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# GEOPOLITICAL IMPLICATIONS OF THE 2024 US ELECTIONS

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## Summary

The 2024 US Elections are taking place at a pivotal moment in global geopolitics. We are witnessing wars and potential conflicts on multiple fronts, an ascendant and assertive Global South, and a highly divisive political environment in the West that is juggling with the question of what the future path needs to be. The path that the US citizens choose through their votes in the upcoming national elections will have significant ramifications for the global geopolitical landscape.

### Geopolitical priorities of the two Presidential candidates

There seem to be two camps within the current US administrative and governing circles (or the Deep State) – one prioritises confronting Russia, while the other prioritises confronting China in the geopolitical competition. Notably, both camps believe that China is the main geopolitical rival of the United States; however, the first camp believes that Russia must be the immediate concern and must be decisively dealt with before it shifts its attention to the more formidable rival, China. The second camp believes Russia is distracting the United States from focusing on the most critical matter of China's emergence as the global superpower and the primary challenger to the US hegemony. Harris is likely to only marginally differ from President Biden on foreign policy matters and is expected to be a light version of her predecessor. However, given that she does not share Biden's visceral feelings towards Russia and Putin in particular, she might very well sway to the camp of those who prioritise confronting China. The Middle East is a distant third on the list of priorities, which is why the Biden administration is irritated when Netanyahu tries to escalate the situation in the Middle East and distract the attention of the US from what the overwhelming majority in the current US administration appears to consider are the more pressing matters. With Donald Trump, on the other hand, the Middle East is the top priority, primarily driven by the demands of his patron, Dr Miriam Adelson. While Trump has displayed a solid

desire to contain the rise of China and maintain US supremacy, he has shown little enthusiasm for the NATO project to counter the Russian threat to Europe.

### **Palestine-Israel conflict and the prospects of a wider regional war**

There is a sharp contrast in the potential geopolitical implications of the US election outcome on the issue of the Palestine-Israel conflict and the prospects of a wider regional war, particularly against Iran and/or its regional allies and proxies. While each camp bends head over heels to emphasise its iron-clad commitment to Israel, its security and its ability to defend against external threats, primarily emanating from Iran and its regional allies and while the end result of this bi-partisan support is an unrestricted supply of weapons and technology to Israel; there are substantive differences in what the end goals of each are in the region. When Donald Trump talks of support for Israel, he is alluding to the incumbent prime minister, Benjamin Netanyahu and his extreme right-wing allies, their ideology and ambitions for the region. The camp of Kamala Harris, on the other hand, continues to follow the policy of the Biden administration of supporting the liberal faction in Israel that is increasingly opposed to the policies and actions of Benjamin Netanyahu and his allies.

Dr Miriam Adelson, by far one of the largest donors pledging more than [\\$100 Million](#)<sup>1</sup> to Trump's presidential campaign, is a fervent Israeli supporter and argues that the people who criticise Israel or offer only qualified support are "dead to us". After the death in Jan 2021 of her billionaire husband, Sheldon Adelson, who used his fortune to support conservative policies and politicians in the United States and Israel, Dr Miriam took over the baton and continued his policies. He was a vigorous supporter of Donald Trump and Benjamin Netanyahu which further bolsters the argument of Trump's alignment with Netanyahu. An essential pillar of Trump's Middle East policy will be building further on the

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<sup>1</sup> [Who Are the Biggest Donors to Trump and Harris? - The New York Times \(nytimes.com\)](#)

Abraham Accords. As Dr Miriam highlighted, this was one of Trump's significant successes during his earlier Presidency. Senator JD Vance, too, suggested that building the alliance of Arab nations with Israel as a counterweight against Iran and its allies would be the optimal strategy for the region. During his address to the Joint Congress, Benjamin Netanyahu spoke extensively about this.

