



TRUMP, HARRIS AND TRANSATLANTIC UNCERTAINTIES

What choices for Europe?

by

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On 5 November 2024, the citizens of the United States will elect their 47th president. After President Biden's decision to withdraw his candidacy this summer, the two candidates are former President Donald Trump and sitting Vice-President Kamala Harris. Their positions on many issues are radically different, including the United States' role in the world. The US presidential election will thus have far-reaching consequences for the EU's own foreign policy. Its outcome will affect the course of Russia's war against Ukraine, the conflict in the Middle East, tensions in the Indo-Pacific, and the strength of transatlantic ties. Brussels must be ready for whatever is to come. This report explores how a Trump or a Harris presidency would affect key flashpoints around the world. Each issue has strategic stakes for EU foreign policy and entails difficult choices that the Union will need to make¹.

TRUMP VS HARRIS

Foreign policy divisions, similarities, and isolationist tendencies

The two candidates, former President Donald Trump and Vice-President Kamala Harris, offer starkly different visions for the United States in the next four years. This is especially true in foreign policy. On the one hand, a second Trump

term would mark a return of the 'America First' and 'Peace Through Strength' approaches, which question the utility of international institutions and of traditional American alliances. On the other hand, Harris would largely continue Biden's foreign policy, which places emphasis on strengthening the US-led alliance system against strategic competitors. Harris could also tilt towards a more liberal agenda in foreign policy, with issues such as climate change and human rights at the centre of her likely approach².

Despite these differences, the Republican and Democratic candidates also share similarities in foreign policy. For instance, both sides of the aisle see China as the main strategic threat to the United States – far surpassing Russia in significance – and aim to expand tariff and non-tariff barriers against Beijing. Both candidates share the goal of reshoring strategic industries inside the United States and to shorten supply chains, both to strengthen national security and to stimulate job creation within the country. However, the policies that they propose to achieve these objectives vary significantly (especially in areas such as energy and artificial intelligence, as we will explore in detail below).

Recent surveys show that domestic policy issues overshadow foreign policy in the minds of US voters when making electoral decisions³. For instance, fewer than two out of ten voters say that foreign issues such as Ukraine and Gaza will impact their decisions significantly. In particular, the majority of Republican voters seem to have embraced isolationism, arguing that alliances do not benefit America⁴. Among Democratic voters, isolationism is less prevalent but still present. Given the low priority placed by voters on foreign policy, neither presidential candidate may be inclined to invest significant political capital in international affairs. Joe Biden's career has been focused on foreign policy, especially on transatlantic affairs, a focus that has continued throughout his presidency. While Harris would represent continuity with Biden in many aspects, some elements of isolationism could re-emerge. In a second Trump term, this trend would be accelerated. The isolationist trend is particularly relevant for the EU. Is Brussels ready to take a more proactive role if Washington turns inwards and away from Europe?

RUSSIA'S WAR OF AGGRESSION AGAINST UKRAINE

Under a Trump Presidency

Former President Trump provided significant military assistance to Ukraine during his first term, which enabled the country to hold off the Russian assault in February 2022. However, Trump does not have a good personal history with Ukrainian President Zelenskyy ⁵. This may have affected his stance on the war, for which he blames the weakness of the Biden administration, and which he has pledged to end. Trump claims to have a plan to 'end the war in 24 hours' once elected, or even during his transition period, but it is not fully clear how he would go about doing this. Versions of the plan circulated by aides close to Trump entail a ceasefire near the current contact lines, amounting to *de facto* territorial concessions to Russia, and a promise of Ukrainian neutrality in exchange for guarantees of its sovereignty ⁶. That might entail overtures to President Putin, reflecting the personal diplomacy that characterised Trump's first term. Trump could start this process with a call to Putin after his electoral victory.

However, according to former National Security Advisor Robert O' Brien, Trump's approach would not be to end assistance, but to continue to provide lethal aid to Ukraine, financed by European countries, while keeping the door open to diplomacy with Russia ⁷. Significant variation among Trump supporters on what to do with Ukraine adds to the uncertainty about what to expect. Trump's vice-presidential nominee, Ohio Senator JD Vance, openly opposes continued assistance to Ukraine ⁸. At the other end of the spectrum, former Secretary of State Mike Pompeo claims that Trump would lift all restrictions on the type of weapons that Ukraine can use and on the targets it can strike within Russia, and create a land-lease programme for Ukraine ⁹. Given the range of possible outcomes, the key characteristic of Trump's foreign policy *vis-à-vis* Ukraine will be unpredictability.

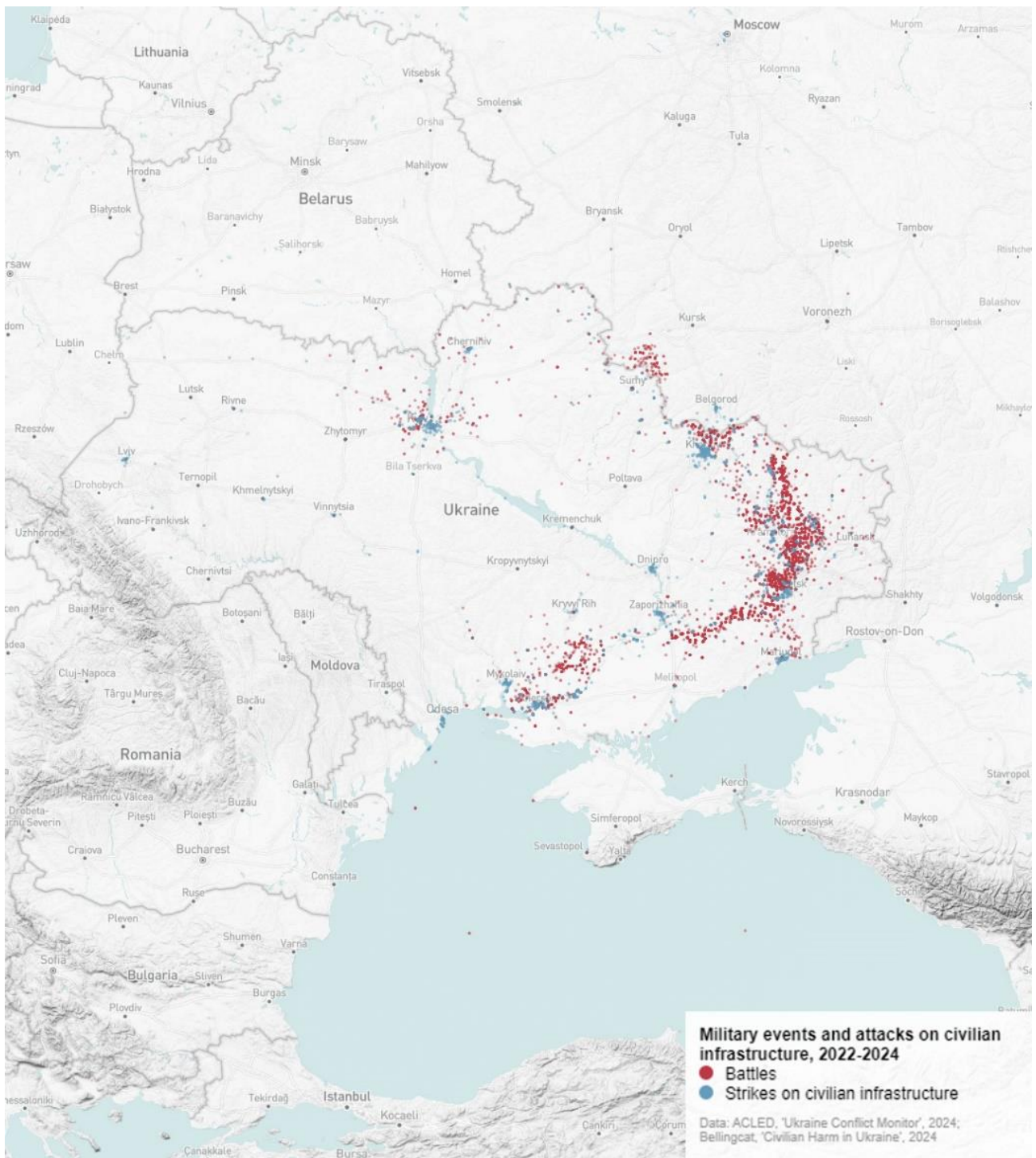
Under a Harris Presidency

Vice-President Harris has a good record of relations with Ukraine: she has met Volodymyr Zelenskyy several times, most recently in June when she represented the United States at the Peace Summit in Switzerland ¹⁰. Her running mate, Minnesota Governor Tim Walz, has signed an agricultural partnership letter of agreement between Minnesota and Chernihiv oblast ¹¹. A Harris administration would most likely continue President Biden's current policy of military support for Ukraine. Harris would likely push to approve new support packages, but she would need the support of Congress. In a divided House, this could result in lengthy deadlocks, similar to what happened in 2023 and early 2024. It remains to be seen how much political capital the new administration would be willing to invest in this issue, given its relatively low salience.

Harris would also probably maintain Biden's cautious policy of limiting Ukraine's ability to use weapons for deep strikes inside Russia, and would continue to oppose Ukrainian membership in NATO while the war continues. The administration might intensify calls for European countries to shoulder a greater share of the burden in supporting Ukraine—especially if an additional support package becomes a contested. Nevertheless, under a Harris presidency, relations with Moscow are likely to remain strained, suggesting that a direct approach to the Kremlin is unlikely.

