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European & American Think Tanks and the Reality of US-China Trade War: An NPF Application

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Abstract

NPF probes into a policy narrative and answers questions about who are the heroes, villains and victims? How does the narrative deploy plot, causal mechanisms and symbolic languages to register meaning and reflect policy realities? Applying NPF to explore four Western European and American think tanks' narratives about US-China trade war in 2018, this study aims to construct the reality of this trade war through making comparison of the different narrative elements, strategies and underlying belief systems used in their narratives. This study finds that their divergent casting of heroes and victims, their differences in the employment of plot, causal mechanism and symbolic languages reflect the divergence of their economic and diplomatic interests, as well as different interpretations of the nature of this trade war. This study also shows think tanks' narratives are valuable policy inputs and desirable to conduct NPF analysis.

Keywords: Narrative Policy Framework, Think Tanks, Trade War, Tariff, Multilateral Rule-Based System

Introduction

In complex foreign policy context, narratives are deployed to legitimize or analyze policy moves. NPF provides theoretical means to disaggregate the component elements of policy narratives, examine how they vary, identify patterns, and reveal the deep-structures behind the narratives. Think tanks are unique forces in policy making arena, serving as “bridge between the academic and policymaking communities.” (McGann, 2007) They have increasingly become “fixtures of the national policy-making scene.” (Medvetz, 2012) This research explores how four Western European and American think tanks' policy experts and U.S.-China relation specialists employ their narratives to discuss and examine Trump Administration's trade policy with China and how they view its consequences.

With \$250 billion worth of US imports from China and \$110 billion worth of US exports to China being subject to tariffs initiated in 2018 (USCC, 2018), it is easy to ignore the fact that the United States and China have been top trading partners for years. It is easy to forget that while trade relations between the two economies have not been always smooth, they have not only managed to withstand the ebb and flow but also act as anchors when politics made them drift apart. 2018 and 2019 were bumpy for U.S.-China trade relations. Fortunately, after these

on-and-off negotiations, the US China phase one Economic and Trade Agreement went into force on Feb. 14, 2020. However, “average US tariffs on imports from China will remain elevated at 19.3 percent. These tariffs are more than 6 times high than before the trade war began in 2018.” (Bown, 2019) So, what happened? What was the reality full of sound and fury, signifying something?

Policy Issue: U.S.-China Trade War

In speech after speech during his campaign and later as president-elect, President Trump was recklessly bashing China and scapegoating China (Schell, 2015; Prasad 2017). He argued that China was “raping” the U.S. economy through unfair practices and accused China of manipulating its currency to gain an advantage in its exports even if his accusations were “disconnected from reality and not supported by the facts.” (Prasad, 2017) He claimed he would slap a big tariff on Chinese exports to America. “He singled out China as a trade scofflaw, and the prospects of a trade war are higher than ever.” (Kennedy, 2016) He also filled his trade team with China hawks: Robert Lighthizer, the Deputy USTR under President Reagan and a long-time critic of China’s trade practices; Peter Navarro, who “closely shaped Trump’s strident rhetoric on China” during his campaign, and who is the author of *Death by China* and *Crouching Tiger*, which have used hyperbolic language and demagogic images to arouse “media attention and sought political fame” (Chan, 2017), also whose views about China “is not just simplistic, it is wrong and dangerous” (Davidson, 2016); and Wilber Ross who went to war against Chinese steelmakers in the early 2000s. “The core combination of Lighthizer, Navarro, and Ross view trade as being a zero-sum game about winners and losers,” said Joshua Meltzer (2017), a senior fellow at the Brookings Institute. The hawkish appointment signals “a return to the Reagan era of unilateral trade policy,” Sharyn O’Halloran (2017), a political economics professor at Columbia University, told *Business Insider* (Smith, 2017). *New Yorker’s* Adam Davidson believes “Navarro takes commonly held views about China into radical terrain.” (2016) The report “Trade, Regulatory & Energy Policy Impacts” co-authored by Peter Navarro and Wilbur Ross was mocked by the economists on the left and right. Harvard economist Greg Mankiw said the analysis was really disappointing and he wrote in his blog: “it misunderstood things even a freshman at the end of ec10 knows” (Davidson, 2016).

As President, Trump backpedaled on much of his anti-China rhetoric during his campaign and followed a much conventional way of dealing with U.S.-China relations. But in August 2017, President Trump directed the United States Trade Representative Robert Lighthizer to decide whether to investigate China’s practices and actions that may be harming American intellectual property, innovation and technology development and On Aug. 18, 2017 the USTR officially initiated an investigation of the People’s Republic of China regarding intellectual property rights and technology transfer under Section 301 of the Trade Act of 1974, which past administrations have not used liberally for fear of retaliations against U.S. trade.