The Arab nations are keenly aware of the difference in the priorities between the two camps and will likely decide on their future course of action based on who wins in the White House. They will likely interpret a Trump win as leading to the United States refocusing its attention on the Middle East. In contrast, a win by Harris would be construed as the United States drifting further away from being concerned with the affairs in this region and shifting its attention towards the more geopolitically important Eurasian region. The rapprochement between Iran and the other Arab nations that started during the Biden administration will likely accelerate in that second scenario. Still mostly sitting on the fence watching the geopolitical game, Saudi Arabia and Turkey will invariably drift further towards the BRICS+ project in this scenario. China and Russia are likely to get more involved in the affairs of this region, and the fanaticism of the far-right in Israel will likely be restrained, with Benjamin Netanyahu almost certainly out of the picture.

### **Russia-Ukraine war and the future of NATO**

There is a good chance that NATO will not survive another Trump Presidency. If elected, Donald Trump has promised to end the war in Ukraine before he takes office, and a part of his peace plan will be the promise of neutrality for Ukraine—in other words, Ukraine will never become part of NATO. President Putin also talks of a sustainable new Eurasian security framework, which he will invariably create after due discussions with Donald Trump and his allies in the BRICS that will allay fears and concerns among the European nations of the imperial ambitions of Russia and remove the Casus belli for the existence of NATO itself. The emergence of Kamala Harris as a strong contender, who appears to say all the right

things (from their perspective) about Europe and the Ukraine project, has been a massive relief to these European leaders. Kamala Harris has criticised Trump, who she says had threatened to abandon NATO and who has no inhibitions in engaging with dictators such as Putin.

Within the Democrats, the current US administration, the Pentagon and the incumbent leaders among the West European allies, there appear to be two factions emerging – one that is calling for an escalation of the war in Ukraine and the other that wants an off-ramp. If those in the camp of escalation prevail, the escalation will be endless, starting with the use of long-range missiles for an attack in Russia, to ultimately the deployment of NATO ground troops in Ukraine, thereby initiating a world war against a nuclear-armed country, Russia, that considers that war as an existential one, that it needs to win at all costs.

### Countering the rise of China and BRICS+

Kamala Harris is likely to continue the policies of Biden and the current Deep State, which are aligned with the Democrats to check the rise of China and BRICS. Sanctions against the adversaries of the United States, building alliances that will work to counter their rise, grooming proxies to carry out the dirty work and using coercive actions and policies against the countries that do not join them will be the modus operandi of Kamala Harris' Presidency, a continuation of Biden's or rather that of the existing Deep State. While countries such as the Philippines and Taiwan are the proxies analogous to Ukraine in the conflict with Russia, the equivalent of the EU (the allies in the fight against Russia) in the context of conflict with China are the AUKUS and QUAD groupings. Continuing the legacy of Biden, Kamala Harris will approach global diplomacy through the prism of 'friends and allies' versus 'foes and enemies'. 'Friends and allies' are the countries that have accepted the hegemony of the United States and completely aligned their policies to the United States' foreign policy interests. Biden-Harris team combines 'carrot and stick' in dealing with the allies while the carrot is either completely missing or is

too insignificant with Trump. This is essentially what Trump means when he talks about the 'America First' principle: the 'carrots to the allies' should instead be used to bolster and enhance the domestic situation in the United States. This effectively means that the 'allies and friends' of the United States are left with the only option of grudgingly accepting the dictates of the United States and are either entirely sidelined or marginalised in any diplomatic endeavour that Donald Trump undertakes, much to their chagrin. These are the 'carrots of allies' that Donald Trump alludes to when he refers to the lucrative deals of the traditional US allies (lucrative for the allies at the cost of the US), including Canada, Mexico, Japan, South Korea and Europe, that he finds disagreeable. He touts the implementation of a principle of reciprocity in international trade and security agreements, alleging that these allies have been taking the United States on a free ride for all these years.

Unlike Kamala Harris, who sees Taiwan as a valuable proxy against its conflict with China, Trump looks at Taiwan as nothing more than a useful bargaining chip in a negotiation with China. Donald Trump's approach towards diplomacy is largely transactional. The taboos of the Biden administration of zero or very little engagement with the leaders of adversarial countries, who they refer to with names such as 'dictators' and 'autocrats', do not exist for Donald Trump.

