By George Friedman

U.S. presidential candidates run for office as if they would be free to act however they wish once elected. But upon election, they govern as they must. The freedom of the campaign trail contrasts sharply with the constraints of reality.

The test of a president is how effectively he bridges the gap between what he said he would do and what he finds he must do. Great presidents achieve this seamlessly, while mediocre presidents never recover from the transition. All presidents make the shift, including Obama, who spent his first hundred days on this task.

Obama won the presidency with a much smaller margin than his supporters seem to believe. Despite his wide margin in the Electoral College, more than 47 percent of voters cast ballots against him. Obama was acutely aware of this and focused on making certain not to create a massive split in the country from the outset of his term. He did this in foreign policy by keeping Robert Gates on as defense secretary, bringing in Hillary Clinton, Richard Holbrooke and George Mitchell in key roles and essentially extrapolating from the Bush foreign policy. So far, this has worked. Obama's approval rating rests at 69 percent, which The Washington Post notes is average for presidents at the hundred-day mark.

Obama, of course, came into office in circumstances he did not anticipate when he began campaigning — namely, the financial and economic crisis that really began to bite in September 2008. Obama had no problem bridging the gap between campaign and governance with regard to this matter, as his campaign neither anticipated nor proposed strategies for the crisis — it just hit. The general pattern for dealing with the crisis was set during the Bush administration, when the Treasury Department and the Federal Reserve Board put in place a strategy of infusing money into failing institutions to prevent what they feared would be a calamitous economic chain reaction.

Obama continued the Bush policy, though he added a stimulus package. But such a package had been discussed in the Bush administration, and it is unlikely that Sen. John McCain would have avoided creating one had he been elected. Obviously, the particular projects funded and the particular interests favored would differ between McCain and Obama, but the essential principle would not. The financial crisis would have been handled the same way — just as everything from the Third World debt crisis to the Savings and Loan crisis would have been handled the same way no matter who was president. Under either man, the vast net worth of the United States (we estimate it at about $350 trillion) would have been tapped by printing money and raising taxes, and U.S. assets would have been used to underwrite bad investments, increase consumption and build political coalitions through pork. Obama had no plan for this. Instead, he expanded upon the Bush administration solution and followed tradition.

The Reality of International Affairs

The manner in which Obama was trapped by reality is most clear with regard to international affairs. At the heart of Obama's campaign was the idea that one of the major failures of the Bush administration was alienating the European allies of the United States. Obama argued that a more forthcoming approach to the Europeans would yield a more forthcoming response. In fact, the Europeans were no more forthcoming with Obama than they were with Bush.

Obama's latest trip to Europe focused on two American demands and one European — primarily German — demand. Obama wanted the Germans to increase their economic stimulus plan because Germany is the largest exporter in the world. With the United States stimulating its economy, the Germans could solve their economic problem simply by increasing exports into the United States. This would limit job creation in the United States, particularly because German exports involve automobiles as well as other things, and Obama has struggled to build domestic demand for U.S. autos. Thus, he wanted the Germans to build domestic demand and not just rely on the United States to pull Germany out of recession. But the Germans refused, arguing that they could not afford a major stimulus now (when in fact they have no reason to be flexible, because the U.S. stimulus is going to help them no matter what Germany does).

Germany's and France's unwillingness to provide substantially more support in Afghanistan gave Obama a second disappointment. Some European troops were sent, but their numbers were few and their mission was limited to a very short period. (In some cases, the European force contribution will focus on training indigenous police officers, which will take a year or more to really have an impact.) The French and Germans essentially were as unwilling to deal with Obama as they were with Bush on this matter.

The Europeans, on the other hand, wanted a major effort by the International Monetary Fund (IMF). The Central European banking system, largely owned by banks from more established European countries, has reached a crisis state because of aggressive lending policies. The Germans in particular don't want to bail out these banks; they want the IMF to do so. Put differently, they want the United States, China and Japan to help underwrite the European banking system. Obama did agree to contribute to this effort, but not nearly on the scale the Europeans wanted.

On the whole, the Europeans gave two big nos, while the Americans gave a mild yes. In substantive terms, the U.S.-European relationship is no better than it was under Bush. In terms of perception, however, the Obama administration managed a brilliant coup, shifting the focus to the changed atmosphere that prevailed at the meeting. Indeed, all parties wanted to emphasize the atmospherics, and judging from media coverage, they succeeded. The trip accordingly was perceived as a triumph.