What this means for the EU

No foreign policy issue is more consequential for the EU than Russia's war against Ukraine. Regardless of which candidate wins in November, Brussels should develop strategies to persuade the United States to continue supporting Ukraine, while also preparing to assume a greater share of the burden of support. How can it ensure that Ukraine's path to EU membership continues even if its accession to NATO does not progress? What strategies can the EU pursue to continue supporting Ukraine if US assistance falters, or if current restrictions on Kyiv's use of Western weapons remain in place? One possible change that was already mentioned during Congressional debates in 2023–24 is a shift in US assistance from grants to loans, which would likely require



guarantees from European countries. Following the model of the G7 agreement to use Russian assets as loan collateral, the EU could push for using all of the seized Russian assets to secure a loan and as funding to cover additional assistance to Ukraine ¹².

The EU should also reflect on how it would position itself *vis-à-vis* a ceasefire proposal from the United States. Should Brussels oppose Washington, or would it seek to find common ground? Is the EU ready to assume the full burden

of supporting Ukraine if the United States suspends all assistance? What would the EU do if Ukraine itself showed openness to the proposal? On this topic, there will be divisions between Member States, and resistance inside – and outside – the institutions. It would be essential for EU leaders to have a frank discussion early on, agree on a unified position, and mobilise the necessary resources to implement it.

EUROPEAN DEFENCE AND NATO

Under a Trump Presidency

During his first term, Trump often clashed with European allies. He threatened multiple times to withdraw from the alliance if other states did not spend 2 % of GDP on defence ¹³. On the campaign trail, Trump raised doubts about the United States' commitment to defending Europe, saying that he would encourage Russia to do 'whatever the hell they want' to any NATO country that does not pay enough. While Congress passed bipartisan legislation in 2023 to prevent a president from withdrawing from the alliance without congressional approval, the Trump campaign has expressed interest in the concept of a 'dormant NATO', in which the US limits its commitment to the nuclear umbrella and withdraws a significant portion of its forward-based assets ¹⁴.

Therefore, a new Trump administration could threaten to reduce support, including in areas such as intelligence sharing, or question Article 5, as leverage to push allies to spend more on defence (possibly 2.5 or 3 % of GDP) ¹⁵. Trump might also scrutinise *how* and *where* European allies allocate their defence expenditure. In 2019, the Trump administration accused the EU of damaging transatlantic cooperation and hindering US access to Europe's defence market through the rules it planned to set for the participation of third states in the European Defence Fund (EDF) and Permanent Structured Cooperation (PESCO) ¹⁶. A similar set of complaints could emerge if the European Defence Industrial Programme (EDIP) is also regarded as protectionist. Finally, Trump shares a preference for bilateral cooperation with allies rather than multilateralism. This could entice Eastern European allies – the most exposed to the Russian threat – to secure bilateral security deals to ensure American presence on their territory *outside* of NATO (following the model of the proposed Fort Trump in Poland) ¹⁷.

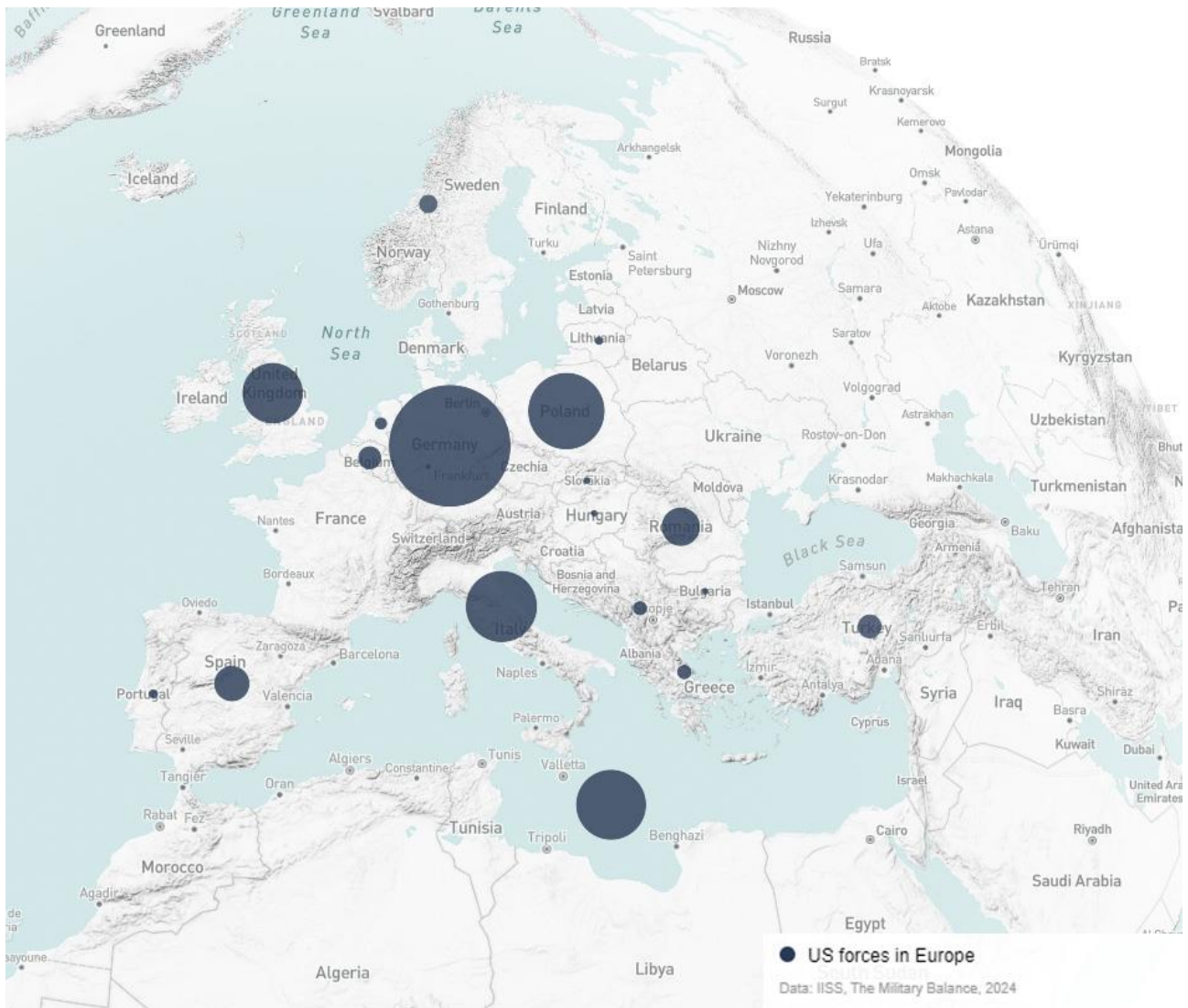
Under a Harris Presidency

Harris is expected to maintain the Biden administration's position on European defence. Philip Gordon, Harris's national security adviser and the likely central figure of a Harris foreign policy, boasts a strong pro-European curriculum, and was Assistant Secretary of State for European and Eurasian Affairs during the Obama years ¹⁸. Harris has demonstrated her transatlantic credentials during three visits to the Munich Security Conference ¹⁹. Therefore, a continued commitment to NATO should be taken for granted under a Harris presidency.

However, some of the trends pulling the United States away from Europe are also likely to continue. Biden, widely believed to be the last exponent of the 'Atlanticist' school of American politicians, made the defence of Europe a central component of his presidency – for instance, by increasing the number of troops in Europe from 80,000 to 100,000 ²⁰. Harris belongs to a new generation, who may not give as much weight to the transatlantic relationship and invest less political capital in it. Moreover, the underlying trends leading the United States to shift its focus towards the Indo-Pacific will persist. Harris will likely continue to pressure Europeans to do more on defence, and to assume a stronger stance against the threats posed by China. Some degree of ambivalence towards the EU's development of autonomous capabilities will also continue, even if it eases the burden-sharing debate, especially if fears about American companies losing access to European markets increase.

What this means for the EU

The prospect of a dwindling American commitment to Europe, especially under a second Trump term, underlines the need for the EU to take a more active role in European defence. The Union should support Member States in increasing defence spending, enhance the production of key European defence capabilities (including through EDIP), and strengthen the 'European pillar' of NATO ²¹. Brussels should also enhance security ties with non-EU countries such as the United Kingdom, Norway and Türkiye, in addition to Ukraine. These actions will serve both to bolster European countries' ability to defend themselves, and to persuade the US that Europe



is increasingly taking a larger share of the burden, which may alleviate Washington’s concerns. The EU and Member States should also strengthen protection of critical infrastructure and intelligence coordination against hybrid attacks – especially in the event of reduced US intelligence sharing.

However, there are some uncertainties that the EU will have to contend with as it prepares for the outcome of the November election. First, can unity among EU Member States for the project of European defence be maintained? Some countries are in favour of giving the EU a bigger role in defence planning and investment, whereas many others still want to ensure NATO, and the US, remain in the lead. Second, how can a feasible European defence industrial base (EDTIB) be developed, reducing its dependencies on the American market, without at the same time increasing US concerns and provoking a backlash? And third, how can the EU persuade the

new administration that a strong transatlantic relationship is beneficial to the US, and that it will actually help Washington deal with strategic challenges such as those in the Indo–Pacific?

