



What a Harris presidency would mean for Europe

by Ian Bond and Luigi Scazzieri, 30 September 2024

A Harris presidency would signal continuity for transatlantic relations. But Europeans should not think they can turn back the clock to the pre-Trump era.

This November Americans face a choice between electing Kamala Harris and Donald Trump as president. A few months ago, when President Biden was still the Democratic candidate, the race seemed to be Trump's to lose, as Biden stumbled from gaffe to gaffe. But Biden's withdrawal from the race and the selection of his vice president to replace him has energised the Democratic Party. Polling analysis [indicates](#) that Trump and Harris have roughly equal chances of winning the presidency, making the race very uncertain. The outcome will depend on a few swing states, especially in America's mid-West.

As the CER set out in [a recent assessment](#), a second Trump presidency would be highly disruptive for transatlantic relations. Trump's trade policy, particularly his threat to impose a 10 to 20 per cent tariff on all imports into the US, would increase transatlantic tensions. Trump would take a highly confrontational approach towards China, pushing Europeans to align with US restrictions on trade and investment, and threatening sanctions if they do not. Trump's opposition to assisting Ukraine, his view of European NATO allies as free-riders on the US and his repeated questioning of whether he would defend NATO allies are another source of worry for Europeans. If Trump reduces assistance to Ukraine, that is very likely to push it into an unfavourable and unstable settlement, further emboldening Russia. Meanwhile, Trump's rhetoric on NATO will undermine the alliance's deterrent power.

A Harris presidency is much less threatening to Europeans. Harris has focused her campaign in large part on personal freedoms and the rule of law, trying to draw a sharp contrast with Trump's authoritarian tendencies and the Republican Party's increasingly restrictive views on issues such as reproductive rights. On foreign policy issues, Harris has taken a conventional line and her talk of respecting the rules-based international order is music to Europeans' ears. Harris promises broad continuity with Biden's approach on both security and trade. However, she has hinted at some differences, for example by not embracing Biden's framing of international politics as a contest between autocracies and democracies, and forcing countries to choose which camp to join.

While there is some speculation that Harris would prioritise relations with the Indo-Pacific region over those with Europe, her public positions and her circle of advisers do not point in that direction. Harris's

foreign policy team as vice-president includes her national security adviser, Philip Gordon, who worked in the Obama administration first on Europe and the former Soviet Union, and subsequently on the Middle East; her principal deputy national security adviser, Rebecca Lissner, who was the lead author of the Biden administration's [National Security Strategy](#); and her deputy national security adviser for strategic communications, Dean Lieberman, who has extensive Middle East experience. The Harris top team does not include an obvious China specialist. Her campaign website's (thin) foreign policy section devotes more space to the Middle East than either to Asia or Europe – but that may be more a matter of its salience to likely Harris voters than her own assessment of its importance. To the extent that one can see any common themes in her foreign policy interventions as a senator and then as vice-president, she seems to take a particular interest in human rights (whether in China, occupied regions of Ukraine, or Gaza) – showing consistency with her domestic focus on the rule of law.

Ukraine and European security

European supporters of Ukraine would be relieved by a Harris victory. Unlike Trump, she has been a stern critic of Russian president Vladimir Putin. Europeans would expect a Harris administration to be committed to supporting Kyiv in its struggle against Russia. But the extent of the support that Harris would or could provide in practice is unclear.

The US has been instrumental in shaping the Western response to the conflict. But, unlike many European countries, the US does not have – or does not perceive – an existential interest in Ukraine's victory or an existential threat in its defeat. As a result, it has emphasised avoiding a broader conflict with Russia, limiting its support for Ukraine. While some Europeans may hope that Harris will follow a different approach, there is little indication of that so far. Harris could be as cautious as Biden in providing Ukraine with advanced weapons and in restricting Ukraine's ability to use American weapons to strike Russian targets far behind the frontlines. Gordon, if Harris appointed him national security adviser in her administration, would probably share current national security adviser Jake Sullivan's overriding concern to avoid escalation that might result in NATO being drawn into direct conflict with Russia.

On the other hand, Harris would not want to run for re-election in 2028 with the millstone of 'losing Ukraine' around her neck. The result might be that the US would continue to do enough to prevent Ukraine's forces collapsing, but not enough to persuade Russia that it cannot win. The US would remain rhetorically committed to eventual NATO membership for Ukraine, but in practice would do nothing to advance the process of joining.

Even if Harris was inclined to be more forward-leaning than Biden, her ability to provide Ukraine with additional assistance would be constrained if the Republicans controlled one or both chambers of Congress. Therefore, even if Harris wins, it seems likely that Ukraine will be in a very difficult position. Europeans will have to increase their own support for Kyiv to enable it to hold something close to its current frontline.

A Harris presidency would be better news for NATO and European security than the return of Trump. Harris believes in the value of alliances to the US and she would undoubtedly emphasise her commitment to upholding NATO's mutual defence clause. The risk of the US withdrawing critical military assets from Europe would be much lower than under a Trump administration. Washington would maintain pressure on Europeans to raise their defence spending and their contribution to fulfilling NATO's new deterrence plans, but pressure would be soft and not coercive as under Trump. There would probably still be some tension over defence industrial matters: the US has consistently objected to

Europeans strengthening their defence industry through EU-level measures that direct funding to EU firms. Harris, too, is likely to push back against EU action that Washington sees as discriminatory against US defence suppliers.

There is a real risk that Europeans will feel they can afford to slow down their efforts to increase their defence spending, including through EU instruments. In many Western European countries there is already little support for higher levels of defence spending if this comes at the expense of higher taxes or lower social spending. But slowing down defence efforts would be a big mistake. First, building up European defence is a multi-year endeavour that needs sustained investment. Second, the bigger picture will not change: Russia will still be a grave threat, while competition with China will continue to demand a greater share of US military resources, leaving less for European security. Meanwhile, regardless of what Russia or China do, US isolationism, particularly among Republicans, may reshape America's relationship with the rest of the world.

