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# Four lenses for observing the second Trump administration

Reflecting uncertainty

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## Reflecting uncertainty

### Summary

- The global security landscape has evolved in the four years since President Donald Trump's first term. The new administration aims to usher in a "Golden Age of America", with impacts on domestic politics and society, as well as foreign policy.
- Unlike in 2017, the incoming administration appears better prepared, with outlined plans and key appointments. However, chaotic decision-making processes and an emphasis on loyalty to Trump are likely to introduce unpredictability into governance and policymaking.
- The administration's unified domestic and foreign policy strategy can be viewed through four lenses: national sovereignty, economic nationalism, devolution, and the unmooring of power.
- The Trump administration is likely to embrace disruption and chaos to achieve revolutionary rather than evolutionary change. This thinking draws on tech-inspired startup culture and generational-revolutionary philosophies, which perceive the US as being in a moment of crisis that will usher in a new historical epoch.
- Key uncertainties remain regarding the administration's long-term effects on democracy, alliances, and great power competition, particularly concerning trade-security linkages and alliance relations with Europe and Asia.

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## Introduction

Donald Trump's ascent to the US presidency for a second term comes during a period of profound global tension, pronouncedly different from the context of his first term. In his victory speech, the President painted his historic political comeback as the dawn of a new "Golden Age of America". While the notion is broad, it implies the achievement of certain policy goals dear to Trump and the people who will inhabit his administration. These include, for instance, enhanced sovereignty, a thriving and resilient economy, strengthened domestic security, and reduced dependence on external actors.

The incoming Trump team is better prepared than his first administration in 2017 to pursue these objectives. First, there are concrete plans in place. Regardless of how Trump utilizes the Project 2025 policy proposals drafted by the conservative Heritage Foundation think tank, the document provides a template for fast-paced policy change – especially with Republicans in control of both houses of Congress. Second, unlike last time around, the transition team has announced candidates for all senior administration positions.

Loyalty to Trump has been a key prerequisite for nomination, so fealty combined with the need to "return a favour" are likely to be the watchwords for filling the thousands of political appointments across the federal bureaucracy. However, Trump's unpredictability and non-linear policymaking make it unlikely that the actions of his administration can be foreseen based solely on the identity or rhetorical positions of his key appointees.<sup>1</sup>

Paradoxically, Trump will seek both individual and executive power, while devolving certain

strands of authority to others. Domestically, this means giving states and the private sector more leeway to make decisions, deconstructing the administrative (or "deep") state in the process. Internationally, the Trump administration is seeking to uphold "America First", while simultaneously reducing US burdens by demanding more from allies and partners. Both policy circles – domestic and international – could be difficult to square in practice.

To deal with these uncertainties in policy formulation and implementation, both internationally and domestically, this Briefing Paper provides a framework consisting of four lenses that shed light on how the President and leading individuals in his orbit perceive and seek to implement policy. This is followed by thoughts on how the lenses refract an underlying ethos of purposeful chaos espoused by many in Trump's universe. The paper then concludes with essential questions to bear in mind regarding Trump's domestic and foreign policies, as informed by the four lenses.

## Four lenses for understanding the second Trump administration

Donald Trump's second term can be understood through four analytical lenses, which can be distilled from the policy views of Trump and those in his close circle, namely (1) *national sovereignty*, (2) *economic nationalism*, (3) *devolution*, and (4) *unmooring power*. These lenses are related to each other through a mixture of complementarity and tension, blending the administration's domestic

<sup>1</sup> See Baker, P. and Glasser, S. (2022) *The Divider: Trump in the White House, 2017–2021*. New York: Penguin Random House.

and foreign policy priorities.<sup>2</sup> While none of the lenses – or even all of them together – constitutes a (*grand*) *strategy* in the strict sense of the term,<sup>3</sup> it is analytically useful to outline them in terms of the ends that the administration seeks to achieve, and the means that may be employed to do so.

### **National sovereignty**

Viewed through the lens of national sovereignty, the Trump administration’s ultimate objective is to assert US independence vis-à-vis others in the international arena, and to control flows across US borders, whether in the form of people, goods, services, or even ideas.