Subsequently, on December 18, 2017, the Trump administration published its National Security Strategy (NSS), within which China was characterized as “strategic rival” and “revisionist power” that not only “challenges American power, influence and interests,” but also “attempts to erode American security and prosperity.” The NSS believes China-U.S. rivalry extends to every geographic region, from the Indo-Pacific, the Atlantic to Africa, and each common domain from outer space to cyberspace. (2017) The NSS’s “China complex” also focused on the nature of Beijing and Washington’s competition, which said: “China seeks to displace the United States in Indo-Pacific region, expand the reaches of its state-driven economic model.” (2017) Brookings Institute’s Daniel Drezner warned about its mercantilist tendency when he wrote in a *Washington Post* article “the foreign economic policy side of the NSS sounds very Trumpian, with its mercantilist warnings of economic aggression and repeated pronouncements that it is a competitive world out there.” (2017) On the trade front, the “American first bilateralism” on the basis of “cost-benefit calculation as to how each relationship works in America’s perceived economic or political interest” signals that 2018 would be difficult for America’s trade partners especially China because trade was mentioned 45 times and competition/competitor 58 times in the NSS. (Stokes, 2018) Brookings’s Joshua Meltzer wrote for *The Hill*, “Political considerations that stayed Trump’s hand on trade no longer exist, in particular the focus on repealing the Affordable Care Act and passing corporate tax cuts; there is a growing political imperative for Trump to show more aggressive trade action.” (2018)

The first major trade action against China came at the beginning of the year 2018, when the US announced a 30% tariff on imported solar panels—most of which come from China—and taxes on large residential washing machines starting at 20%.

On March 9, 2018, Trump followed through on the tariffs recommended by the Commerce Department on the basis of Section 232 of the Trade Expansion Act of 1962 to address the perceived threat to national security, taxing steel imports at 25% and imported aluminum at 10%. Among countries not exempted from the tariffs, China is the top supplier of aluminum, though the steel supply only accounts for 3.5% of total U.S. imports.

On April 3, 2018, in response to the August 2017 investigation into Chinese intellectual property practices, the US Trade Representative proposed a 25% tax on close to 1,334 Chinese goods from the aerospace, machinery and medical industries.

On July 6, 2018, the US Customs and Border Protection (CBP) began collecting a 25 percent tariff on 818 imported Chinese products (List 1) valued at US\$34 billion—giving effect to the first round of tariffs, which were revised and announced on 15 June 2018. Meanwhile, the second round of tariffs discussed in List 2 is under review, which proposed implementing a 25 percent tariff on 284 Chinese products (worth US\$16 billion). Commodities targeted in this round of tariffs included: iron or steel products, electrical machinery, railway products, instruments and apparatus.

On July 10, 2018, the USTR released a third list of tariffs (List 3) of over 6,000 commodities originating in China (worth US\$200 billion), which would be subject to a 10 percent tariff. On August 2, 2018, the USTR, under the direction of Trump, considered a 25 percent tariff rather than a 10 percent one on List 3, which was originally announced on 10 July 2018. The list targeted approximately US\$200 billion worth of goods and included categories such as: consumer products, chemical and construction materials, textiles, tools, food and agricultural products, commercial electronic equipment and vehicle/automotive parts.

On August 23, 2018, US implemented a 25 percent tariff on 279 goods originating from China (worth US\$16 billion). Goods targeted include semiconductors, chemicals, plastics, motorbikes and electric scooters.

On Sept. 17, 2018, U.S. announced 10 percent tariff on \$200 billion of Chinese exports effective Sept. 24 until the end of 2018, to rise to 25 percent afterward. Thus, the U.S. had already put tariffs on \$250 billion in Chinese goods — and had threatened duties on double that value of products. Beijing had responded with tariffs on \$110 billion in U.S. goods targeting politically important industries such as agriculture.¹

The U.S. business groups had already felt the pressure. On Sept. 13, 2018, “the largest U.S. business groups in China pleaded with Trump to cease fire.” Nearly two-thirds of more than 430 U.S. companies in China said the Trump tariffs had damaged their business according to a survey conducted by the American Chamber of Commerce in Beijing and Shanghai while President Trump insisted “he was under no pressure to make a deal with China.” (Lynch, 2018)

On Dec. 2, 2018, the US and China agreed to a temporary truce to de-escalate trade tensions, following a summit working dinner at sideline of the G20 Summit in Buenos Aires on 1 December, 2018. According to the agreement, both the US and China would refrain from increasing tariffs or imposing new tariffs for 90 days (until 1 March 2019), as the two sides worked towards a trade deal, and on Feb. 14, 2019, the deadline was extended by the US.