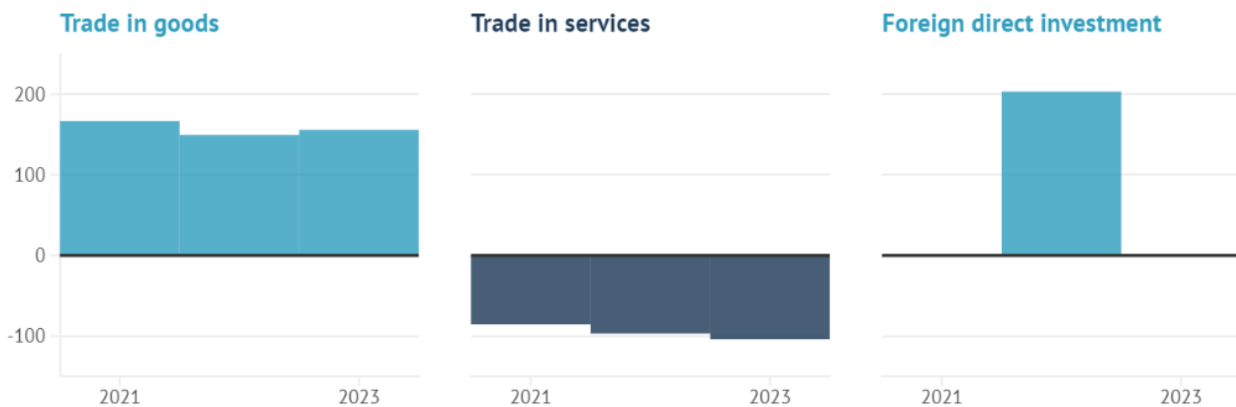
EU-US RELATIONS

Under a Trump Presidency

Relations between Trump and the European Union were tense during his first term. He perceives Europeans as competitors in America’s quest for re-industrialisation, seeing the American trade deficit with Europe as evidence of unfair competition. Trump engaged in a tariff war with the EU. A second Trump administration has promised to double down on this policy, imposing a general import tariff of 10% on European

EU-US trade and investment

Balance, € billion, 2021-2023



Data: EU Commission, Trade relations - United States, 2024

products ²². Trump also has plans to shield American companies from European tax rules for the digital economy. The Heritage Foundation, as part of the presidential transition booklet 'Project 2025', has called for the United States to challenge the European Union on the Privacy Shield Framework governing cross-border data transfers ²³.

In addition, Trump prefers dealing with European countries on a bilateral basis than working directly with Brussels. By privileging governments who are more closely aligned with him, Trump will embolden anti-European sentiment in the continent. At the same time, a new Trump administration is likely to pressure the EU to take a tougher stance on trade with China, including by imposing more sanctions on Beijing and reducing dependencies.

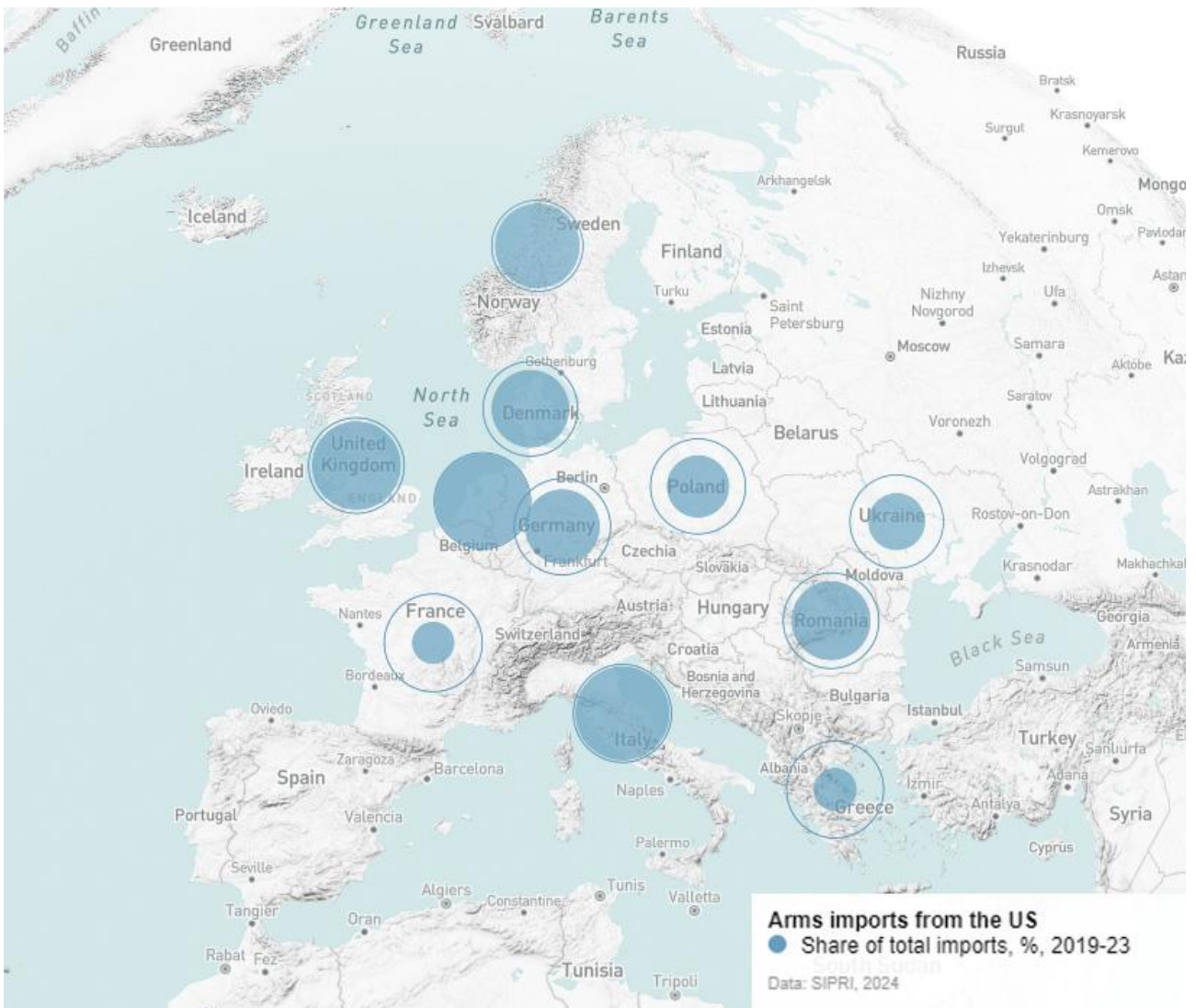
Under a Harris Presidency

Vice-President Harris was part of the administration that mended trade relations with the EU, establishing the Trade and Technology Council (TTC) as a central vehicle for EU-US cooperation. However, that same administration also clashed with the EU on the Inflation Reduction Act (IRA), which had significant consequences for European industry ²⁴. A Harris administration would likely entail a continuation of this relationship: EU-US ties would continue to be characterised by good relations, a common commitment to de-risking from foreign competitors, growing integration of security and

economic interests, and cooperation in forums such as the G7. Harris's National Security Advisor, Philip Gordon, has long supported European integration and a united EU foreign policy. At the same time, some degree of tensions in the relationship will remain, especially in areas of industrial policy, as evidenced by discussions during TTC meetings. As Harris is even more sceptical than Biden on free trade, a comprehensive EU-US trade agreement remains unlikely ²⁵. The Harris administration would also push the EU to take a stronger position against China, similarly to Trump.

What this means for the EU

The United States will remain among the EU's top partners for trade, security and other issues. Brussels should preserve a functioning relationship with Washington, but it should also be ready for heightened tensions if a more confrontational administration comes to power. In the latter case, the EU must hold its ground. During the first Trump administration, the EU strongly retaliated against the US tariffs, imposing reciprocal measures and targeting US products. European Commission president Juncker signalled to the Trump administration that the European Union could impose reciprocal costs, which prevented the trade war from escalating ²⁶. Can the EU use the same template to dial down tensions with Washington? The TTC was utilised in 2021 to address and amend the divisions between the EU and the US. It serves as



an effective forum for preventing and resolving trade, technological and economic disputes.

Many EU Member States already prefer dealing bilaterally with Washington rather than through the EU. Especially in the case of a Trump presidency, this tendency would be amplified. Several delegations from Europe have already met bilaterally with representatives of both the Harris and Trump campaigns. Notably, Hungarian Prime Minister Victor Orbán has visited Trump twice. While these bilateral visits reduce the chances of forging a united European position, they can also be an opportunity. Can the EU harness the power of bilateral ties to develop a unified message that each capital could repeat in their bilateral meetings with the United States? A cohesive European playbook, reinforced through bilateral channels, could be very useful in relations with a new Trump administration. Brussels should prepare a clear and unified message even in the

case of a Harris presidency, as tensions will likely be less prominent but, in certain sectors, could still emerge. Finally, the EU should maintain close ties with many groups in the United States beyond the administration, by reaching out to domestic constituencies and political parties that benefit from close relations with Europe (for instance, producers of arms and products that are sold in Europe) and would be hurt by reciprocal sanctions. This approach could help generate political pressure.

CHINA AND INDO-PACIFIC

Under a Trump Presidency

Trump emphasised the threat posed by China to the American economy during his first mandate and presidential campaign. The first Trump administration imposed tariffs amounting to 350

billion USD on Chinese imports and introduced restrictions on exports of advanced technologies to China ²⁷. If re-elected, Trump promises to ‘completely eliminate dependence on China in all critical areas,’ including electronics, steel and pharmaceuticals, imposing a 60 % tariff on all Chinese goods. JD Vance has argued that China is the biggest threat to America’s re-industrialisation. There is near consensus within the Trump campaign on the need to prioritise the Indo-Pacific over the Euro-Atlantic theatre. According to Elbridge Corby, the penholder of the 2018 National Security Strategy, the United States does not have the capacity for a two-theatre war, and China represents a bigger threat to US interests than Russia does. Hence, the US should redirect scarce resources from Europe to the Pacific, and prioritise weapons sales to Taiwan over Ukraine ²⁸.