Campaign Promises and Public Perception

This is not a trivial achievement. There are campaign promises, there is reality and there is public perception. All presidents must move from campaigning to governing; extremely skilled presidents manage the shift without appearing duplicitous. At least in the European case, Obama has managed the shift without suffering political damage. His core supporters appear prepared to support him independent of results. And that is an important foundation for effective governance.

We can see the same continuity in his treatment of Russia. When he ran for president, Obama pledged to abandon the U.S. ballistic missile defense (BMD) deployment in Poland amid a great show made about resetting U.S. Russia policy. On taking office, however, he encountered the reality of the Russian position, which is that Russia wants to be the pre-eminent power in the former Soviet Union. The Bush administration took the position that the United States must be free to maintain bilateral relations with any country, to include the ability to extend NATO membership to interested countries. Obama has reaffirmed this core U.S. position.

The United States has asked for Russian help in two areas. First, Washington asked for a second supply line into Afghanistan. Moscow agreed so long as no military equipment was shipped in. Second, Washington offered to withdraw its BMD system from Poland in return for help from Moscow in blocking Iran's development of nuclear weapons and missiles. The Russians refused, understanding that the offer on BMD was not worth removing a massive thorn (i.e., Iran) from the Americans' side.

In other words, U.S.-Russian relations are about where they were in the Bush administration, and Obama's substantive position is not materially different from the Bush administration's position. The BMD deal remains in place, the United States is not depending on Russian help on logistics in Afghanistan, and Washington has not backed off on the principle of NATO expansion (even if expansion is most unlikely).

In Iraq, Obama has essentially followed the reality created under the Bush administration, shifting withdrawal dates somewhat but following the Petraeus strategy there and extending it — or trying to extend it — to Afghanistan. The Pakistani problem, of course, presents the greatest challenge (as it would have for any president), and Obama is coping with it to the extent possible.

Obama's managing of perceptions as opposed to actually making policy changes shows up most clearly in regard to Iran. Obama tried to open the door to Tehran by indicating that he was prepared to talk to the Iranians without preconditions — that is, without any prior commitment on the part of the Iranians regarding nuclear development. The Iranians reacted by rejecting the opening, essentially saying Obama's overture was merely a gesture, not a substantial shift in American policy. The Iranians are, of course, quite correct in this. Obama fully understands that he cannot shift policy on Iran without a host of regional complications. For example, the Saudis would be enormously upset by such an opening, while the Syrians would have to re-evaluate their entire position on openings to Israel and the United States. Changing U.S. Iranian policy is hard to do. There is a reason Washington has the policy it does, and that reason extends beyond presidents and policymakers.

When we look at Obama's substantive foreign policy, we see continuity rather than changes. Certainly, the rhetoric has changed, and that is not insignificant; atmospherics do play a role in foreign affairs. Nevertheless, when we look across the globe, we see the same configuration of relationships, the same partners, the same enemies and the same ambiguity that dominates most global relations.

Turkey and the Substantial U.S. Shift

One substantial shift has taken place, however, and that one is with Turkey. The Obama administration has made major overtures to Turkey in multiple forms, from a presidential visit to putting U.S. anti-piracy vessels under Turkish command. These are not symbolic moves. The United States needs Turkey to counterbalance Iran, protect U.S. interests in the Caucasus, help stabilize Iraq, serve as a bridge to Syria and help in Afghanistan. Obama has clearly shifted strategy here in response to changing conditions in the region.

Intriguingly, the change in U.S.-Turkish relations never surfaced as even a minor issue during the U.S. presidential campaign. It emerged after the election because of changes in the configuration of the international system. Shifts in Russian policy, the U.S. withdrawal from Iraq and shifts within Turkey that allowed the country to begin its return to the international arena all came together to make this necessary, and Obama responded.

None of this is designed to denigrate Obama in the least. While many of his followers may be dismayed, and while many of his critics might be unwilling to notice, the fact is that a single concept dominated Obama's first hundred days: continuity. In the face of the realities of his domestic political position and the U.S. strategic position, as well as the economic crisis, Obama did what he had to do, and what he had to do very much followed from what Bush did. It is fascinating that both Obama's supporters and his critics think he has made far more changes than he really has.

Of course, this is only the first hundred days. Presidents look for room to maneuver after they do what they need to do in the short run. Some presidents use that room to pursue policies that weaken, and even destroy, their presidencies. Others find ways to enhance their position. But normally, the hardest thing a president faces is finding the space to do the things he wants to do rather than what he must do. Obama came through the first hundred days following the path laid out for him. It is only in Turkey where he made a move that he wasn't compelled to make just now, but that had to happen at some point. It will be interesting to see how many more such moves he makes.