On May 10, 2019, President Trump hiked tariffs on \$200 billion worth of Chinese products from 10% to 25%. At the same time, the president threatened to impose 25% tariffs on \$325 billion in Chinese goods that remain untaxed.

On Aug. 1, 2019, the US announced it would implement a 10% tariff on the remaining USD \$300 billion worth of Chinese goods. Effective immediately in September. On Sept. 1, 2019, US placed tariffs on USD \$125 billion worth of Chinese imports as promised. On Dec. 13, 2019, the US delayed tariffs scheduled on Dec. 15, 2019

affecting \$ 160 billion worth of imports from China and cut tariffs from 15% to 7.5% on tariffs enacted on Sept. 1, 2019.

On Jan. 15, 2020, the US and China signed phase one Economic and Trade Agreement, which went into force on Feb. 14, 2020.

Methodology

NPF

This study uses Narrative Policy Framework to examine American and European think tanks' perception of U.S.-China trade war. The purpose of this study is to uncover the true face of this trade confrontation by conducting qualitative content analysis of four American and European think tanks' narratives based on the analytical framework of NPF.

NPF is a theoretical framework in the field of public policy analysis and NPF scholars believe that narratives matter for public policy and play important role in constructing policy reality promoted by policy actors. (Jones, Shanahan and McBeth, 2014) NPF can be applied across different policy context and it defines three component parts of a policy narrative: narrative elements, narrative strategies and narrative beliefs. Narrative elements are narrative structures including plot, causal mechanism, characters, setting, moral, and evidence. The setting situates the policy problem in a specific context. NPF operationalizes the characters in a policy narrative as heroes, potential fixers of a policy problem; villains, those who are causing the problem; and victims those who are harmed by the problem. Moral refers to the solution offered by the policy narrative. (Jones, Shanahan and McBeth, 2014; Shanahan et al., 2013) NPF uses Deborah Stone's framework to analyze plots and causal mechanism. Stone identifies two basic plots that are widespread in policy narratives: stories of change and stories of power (each include several nuanced plot types). (Stone, 2012) To define policy problems, Stone also identifies causal mechanism as intentional, mechanical, inadvertent and accidental and intersects them with guided (purposeful) and unguided (not purposeful) actions (Stone, 2012). "Policy beliefs are akin to the moral compass embedded within the narrative" (Shanahan et al., 2013) Narratives operate at three levels: micro-individual, meso (policy subsystem) and macro level of culture and institutions. At meso level, NPF concerns itself with the role of policy narratives in a policy system (subsystem or policy regime) aiming at analyzing policy narrative generated by subsystem and the groups and individuals within that system. (O'Bryan, Dunlop, and Radaelli, 2014) Shanahan et al once pointed out "media are important players in policy subsystems that have been neglected in the study of public policy." (2013) In that spirit, this study proposes that think tanks can also be important contributors to public policy process, especially foreign policy making.

Why Think Tanks?

In order to provide an in-depth exploration of think tanks' narratives on U.S.-China trade war, this study limited its analysis to four American and Western European think tanks: Peterson Institute for International Economics (PIIE United States), French Institute of International Relations (IFRI France), Bruegel (Belgium), and Chatham House (United Kingdom). It conducted content analysis of these four think tanks' narratives concerning US-China trade war from Oct. 2016 to April 2019. PIIE is selected because it is ranked as NO. one think tank among "Top International Economics Policy Think Tanks" and IFRI, Bruegel and Chatham House are ranked top three among "Top Think Tanks in Western Europe", according to McGann's "Global Go-To Think Tanks Index". (McGann, 2019)

As public policy research institutions and largely Anglo-Saxon tradition, think tanks have shaped the global engagement of western countries for more than 100 years (Haas 2002; Stone and Denham, 2004). Although President Trump ran as an economic populist and has been widely known for his anti-intellectual and anti-establishment stance, American think tanks are still actively taking part in policy debates. Think tanks' experts still frequently testify before Congressional committees and subcommittees; assume responsibilities in

government offices; issue reports and policy briefs; publish articles in newspapers and journals; and speak as news media pundits. As to Trump Administration's "trade war" with China, they are still a very visible and active force. For instance, experts from PIIE testified before House Committee on Financial Services, Subcommittee on Monetary Policy and Trade, House Committee on Foreign Affairs, Subcommittee on Asia and the Pacific and Terrorism, Nonproliferation and Trade, U.S.-China Economics and Security Review Commission and Section 301 Committee Office of the United States Trade Representative. They published articles on *Foreign Affairs*, *Washington Post*, *The New York Times*, *Project Syndicate*, *The Hill*, *Wall Street Journal*, *Harvard Business Review*, *The Economist*, and etc. Their publications, which include research reports, policy briefs, podcast discussions, interviews and commentaries, are also widely cited by various media. On 25 Sept. 2018, PIIE's leading experts on China briefed Senate and House of Representatives committee staff members on Capitol Hill on the escalating US-China trade war.