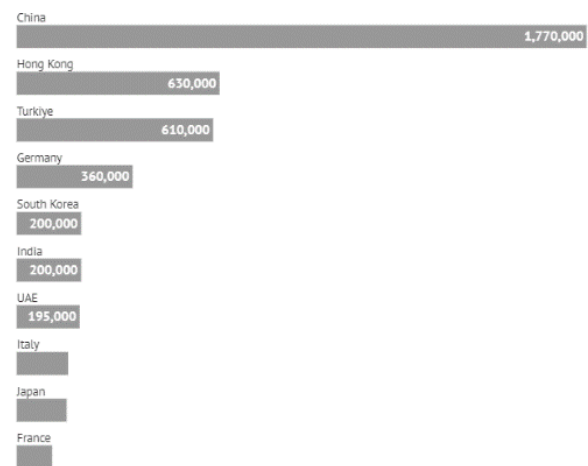
However, Trump’s long-standing reservations about American alliances are relevant to the Indo-Pacific as much as to Europe. Former national security advisor Robert O’Brien argues that American allies in the region must spend more for their defence ²⁹. And Trump has argued the following about Taiwan: ‘They did take about 100 % of our chip business. I think Taiwan should pay us for defense. You know, we’re no different than an insurance company. Taiwan doesn’t give us anything’ ³⁰. If Trump wins the presidency again, traditional US allies will likely ramp up their defence spending. However, they may also seek to develop domestic defence capabilities as insurance. For instance, South Korea could be incentivised to start its own nuclear programme – especially if a second Trump administration seeks a second attempt at bilateral negotiations with North Korea ³¹.

Under a Harris Presidency

If elected, Vice-President Harris is likely to continue the Biden administration’s policy on China. The 2022 National Security Strategy sees China as the only systemic challenger to the United States ³². A Harris presidency would see a continuation of the policy of de-risking from China, relying on non-tariff measures, export controls and on restrictions on Chinese access to US technology and markets. The administration would also continue pressing US partners in the

Russian imports of key military goods

Semiconductors, spare parts, components, 2022-2023



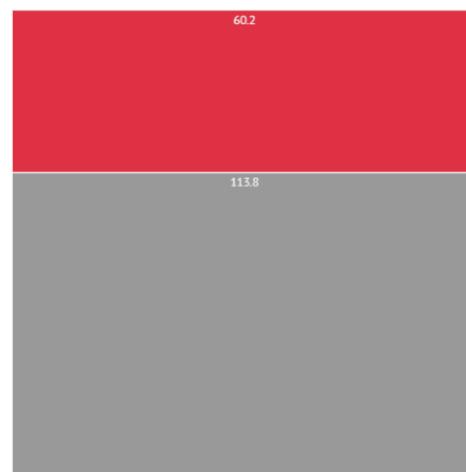
Data: CSIS, 'Back in Stock? The State of Russia's Defense Industry after Two Years of the War', 2024; the Economist, 'Who is supplying Russia's arms industry?', 2024

EU and elsewhere to increase their restrictions on Chinese technology and to reduce trade with

Chinese exports to Russia

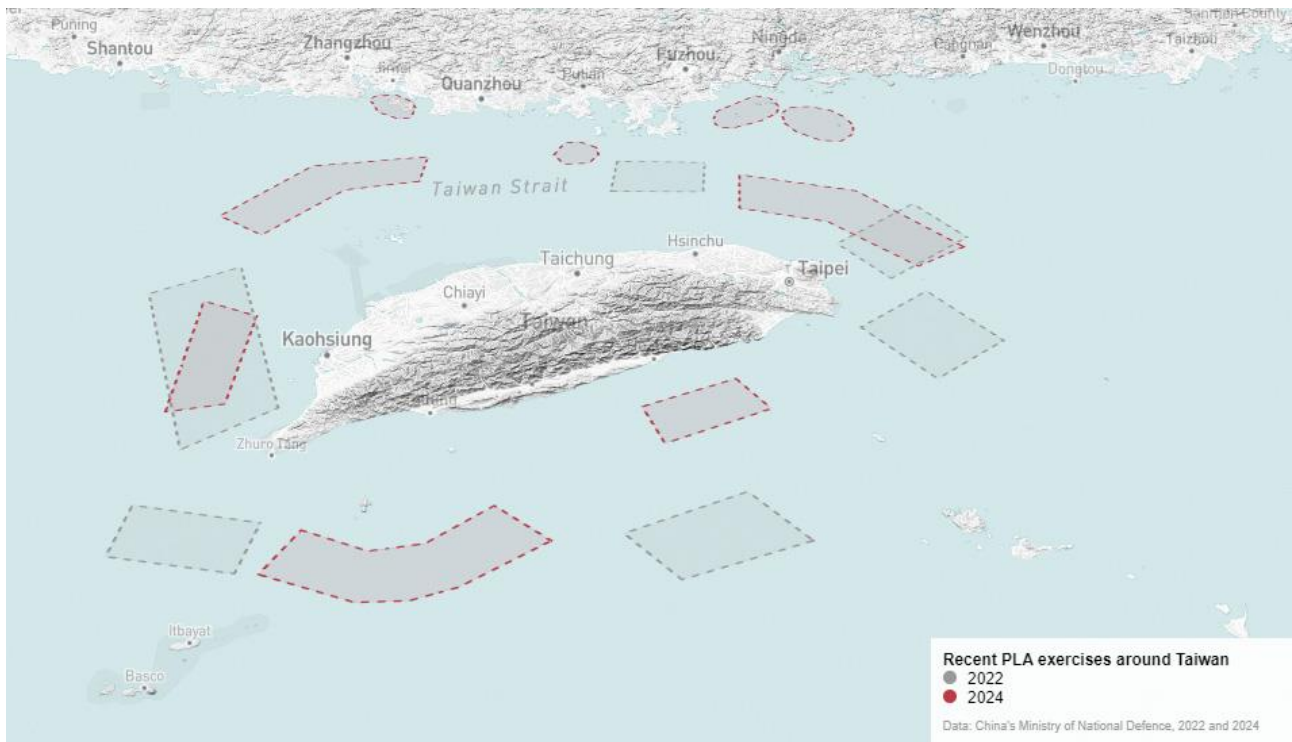
2022-2024, \$ billion

■ Products that are in G7 restricted lists ■ All other items



Beijing. A Harris presidency would also continue to prioritise its bilateral alliances, AUKUS and the Quad, and the trilateral military cooperation with South Korea and Japan.

Harris will also uphold the American commitment to Taiwan. President Biden has shifted away from the long-standing “strategic ambiguity” policy, arguing that the US would defend Taiwan if attacked ³³. Harris would likely continue to demonstrate support for Taipei in order to deter Beijing. Both Harris and Walz (who has lived in China and speaks Mandarin) place significant emphasis on human rights and international law as part of their foreign policy



discourse. As a result, we may expect additional criticism of China's human rights record in Xinjiang and Hong Kong, of Beijing's activities in the South and East China Seas, and of North Korea. Finally, while a Harris presidency would pay attention to both the Euro-Atlantic and Indo-Pacific theatres, in the event of a major crisis in East Asia we can expect a significant reduction in the US footprint in Europe.

What this means for the EU

Whatever the outcome of the 2024 presidential race, the underlying trends show a steady increase in American attention to the Indo-Pacific. However, the speed at which this rebalancing takes place could vary significantly: in a second Trump administration, it could be faster than in under a Harris presidency. A crisis around Taiwan or in the South China Sea could prompt a sudden shift of resources under either presidency ³⁴. To effectively respond to these scenarios, the EU and its Member States should craft a coordinated approach to the Indo-Pacific. Can Brussels develop an autonomous contribution to deterrence in East Asia, which makes a crisis in the region (and its repercussions for European prosperity and security) less likely ³⁵? If the EU can present itself as a reliable partner to the United States in East Asia, Washington might also be less prone to abandon Europe.

The EU should also foster closer cooperation with partners in East Asia, especially those who share the concern about US abandonment. One way to do so is to increase the security and resilience of supply chains for semiconductors and critical raw materials, which are essential for the European economy as well as key exports for East Asian countries. How can the EU improve cooperation with partners in this context? Finally, the EU should rethink its relationship with China. Is the characterisation of Beijing as 'partner for cooperation, an economic competitor and a systemic rival' still apt? Will this ambiguity damage its relationship with Washington and with partners in East Asia? Does it sufficiently deter Beijing from supporting Russia and upending the *status quo* around Taiwan, in the East and South China Seas?

ISRAEL-HAMAS WAR

Under a Trump Presidency

On the 2024 campaign trail, Trump has argued that Israel must be allowed to 'finish the job' in Gaza, supporting the Netanyahu government's efforts to eradicate Hamas from the Strip. This stance would represent continuity with the policy

of strong support for Israel that Trump followed during his first term in power. He broke with long-standing bipartisan consensus by rejecting a separate Palestinian state and recognising Jerusalem as the capital of Israel. Trump's flagship Middle East initiative was the Abraham Accords between Israel and several Arab states, which *de facto* bypassed the Palestinian issue ³⁶. A second Trump presidency would likely push to end the war quickly, and to resume the Abraham Accords. It is unclear, however, how easily Trump would be able to bring Israel and the Arab states back to the negotiating table, especially if a Palestinian state is not part of the arrangement. A second Trump presidency could also reduce the US presence in the Middle East, through the withdrawal of troops from Iraq and Syria that was initiated during his first term. Questions arise over whether the US would terminate Operation Prosperity Guardian in the Red Sea, leaving the responsibility to European allies, or if it would continue it as part of a renewed policy of maximum pressure on Iran and its proxies (see section on Iran).

