In the Shadow of Ballots

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Geopolitical instability has broadened to include diverse political and regional issues. The United States' (US) internal dynamics have shifted significantly, leading to a self-focused, isolationist foreign policy. For the European Union (EU), its alliance with the US remains vital to its foreign and security strategies. The US presidential election on November 5, 2024, will profoundly impact EU security, influencing defence strategies and geopolitical priorities. The EU must adapt its approach in response to these developments.

Shifting Currents: Transatlantic Ties and Eastern Frontlines

The election outcome will shape transatlantic relations, NATO's future, and Europe's defence strategy. NATO relies heavily on US support, and any

shift in American policy will significantly affect its role. If Kamala Harris wins, she is likely to back NATO and advocate for stronger US-EU cooperation. Harris has stressed the need for such cooperation to address global challenges. However, her policies might diverge from Biden's administration in two areas: *China's prominence and European security*.

Harris may continue supporting Ukraine but could also pressure Europe to assume greater responsibility for its defence, aligning with the EU's strategic autonomy goal outlined in its **Strategic Compass**. Conversely, if Trump is re-elected, a different trajectory is expected. His isolationist "America First" stance could lead to reduced US military presence in Europe, weakening NATO and favoring a more transactional approach. During his previous term, Trump pressured European allies to increase defence spending, shifting the focus to bilateral relations. According to NATO's 2023 Defense Expenditure report, Poland met the 2% GDP target, while Germany lagged. A Trump administration might further strengthen bilateral ties with high-spending countries like Poland while penalizing those with lower contributions. This shift could challenge the EU's collective defence strategy and push Europe to seek independence in its security policies. Additionally, Trump's aggressive stance on China could pressure EU countries to align with US policies, creating tensions within the EU.

Mirrors and Shadows

The Middle East

EU security is closely tied to developments in the Middle East, where US influence is critical. A Trump administration would likely take a hardline approach toward Iran, as seen with his 2018 withdrawal from the **Joint Comprehensive Plan of Action (JCPOA)**. Such actions could heighten regional instability, affecting Europe's energy security and triggering refugee flows. The EU has struggled with migration management in the past, and renewed crises could strain its border policies.

On the other hand, a Harris administration might pursue diplomatic engagement, potentially re-entering the JCPOA to reduce tensions. This approach could allow the EU to enhance energy security, aligning with the **REPowerEU** plan to diversify energy sources. A cooperative US approach under Harris could bolster EU efforts to reduce its dependency on Russian gas.

Internal EU Challenges

Populism and nationalism within the EU are linked to US political trends. Viktor Orbán of Hungary's Fidesz party is a leading figure in Europe's nationalist movement, often opposing EU institutions. Orbán's support for Trump during the 2020 elections aligns with his anti-immigration stance and criticism of EU integration efforts.

Populism is spreading across Europe. In Poland, Italy, and France, nationalist parties are gaining momentum. The **European Council on Foreign Relations (ECFR)** reports record polling levels for these parties, with Italy's Brothers of Italy, led by Giorgia Meloni, winning the 2022 elec-

tions. Furthermore, migration remains a key issue; Eurostat data shows that asylum applications in 2022 were the highest since 2015, fueling calls for tighter border controls.

A Trump victory could embolden nationalist leaders like Orbán, legitimizing their stance and challenging EU unity. This may disrupt EU-wide defence and migration policies, weakening the **EU's Strategic Compass** aimed at enhancing collective security. Conversely, a Harris administration could strengthen EU-centric forces, encouraging multilateralism and cohesion within the bloc.

And the China Equation

China's expanding influence poses challenges for US-EU relations. The EU's 2019 **Strategic Outlook** defines China as a partner, competitor, and rival, reflecting a balanced approach. The Biden administration, however, has focused on competition, particularly in technology and trade. The **Inflation Reduction Act (IRA)** and US strategies to reduce dependency on Chinese supply chains aim to curb China's influence.

While the US advocates for economic decoupling, the EU's economic ties with China remain deep. In 2022, EU-China trade reached €860 billion, making China the EU's largest trading partner. Germany, Europe's economic powerhouse, hesitates to align with US policies due to its substantial business interests in China. Discrepancies also arise in technology policy; despite US pressure, only 11 EU member states have enacted restrictions on Chinese telecom investments.

A Trump administration would likely push for aggressive decoupling, forcing the EU to choose between economic ties with China and alignment with the US. Such a stance could strain the transatlantic alliance, as many European states may resist compromising their economic interests. A Harris presidency, in contrast, might seek a more cooperative approach, balancing competition without economic fallout, allowing the EU to navigate its relationship with China more flexibly.

Finding Clarity in an Uncertain Landscape

As the US election draws near, the EU faces a critical juncture. The election outcome could either strengthen or challenge transatlantic ties, reshape NATO, and influence Europe's approach to security. To ensure resilience, the EU must prepare for scenarios where it may need to reduce reliance on NATO and build its capabilities through strategic autonomy initiatives.

Investing in defence, fostering unity, and adapting policies are essential for the EU to navigate the uncertain future and safeguard its interests, regardless of the evolving political landscape across the Atlantic.