On the foreign policy side, this implies reduced engagement with, or outright disregard for, international institutions, in addition to the renegotiation of international agreements that – in the Trump administration’s reading – reduce the US’s room for manoeuvre. Trump’s preference is for bilateral settings, where the US can maximize power asymmetries and, by implication, its leverage regarding potential negotiating partners.<sup>4</sup> This approach is likely to weaken the international rules-based order further, but enable the US to seek more tailored and favourable international arrangements. While the bilateralization and minilateralization of US foreign policy has been a longer-term trend, it could accelerate significantly in Trump’s second term.<sup>5</sup> At times, the administration may simply exit or ignore international bodies, as it did in Trump’s first term with the Paris Climate Agreement, the Joint Comprehensive Plan of Action (JCPOA), and UNESCO.

Within domestic politics, the national sovereignty lens implies tighter border security and restrictive immigration policies, such as continued construction of barriers at the US southern border

and bolstering Immigration and Customs Enforcement (ICE) funding. Trump and some in his circle have also suggested using not only federal and state-level law enforcement, but also the national guard and military to carry out the “largest mass deportation in US history”. The political backlash and legal hurdles, not to mention potential economic calamities, might make this a difficult proposition to put into practice. However, initial observations suggest that immigration-related action will be an immediate priority for Trump and his administration, as was the case in 2017 with Executive Order 13769 banning travel to the US from six Muslim-majority countries.<sup>6</sup>

### **Economic nationalism**

The ultimate goal of Trump’s economic nationalism is a thriving US economy and successful American businesses (obviously including his own family businesses). Trump and his allies see three pathways to achieve this objective: (1) protecting and prioritizing American jobs and industries, thereby achieving increased economic resilience, (2) enabling growth through lower taxes and reduced regulations, and (3) curbing trade deficits.

In the foreign and trade policy arena, Trump aims to accomplish his objectives by, first and foremost, increasing tariffs to levels unseen since the 1930s, employing economic coercion against countries that he sees as engaging in unfair trade practices, imposing limits on Foreign Direct Investments (FDIs) or ownership, and undertaking other trade-limiting actions justified on national security grounds. This could entail, for example, extensive data flow restrictions to countries that the US considers hostile. Trump’s picks for central trade and technology posts suggest a desire to encourage innovation within the United States, such as in the field of AI, while seeking additional avenues to limit the diffusion of technology to adversaries. Specifically regarding China, it seems possible that the Biden administration’s “small yard, high fence”

2 On this inexorable linkage between international and domestic, see e.g., Kupchan, C. A. and Trubowitz, P. L. (2021) “The Home Front: Why an Internationalist Foreign Policy Needs a Stronger Domestic Foundation”. *Foreign Affairs* 100 (3), pp. 92–101.

3 Cf. Drezner, D. W., Krebs, R. R. and Schweller, R. (2020) “The End of Grand Strategy: America Must Think Small”. *Foreign Affairs* 99 (3), pp. 107–117.

4 Cf. Womack, B. (2015) *Asymmetry and International Relationships*. Cambridge: Cambridge University Press.

5 See e.g., Patrick, S. (2023) “Four Contending U.S. Approaches to Multilateralism”. Carnegie Endowment for International Peace. <https://carnegieendowment.org/research/2023/01/four-contending-us-approaches-to-multilateralism?lang=en>.

6 Toosi, N. (2024) “Trump’s Foreign Policy: First-Term Errors”. *Politico*, 14 November 2024. <https://www.politico.com/news/magazine/2024/11/14/trump-foreign-policy-first-term-errors-00189428>.



Donald Trump and Elon Musk watching the test flight for SpaceX's rocket Starship lift off in November 2024.  
Source: Brandon Bell, AP/Lehtikuva

approach may be replaced by a “big yard, massive fence”.<sup>7</sup>

The Trump administration is backed by full Republican control of Congress and a generally supportive Supreme Court – combined with what Trump perceives as a historically powerful mandate.<sup>8</sup> It is therefore likely that the President will pursue tax cuts for corporations and the wealthy, significantly reduce regulatory hurdles across many industries, and continue investing in domestic manufacturing.

The administration is likewise eyeing an energy policy that supports the (ostensibly) growing demand for electricity, combined with increased sales of hydrocarbons, the extraction of which will also increase. This is intended to deepen the dependence of others on the US as an energy supplier and to balance trade deficits, a long-standing preoccupation

for Trump. Moreover, not all components of the Inflation Reduction Act (IRA), signed by the Biden administration in August 2022, are likely to be jettisoned, even if Trump has spoken of taking a sledgehammer to the Act.