As the principal institution for independent research and debate in France, IFRI is dedicated to illuminating international issues and putting them in perspective. The World Policy Conference organized by the institution is ranked as the third "Best Think Tank Conference." Bruegel is the leading European think tank specializes on economics. The institution hosts events, podcasts and publishes policy briefs, policy contributions, working papers and blueprints. Bruegel experts regularly testify before the European Parliament and various national Parliaments. Chatham House, also The Royal Institute of International Affairs, is committed to informing debate, providing independent analysis, new policy ideas and outreach to the audience. The Institute's reports, research papers, books and other publications are vital resources for British leaders, and public policy-makers in government, private sector and civil society. The Institute's journals, *International Affairs* and *The World Today*, are Britain's leading journals of international relations as well as authoritative analysis and up-to-date commentary on current topics.

"Think tanks had become ubiquitous actors in the global production of policy knowledge." (Stone, 1996) Therefore, this study explores the narratives of these high-profile think tanks' policy experts because they are either renowned U.S.-China relation specialists or economists focusing on U.S.-China trade issues. So far, NPF studies are mostly concerned with domestic wicked and contesting policy issues, especially environmental issues but NPF scholars believe this theoretical method is generalizable to any subsystem in such policy areas as economic development, energy, crime and foreign policy (McBeth et al., 2007) In addition, NPF has an advantage to measure socially constructed reality: "the strategic, the unstructured and even the manipulated policy narratives of policy stakeholders who use policy narrative to construct a political reality." (McBeth, Jones and Shanahan, 2014) This research will answer two questions: 1. How do think tanks' experts view US-China trade war? 2. Are there differences in narrative elements, narrative strategies and policy belief used by Western European think tanks and American think tank?

The constructed reality is uncovered through content analysis and a consistent coding system, which is developed by drawing on the previous coding frames of Shanahan et al. (Appendix A). The NPF defines a policy narrative as having at least one character and referring to the public policy of interest. (Shanahan, Jones and McBeth, 2017) According to the criteria, this research collected and coded 49 narratives found on the websites of the four think tanks as well as articles published on newspapers, academic journals and congressional hearing testimony. The narratives are content analyzed for policy narrative elements (plot, policy solution, and characters) and narrative strategies (causal mechanism and use of symbols).

Results and Discussion

1. *The Cast of Characters: Heroes, Villains and Victims*

Characters add drama and bring narrative to life. (Stone, 2012) Heroes as fixers of the policy problem, are missing in most of the narratives except four from PIIE and four from their European counterparts. Two European narratives describe European countries as heroes because they think Europe can take advantage of this trade war. For example, in his article published by *Caixin*, *Die Zeit*, *Nikkei* and *Politico*, Wolff from Bruegel believes, "this provides the EU with an important opportunity it must not waste—under pressure from the U.S., Beijing is set to

be more open to make new allies.” (2018) And largely due to their European perspective and identifying the “structural feature this US-led trade war” (Gracia-Herrero, 2018), other two European narratives regard President Xi and China as heroes. For instance, in her article published in *Brink*, Alicia Garcia-Herrero wrote, “China has shifted from a tit-for-tat tactic based on retaliatory measures on trade to a three-pole strategy: sustaining domestic growth at any cost, finding alliances externally, and accelerating China’s upgrade of its technology capacity.” (2018) In the article published in *The Diplomat*, Kerry Brown from Chatham House also points out the “maverick, chaotic nature of the Trump presidency” (2018), and “China needs to change but that doesn’t mean returning to a neatly marked box put there for others for it to occupy.” He also emphasizes that President “Xi needs to get a grip on the US issue.” (2018)

Three PIIE narratives also depicts China as heroes but for different rationales. Nicholas Lardy’s article believes China’s liberalization of its foreign investment has occurred in some service sectors and the wholly foreign-owned firms and this trend continues, so the USTR should work with this new dynamic rather than continue to villainize China (2018). Peter A. Petri and Michael G. Plummer’s Policy Brief and Petri’s article published in *South China Morning Post* also characterize China as hero and they propose that if China joins CPTPP, China will “have a chance to shape the global innovation economy while signaling clear commitment to outward-oriented reforms and global norms.” (2019) And China’s CPTPP membership will offer “essential support for a rule-based trading system, at a time when US seems to be walking away from it.” (Petri, 2019) In similar vein, C. Fred Bergsten’s narrative makes China as hero, and in his Policy Brief he proposes the following road map for China to fix the problem:

1. China should join the US-EU and US-EU-Japan initiatives to reform the rules of the WTO in a plurilateral and thus less charged political context;
2. China should indicate interest in joining the CPTPP which would probably induce US to rejoin so both could then use the negotiation to reduce barriers and write new regional rules in some of these areas;
3. Both China and the US should support major reforms of the IMF. (2018)

This explains American experts and their European counterparts’ disappointment with the Trump administration’s unilateral and illegitimate self-initiated investigation and tariff imposition (Bown, 2018a; Brown, 2018) and the affirmative expectations they have placed on China’s positive responses to the trade war. (Gracia-Herrero, 2018; Bergsten, 2018)

The framing of characters for the four think tanks is similar for the villains: of 17 western European narratives, 16 of them cast President Trump’s vision of free trade, trade policy, and tariffs as villain, while 25 of 32 PIIE narratives portray Trump administration’s trade policy and tariffs as villains as well as other 6 villainizing USTR, President Trump’s focus on trade deficit with China, the administration’s 301 investigation and Candidate Trump’s destructive, and protectionist rhetoric in presidential debate, Sino-US systemic competition and both China and Trump’s policies.

The primary difference of these transatlantic think tanks is the use of victims in their narratives. The prominent victims for Western European think tanks are global economy, multilateral system, collateral damage to companies in third countries, the economy of China and Non-US G7 countries and European exports to China. In the meanwhile, three of them victimizing American economy, and other two narratives depict the Republican Party’s Mid-Term election and the Trump administration’s aim to contain China as victims. Similarly, 5 PIIE narratives also victimize global economy, multi-lateral mechanism especially WTO and rule-based approach and global trading system but most of them cast American economy including American consumers, workers, job losses, businesses, supply chains for American multinationals, farm belt especially soybean farmers, Republican seats in the Mid-Term election and manufacturing industries as victims. The rest depicts American’s image, global leadership, foreign policy, American alliance relationship, and American competitiveness as victims.

2. Interpreting the Plot: Decline and Control

Plots links the characters with intentions and solutions. The story of decline spins a tale of how conditions will get worse if a specific action is taken. In contrast, the control storyline offers hope by implying that certain actions can allow one to reach previously unattainable goals. Two more variants this research codes are change is an illusion and helplessness and control. Change is an illusion shows progress or decline is an illusion when you think it would get better or worse; whereas the latter emphasizes seemingly out-of-control situation actually is possible to get under control. Significant differences have been found between the four think tanks across the Atlantic in the use of plots. The European think tanks embed helplessness and control and change is an illusion almost evenly throughout their narratives, while most of the American narratives (43 of them) embed story of decline with four helplessness and control and one change is only an illusion as exceptions. Therefore, these differences reveal that their economic and strategic interests are not compatible when European think tanks think it is window of opportunity to export more agricultural products to China and press China to open up its market to more sectors (Wolff, 2018), their American counterparts find the bleak future of farmers' interests harmed, supply chains disrupted, job losses, consumers' paying higher prices for their daily consumptions, let alone alliance relationship, leadership credibility and rule-based multilateral trading system. What's more revealing is that 3 of PIIE's helplessness and control storylines use China as heroes and this is in synch with 2 Bruegel and 1 Chatham narratives. Stone explains that "stories of control offer hope, just as stories of decline foster anxiety and despair." (2012) These narratives share the similar controlling development: China's actions may fix the problem. For example, Bergsten, Petri and Plummer all think China's membership in CPTPP will foster healthy environment to solve contentious trade issues. (2018; 2019) And Bruegel's Alicia Gracia-Herrero thinks China has realized the structural nature of this US-led trade war and taken three-pronged actions. Chatham's Brown believes President Xi needs to act but not the roadmap dictated by others. (2018; 2019)

3. Moral: Divergent Solutions

American and European think tanks have proposed divergent solutions. American think tanks proposed the following solutions: China's positive actions count; returning to multilateral rule-based approach is the right track; constructive discussion; making investment at home and shifting away from unilateral actions; binding together with its allies to make new rules or force China to change; and carefully targeted sanctions should be imposed on the Chinese entities involved in technology misappropriations.

In contrast, European think tanks find the solutions lie in that the European countries take advantage of this trade war in their economic or strategic interests. Also, they believe Trump needs to take allies and the strategic assets they represent seriously. One narrative emphasizes China's efforts to deal with it. Still one narrative examining the trade war from China's point of view, thinks the dynamic has changed when China realized the structural nature of the US-led trade war and take three-pronged actions, so the moral is China will give a "more strategic, rather than tactical, response to the U.S. containment push." (Gracia-Herrero, 2018)

4. Narrative Strategies: Causal Mechanism and Symbols

While narrative elements are building blocks of a policy narrative, "narrative strategies are another way narrators shape policy realities." (Shanahan, Jones and McBeth, 2017) NPF also assumes variation in the interpretations of policy reality is not random but is bounded by belief systems and strategies. Thus, this research links the interpretation of narrative strategies with narrators' belief systems and value orientations.