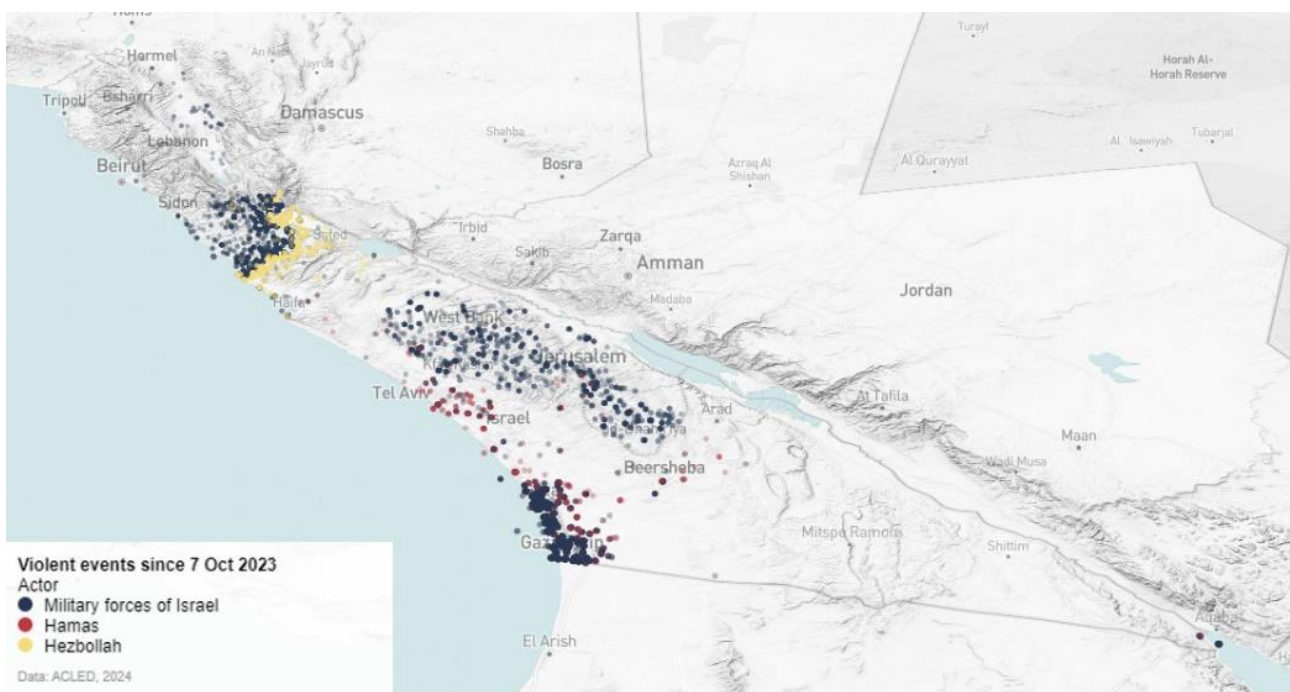
Under a Harris Presidency

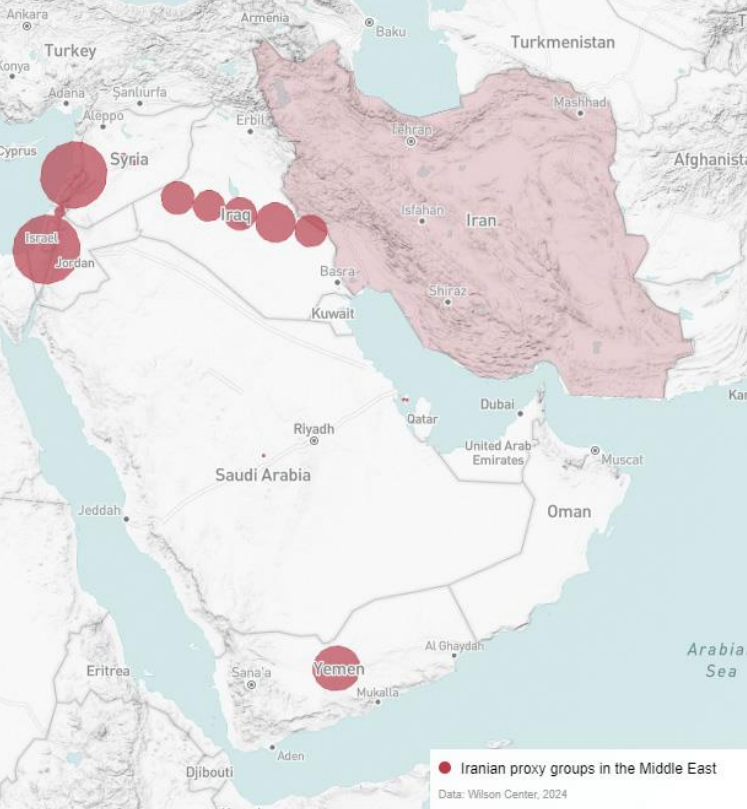
If there is one foreign policy area where Harris might diverge from the Biden administration's position, it is the war in Gaza. During her tenure, she has taken a more sympathetic stance towards the Palestinians, and has expressed criticism of Israel's conduct of the war. After becoming the

presumptive Democratic nominee, she did not attend Prime Minister Netanyahu's speech to Congress, which as president of the Senate she would normally attend. Harris did meet with Netanyahu later, but then gave a forceful speech about the humanitarian situation in Gaza ³⁷. However, the Harris campaign does not support an arms embargo on Israel, maintaining continuity with the traditional US foreign policy position ³⁸. A Harris administration could instead make the transfer of specific weapons systems conditional on Israeli war conduct, protection of civilians, and a path towards a two-state solution. Harris would continue to push for the implementation of the Biden ceasefire plan or a similar version, but would likely face similar challenges as the current administration in getting all sides to agree.

What this means for the EU

The EU has a stake in stabilising the Middle East and resuming the path towards a two-state solution. However, its current role in the region is quite limited. Can Brussels assume a stronger role in pressuring for a ceasefire between Israel and Hamas, while avoiding an expansion of the conflict to all-out war with Hezbollah? If the EU assumed a more active position, it would complement the efforts of a Harris presidency, while also preserving the viability of the two-state solution in the event of a Trump victory.





Moreover, the EU could position itself as a dialogue partner between the United States and Israel on the one hand and Arab countries on the other. Such a role could prevent spillovers from the war, ensure the delivery of aid to the Palestinians, and facilitate the re-opening of negotiations. Given the uncertainty about the continuation of Operation Prosperity Guardian, the EU should reinforce Operation Aspidos. European forces in the Middle East (especially in Iraq) might also become more vulnerable if the United States further reduces its regional footprint. However, for all these efforts to be achieved, EU Member States must first agree on a common position. Can they manage to do this before the next US president takes power?

IRAN

Under a Trump Presidency

Trump's policy on Iran was one of 'maximum pressure.' According to him, the relaxation of this policy under Biden emboldened Tehran to attack Israel, both through Hamas and Hezbollah, and directly, through drone and missile strikes. Trump also believes that Iran has amassed enough uranium to build a nuclear bomb in a matter of months. A second Trump administration would likely return to the policy of maximum pressure against Iran, including the

full enforcement of US sanctions on Iran's energy sector and on governments and organisations that buy Iranian oil and gas. The US would also seek to rally allies in the region around the threat posed by Iran and its proxies – as a way of reviving the Abraham Accords. The new administration could also consider direct strikes on the Iranian nuclear programme and on high-ranking officials, following the precedent of the attack on General Qasem Soleimani in 2020 ³⁹. Iran is concerned about a new Trump presidency, and has reportedly targeted the Trump campaign with cyber attacks ⁴⁰. Tensions between Tehran and Washington are poised to grow significantly in a second Trump term.

Under a Harris Presidency

Harris's national security advisor, Gordon, was a key architect of the Joint and Comprehensive Plan of Action (JCPOA), the Iran nuclear deal negotiated during the Obama administration, and has written a book criticising regime change pursued by the United States in the region ⁴¹. With Gordon expected to play a major role in a Harris administration, the US approach to Iran would veer away from any attempt at regime change in Iran. Harris has also expressed support for the US return to the 2015 agreement limiting Iran's nuclear programme in exchange for lifting sanctions which Trump abandoned in 2018 ⁴². If the approach is seen as too accommodating, it may lead to tensions with US allies in the region such as Israel and Saudi Arabia.

What this means for the EU

While Iran's support to proxy groups encourages regional instability and affects European security, Tehran's main threat to the EU emerges arguably from its supplies of drones and missiles to Russia for the latter's war of aggression against Ukraine ⁴³. In shaping its approach to the United States' future Iran policy, the EU should highlight this issue to forge a united front with Washington. A Harris administration would likely be open to disrupting the cooperation between Moscow and Tehran. A Trump presidency would want to incorporate this element into its maximum pressure campaign. This could also facilitate cooperation with Arab countries and Israel who see Iran as a significant threat. At the same time,

the EU should continue efforts to prevent regional escalation from conflicts involving Iran and its proxies on the one hand and the US and its allies on the other. Will Brussels be able to take on a more prominent diplomatic role in the region? Can it disrupt the Moscow–Tehran cooperation and Iran’s support for its proxies without contributing to regional escalation?