Tax incentives to bring factories and jobs to the US, a part of the IRA, are likely to continue, as they benefit areas from which Trump draws his support. Technology companies, particularly those already aligned with Trump (such as Elon Musk's X, XAI, and SpaceX) or not publicly adversarial towards him (like Jeff Bezos' Amazon), are likely to see reduced regulation, especially in emerging fields such as AI, biogenetics, and quantum computing. This may lead to policy confrontation and disagreement with the European Union. Vice President-elect JD Vance, for example, has pondered tying US security guarantees to the willingness of allies to refrain from regulating American tech platforms, specifically X.<sup>9</sup>

7 Gertz, G. (2024) “Goodbye to Small Yard, High Fence”. *The New York Times*, 31 January 2024. <https://www.nytimes.com/2024/12/31/opinion/china-semiconductor-biden-xi.html>.

8 Baker, P. (2024) “The ‘Landslide’ That Wasn’t: Trump and Allies Pump Up His Narrow Victory”. *The New York Times*, 22 November 2024. <https://www.nytimes.com/2024/11/22/us/politics/trump-election-landslide.html>.

9 Kilander, G. (2024) “J.D. Vance says us could drop support for NATO if Europe tries to regulate Elon Musk's platforms”. *The Independent*, 17 September 2024. <https://www.independent.co.uk/news/world/americas/us-politics/jd-vance-elon-musk-x-twitter-donald-trump-b2614525.html>.

## Devolution

The devolution lens has as its foreign policy objective the reduction of US responsibilities and burdens in the international domain. In the domestic sphere, it aims to downsize the federal government while simultaneously devolving power to states and companies. The Trumpian logic suggests that this approach will increase flexibility in both foreign relations and domestic governance.

Devolution entails reduced dependence on, and a concomitant US commitment to, alliances and partners: the US wants to “shift” rather than “share” burdens. In the administration’s thinking, US international obligations should be renegotiated in a transactional manner to maximize returns for the US at minimal cost.<sup>10</sup> Here, the Trump team is again willing to employ a mix of verbal threats, economic incentives and inducements. For instance, within NATO and the US Indo-Pacific alliance network, allies should be prepared for verbal tirades, economic sanctions and bizarre issue linkages. As in Trump’s first term, these measures are designed to impress upon allies that continued US protection requires increases in their defence budgets or more money in return for stationing American troops on their territory.

Devolution also means that regional actors must expect demands for them to step up in providing common goods, and upholding those components of the rules-based order towards which the Trump administration is not fundamentally hostile. The Trump team could task relevant agencies with negotiating direct deals with individual countries or a small group on a specific issue, such as critical minerals. These agreements would likely take the form of memoranda of understanding or declarations, for instance, rather than treaties.

However, devolution does not, by definition, mean across-the-board demotion. Some senior members of the administration recognize the importance of a strong global alliance and partner network to further US foreign policy objectives. The preoccupation with China, voiced by the likes of Secretary of State appointee Marco Rubio and National Security

Advisor Mike Waltz, may also lead the US to expend more resources on its Indo-Pacific posture and alliance network than was the case in either Trump’s first term or in the Biden era.

In domestic politics, the administration seeks to achieve the above goals by decentralizing and reducing the control or influence of federal authorities, while empowering individual states – especially those controlled by Republicans – and private actors. These entities would then take the lead in regulating and developing business, environmental questions, socioeconomic issues, education, and healthcare. In fact, by creating the Department of Government Efficiency (DOGE), Trump is effectively subcontracting the initial push for deregulation and devolution to two businessmen: Elon Musk and Vivek Ramaswamy.

Many Republicans also favour federal budget cuts (“starving the beast”), and efforts to narrow the existing mandates of federal agencies. All of this is propped up by a legal strategy supported by the current conservative-majority Supreme Court. Its recent rulings have struck down the “Chevron doctrine”, which allowed federal agencies to fill in gaps in existing legislation, and “Roe vs. Wade”, which guaranteed the constitutional right to abortion. The former is an example of devolving power away from the federal government to companies, the latter to states.

## Unmooring power

The fourth lens involves expanding the personal power, first and foremost, of the executive branch and President Trump, and secondly of those in the Trump administration more broadly. The goals are self-enrichment and aggrandizement on the one hand, and delivering on Trump’s promises to create the US envisioned by his MAGA base on the other. Bolstering Trump’s slim electoral majority, and garnering more support for his authoritarian inclinations, could ultimately unmoor the incoming administration from the US Constitution and historical precedent.

