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Navigating New Geopolitical Realities: Policy Paths for the Next U.S. Administration

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Introduction

Since the Biden/Harris Administration's hurried, calamitous US withdrawal from Afghanistan in August 2021, the US-led, unipolar world has transitioned toward multipolarity. Strategic competition between Washington and Beijing has intensified, with relations between America and China hitting a low point during the spy balloon scandal in early 2023. Bifurcated technology sectors and increasing de-dollarization now erode at America's ability to effectively use both

carrots and sticks to influence competitors and partners. Under US President Joe Biden's watch, the largest land war in Europe since World War II erupted, following Russia's 2022 invasion of Ukraine. With an estimated one million killed and injured, the Russo-Ukrainian war shows no sign of abating. Escalation remains a distinct possibility, as US officials debate providing Ukraine authorization to use long-range weapons for strikes within Russia, while Moscow authorities have threatened the use of nuclear retaliation should the Russian Federation face an existential threat from NATO.

Iran-backed Hamas terrorists killed, raped, and abducted Israeli civilians in October 2023 and the Israeli military has since responded with the dismantling of the terrorist network in Gaza. Israel's intelligence services are believed to be behind the September 2024 attacks on Hezbollah's forces in Lebanon, expanding the Israeli government's efforts to "thwart [the] Islamic-Iranian terrorist structure," while Tehran-backed Houthi rebels have struck US and UK naval forces and terrorized commercial ships in the Red Sea. Destabilizing the region further, the US and UK governments believe Russia is sharing nuclear technology with Iran, as the Tehran regime pursues enrichment of uranium. Meanwhile, global competition over rare earth elements and other critical minerals has led to military industrial base disruptions. As noted by the Heritage Foundation, these rare earths and minerals are "vital components" of equipment ranging from precision-guided weapons to night vision goggles to stealth technology. The National Defense Industrial Association reported, "during the last 35 years, the US lost its understanding of the direct connection between a strong defense industrial base and effective national deterrence." America's Army, Navy, and Air Force have all failed to meet recruiting targets, while China's naval forces have now surpassed the size of the US Navy, giving Beijing carte blanche to test the resolve of PRC neighbors in the South China Sea and Taiwan Strait.

Prior to the October 2023 Hamas attack, ammunition shortages caused by the US supplying arms to Ukraine led Pentagon officials to draw from a stockpile of 155-millimeter shells stored in Israel. The US has even experienced gun powder shortages during the Biden Administration, as the White House pursued contradictory policies aimed at combatting slave labor in Xinjiang, while remaining almost entirely dependent on imports from western China for nitrocellulose ("guncotton"), the key ingredient for munitions propellants. With mounting threats and challenges related to finite resources and manpower, the United States appears increasingly unable to deter geopolitical instability in the Indo-Pacific, Europe, or the Middle East. *Wall Street Journal* columnist Walter Russel Mead has acknowledged "China, Russia and Iran are stepping up their attacks on what remains of the Pax Americana..." while "not since the 1930s have Americans been this profoundly indifferent as a great war assembles in the world outside...". A rising China has not only increased its economic clout through expanding BRICS, but has forged a loosely knit coalition of the largest militaries in the world – Russia, Iran, and North Korea – which are all increasingly dependent on one another for deepening technological and military ties following years of US sanctions overreliance aimed at weakening their economies.

As the U.S. approaches its November presidential election, the next president—whether Donald Trump or Kamala Harris—will face these growing foreign policy challenges. Trump’s first term saw a relative absence of new military conflicts, alongside US initiatives aimed at countering China’s influence and pursuing peace in the Middle East. These included opening a US Development Finance Corporation office in Belgrade, pledging \$1 billion to the Three Seas Initiative Investment Fund, and engaging the private sector through the Blue Dot Network to better compete with Beijing’s Belt and Road Initiative. In the Middle East, the Trump Administration pursued historic peace accords between Israel and its neighbors and advanced the Vision for Peace Plan, which proposed a two-state solution and an economic recovery plan for a self-governed Palestinian state. In contrast, if elected, Harris will face the challenge of distancing herself from the Biden administration’s foreign policy, particularly its failure to deter global competitors—especially if Washington seeks a political solution in Ukraine. However, she cannot entirely separate herself from the previous four years, and her presidency will inevitably be judged through the prism of Biden’s decisions.

