth — you can follow that down the path of your imagination.

The most important thing, from my perspective, is that we recognize what America's fundamental interests are here. Our first interest is to make sure that we continue to keep the pressure on ISIS, so that ISIS does not re-emerge as a major territorial challenge as it did a decade ago.

The second is that we support our friends in the region so that the instability that's emanating from Syria and elsewhere does not wash over them in Jordan, in Iraq, in Egypt and of course, in Israel — and to keep this fragile cease-fire in Lebanon and try to have it grow out.

The third is actually to try to ensure that Iran can never get a nuclear weapon. That has been a position of Democratic and Republican administrations.

And the fourth is to try to address the human suffering that has come as a result of all of these conflicts, through surges in humanitarian assistance. That's what we've got to try to do.

But what is the outcome of all of this? I think it is too early to predict. Even when good things happen, there are bad things around the corner. That's true across foreign policy. It's especially true in the Middle East.

Let me go back to the question I asked you in the beginning: You did a lot of thinking about why Hillary Clinton lost. The foreign policy that you and the Biden administration pursued was partially a product of that thinking.

And now four years after coming to power with everything Americans know about Donald Trump, he won again. He won more convincingly. How has that changed your thinking? Do you have a different way of understanding that now than you did then?

That's a great question to ask me in six months after I've slept for a really long time. Because, honestly, I haven't had the time since November to reflect. I was hoping to reflect, and then Assad fell and lots of other things happened, even just during the transition.

So I can't give you a fully formed, coherent answer to the question. But I can give you the beginning of an answer. Which is that I actually think this election was determined less by the deeply structural factors we were talking about earlier and more by immediate things — post-Covid economics, high prices, the feeling people had of dislocation in the years following the pandemic.

And what I believe quite deeply is that President Biden's economic policies — the fruits of them and the benefits that flow to the American people — will be measured in decades, and political cycles are measured in years.

And the gap between those two things, I think, has a lot to do with why President Trump won this election.

When you look back on these four years, is there more you think the administration could have done or should have done such that its policies were felt in years, rather than decades?

When the other side wins the election and you lose the election, if your answer to that question is: No, there's nothing else we could have or should have done — then you'd have no business still being around. Of course I think about that because of course the answer has to be yes. We could have and should have done things to try to produce a different result.

President Biden had a deep conviction about what he was trying to deliver for the American people at the end of the day. And it wasn't completely about just setting up the terms of re-election for Democrats. It was about his view of what was going to make America — and especially working families in the United States — safe and strong.

And I think he believes he set all of those things in motion in a quite dramatic and profound way. And that when we look back at the policies he pursued, the investments he made and the course he set the country on, it is going to look pretty damn good.

I find myself thinking about the story you told me at the beginning of our conversation — about being in Ohio and talking to someone about the liberal international order. And he says: I don't like any of those words.

We talk about what the liberal international order does and does not provide, and I think one of its deep vulnerabilities has proved to be that people don't necessarily believe it provides order.

There wasn't order on the border — that wasn't the liberal international order, but that was the Biden administration and decisions about policy and Congress. There was a sense that we were enmeshed in the Ukraine-Russia war — but without a clear endgame. We are enmeshed in something nobody likes in Israel and Gaza, almost no matter what side of it they fall on. And now you have Donald Trump promising to bring back order in the way a strongman can offer order.

I'm curious if this sparks anything for you. Because I do think something that I heard, even from people who are sympathetic to the Biden administration's values, was they just felt the world had become more disordered.

And maybe what people want from foreign policy isn't so much that it's for or not for the middle class, but that it makes it so they just feel that they don't need to worry so much about the world — that somebody has it handled.

I'm not saying it is possible to handle everything, but I'm curious how you think about working with that desire that I think actually Trump speaks to very effectively — even if his governance doesn't answer it all that well.

I've thought about this a lot, as well.

I believe we are in a plastic moment in the world, a time when our competitors are trying to challenge the system in a profound way. It's true of China, it's true of Russia, it's true of Iran. And they're doing so trying to push the boundaries of what they can — for lack of a better term — get away with.

And I believe that, in a period like this, there is no way to prevent all crises, all turbulence. I don't think that is a viable endgame for American foreign policy.