Causal Mechanism: Who Is to Blame

Causal stories are created to describe harms and difficulties as well as to attribute them to actions of other individuals and organizations to invoke change. This research codes four types of causal links: intentionality, mechanical, inadvertence, and accidental.

Stone proposes that causal mechanism are strategically embedded in narratives to convince the public and policy officials of who or what is to blame for the policy problem (2012). The primary causal mechanism embedded in the 32 American narratives can be identified as inadvertence, which suggests harmful unintended consequences of Trump administration's purposeful policy of imposing tariffs on China. Think tanks' narratives using this "help-is-harmful" (Stone, 2012) causal link obviously criticize Trump's trade policy with China for missing the target. To make it worse, it actually hurts American economy, interrupts the supply chain of multinational corporation and multilateral trading system, and etc. For example, Bown's article in *Harvard Business Review* emphasizes:

One out of every five tariffs that he selected involved a product with the word "parts" in its description. Most were so technical that even trade experts had no idea what they were, except to know that businesses and workers rely on those "parts" from China to remain competitive in the global marketplace. (Bown 2018 b)

In the meanwhile, Mary E. Lovely attributes the failure of Trump policy to the Administration's ignorance of the interdependence of global economy. Take her article published at *New York Times* as example, it says "if jobs and wealth are the metric for "winning the trade war," China, not America, will emerge the victor." (2018). She further explains:

First, about 60 percent of China's exports to the United States are produced at factories owned by non-Chinese companies. Many of them produce customized inputs for American manufacturers, such as computer routers, LED fixtures and boat motors. That means the tariffs imposed by the Trump administration that are directed at China actually affect many American (and European) companies that own factories in China..... Moreover, much of what the United States imports from China contains value created in other locations, including America. (2018)

Besides, Lovely also blames the tariff policy based on illegitimate reasoning thus it leads to unintended harmful consequences for American economy, when she points out that "Made in China 2025 remains an aspiration, not a reflection of current manufacturing prowess. It is impossible to hit tomorrow's exports with today's tariffs." (Lovey and Liang, 2018)

Likewise, Bown (2018 a) and Lawrence also criticize the administration's lack of consistent causal reasoning. For example, Lawrence explains:

Trump's ill-considered trade war is not intended to achieve fair trade through negotiation or change Chinese behavior. Rather the aim is to erect stiff trade barriers that remain in place for many years, blocking or curbing all Chinese imports and discouraging US firms from ever outsourcing operations on Chinese territory. (2018)

In contrast, European narratives either do not have obvious casual mechanism or use mechanical and accidental causal mechanisms because they think the European governments or the EU would let this chance slip out of their hands if they adopt wrong policy, also because they think that the EU will not stand a chance to take advantage of this US-led trade war. For example, Wolff thinks, "whatever the economic spillover of the U.S.-China trade war, there is diplomatic advantage to be gained. It's up to Europe's leaders to formulate a unified strategic position and explore the opportunity." (2018) Besides, Alicia Garcia-Herrero's article published in *The Corner* points out "While there is no clear winner from the US-China trade tensions, the way in which the negotiations between the US and China are shaping up does not bode well for the European Union (Herrero, 2019)."

Symbols: belief systems and value orientations

This research also analyzes use of symbols like metaphors, colorful languages and condensation symbols. While former NPF studies focus on using symbolic languages to reduce or shrink complicated policy issues into simple and memorable forms to expand the scope of conflict (McBeth et al., 2007), this study interprets them as correlated

to narrators' belief systems and value orientations. Jones and Baumgartner believe that "every public policy problem is usually understood, even by the politically sophisticated, in simplified and symbolic terms." (1993) Stone asserts in her seminal book for policy analysis, *Policy Paradox* that "symbolic representation is the essence of problem definition in politics." (2012) This research argues that policy experts use symbols to define the policy issues and to characterize heroes and villains, and these symbols used also reflect their underlying beliefs about rule-based multilateral system vs. Trump administration's unilateral, self-initiated approaches; the influence of the "new globalization or Richard Baldwin's "great unbundling" (Lovely and Liang, 2018); Trump administration's shift from viewing China as "awkward counterpart to strategic competition" (Niblett, 2018); and the structural nature of this US-led trade war.(Gracia-Herrero, 2018)

All European narratives use symbols and war symbols are used 9 times, among which four specifically used the symbolic language of "US-led, or Trump-led trade war", as well as one compared the trade war to a "new political economic trade cold war." Others use the colorful languages of "turning the clock back," "new strategic stand-off," "spill over," "chess game," and "beating the war drums of trade across the globe." Still others use such descriptions as "windows of opportunities for China," and "neatly marked box."