THE WESTERN BALKANS ⁴⁴

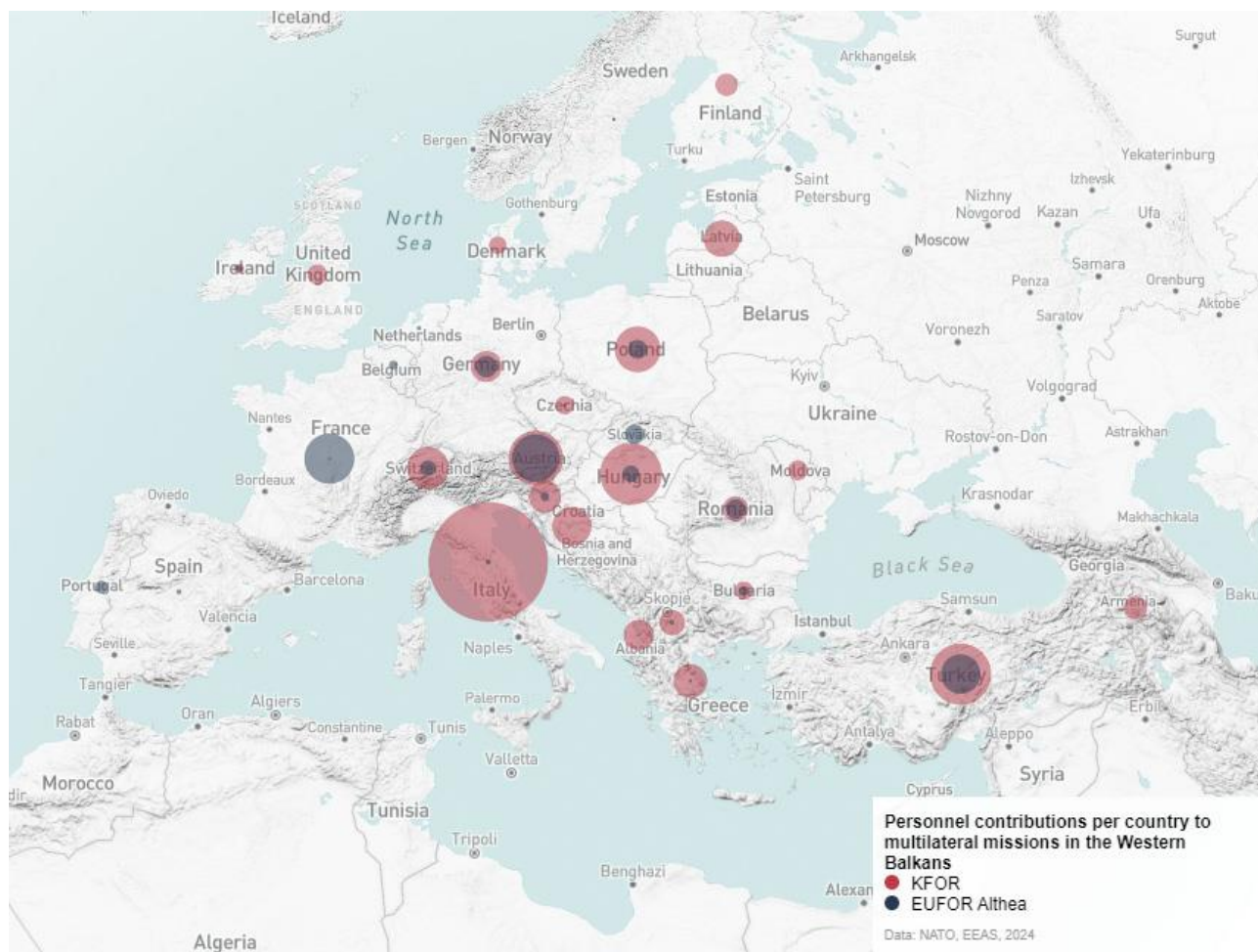
Under a Trump Presidency

A second Trump term is expected to exacerbate authoritarian and nationalist tendencies, deepening ethno-nationalist divisions both within and between countries in the region. Trump’s personalistic diplomatic style is likely to become even more pronounced. Ivanka Trump and Jared Kushner have secured deals in Albania and Serbia to develop luxury complexes worth over EUR 924 million ⁴⁵. During Trump’s first term, the 2020 Washington Agreement aimed at economic normalisation between Belgrade and

Pristina was a key initiative. A new Trump administration would push for its revival. This exclusive focus on Belgrade–Pristina relations could undermine the broader, more complex political dynamics in the region. Additionally, there is a significant risk of reviving the controversial ‘land swap’ or ‘border correction’ proposal. This approach, not necessarily excluded during Trump’s first term, marked a significant departure from the policies of the Obama era ⁴⁶. Finally, a ‘dormant NATO’ policy would see the US taking a back seat in Europe, and could have significant spillover effects in the region, where US presence is crucial, especially within the framework of KFOR.

Under a Harris Presidency

Vice-President Harris has yet to clarify the direction of US foreign policy concerning the Western Balkans. Her administration is likely to maintain the core principles of the Biden administration, focusing on the Euro-Atlantic agenda, upholding democratic principles and the rule of law, and addressing security challenges



posed by Russian and Chinese malign influence operations. Harris is expected to adopt a firm stance on organised crime and its connections with political and business elites. When accepting the presidential nomination, Kamala Harris stated that she would ‘never waver in defence of America’s security and ideals’, hinting at Donald Trump’s admiration for dictators and autocrats. In June 2024, President Biden extended the Executive Order on National Emergency With Respect to the Western Balkans for another year, citing ongoing violence, obstructionist activities, and the region’s continued threat to US national security and foreign policy ⁴⁷.

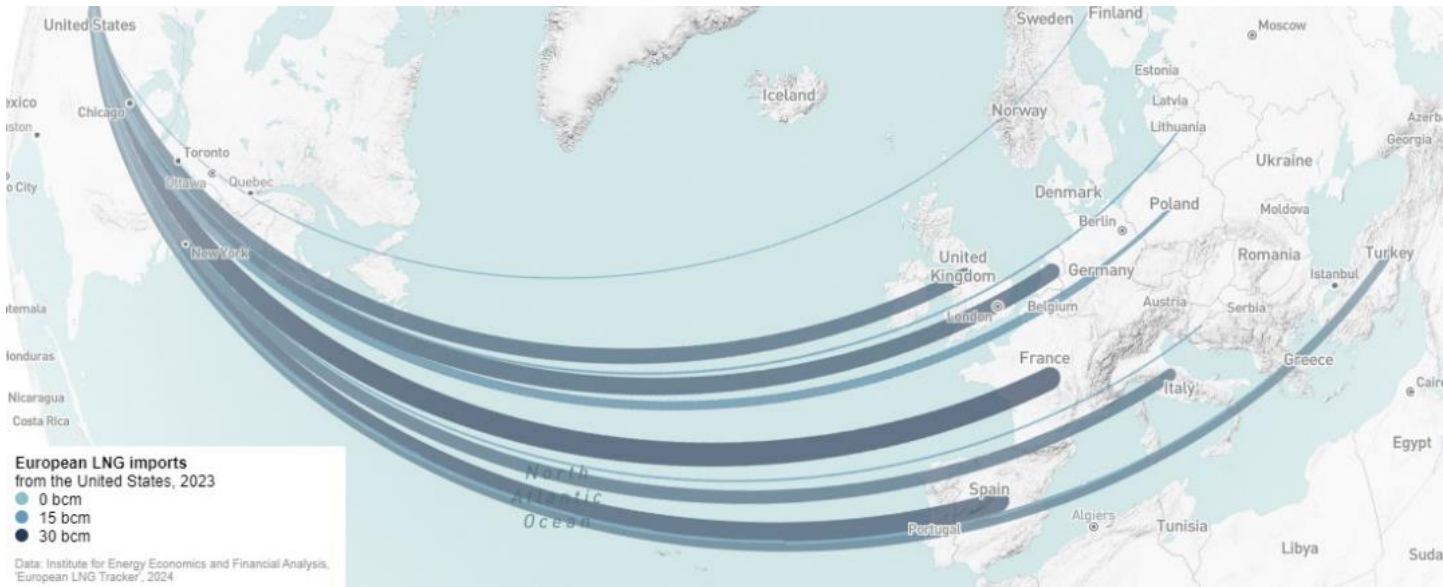
What this means for the EU

While the Western Balkans may not be a central focus of the presidential campaign, the outcome of the election will affect the region significantly. Current US foreign policy in the Western Balkans aligns closely with EU efforts to advance the region's path toward EU membership. This includes strong support for the EU-facilitated dialogue between Belgrade and Pristina, upholding Bosnia and Herzegovina's territorial integrity and sovereignty under the Dayton Agreement, and promoting full Euro-Atlantic integration for Albania, Montenegro and North Macedonia. A Democratic victory would likely reassure the EU by maintaining a supportive US approach and consistent engagement in addressing these challenges. The US presence in KFOR and support to EUFOR Althea would be essential in maintaining security and stability, especially during the transition period under the new EU leadership. A second Trump term, however, would likely amplify populist and nationalist rhetoric, undermining the critical reforms needed in these countries. This includes efforts to combat organised crime and corruption, strengthen the rule of law, and ensure media freedom. Such a shift could set back the region’s EU enlargement prospects, slowing progress toward membership. Additionally, this scenario might undermine the region's resilience against foreign interference.

ENERGY AND CLIMATE

Under a Trump Presidency

Trump is an outspoken critic of the energy transition and is sceptical of climate change. On his first day in office in 2017 he withdrew the United States from the Paris Agreement, and he may do so again if re-elected. The United States’ leadership in international climate agreements would once again be upended. The Republican platform pledges to ‘unleash American energy’, making the United States energy independent thanks to fossil fuels ⁴⁸. Trump also plans to press Congress to repeal the IRA, while slowing down the implementation of subsidies for electric vehicles and clean energy products. The Supreme Court’s recent decision to end the ‘Chevron deference’ will facilitate Trump’s efforts ⁴⁹. Since federal judges can now rule whether a government agency is overstepping its interpretative powers, many project authorisations stemming from the IRA will be challenged, and permits will be issued more slowly. However, the Trump administration may also face challenges to its plans since many Republican-leaning states are beneficiaries of tax cuts under the IRA.