Indo-Pacific

Following decades of ‘forever wars,’ which have cost the US an estimated \$8 trillion and claimed the lives of over 900,000 people, there has been an ongoing struggle over the direction of Republican foreign policy since President Trump’s first term. This debate is primarily between *primacists*, who advocate for a robust US presence around the globe; *prioritizers*, who recognize the limits of America’s finite resources and argue for a more strategic focus on key regions; and *restrainers*, who support a more isolationist approach to international relations. A second Trump presidency is expected to align closely with prioritizer influencers, who advocate for Washington to focus on securing the Indo-Pacific in response to escalating US-China strategic competition, while reducing US involvement in Europe to prioritize resources and attention on the Asia-Pacific theater.

A Trump administration would connect securing the Taiwan Strait to strategy of ‘deterring China.’

Advisers such as former Trump national security officials Elbridge Colby and Robert O’Brien view the Indo-Pacific as central to US national interests, given that the region accounts for

60 percent of global GDP and nearly half of all container ships traverse the Taiwan Strait. If China were to attempt a forcible reunification with Taiwan, which produces up to 90 percent of all advanced semiconductors, the seizure of semiconductor facilities or blockades of shipping routes could result in severe supply chain disruptions. Trump's national security team views Taiwan, which US General Douglas MacArthur famously called an 'unsinkable aircraft carrier,' as the 'key issue for US military deterrence against the Chinese Communist Party in terms of strategy and symbolism,' according to Stephen Yates and Adam Savitt. A Trump administration would connect the goal of securing the Taiwan Strait to a broader strategy of 'detering China from using military force against the United States and its allies and partners, and developing the capabilities and concepts to counter Chinese actions across the spectrum of conflict,' as outlined in the first Trump Administration's U.S. Strategic Framework for the Indo-Pacific.

Biden Administration's inconsistent approach led to increased reliance on Chinese supply chains.

On the other hand, a Kamala Harris presidency would likely continue many of the inconsistent policies established by President Biden's national security team. There are no indications

that a Harris administration would address the risks of continued dependency on China for rare earth elements and critical minerals, as it might remain influenced by the environmental lobby advocating for strict restrictions on upstream mining. The Biden Administration's inconsistent approach led to increased reliance on Chinese supply chains for essential components such as solar panels and electric vehicle batteries, exacerbating trade imbalances and empowering China's geopolitical influence. This dependency has also facilitated China's expansion of anti-US alliances, with strategic partnerships forming between China and nations like Russia and Iran. Consequently, a Harris administration would face the challenge of addressing these adverse effects while managing the legacy of policies that inadvertently bolstered China's global position and weakened US strategic interests.

Regardless of whether Trump or Harris wins in November, the next US President will prioritize the stability of the cross-Strait status quo as a central element of America's Indo-Pacific strategy. This will include neither supporting any Taipei declaration of *de jure* independence, nor allowing Beijing to forcibly reunify with Taiwan, either militarily or through coercion. This will necessitate enhancing Taiwan's defense capabilities to deter Chinese aggression and strengthening regional alliances with Japan and Australia to maintain a balanced power

dynamic. The next president also will need to deepen commercial ties in the Indo-Pacific, to prevent PRC hegemony as well, strengthening the Biden Administration’s “trade lite” Indo-Pacific Economic Framework.

Europe

The next US president’s primary focus in Europe will be ending the Russo-Ukrainian War and potentially leading an overhaul of Europe’s existing security architecture. The Commission on the National Defense Strategy, noting China outpacing America’s military modernization and the decline of the U.S. industrial base, has suggested an additional \$10 trillion in defense spending over the next decade. With the Commission recommending tax hikes and entitlement cuts to offset this increased spending, any effort by either candidate to implement these changes is expected to face domestic backlash. An April 2024 poll found that a plurality of Americans surveyed believe the U.S. government spends too much (28%) on military and defense, compared to too little on social security (45%), infrastructure (43%), and health care (40%).

Under Trump’s second presidency, Europe would assume greater responsibility for its own security.