The Middle East

When it comes to other security issues affecting Europe, the conflagration in the Middle East will be a significant item on Harris' agenda. So far, her main concern has been keeping the Democratic Party united. To do that she has taken on board some of the criticism of the left towards Biden's policy on the Gaza war, saying that she will support Israel but that more needs to be done to ease Palestinian suffering. That will only be possible if Harris proves more willing to put pressure on Israel to allow in more aid and to be more restrained in its use of force. Whether she will be willing to pursue such a policy is unclear, as many in the Democratic Party would oppose it. Trump has advocated for unconditional support for the hard-line policies of Israeli prime minister Benjamin Netanyahu. If Harris adopted a more balanced approach to the Israel/Palestine issue than Trump, that would bring US policy closer to that of most Europeans than it has been for some time.

Harris will also have to deal with the threat from Iran's nuclear programme, which has expanded dramatically over the past few years and might be able to produce a nuclear device with very little advance warning. There is little indication, however, of how she will try to engage Iran in negotiations over its nuclear programme. As Israel expands the conflict in the region from Gaza to Lebanon, increasing the risk of a wider Middle Eastern war, Europe will also face a number of threats that may be a lower priority for the US, including an intensified risk of radicalization and violent extremism, large-scale movements of refugees, and disruption to energy supplies from the Gulf and to shipping in the Red Sea.

China and tech

Europeans have become used to the fact that one of the few things Democrats and Republicans agree on is that China is, as the 2022 US [National Security Strategy](#) put it, "the only competitor with both the intent to reshape the international order and, increasingly, the economic, diplomatic, military, and technological power to advance that objective". The EU still [treats](#) China as a "a partner for cooperation, an economic competitor and a systemic rival" (even if the element of rivalry has grown more prominent, particularly in light of China's support for Russia in its war against Ukraine). Meanwhile, the US has already concluded that China's rise is inherently threatening to US interests, and is increasingly focused on constraining Beijing and denying it access to Western technology.

Europeans looking for clues as to how Harris's China policy might differ from Biden's, if at all, have relatively little to go on. She has never visited China, and as vice-president her public [statements](#) on it

have broken no new ground – criticizing Chinese behaviour in the South China Sea and the Taiwan Strait, but [posting](#) on social media after a brief meeting with Chinese leader Xi Jinping in 2022 that “we must maintain open lines of communication to responsibly manage the competition between our countries”. In her August 22nd [speech](#) accepting the Democratic Party nomination, she said only that she would make sure “that America – not China – wins the competition for the 21st century, and that we strengthen – not abdicate – our global leadership”.

Harris and her vice-presidential candidate, Tim Walz, are likely to take a similar position to Biden on human rights in China. As a senator, Harris co-sponsored bi-partisan bills promoting democracy in Hong Kong and imposing sanctions on officials violating human rights there and in China’s western Xinjiang region, where Beijing has brutally repressed the indigenous Uyghur people. Walz, who taught at a school in China in 1989 and has been a [frequent visitor](#) to the country, has also been a fierce critic of its human rights record in Hong Kong, Xinjiang and Tibet (he visited Tibet as part of a congressional delegation in 2015, and met the Dalai Lama in 2016). European firms suspected of turning a blind eye to the use of Uyghur forced labour in their supply chains or otherwise benefiting from human rights abuses in China could expect more pressure from a Harris-Walz administration than from a Trump-Vance administration. According to his former national security adviser John [Bolton](#), Trump told Xi that he was right to build detention camps for the Uyghurs.

US partners in Europe may also find that, as with the Biden administration, Harris would keep the pressure on them not to supply advanced technology to China, or to allow China to acquire sensitive information by investing in European tech firms. The Dutch and German governments have both been [put under the spotlight](#) by the current administration in an effort to get them to prevent the export of various goods and services involved in producing semiconductors; it is unlikely that Harris would give them any relief. The main difference will be in the extent to which the next administration would be willing to play hardball with its European allies: under Trump, the US [threatened](#) to cut off Germany’s access to US intelligence if it allowed the Chinese telecoms giant Huawei to provide it with 5G equipment. A Harris administration would be more likely to use softer means of persuasion, including through continued dialogue in the EU-US Trade and Technology Council.

Trade

Harris and her team have been critical of Trump’s protectionist trade proposals, which would involve imposing 60 per cent tariffs on imports from China, and 10-20 per cent tariffs on imports from everywhere else. But Harris is no free-trader – she is likely to take a similar approach to that of Biden. The Trump-era tariffs on European steel and aluminium imports would continue be suspended, but not abolished, and negotiations on removing trade irritants would grind on. Harris would be very likely to follow Biden’s example of competing with China through a mixture of targeted tariffs (for example on electric vehicles) and subsidies for domestic producers. Both sorts of measures would pose problems for Europe. US tariffs would force Europeans to impose tariffs of their own in fear of a diversion of Chinese exports to European markets; while subsidies would threaten to attract investment to the US and away from Europe.

Conclusion

A Trump presidency would herald a very turbulent period for transatlantic relations, and most Europeans, except for Trumpian leaders like Viktor Orbán, will be relieved if Harris prevails. Her presidency would in most respects represent continuity with Biden’s. But even a Harris victory would not save Europeans from

difficult choices over how to support Ukraine, or alter America's gradual tilt away from Europe (though it may slow it temporarily). Neither would it change America's emphasis on industrial policy and protecting US manufacturing at the expense of free trade. Whoever wins the election on November 5th, Europeans will need to build up their ability to defend themselves with less American help, and learn to navigate greater economic competition.

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