Firstly, some war symbols are used to criticize the unilateral and protectionist approaches as well as the zero-sum vision and cold war mentality of the Trump administration. For example, one IFRI report is titled "Trump-Led Trade War with China: Energy Dominance Self-Destructed?" (Gandolphe and Boittin, 2018), and another IFRI article published in *Politique Etrangere*, titled "Trump's Trade wars: The Outcry Against Multilateralism" (Siroen, 2018) points out Donald Trump is stepping up protectionist measures and seeking to reduce the power of the WTO to zero. The results of the current trade war are far from known. (Siroen, 2018) And one Chatham article published in the *Diplomat* thinks that US allies will not jump on the US bandwagon when "Washington itself has taken steps to undermine US partners' interests in a robust, rules-based, liberal international order," and emphasizes "US allies do not entirely share the same zero-sum vision of relations with China as portrayed by the new US strategy." (Gill, 2018) Another Chatham article also argues that "they (European countries) do not share the Trump administration's determination to stem China's rise; and they do not want to find themselves trapped on one side of a new political-economic cold war," because "under an 'America first' slogan, the Trump administration is demanding more direct benefits from international cooperation while tolerating fewer rewards for others." (Wang, 2018) According to IFRI trade expert, John Seaman, "Washington's incessant beating on the war drums of trade across the globe and the broader unilateralist stance taken by the Trump administration on questions such as climate change or Iran (JCPOA) have severely undercut efforts to confront global challenges in a constructive manner." (2018) Bruegel's Jean Pisani-Ferry also says:

Many in his administration regard the World Trade Organization's principles and procedures as an obstacle to bilateral negotiations. They would prefer to clinch deals with partners one by one, without being bound by the obligation to apply liberalisation measures across the board and without being forced to abide by the rulings of the WTO's dispute settlement mechanism. Their aim is to restructure the trade relationships along a hub-and-spoke model, with the US at the centre. (2018)

Secondly, Other symbolic languages like "number one threat", Trump's "hawkish" trade team, "new strategic stand-off", and "tussle" are used to underline that the trade war is the result of Trump administration's strategy of viewing China as a threat and strategic competitor. For example, Chatham House's Niblett says, "the Trump administration has made clear that it sees China as the number one threat to US interests and its longstanding global pre-eminence." (2018) In another Chatham article titled "Tariff Dispute Is Just One Tussle in Longer US-China Struggle", the author argues that "President Trump and his hawkish allies in the White House concern that the Sino-US economic competition dynamic is changing in favour of China and threatening the US high-tech sectors." (Wang, 2018)

In addition, symbolic descriptions like "neatly marked box", "strategic assets" and "windows of opportunities for China" are used to discuss China's response when it has realized the structural nature of this trade war and European countries' complaints about Trump's administration's neglecting European friends. For instance,

Chatham's Kerry Brown thinks "China definitely needs to change, that's true. But that doesn't mean returning to a neatly marked box put there by others for it to occupy." (2018) And another Chatham expert points out that "US strategy needs to take allies and the tremendous strategic asset they represent seriously, not just in words, but in deeds. Until it does, expect China to continue taking advantage of a remarkable window of opportunity." (Gill, 2018) At the same time Bruegel China expert, Alicia Gracia-Herrero thinks "China's recognition of the much more structural features of the U.S.-led war" has propelled China to act strategically instead of tactically. (2018)

In contrast, American think tank uses war symbols 8 times and other symbols like "hobgoblin of little minds", "the sequel of Regan's economic policy," "head-on collision", "trade tiff", "trade spat", "sneak attack", "stealthy trade policy", "rogue behavior", "tyrant", "bully" and "own goal" are used 13 times.

In the first place, war symbols are first used by PIIE experts in their policy briefs as early as Sept. 2016 when Marcus Noland and other PIIE experts analyzed and warned the dangerous trade stance of candidate Trump which might lead to "trade war and would be horribly destructive" (2016) if materialized. Candidate Trump's "stated approach to the global economy of waging trade war and protecting uncompetitive special interests would be disastrous for American economic well-being and national security." (Noland et al, 2016) Later, Chad Bown, Robert Z. Lawrence, Gary Clyde Hufbauer and other PIIE experts also use war symbols to emphasize the destructive consequences of Trump's unilateral imposition of tariffs on China. For example, in their article published in *Washington Post*, Bown and Irwin use war symbols to make comments on Trump's remarks "trade wars are good and easy to win," and to discuss the infamous Smoot Hawley tariffs' implications for today (2018). In the meanwhile, in her article published in *New York Times* Mary E. Lovely points out that "China will win the trade war because it is playing the game more skillfully" even if the Trump administration wants to inflict more pain on China. (Lovely 2018) Besides, Lovely also use the "own goal" metaphor to comment on the administration's trade policy with China is "taxes on manufacturing in America", (Lovely and Liang, 2018) and the administration's ignorance of the importance of knowledge flow and production fragmentation to 21st century supply chains.