During a second Trump administration, US foreign and defense policies would likely be shaped by the recognition of finite economic and defense resources. Trump’s White House would be expected to challenge the irrational optimism of neoconservatives and neoliberal internationalists regarding US military capabilities, which his advisers believe is a disservice to Washington’s allies and partners, particularly regarding NATO membership promises for Ukraine and others. Under Trump’s second presidency, Europe would likely be compelled to assume greater responsibility for its own security. US forces stationed in Europe would likely be redeployed to the Indo-Pacific, resulting in a reduced American footprint in Europe, with the primary US contribution to NATO being its nuclear umbrella. Republican prioritizers argue that America’s inability to bolster its military presence in the Indo-Pacific stems from Europe’s failure to share more of the defense burden. They emphasize that it is in Europe’s best interest to assume greater responsibility for its own defense, as America might swiftly withdraw its forces from the region—regardless of Europe’s security situation—to address Indo-Pacific conflicts if they arise. There is near unanimity among Trump’s prioritizer-dominated foreign policy team that America’s European allies must take on more responsibility for both Ukraine’s

immediate aid and long-term reconstruction. Any political solution related to Ukraine that freezes NATO expansion or includes a partition of Ukraine would likely involve continuing to arm Ukraine and securing binding security guarantees from select NATO partners. While Harris has pledged to “stand strong with Ukraine and our NATO allies,” offering scant details to the American public on what this means, her recognition of the growing limits to U.S. power may not differ greatly from Trump’s team. Her national security adviser, Philip Gordon—a former State Department official and committed transatlanticist—is described by *the Financial Times* as skeptical of America’s ability to influence global events and cautious about linking foreign policy to idealistic goals. Gordon has stated that the “transatlantic alliance will require both a U.S. president who recognizes its value and Europeans who are able to overcome their own internal divisions and commit to an equal partnership.” Rebecca Lissner, Deputy National Security Adviser to Vice President Harris, also questions America’s ability to rely on military power and existing institutions to support the oft-invoked “rules-based international order.”

Significant questions remain about Washington’s approach to normalizing relations with Russia.

Beyond ending the conflict in Ukraine and setting priorities for America’s defense spending and forward positioning, significant questions remain about Washington’s approach to normalizing relations with Russia. Robert O’Brien, President Trump’s former national security adviser and a potential candidate for secretary of state if Trump wins the election, has remarked that Moscow’s “no limits friendship” with Beijing “will not end well for the Russians.” He has advocated what former *Wall Street Journal* reporter Bob Davis has termed a “reverse Kissinger,” with O’Brien expressing a willingness to “explain to the Russians that it’s not in their best interests to be so cozy with [China],” once the Russian invasion of Ukraine is resolved. Philip Gordon, described as a “full-throated supporter of the U.S. effort to defend Ukraine,” was once optimistic about warmer ties with Russia during his time in the Obama Administration and has shown a willingness to “negotiate with autocratic regimes.”

Global Trade

Donald Trump’s running mate, U.S. Senator J.D. Vance (Ohio), has stated that U.S. wage losses are attributable to the growth of China as an export power, declaring, “we will... stop the Chinese Communist Party from building their middle class on the backs of American citizens.” U.S.

skepticism on trade supports Vance's viewpoint and has worsened over the previous two presidential administrations, with 59 percent of those polled in a July 2024 Pew Research Center survey responding that the United States has lost more than it has gained from increased trade with other nations. An August 2024 Cato Institute survey found that only 15 percent of Americans feel China practices fair trade with the United States. When respondents were asked if they would prefer American businesses to manufacture and make everything needed, rather than relying on foreign imports, 58 percent of those polled responded that they prefer domestic manufacturing.

Only 15 percent of Americans feel China practices fair trade with the United States.

Economic populism is the dominant trade philosophy in the United States and is not expected to revert toward free trade dogma anytime soon. The Washington Consensus of the 1990s and early 2000s, with its support for free trade, foreign direct investment, and subsidy-reduction policies, is dead and buried. In its place is broad, bipartisan support for the use of subsidies to bolster US competitiveness, restrictions on both inbound and outbound capital flows from/to foreign trading partners

and limiting import dependency to help strengthen domestic supply chains. Essentially, former President Trump and Vice President Harris are two sides of the same coin on trade policy, with the former president supporting "America First" economic nationalism, while the vice president pursues "polite protectionism" aimed at supporting and strengthening the middle class. US economic competitors likely see very little difference in the trade agendas of both candidates, with a Chinese academic calling Trump and Harris "two bowls of poison for Beijing."

Harris is expected to continue renewed talks with Brussels for a "green steel deal."