While Kamala Harris's camp relies on sanctions and increasingly confiscates USD-denominated foreign assets of adversarial countries, Donald Trump is more wary of this strategy. He believes that the reckless use of sanctions pushes the countries to find alternatives to US\$ and undermines the hegemony of USD, as has been the case with Russia and Iran. He believes the sanctions must be used judiciously, and the Biden administration has over-used this tool for too long. Instead, Donald Trump plans to use tariff and trade as the primary negotiating tool, leveraging the strong consumer market in the United States and using access to this lucrative market as a negotiating tool with both friends and foes. Kamala Harris is sceptical of using tariffs, which she argues will increase inflationary pressures on domestic consumers.

Overall, Trump is likely to be more flexible in his approach, while Kamala Harris will be too rigid, hardline and ideological, looking at global diplomacy through the binary prism of ‘us versus them’ and ‘good versus evil’. The latter will only amplify and accelerate the process of geopolitical divergence and increase the probability of armed conflicts. Trump is not entirely incorrect when he says there is a high chance of a world war under the presidency of Kamala Harris, while his approach, at least in the Russian and Chinese theatres, is likely to minimise the chances of an armed conflict significantly. The rise of China and BRICS and the move towards multipolarity is inevitable. A Trump presidency will likely lead to deals that will ensure that the BRICS develops in a manner that is not too adversarial to the interests of the United States.

## Palestine-Israel Conflict and the Prospects of a Wider Regional War

There is a sharp contrast in the potential geopolitical implications of the US election outcome on the issue of the Palestine-Israel conflict and the prospects of a wider regional war, particularly against Iran and/or its regional allies and proxies. While each camp bends head over heels to emphasise its iron-clad



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The deepening rift in the Israeli society between the extreme right and liberal factions was on display on the eve of the Oct 7<sup>th</sup> incursion. The increasingly acrimonious debate had spilled over onto the streets of Tel Aviv in the form of unprecedented protests against what the liberal faction saw as an attempt at the usurpation of power by Netanyahu and his faction, undermining the independence of the judiciary and the liberal and democratic Western values of Israel. Even then, the Biden administration expressed their concerns about the developments under Netanyahu, throwing their weight behind the liberal faction and the protesters.

While the October 7<sup>th</sup> incursion by Hamas into the Israeli territory shook Israeli society and temporarily united them against the external threat, the hiatus was only brief, and the rifts have started growing and manifesting themselves again on the streets. Benjamin Netanyahu's position has undeniably strengthened following the Oct 7<sup>th</sup> attack and the thumping support he received in the US Congress when he addressed the joint session amidst a record-breaking number of standing ovations. However, the opposition to what the liberal faction in Israel sees are his factions' eschatological and extreme religious views have also become more vociferous and are visible in the raging protests in the Tel Aviv streets against Netanyahu's opposition to a ceasefire deal in Gaza that could result in the return of the

Israeli hostages home. They are also visibly manifest in the written and verbal protestations from senior IDF, Mossad and Shin Bet officials, positions typically occupied by the Ashkenazi Jews who lean towards the Western liberal values against the policies of the Prime Minister and his extremist allies. On July 22nd 2024, senior officials of Israel's security establishment, including prominent ex-high-ranking members of IDF and Mossad, sent a [letter<sup>2</sup>](https://s3.documentcloud.org/documents/24947951/israeli-former-national-security-officials-and-business-leaders-blast-netanyahu-ahead-of-his-speech-to-congress.pdf) to the US Congress speaker and other leaders, complaining that Netanyahu is “an existential threat to the state of Israel”, citing among other reasons, Netanyahu's actions that are “dragging Israel and the USA into an endless war with Hamas, Hezbollah and potentially with other enemies in the region”. Three primary motivations for these belligerent actions of Netanyahu mentioned in the letter were Netanyahu's selfish desire to prolong his political life, delay his prosecution for crimes that the letter claims amount to “unprecedented legal conflicts of interest within the State of Israel” and pandering to the wishes of his “messianic partners” alluding, of course to the likes of Ben Gvir and Smotrich. Netanyahu's camp is energised by the rhetoric of the hardline Rabbis who speak of greater Israel, openly preaching complete annihilation of all Palestinians and plunging Israel into a regional war, beginning Armageddon and hastening the coming of their Messiah. Their actions and strategies are not driven by any political and military rationale but by a blind ideology that leads them into a blind alley, at the end of which, they believe, they have been promised a Divine victory. Donald Trump's son-in-law, Jared Kushner, along with a significant portion of his electorate – the Zionist Christians and his biggest funders are from this camp. The Zionist Christians support Zionism despite their antipathy towards Jews themselves because they believe, based on their faith, that this will hasten the second coming of Christ. Unlike Benjamin Netanyahu, whose political career is effectively hostage to the support of the extreme right ideologues, including Ben Gvir, Smotrich and their militant extremist