President Trump's Section 301 tariffs are a prime example of 20th century tools aimed at the knowledge embodying trade flows of the 21st century. Tariffs and quotas are ineffective at stemming knowledge flows between innovative countries and developing nations. Beyond the immediate damage to American competitiveness, trade restrictions push high-technology firms to locate elsewhere in the future. Tariffs can diminish trade flows, but ideas are easily relocated. American workers would bear the burden if high-value activity moves offshore due to the ill-conceived tariffs of the Trump administration. (Lovely and Liang, 2018)

In the second place, American think tank also uses character symbols like "rogue behavior, bully, tyrant and hobgoblin of little minds" to portray Trump and its trade team.

Conclusion

NPF emphasizes the important role of narratives in policy process and believes narrative constructs meaning and meaning reflects the understanding of reality. Think tanks' policy research constitutes their interpretation of the policy reality of US-China trade war. Think tank expert Kent Weaver once said, "one of the tasks commonly associated with think tanks is the exploration and popularization of ideas that may not be politically feasible in the short term, but gradually gained acceptance among policy makers and eventually found enough champion that they can be enacted."(1989) Therefore, applying NPF to analyze American and European think tanks' narratives about US-China trade war illuminates the structural aspects of the trade war, as well as its implications for US-China bilateral relations, and the world economy at large.

NPF framework goes deeper and explores questions about who are the heroes, villains and victims? How does the narrative deploy plot, causal mechanisms and symbolic languages to register meaning and reflect policy realities? In terms of characterization, European think tanks cast European countries and China as heroes because they think

European countries should take advantage of this window of opportunity and China need to deal with it. Conversely, American think tank casts China as hero because they are frustrated by the chaotic and unilateral nature of Trump policy and place high expectations on China's positive response. As to villain, the common consensus is Trump tariff and Trump trade policy. The European and American think tanks diverged substantially concerning victim of the trade war: European think tanks identify multilateral system, global economy and European exports to China as victims whereas American PIIE mainly casts American economy, consumers, workers, farmers, multinationals as well as American corporations' competitiveness, American leadership and credibility as victims. Plot, which has a beginning, middle and end, connect characters to one another and to the policy setting (Jones, Shanahan and McBeth, 2014). While the European think tanks embed helplessness and control and change is an illusion in their narratives, their American counterpart mainly uses story of decline. The differences shed light on their different interpretations of this trade war: for European think tanks, they see this trade war as opportunities accompanying challenges; for American think tank, condition is getting worse and the best shot is for China to give a positive response. The solutions proposed are also divergent: European experts focus on making best use of this opportunity, Trump taking allies seriously and China's strategic response; American researchers emphasize domestic investment, shifting away from unilateral actions, working together with allies and constructive discussions. Their differences in using causal mechanism are more revealing. Compared with European think tanks' obvious lack of causal mechanism to identify the villains, American think tank use inadvertence to attribute a series of unintended harmful consequences to Trump administration's purposeful tariff policy. Like causal mechanism embedding in their narratives, tying symbols to belief system and value orientation reflects where American think tank and their European counterparts converge and depart from each other. Their convergence lies in they all use war symbols most frequently, which represents their understanding of the unilateral and zero-sum nature of Trump's trade policy with China but European experts' specific use of US-led or Trump-led trade war signifies the disaffection for Trump administration's American first principle. European experts use "number one threat", "hawkish" team, "neatly marked box", and "tussle" to comment on Trump administration's viewing China as a competitor whereas American experts use "tyrant, bully, hobgoblin of little minds and rogue behavior" to describe the illegitimacy of Trump's trade policy. Besides, American think tank also uses "sneak attack, stealthy policy and own goal" to depict the inconsistent, chaotic nature of Trump administration's trade policy with China as well as its ignorance of the influence of "new globalization" on US-China trade reality which leads to its literally taxing manufacturing America and meaningless intention of hitting tomorrow's exports capacity and technology prowess with today's tariff. (Lovely and Liang, 2018)

Finally, this study shows NPF can also be used to analyze the narratives of think tanks who are active forces in the policy making arena and whose policy inputs and expertise contribute to understanding complex policy issues and providing "contextual intelligence" (Nye, 2011) for the policy making community.

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