Trump – and the Republican Party more broadly – have excelled at playing the US legal and political system, as well as the evolving US media landscape,

<sup>10</sup> Sinkkonen, V. (2018) “Contextualizing the ‘Trump Doctrine’: Realism, Transactionalism and the Civilizational Agenda”. *FIIA Analysis 10*. <https://www.fia.fi/en/publication/contextualizing-the-trump-doctrine>.

to their electoral advantage.<sup>11</sup> Tried and tested tactics such as gerrymandering, voter suppression, and the spread of false information are likely to continue, despite Trump managing to secure more votes in the 2024 election than his opponent, Kamala Harris. Another vehicle that the Trump administration could resort to is Schedule F, the much-sSpeculated layoff of tens of thousands of federal employees, only to rehire those willing to express loyalty to Trump himself. Such an approach would lend further credence to the argument about Trump’s authoritarian proclivities.<sup>12</sup>

Trump could also enhance his power by appealing directly to his voter base. Reflecting what “the forgotten” are feeling is a traditional populist messaging approach, and one that Trump has used successfully for years. Here, the Trump administration is likely to frame domestic and foreign policies as a fight against the elite-driven global order that has treated Americans unfairly and resulted in global calamities such as wars and pandemics. This is not a wholly incorrect set of conclusions: globalization has not necessarily always improved the quality of life of many of Trump’s supporters. The fact that Trump himself is a member of the entrenched elite should have little bearing on the resonance of this kind of rhetoric.

Pushing for significant changes to the norms of civil-military relations would be another means of unmooring the presidency from the Constitution. During his first term, Trump’s efforts to subvert existing civil-military conventions were curtailed by “his generals”, who, much to the President’s chagrin, remained loyal to the US Constitution as opposed to him. The President attempted to subvert the chain of command by appealing to the rank and file, seeming to “have their back” against performance-com-promising “woke ideologies” and painting the elite (here the generals) as antithetical to the interests of

the common man.<sup>13</sup> An early test of Trump’s desire to circumvent civil-military norms may be whether his administration attempts to use the US military to carry out the envisioned deportation operations.

In terms of foreign policy, a reduced set of checks on Trump’s power could have detrimental consequences in the global arena. A less constrained presidency would enable Trump to pursue his long-held foreign policy preferences: further distancing the US from international organizations such as the UN, and extracting even higher rents from allies in Europe and Asia by portraying alliances as optional, conditional upon direct benefits to the US, or irrelevant to American and global security. A compromised civil-military order would also create problems for regular cooperation with allies and partners, and could have negative consequences in an international crisis, potentially affecting nuclear stability.

**“In terms of foreign policy, a reduced set of checks on Trump's power could have detrimental consequences in the global arena.”**

One clear silver lining is that federal and state institutions, along with American civil society, have been strengthening their defences against domestic efforts to improperly expand the power of the executive. Even on Capitol Hill, Republican majorities in both houses are relatively slim by historical standards, leaving little room for error should Trump attempt to overreach.

### **The view through the lenses changes: The underlying ethos of chaos**

The lenses described above exist in a dynamic and potentially tense relationship with one another. No single lens fully captures the range of possibilities during Trump’s second term. Taken together,

11 Lindén, M. (2024) “Trump’s playbook of electoral manipulation: An interplay of manipulation tactics in a longstanding democracy”. *American Studies in Scandinavia*, 56 (1), 27–42. <https://doi.org/10.22439/asca.v56i1.7173>.

12 Schmidt, M.S. (2024) “As Election Nears, Kelly Warns Trump Would Rule Like a Dictator”. *The New York Times*. 22 October 2024. <https://www.nytimes.com/2024/10/22/us/politics/john-kelly-trump-fitness-character.html>.

13 *Foreign Affairs* (2024) “The World of Trump 2.0: A Conversation With Daniel Drezner and Kori Schake”. 8 November 2024. <https://www.foreignaffairs.com/podcasts/world-trump-second-term-foreign-policy>.

however, they suggest an administration that is determined to enact change and shake things up across the board.

Traditional conservatives would seek change through small, marginal alterations that add up over time. A modern current of the Republican Party, running from Barry Goldwater and Ronald Reagan to Newt Gingrich and Pat Buchanan in the 1990s to the Tea Party of the 2010s and ultimately Trump's MAGA brand, espouses more radical change. A pertinent question is how Trump and key members of his administration view the objectives of change. Do they merely seek radical alterations within the system or, in some instances, to break the system altogether?