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<sup>2</sup> <https://s3.documentcloud.org/documents/24947951/israeli-former-national-security-officials-and-business-leaders-blast-netanyahu-ahead-of-his-speech-to-congress.pdf>

settlers, the liberal faction tends to be more pragmatic in their approach. The tired and weary IDF army can see through Netanyahu's plans to pursue his long-held aspirations to drag Israel into a wider regional war against Iran and its allies in the region, a war that they see as unwinnable and would lead to the destruction of Israel. They had warned as much in their letter addressed to the US Congress on the eve of Netanyahu's visit, warning the US to be wary of Netanyahu's madness, which they perceived as an existential threat to their country. A former IDF Major General, Gadi Shamni, who served in the Gaza division, said, "Our soldiers are winning every tactical encounter with Hamas, but we are losing the war, and in a big way." The stark contrast between the Trump and Harris camps could not have been more evident, with the former displaying his strong support and warm friendship with Netanyahu and rebuking Kamala Harris for refusing to meet Netanyahu and for her remarks when she said that she "will not be silent" about the deaths of "far too many innocent civilians" in Gaza as a result of Israel's military campaign. Trump described her remarks as "disrespectful to Israel" and termed her as a radical, a term he has often used against her. While many consider Harris' remarks as a tactical concession to ease the concerns of the Progressives, who have shown increasing dismay towards Biden's handling of the Gaza conflict, it appears to be a strategic positioning against Netanyahu's manner of handling the war and his broader policies in general, echoing the concerns of the liberal camp within Israel. Biden's administration did not exactly mince words about their desire for a regime change in Israel when one of their senior-most senators and ardent Israeli supporter, Chuck Schumer, all but stated as such, following their rhetoric with actions including inviting the Benny Gantz, Netanyahu's rival for a high profile meeting in the United States while denying Netanyahu's earlier request for a visit to the White House. Kamala Harris has practically inherited the policies and rhetoric of the Biden administration on the issue of the Gaza-Israel conflict and is largely expected to continue to align with this strategy.

Benjamin Netanyahu has gone to great lengths to provoke a wider war in the region against Iran and its regional allies, a war in which he is confident of stringing the US and his Western allies along. The unprovoked attack on the Iranian embassy in Syria, the assassination of Hezbollah leader Fuad Shukr in the heart of Lebanon, the assassination of Ismael Haniyeh, the chief negotiator in the peace deal from the Hamas side, who was a guest in Iran, on the eve of the swearing-in ceremony of the new Iranian President and the most recent attack on Lebanon involving the explosions of communication devices (pagers) are examples of these attempts. Both Iran and the US (under Biden and, by extension, Harris) are extremely wary of starting a wider conflagration in the Middle East and have gone to great lengths to restrain Netanyahu and use all means to do the damage control with Iran following these provocative actions of Netanyahu. The IDF, too, has been extremely wary of going down this dangerous path of escalation, apparent in the strong opposition from Israel's Defense Minister, Yoav Gallant, who has had an extremely tense relationship with Benjamin Netanyahu on this subject and whom the latter has threatened to sack multiple times for hindering attempts to escalate the war through a ground invasion of IDF troops into Lebanon.