Trump's trade strategy includes objectives to close the trade deficit, such as weakening the US dollar to help increase U.S. exports, and continuing an ongoing economic denial strategy vis-à-vis China, including threats to end permanent normal trade relations (PNTR) for China. Additionally, the former president's strategy to secure supply chains includes investments in upstream mining and downstream processing of rare earths, along with aiming to deregulate the economy, including increasing domestic semiconductor production by exempting chip manufacturing

from environmental review. Harris, meanwhile, is expected to continue the policy of tariffs enacted during the Biden Administration, including renewed talks with Brussels for a “green steel deal” with the European Union for targeted steel imports. If elected, the vice president is expected to continue supporting environmental, social, and governance (ESG) policies, including the requirement for companies to disclose “climate-related risk” with US regulators, as well as the use of subsidies to bolster American industries, similar to the CHIPS and Science Act and the Inflation Reduction Act. As the global trade system pivots toward multipolarity, with bifurcated technology sectors and competing economies of the sanctioned versus the unsanctioned, the next U.S. president will need to grapple with blowback from ongoing protectionist trade policies. These include PRC restrictions on rare earth elements, circumvention of existing U.S. sanctions policies, diversified trade routes, and alternatives to the SWIFT financial transaction platform.

Middle East/Conclusion:

The next US president will not only face challenges in the Indo-Pacific and Europe, along with the threats posed by a strengthened

Sino-Russian alliance, but will also need to help broker resolutions to the ongoing conflicts between Israel and its neighbors. As noted by this author previously, despite initial robust support from America, cracks are continuing to emerge in Washington’s stance toward Israel due to growing domestic political pressures and international discontent. A Harris administration, pressured by a progressive base critical of Israel, would likely support a ceasefire between Israel and Hamas—an objective the Biden administration has been unable to realize—while also backing a two-state solution. In meetings with Israeli Prime Minister Benjamin Netanyahu, Harris has previously attributed destabilization to “extremist settler violence and settlement expansion.” It is probable that her administration would use pauses in weapons sales to Israel as leverage to push for a ceasefire, similar to the Biden administration’s suspension of arms shipments to prevent Israeli Defense Forces from escalating in Rafah.

A second Trump administration would provide support to Israel’s efforts to weaken Tehran-backed proxy fighters, such as Hamas and Hezbollah.

In contrast, a second Trump administration would likely provide full support to Israel's efforts to weaken Tehran-backed proxy fighters, such as Hamas in Gaza and Hezbollah in Lebanon, as well as Shia factions in Iraq and Syria. Although Saudi Arabia has stated that it will not normalize ties with Israel without a Palestinian state, Trump would likely leverage his strong ties with the Saudi leadership to counterbalance Tehran's influence in the region. His national security team would likely seek to further strengthen alliances with other Gulf states to enhance regional stability, counter terror threats, promote economic cooperation, and secure energy interests. As the next administration navigates the growing China-Russia partnership in the Indo-Pacific and Europe, it must also contend with Tehran's and Moscow's influence in the Middle East, particularly regarding Iran. While sanctions have crippled Iran's economy, they have failed to deter its nuclear ambitions or prevent it from using proxies to strike at US interests and allies. Like the Biden and Trump administrations, the next president is unlikely to revive the Joint Comprehensive Plan of Action (JCPOA) without addressing Iran's ballistic missile program. However, an off-ramp for sanctions in exchange for International Atomic Energy Agency (IAEA) inspections might be a viable negotiation path.

Existing US policies have inadvertently driven China, Russia and Iran closer together.

As the shift toward multipolarity has demonstrated, sanctions alone often fall short of their intended goals, as they don't always force target nations to change their behavior. In fact, existing US policies have inadvertently driven China, Russia, and Iran closer together, creating a bloc of nations with mutual interests in defying American influence. Instead of reinforcing these alliances, Washington should adopt a strategic approach that undermines this growing cohesion—perhaps through diplomacy or selective engagement that strains the bonds between these nations. This approach should be paired with containment strategies aimed at preventing the expansion of Iranian, Russian, or Chinese influence in key regions like the Indo-Pacific, Central/Eastern Europe, and Middle East. Additionally, Washington must focus on bolstering its industrial base, revitalizing manufacturing, and reinforcing global partnerships. By strengthening economic and defense partnerships with like-minded nations, America can enhance its deterrence capabilities, positioning itself as a more robust and competitive global player. A fresh approach is critical. Continuing on the path of broad

sanctions risks cementing opposition coalitions, making it harder to isolate adversaries. Instead, a nuanced policy framework that exploits divergences between these powers will create opportunities for leverage while ensuring US leadership in maintaining global order.

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