By George Friedman

The 2010 U.S. midterm elections were held, and the results were as expected: The Republicans took the House but did not take the Senate. The Democrats have such a small margin in the Senate, however, that they cannot impose cloture, which means the Republicans can block Obama administration initiatives in both houses of Congress. At the same time, the Republicans cannot override presidential vetoes alone, so they cannot legislate, either. The possible legislative outcomes are thus gridlock or significant compromises.

U.S. President Barack Obama hopes that the Republicans prove rigidly ideological. In 1994, after the Republicans won a similar victory over Bill Clinton, Newt Gingrich attempted to use the speakership to craft national policy. Clinton ran for re-election in 1996 against Gingrich rather than the actual Republican candidate, Bob Dole; Clinton made Gingrich the issue, and he won. Obama hopes for the same opportunity to recoup. The new speaker, John Boehner, already has indicated that he does not intend to play Gingrich but rather is prepared to find compromises. Since Tea Party members are not close to forming a majority of the Republican Party in the House, Boehner is likely to get his way.

Another way to look at this is that the United States remains a predominantly right-of-center country. Obama won a substantial victory in 2008, but he did not change the architecture of American politics. Almost 48 percent of voters voted against him. Though he won a larger percentage than anyone since Ronald Reagan, he was not even close to the magnitude of Reagan's victory. Reagan transformed the way American politics worked. Obama did not. In spite of his supporters' excitement, his election did not signify a permanent national shift to the left. His attempt to govern from the left accordingly brought a predictable result: The public took away his ability to legislate on domestic affairs. Instead, they moved the country to a position where no one can legislate anything beyond the most carefully negotiated and neutral legislation.

Foreign policy and Obama's campaign position

That leaves foreign policy. Last week, I speculated on what Obama might do in foreign affairs, exploring his options with regard to Iran. This week, I'd like to consider the opposite side of the coin, namely, how foreign governments view Obama after this defeat. Let's begin by considering how he positioned himself during his campaign.

The most important thing about his campaign was the difference between what he said he would do and what his supporters heard him saying he would do. There were several major elements to his foreign policy. First, he campaigned intensely against the Bush policy in Iraq, arguing that it was the wrong war in the wrong place. Second, he argued that the important war was in Afghanistan, where he pledged to switch his attention to face the real challenge of al

Qaeda. Third, he argued against Bush administration policy on detention, military tribunals and torture, in his view symbolized by the U.S. detention facility at Guantanamo Bay Naval Base.

In a fourth element, he argued that Bush had alienated the world by his unilateralism, by which he meant lack of consultation with allies — in particular the European allies who had been so important during the Cold War. Obama argued that global hostility toward the Bush administration arose from the Iraq war and the manner in which Bush waged the war on terror. He also made clear that the United States under Bush had an indifference to world opinion that cost it moral force. Obama wanted to change global perceptions of the United States as a unilateral global power to one that would participate as an equal partner with the rest of the world.

The Europeans were particularly jubilant at his election. They had in fact seen Bush as unwilling to take their counsel, and more to the point, as demanding that they participate in U.S. wars that they had no interest in participating in. The European view — or more precisely, the French and German view — was that allies should have a significant degree of control over what Americans do. Thus, the United States should not merely have consulted the Europeans, but should have shaped its policy with their wishes in mind. The Europeans saw Bush as bullying, unsophisticated and dangerous. Bush in turn saw allies' unwillingness to share the burdens of a war as meaning they were not in fact allies. He considered so-called "Old Europe" as uncooperative and unwilling to repay past debts.

The European misunderstanding of Obama

The Europeans' pleasure in Obama's election, however, represented a massive misunderstanding. Though they thought Obama would allow them a greater say in U.S. policy — and, above all, ask them for less — Obama in fact argued that the Europeans would be more likely to provide assistance to the United States if Washington was more collaborative with the Europeans.

Thus, in spite of the Nobel Peace Prize in the early days of the romance, the bloom wore off as the Europeans discovered that Obama was simply another U.S. president. More precisely, they learned that instead of being able to act according to his or her own wishes, circumstances constrain occupants of the U.S. presidency into acting like any other president would.

Campaign rhetoric notwithstanding, Obama's position on Iraq consisted of slightly changing Bush's withdrawal timetable. In Afghanistan, his strategy was to increase troop levels beyond what Bush would consider. Toward Iran, his policy has been the same as Bush's: sanctions with a hint of something later.