Donald Trump, who calls himself the strongest ally that Israel has ever had, says that the Jews who vote for Democrats are betraying their identities. Regarding Harris, he has said, "I actually don't know how a person who's Jewish can vote for her, but that's up to them." He enjoyed a warm and friendly relationship with Benjamin Netanyahu during his Presidency, but the relations were strained in 2020 when Netanyahu endorsed Biden's win in the Presidential election. In the immediate aftermath of the Oct 7<sup>th</sup> incursion, he blamed Netanyahu and the intelligence agencies in Israel for the failure to prevent the attack but has since retreated from these criticisms. Donald Trump had also been urging Israel for several months to end the war in Gaza as quickly as possible. On the eve of his meeting with Netanyahu at his private club and residence, Mar-a-Lago, during Netanyahu's US visit to address Congress, Trump

had said in an interview on Fox News about Israel's onslaught on Gaza, "It can't continue to go on like this. It's too long. It's too much." In these remarks, he was essentially echoing the concerns of the military experts in Israel and the US, who were concerned about the unsuitability of the Israeli society to engage in a drawn-out conflict that has negative repercussions for Israel, militarily, economically and diplomatically. He elaborated this stance further when he said in late July 2024, "Israel has to handle their public relations. Their public relations are not good. And they've got to get this done fast because the world — the world is not taking lightly to it. It's really incredible." However, unlike Harris' camp, which hopes to constrain Netanyahu and prevent the situation in the Middle East from getting out of hand, Trump believes that peace should be achieved through much greater force and strength, including in Gaza. While both the Trump and Harris camps call for an early end to the Israeli campaign in Gaza, Harris's camp calls for a ceasefire, while Trump believes a ceasefire would only offer Hamas a much-needed break to rearm itself. What he calls for is a decisive and forceful attack by Israel and a quick win in Gaza, and he blames the Biden-Harris camp for tying the hands of Israel and preventing them from achieving this victory. When a reporter asked Trump if he needed to rebuild his relationship with Netanyahu if he won the presidential election in November, he responded, "We don't have to. We've had a good relationship." Benjamin Netanyahu clearly understands that he will find an excellent ally and friend in Trump who will be in lockstep with him to achieve every aspiration Netanyahu has for the future trajectory of Israel, even if they may have minor disagreements on how these goals could be achieved. Harris, on the other hand, will strengthen the hand of his domestic opponents in Israel and create several hurdles in his path or, worse, try to effect a regime change in Israel.

Donald Trump insists that the Oct 7<sup>th</sup> incursion by Hamas would never have happened if he had been the President because of his show of strength and his ability to choke the Iranian economy. This also hints at the future policies he will likely deploy in this region. The JCPOA agreement reached between the

collective West and Iran under the Obama administration, much to Netanyahu's displeasure, was torpedoed by Trump during his Presidency. Now, he criticises the Biden administration for having given breathing space to Iran's economy by gifting them USD 300 Billion, which he alleges was used by Iran to strengthen its allies in the region and precipitated the current situation in the Middle East where Israel is facing military threats from significantly enhanced adversaries all backed up by an economically stronger Iran. Trump is likely to launch a vigorous economic offensive against Iran and its allies in the region to choke off their economies to the extent the US can do so. This sharply contrasts with his strategy with the rest of the world, where he believes that the sanctions are proving counter-productive as they are undermining the strength of the US Dollar and pushing countries to look for alternatives.