Under a Harris Presidency

If Vice-President Harris were to be elected, her presidency would expand her predecessor's climate and energy policy. The Biden administration has pursued one of the most ambitious climate policies in American history, passing legislation such as the IRA. However, oil and gas production has grown to historic highs under Biden. Harris would likely continue to further develop the US renewable energy sector. When she ran for president in 2020, her climate plan called for a 10 trillion USD increase in spending over a decade as well as a carbon pricing mechanism, and favoured a ban on fracking, which she has now disavowed ⁵⁰. As Vice-President, Harris incorporated climate change into foreign relations, holding a round table in Bangkok to connect environmental activists with clean energy experts and starting a partnership with Caribbean countries to address climate change ⁵¹. Therefore, a Harris presidency would likely make climate diplomacy a central feature in international relations.

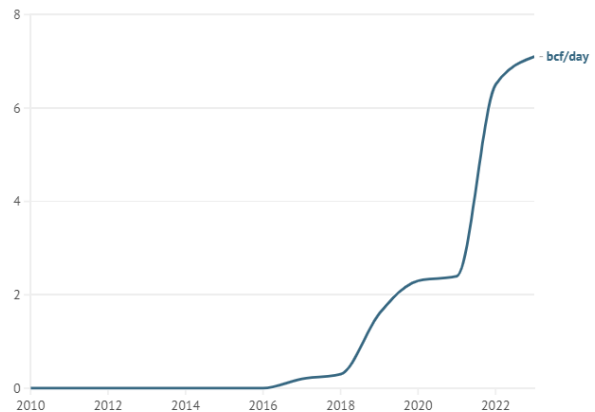
What this means for the EU

Under a Trump presidency, the EU would lose the US as an important ally in climate diplomacy, but it would have the opportunity to resume a global leadership role in the field. Trump's proposed increases in energy production would significantly affect the European energy market. On the other hand, a Harris-led United States would be closely aligned with the EU in fighting

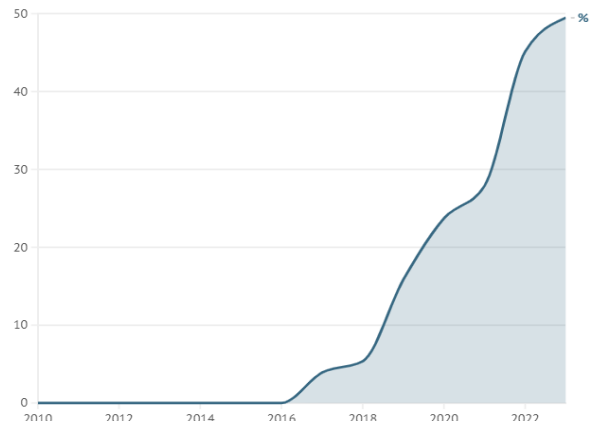
climate change, but the transatlantic competition for clean-energy resources and industry could intensify. Regardless of the outcome, the EU should also seek to protect its domestic energy market from both American (and Chinese) competition. It should strengthen European countries' abilities to produce and procure affordable and clean energy. One way to do so is

Total annual LNG imports from the US

to EU27 and the United Kingdom, billion cubic feet per day



to EU27 and the United Kingdom, share of total



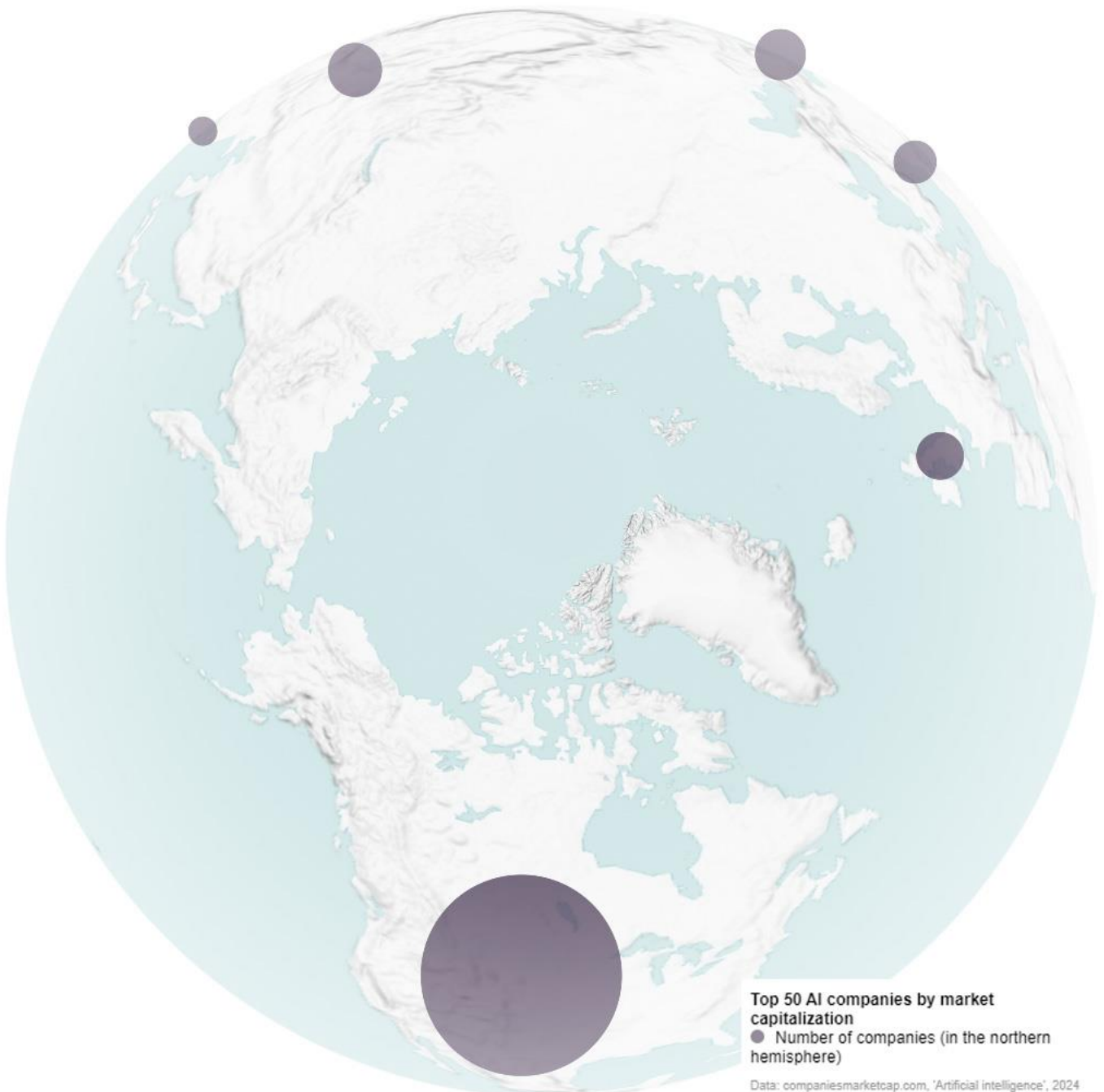
Data: EIA, 'The United States remained the largest liquefied natural gas supplier to Europe in 2023', 2024

to strengthen partnerships focused on critical minerals and supply security with like-minded nations, who are also concerned about developments in the United States. On the climate diplomacy front, the EU should strengthen its position at the centre of multilateral efforts to address climate change, and intensify its partnership with countries across the globe who see it as existential threat. This would either make the EU a valued ally to the United States, or limit the impact of a U-turn in American climate and energy policy.

DATA AND ARTIFICIAL INTELLIGENCE

Under a Trump Presidency

Trump has received the endorsement of several Silicon Valley executives for his platform supporting deregulation in the field of data and artificial intelligence (AI) ⁵². Trump and Vance – himself a venture capital investor – see an arms race with China in the field of AI and emerging technologies ⁵³. The Trump campaign has pledged to repeal the Biden administration’s 2023 executive order on the safe development of AI, which it says overly restricts innovation ⁵⁴. Trump may launch a series of ‘Manhattan



Projects' to spur AI research and develop dual-use applications, using the abundant electricity that will be generated domestically to meet the high energy demands of AI research and development ⁵⁵. A second Trump presidency may also ease regulations on data transfers. The presidential transition booklet 'Project 2025' advocates for repealing Executive Order 14086 to remove obstacles to signal intelligence ⁵⁶. This would impact one of the building blocks of the EU-US Data Privacy Framework. Trump is also willing to protect US tech giants such as Apple, Meta and X against EU privacy legislation ⁵⁷.

Under a Harris Presidency

Harris launched her political career in Silicon Valley, and some of her former top staffers are now big names in the tech industry. She has supported the Biden administration's regulations on AI and other critical technologies, including the CHIPS and Science Act and the Executive Order on AI. However, the primary focus of these regulations was to restrict China and Russia's access to the technology. Regulation was left to voluntary industry-led standard-setting. A Harris presidency would likely be more outspoken in calling for regulations to address the dangers posed by AI, including deepfakes, algorithmic bias and disinformation. In July 2023, Harris led a meeting among civil rights, labour and consumer protection groups where she rejected the 'false choice' between promoting innovation and protecting the public ⁵⁸.