I think the endgame for American foreign policy should be: Can we manage that period without our getting dragged into a major conflict? We have done that. Can we manage that period with our alliances stronger than we found them? I think it is indisputable that we have done that. And can we manage that period where our adversaries are weaker than we found them? In all three cases — China, Russia, Iran — I think the record is clear that they are demonstrably weaker.

And on the two areas that I think are going to matter the most to our future: One, is artificial intelligence going to work for us or against us? The U.S. has led and has actually shaped both the technology and the rules of the road. And on the clean energy transition: Are we going to make it through this transition in a way that is just and efficient? We have moved supply chains. We have moved investment. We have moved innovation.

Right now, when you look around the world, there's no one else who has anything remotely resembling the hand the United States has.

If the measure is: Are there any wars happening anywhere in the world at this time? If there are, you failed. Well, there are wars happening.

If the measure is: Is there conflict in the Middle East unfolding? Then there hasn't been a presidency, including the Trump presidency, where there hasn't been a substantial amount of disorder in the Middle East.

But if the measure is: Is America in a stronger position on the issues that actually matter to the long-term health, security and prosperity of the American people? I think the answer to that question is demonstrably yes.

Where things stand in the Middle East today, compared with under the Trump presidency or the Obama presidency or before, in terms of the relative position of our friends and our adversaries — I'll take it broadly that that is an opportunity for the new Trump administration to seize of the events that continue to unfold in Gaza.

As you said, it is heartbreaking. It is brutal. It keeps me up at night — and I think about that from both the perspective of the Palestinians and the Israelis. And I believe that if we can get a foothold in the cease-fire and hostage deal, and try to carry that forward into something more enduring, we can move into a different era on that conflict, as well.

And I know you said you're not one who thinks there can be an ultimate solution. I have not entirely given up hope on that, despite the sense of hopelessness that is there right now.

And then the very final point that I would make is we have thought hard about how you integrate foreign policy and domestic policy so that, at the end of the day, what we are doing in terms of our investments in the American people and what we are doing working with countries around the world is, most likely, 10 years from now, to put the United States in a position where we aren't dependent on other countries for critical supply chains. We aren't facing adversaries that are overmatching us militarily or technologically. We have great and strong friends who we stand behind and who stand behind us.

And it is a real dividend to Donald Trump that he's being handed a hand that does not involve the United States at war.

Then, always our final question: What are three books you'd recommend to the audience?

First, I'll just say that I frequently get Amazon deliveries from my dad because he listens to your podcast and then takes a book that one of your guests recommended, and he sends it to me.

For your huge amounts of spare reading time, I'm sure.

Yes, exactly. So for me, three books: The first is actually a report from 1945 by Vannevar Bush to Franklin D. Roosevelt called "Science, the Endless Frontier," which

has been turned into a book. You can get it on Amazon, and it's basically the blueprint for America's national science and technology policy for the next several decades. And I think it has so much resonance to what we need to do today on semiconductors, on A.I., on clean energy, on biotechnology, on quantum. And it's really a story about bold public investment and experimentation — unlocking both private sector and academic research that powered American innovation through decades. Vannevar Bush delivered that right at the end of the Second World War to F.D.R., and it makes for a very good read.

The second is a book that I'm just partly through. I'll read the whole thing, but I skipped to the end because I really wanted to focus on the A.I. part of it: "Nexus: A Brief History of Information Networks from the Stone Age to A.I.," by Yuval Noah Harari. I think everyone should read this book. I don't agree with every word of it, but it paints a picture of what we are going to be contending with artificial intelligence that, frankly, is a little bit worrisome but is also so deeply thoughtful. One of the points he makes is: For the first time, humans are inventing not a tool but an agent, and this has all kinds of implications.

And then the third book — a totally different kind of book — "The Situation Room: The Inside Story of Presidents in Crisis," which George Stephanopoulos wrote. If you want to understand my job and what sitting in the Situation Room is like — dealing with crises, with presidents, with secretaries of state and defense — this book actually walks through the history of the Situation Room as told through a series of episodes over multiple presidents.

And I recommend it simply because it's hard to know what the heck a national security adviser does. You read that book, you'll have some sense of the reason why the bags under my eyes are so heavy.

Jake Sullivan, thank you very much.

Thank you.