Dr Miriam Adelson, by far one of the largest donors pledging more than [\\$100 Million](#)<sup>3</sup> to Trump's presidential campaign, is a fervent Israeli supporter and argues that the people who criticise Israel or offer only qualified support are "dead to us". After the death in Jan 2021 of her billionaire husband, Sheldon Adelson, who used his fortune to support conservative policies and politicians in the United States and Israel, Dr Miriam took over the baton and continued his policies. He was a vigorous supporter of Donald Trump and Benjamin Netanyahu which further bolsters the argument of Trump's alignment with Netanyahu. Sheldon Adelson was also a close friend of Netanyahu, gave significant monetary support to Netanyahu's successful campaign in 1996 and launched a right-wing newspaper in Israel in 2007 that critics call Netanyahu's mouthpiece. The Adelsons reportedly gave more than [\\$218 million](#)<sup>4</sup> to Republican and conservative causes in the 2020 US elections. They gave strong backing to Trump's bid in 2016, who fulfilled some of Adelson's cherished goals for Israel, including moving the US embassy to Jerusalem. Dr Miriam, during a recent 'Fighting Antisemitism' event attended by Donald Trump, briefly

<sup>3</sup> [Who Are the Biggest Donors to Trump and Harris? - The New York Times \(nytimes.com\)](https://www.nytimes.com/2020/09/01/us/politics/trump-donors.html)

<sup>4</sup> <https://www.reuters.com/article/business/sheldon-adelson-casino-mogul-who-made-big-bets-on-trump-and-netanyahu-dies-at-idUSKBN29H1SM/>

listed the other promises for Israel that Donald Trump fulfilled in his Presidency, including recognising Jerusalem, withdrawing from the Iran nuclear deal, bringing peace between Israel and Arab nations, and recognising Israeli sovereignty on the Golan Heights. Sheldon Adelson, a hawkish hardliner on Israel, is [widely believed](#)<sup>5</sup> (among those close to him) to have helped advance many of these policy decisions. In one of his addresses to the Israel-American Council, he said, “So Israel won’t be a democratic state. So what?” “I think God didn’t say anything about democracy,” he continued. “He didn’t talk about Israel remaining as a democratic state.” These words must have been music to the ears of the extreme right-wing allies of Netanyahu and a shock to the liberals. His longtime friend and president of the conservative Zionist Organization, Mort Klein, said about him, “He was always against a Palestinian state, and he’d make that clear with whomever he met with in government, be it in the US or Israel.” His opposition to the idea of two-state was so strong that he broke with the Bush administration over its promotion of this solution for Israel. Dr Miriam Adelson, who is likely to shape the foreign policy of Donald Trump on the issue of Israel, is likely to continue with the policies of her husband, as confirmed by David M. Friedman, a longtime confidant of the Adelson couple, who said, “I’m pretty sure that her North Star going forward is going to be what she thinks Sheldon would have done if he were still alive.” In a leaked transcript of Miriam Adelson’s testimony to Israeli police, she is reported to have said, “If Iran gets nuclear weapons and Israel is wiped out, I’ll be to blame because I’m not defending Bibi.” This demonstrates the importance Dr Miriam attached to her support for Benjamin Netanyahu which is undoubtedly now shared by Donald Trump. There were rumblings, notably denied by her spokesman, that Dr Adelson wants Donald Trump to support an annexation of the West Bank by Israel. This policy would be in sharp contrast to the official position of the Biden-Harris camp, who have been expressing their displeasure on the settler violence and illegal land grabbing in the West Bank, calling for the Israeli

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<sup>5</sup> [Backed by deep pockets, Adelson made his mark with an unwavering focus on Israel | The Times of Israel](#)

government to bring the situation under control. There are rumours that the Biden administration even considered imposing sanctions on the prime instigators of unrest in the West Bank, including Smotrich and Ben Gvir, but backed off for fear of reprisals from the Israeli lobby.

While Biden, who repeatedly calls himself a Zionist and often touts that if there were no Israel, “we would have to invent one”, is as loyal to Israel as a President can be, his commitment to the Ukrainian project received greater priority under his administration. The West found a formidable foe in Russia in the Ukraine conflict with a vast military-industrial complex and decided to channel all their resources to this front at the cost of weakening their positions elsewhere. As Senator JD Vance mentioned in his speech at the Quincy Institute for Responsible Statecraft, the United States has limited resources and needs to choose and prioritise. He quoted his conversation with an Israeli minister who effectively said that the war in Gaza got prolonged as a direct result of the United States prioritising the war in Ukraine. Biden continues to believe that Ukraine should be supported by its Western allies against Russia until victory is achieved, a rhetoric that Harris repeats in her election campaign while calling for a ceasefire in Gaza. Trump and his team, on the other hand, are unequivocal that the United States has done more than its fair share in Ukraine and should not go any further while it must do everything in its power to ensure a quick and decisive victory for Israel in the Gaza war.