The answer to date seems to depend on which facets of the system are under consideration, and which of the above-described lenses dominate. For example, the Republican platform and Trump have called for Medicare to remain, but with a preference for the private provider-focused Medicare Advantage. The strength of the US military is to be increased – a traditional Republican talking point – and no radical changes to this dictum have been proposed by those closest to Trump. To paraphrase a well-worn saying, it seems that revolution may be seen as more desirable, but we may still see evolution in many spheres. Conversely, even if evolutionary approaches are the norm, their cumulative impact may be revolutionary.

Based on Trump's campaign and those around him, there appears to be less concern about "breaking glass", amounting to an underlying ethos of chaos to achieve desired ends. While no single coherent ideology seems to inform this acceptance of chaos, two underlying approaches may help to focus the above lenses.

The first is a Silicon Valley startup-inspired "Fail. Fail faster" approach, which embraces disruption and rapid iterative improvement, with a high tolerance for risk and failure. Uncertainty and potential chaos are seen as necessary parts of the process. In a consumer electronics context, this means releasing software known to be incomplete, with user data guiding further development in the desired direction while reducing wasted effort. Combined with the devolution lens, in education this could lead to wholly different educational content in different states, further reducing existing

shared realities and facts. In healthcare, a high-risk approach might eventually result in the development of multiple new avenues of treatment and care, but combined with reduced regulation, it could also pose risks to patient well-being. In security policy, a high tolerance for risk and failure, particularly in the nuclear and cyber spheres, seems ill-advised, to put it mildly. Members of Trump's foreign and security policy team seem to acknowledge this, and may therefore adopt framings more appropriate to their domain.

A second possible approach, adopted by some in Trump's orbit, is informed by a generational-revolutionary framing. A politically resurrected Steve Bannon is an adherent, having frequently spoken about Neil Howe's and William Strauss's "Seasons of History" and combined it with the increasingly less obscure philosophy of "Traditionalism".<sup>14</sup> According to Howe's 2023 book, *The Fourth Turning is Here*, a crisis (either generated or natural) with domestic and international facets will ultimately give rise to a new Golden Age of America. In this dynamic, chaos is desirable – a feature not a bug – enabling the emergence of a new, better, and healthier society.

Such a framing, whether specifically of the Howe and Strauss variety or more generic in nature, suggests that Trump and his administration genuinely believe in their messianic mission and God-given responsibility to implement an America First agenda – to build a new city or lighthouse on the hill. How they ultimately respond to real-world crises, through the implementation of their policies, will determine whether this new lighthouse signals shallows to be avoided or a safe harbour.

## Conclusions: Key questions for Trump 2.0

This Briefing Paper has provided a set of lenses through which to analyze and contextualize both the expected and ex tempore decisions that the Trump administration will make in the coming months and years. The fundamentally unpredictable

14 Peters, J.W. (2017) "Bannon's Worldview: Dissecting the Message of 'The Fourth Turning'". *The New York Times*, 17 August 2017. <https://www.nytimes.com/2017/04/08/us/politics/bannon-fourth-turning.html>; Lupo, J.S. (2024) "The Political Theology of Traditionalism: Steve Bannon, the Far Right, and the End of Days". *Contending Modernities*, 16 January 2024. <https://contendingmodernities.nd.edu/theorizing-modernities/political-theology-traditionalism/>.



nature of Donald Trump and the turmoil of global politics mean that while these lenses can shed light on the most pertinent questions about the future of US policy, they may also, at times, distort.

Domestically, how will the espousal of, and contest over, norms like democracy, rights, freedoms, and the rule of law play out in US politics and society in the coming years as the country comes to terms with the next phase of the Trumpian experiment? How will voters' views on the economy develop, as they will inevitably both *influence* and *be influenced* by Trump's nationalist economic policies? Finally, given Trump's attempts to unmoor himself and the presidency from checks and balances, to what extent will his authoritarian tendencies be enabled or constrained by others?

In foreign policy, the questions revolve around the future of US alliance commitments, and the future of what is left of the rules-based order. Which "theatres" of strategic competition will the Trump administration – bent on reasserting national sovereignty and devolving its global obligations – prioritize in the short, medium, and long term?<sup>15</sup> Relatedly, where are the spheres (both regionally and in terms of issues) within which American interests and those of its allies and partners in Europe and Asia can align, and therefore lead to bastions of global cooperation? Finally, given that Trump's penchant for protectionism looks set to remain, to what extent will the administration push for issue linkages between trade and security questions, with allies and adversaries, and with China in particular? ◆

15 Simón, L., Desmaele, L. and Becker, J. (2021) "Europe as a Secondary Theater? Competition with China and the Future of America's European Strategy". *Strategic Studies Quarterly* 15(1), pp. 90–115.

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