What this means for the EU

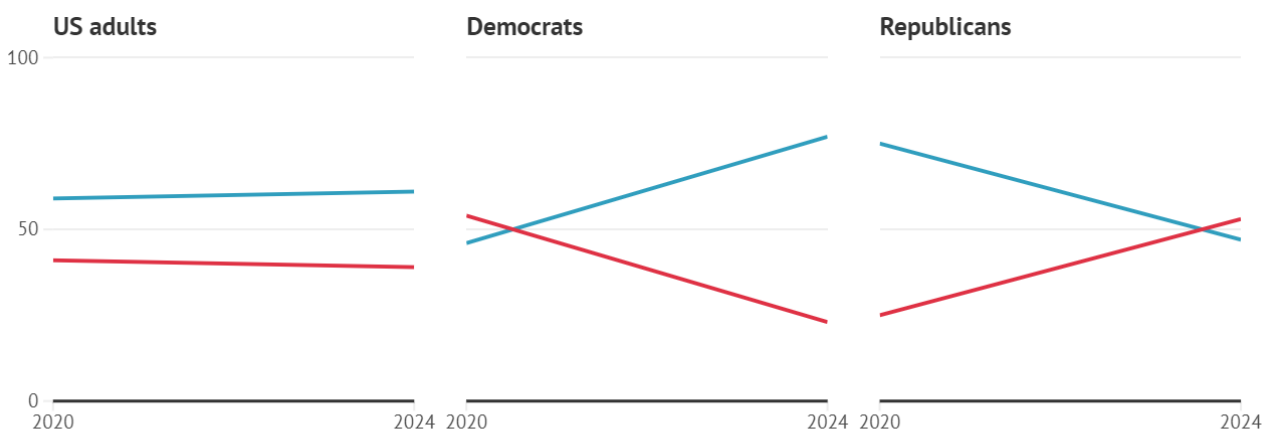
The EU seeks to support the responsible development of AI and a common regulatory approach to emerging technologies. This would be consistent with a Harris presidency's emphasis on responsible innovation but could create significant challenges *vis-à-vis* Trump's deregulation plans. The EU's ability to enforce the Digital Markets Act (DMA) may also be weakened. The risk of harmful uses of AI and disinformation spreading in a deregulated environment would increase. Additionally, the EU should work to avoid a repetition of the situation that occurred with the IRA, when European industry unintentionally became collateral damage of US legislation, whose primary goals were to strengthen the clean energy industry and counter China. Either a Trump or Harris administration could enact new laws in this field with a similarly harmful impact on Europe.

How can the EU be ready for developments in this field following the election? The EU should leverage the Trade and Technology Council (TTC) and other forums for EU-US dialogue, for early warning and consultations to prevent disputes, and to ensure transatlantic regulatory convergence. The EU should also harness the necessary resources that would allow it to enforce the DMA and threaten retaliatory measures in response to any harmful actions by the United States.

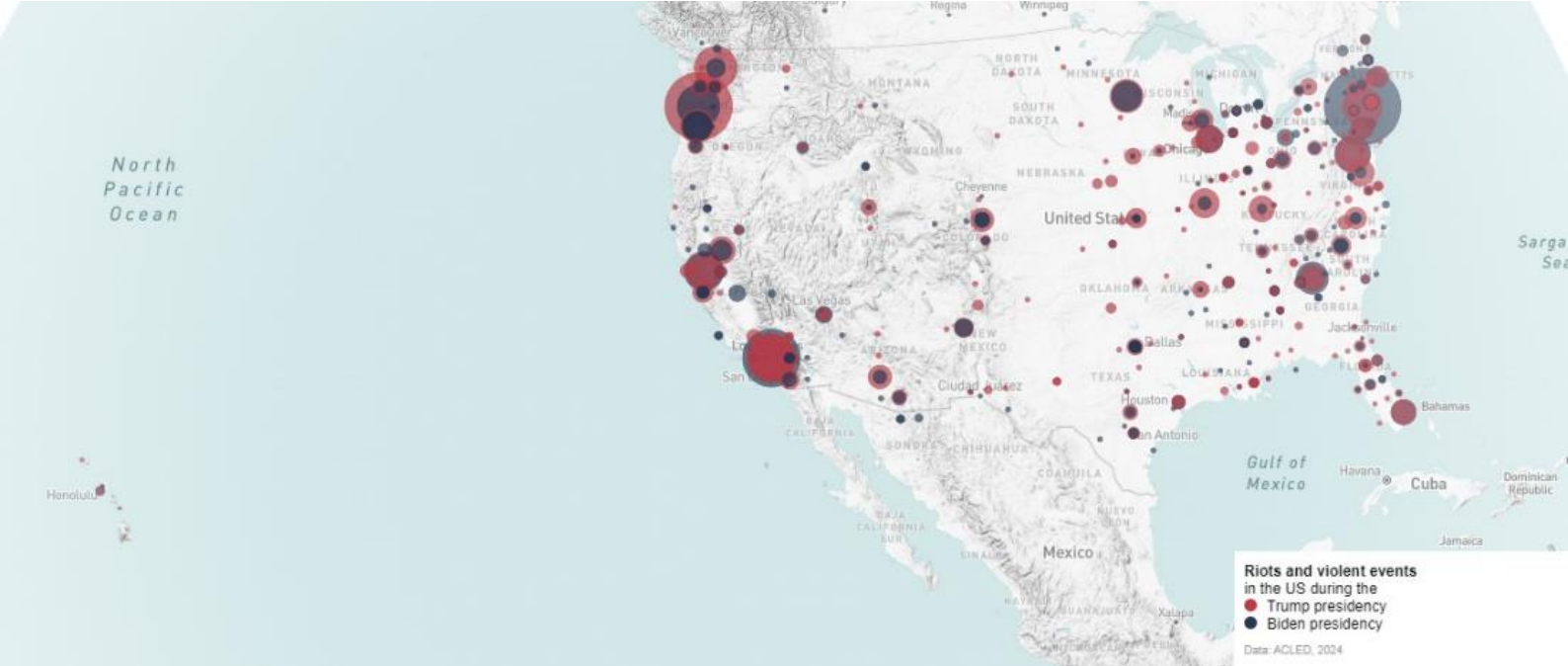
US citizens who are confident that the election will be conducted fairly and accurately

%, 2020 vs 2024

■ Very/somewhat confident ■ Not too confident/not at all



Data: Pew Research Centre, 'Many Americans are confident the 2024 election will be conducted fairly, but wide partisan differences remain', 2024



POLITICAL TENSIONS AND POLARISATION

A key feature of American politics in 2024 is political polarisation. According to most surveys, US citizens are divided into two political camps because of two very different worldviews competing for dominance ⁵⁹. Most respondents find it very hard to agree with representatives of the opposite party on most issues. And importantly, partisan support for the violent removal of adversaries is much more widespread than previously thought: in a PBS poll from April 2024, 20% of respondents (and 28% of Republicans) agreed that ‘Americans have to resort to violence to get the country back on track’ ⁶⁰.

The 2024 election is already featuring high levels of political tension. Trump was the victim of an assassination attempt on 13 July and opinion polls consistently point to a high degree of political polarisation and an erosion of trust in US political institutions. Against this background, a contested election outcome could unleash a significant wave of political violence across the country ⁶¹. The Trump campaign is already questioning the validity of the electoral process, such as Biden’s replacement on the ballot. On 6 January 2021, pro-Trump protestors stormed the US Capitol in an attempt to prevent the certification of electoral results. Trump and other Republicans have threatened that a repeat of the insurrection could take place if Trump is not elected again ⁶².

Another key theme of the next presidency will be the robustness of the system of checks and balances. Two recent decisions by the US Supreme Court will make the next US president particularly powerful: the decision in July granting presidents sweeping immunity from criminal prosecution after leaving office, and the decision to end the ‘Chevron deference’ – whereby federal judges can now rule whether a government agency is overstepping its interpretative powers. Through these two rulings, experts argue, the commander-in-chief will be able to run an ‘Imperial presidency’ ⁶³. Trump could use them to continue his first administration’s practice of expanding the power of the White House *vis-à-vis* federal agencies ⁶⁴. A Harris presidency would likely push back against the recent Supreme Court decisions. Harris has endorsed President Biden’s proposals for changes to the Court such as term limits for Supreme Court justices. Harris may push the proposal forward if she is elected president. While these are strictly domestic issues, they do have implications for international affairs, as they could, over time, reduce the legislature and the judiciary’s ability to counterbalance the executive power. This would weaken democratic countries worldwide and embolden authoritarian actors.

What this means for the EU

The EU has a stake in a stable and peaceful United States, and on the peaceful transfer of power, for both value-based and strategic considerations. Widespread political violence in the US would not only weaken the transatlantic relationship but

could also embolden strategic competitors to undertake more aggressive actions that could compromise European security. Therefore, the EU should do what it can to support the democratic transfer of power in Washington. This would be particularly complex in the event that one of the two parties refuses to accept the electoral results, if there is no clear winner, like in the 2000 election, and if political violence becomes widespread. The uncertainty might cause divisions among Member States and might be exploited by malign actors such as Russia. Disinformation is also likely to be a key issue for the EU in the run-up to, and in the wake of, the

election on 5 November. Can the EU coordinate with Member States to address contested electoral results and potential violence in the US? How can Brussels effectively curb the likely wave of disinformation around election day? And can it step up to uphold the principles of democracy, the rule of law, and human rights if a crisis emerges in the US political system?

- ¹ This report is an extension of the interactive map ‘The US Election: What choices for Europe?’, produced by Giuseppe Spatafora and Christian Dietrich and available on the EUISS website (<https://www.iss.europa.eu/content/us-elections-what-choices-europe>). The author would like to thank Bojana Zorić, Associate Analyst for the Western Balkans at the EUISS, for contributing the section on the Western Balkans.
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