The Europeans quickly became disappointed in Obama, especially when he escalated the Afghan war and asked them to increase forces when they wanted to withdraw. Perhaps most telling was his speech to the Muslim world from Cairo, where he tried to reach out to, and create a new relationship with, Muslims. The problem with this approach was that that in the speech, Obama warned that the United States would not abandon Israel — the same stance other U.S. presidents had adopted. It is hard to know what Obama was thinking. Perhaps he thought that

by having reached out to the Muslim world, they should in turn understand the American commitment to Israel. Instead, Muslims understood the speech as saying that while Obama was prepared to adopt a different tone with Muslims, the basic structure of American policy in the region would not be different.

Why Obama believed in a reset button

In both the European and Muslim case, the same question must be asked: Why did Obama believe that he was changing relations when in fact his policies were not significantly different from Bush's policies? The answer is that Obama seemed to believe the essential U.S. problem with the world was rhetorical. The United States had not carefully explained itself, and in not explaining itself, the United States appeared arrogant.

Obama seemed to believe that the policies did not matter as much as the sensibility that surrounded the policies. It was not so much that he believed he could be charming — although he seemed to believe that with reason — but rather that foreign policy is personal, built around trust and familiarity rather than around interests. The idea that nations weren't designed to trust or like one another, but rather pursued their interests with impersonal force, was alien to him. And so he thought he could explain the United States to the Muslims without changing U.S. policy and win the day.

U.S. policies in the Middle East remain intact, Guantanamo is still open, and most of the policies Obama opposed in his campaign are still there, offending the world much as they did under Bush. Moreover, the U.S. relationship with China has worsened, and while the U.S. relationship with Russia has appeared to improve, this is mostly atmospherics. This is not to criticize Obama, as these are reasonable policies for an American to pursue. Still, the substantial change in America's place in the world that Europeans and his supporters entertained has not materialized. That it couldn't may be true, but the gulf between what Obama said and what has happened is so deep that it shapes global perceptions.

Global expectations and Obama's challenge

Having traveled a great deal in the last year and met a number of leaders and individuals with insight into the predominant thinking in their country, I can say with some confidence that the global perception of Obama today is as a leader given to rhetoric that doesn't live up to its promise. It is not that anyone expected his rhetoric to live up to its promise, since no politician can pull that off, but that they see Obama as someone who thought rhetoric would change things. In that sense, he is seen as naive and, worse, as indecisive and unimaginative.

No one expected him to turn rhetoric into reality. But they did expect some significant shifts in foreign policy and a forceful presence in the world. Whatever the criticisms leveled against the United States, the expectation remains that the United States will remain at the center of events, acting decisively. This may be a contradiction in the global view of things, but it is the reality.

A foreign minister of a small — but not insignificant — country put it this way to me: Obama

doesn't seem to be there. By that he meant that Obama does not seem to occupy the American presidency and that the United States he governs does not seem like a force to be reckoned with. Decisions that other leaders wait for the United States to make don't get made, the authority of U.S. emissaries is uncertain, the U.S. defense and state departments say different things, and serious issues are left unaddressed.

While it may seem an odd thing to say, it is true: The American president also presides over the world. U.S. power is such that there is an expectation that the president will attend to matters around the globe not out of charity, but because of American interest. The questions I have heard most often on many different issues are simple: What is the American position, what is the American interest, what will the Americans do? (As an American, I frequently find my hosts appointing me to be the representative of the United States.)

I have answered that the United States is off balance trying to place the U.S.-jihadist war in context, that it must be understood that the president is preoccupied but will attend to their region shortly. That is not a bad answer, since it is true. But the issue now is simple: Obama has spent two years on the trajectory in place when he was elected, having made few if any significant shifts. Inertia is not a bad thing in policy, as change for its own sake is dangerous. Yet a range of issues must be attended to, including China, Russia and the countries that border each of them.

Obama comes out of this election severely weakened domestically. If he continues his trajectory, the rest of the world will perceive him as a crippled president, something he needn't be in foreign policy matters. Obama can no longer control Congress, but he still controls foreign policy. He could emerge from this defeat as a powerful foreign policy president, acting decisively in Afghanistan and beyond. It's not a question of what he should do, but whether he will choose to act in a significant way at all.

This is Obama's great test. Reagan accelerated his presence in the world after his defeat in 1982. It is an option, and the most important question is whether he takes it. We will know in a few months. If he doesn't, global events will begin unfolding without recourse to the United States, and issues held in check will no longer remain quiet.

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