Another noteworthy point in the foreign policy framework that Senator JD Vance elaborated on during his talk at the Quincy Institute is his disparaging remarks against the liberal narrative of “spreading democracy,” which he suggested does not resonate with the American people or their interests and often leads to other consequences that conflict with American interests and moral leanings. The Americans, the majority of whom are Christians, would rather, according to him, prefer that the United States engage with the external world to promote the domestic interests of its people while using the moral framework of defending and advancing the Judeo-Christian civilisation. In many respects, this



framework aligns with that of Benjamin Netanyahu's extreme-right wing in Israel, further bolstering the theory of the alignment of the Trump camp with this faction.

An essential pillar of Trump's Middle East policy will be building further on the Abraham Accords. As Dr Miriam highlighted, this was one of Trump's significant successes during his earlier Presidency. Senator JD Vance, too, suggested that building the alliance of Arab nations with Israel as a counterweight against Iran and its allies would be the optimal strategy for the region. During his address to the Joint Congress, Benjamin Netanyahu spoke extensively about this. He touted 'the Abraham Alliance' as a security alliance to counter the threat of Iran, just as NATO was conceived to counter the threat of Soviet Russia. He described this alliance as a "natural expansion of the Abraham Accords", clearly indicating his desire for a continuation of rapprochement efforts between Israel and its Arab neighbours while extending the mandate to incorporate the military/security angle to these efforts. This comes on the backdrop of an offer by UAE (one of the four Abraham Accord countries) to lead a multinational force to help restore security in post-conflict Gaza. UAE made this offer on the eve of the second meeting of the Palestinian factions in Beijing that resulted in the historic Beijing Declaration. Notably, the UAE did not have any representation in the closing ceremony of the Beijing Declaration, which had representations from its Arab neighbours, including Egypt, Algeria, Saudi Arabia, Qatar, Jordan, Syria, Lebanon, Russia, and Türkiye. UAE Assistant Minister for Political Affairs and Special Envoy of the UAE Minister for Foreign Affairs Lana Nusseibeh later clarified that UAE was willing to undertake this role assuming that the US would continue to lead and there is a "reformed and legitimate Palestinian Authority, led by an empowered Palestinian prime minister". This is in direct contradiction to the Beijing Declaration, which rejects the unilateral approach (US leadership) and states that all the 14 factions have affirmed that the Palestinian Liberation Organisation (PLO), which is likely to have representations from all the factions (including Hamas), is the sole legitimate representative of all Palestinian people. We also know that

Netanyahu's proposal on the alliance was likely discussed and agreed upon with the Biden administration, too, since, according to Axios, a day after Nusseibeh made his statement, the UAE Foreign Minister hosted the Biden administration's Middle East envoy and Israeli Minister of Strategic Affairs to discuss details of plans of the day after.

While UAE is undoubtedly one of the potential 'Arab partners' that Netanyahu alluded to for the Abraham Alliance, the choice of the alliance's name suggests Bahrain, Morocco and Sudan; the other three Abraham Accord countries would also be on this list. Netanyahu alluded to the April 14<sup>th</sup> success, when more than half a dozen countries collectively countered Iran's missile attack on Israel, as a glimpse of the success of this potential alliance. This might provide further hints as to the other potential Arab partners that Netanyahu has on his mind. In the wake of the April 14<sup>th</sup> event, the US officials had cited cooperation from various Arab countries in intelligence gathering and the active participation of Jordan and Saudi Arabia in countering the attack. We also have reports from Axios that refer to a secret meeting between Israel's top general and his counterparts from Bahrain, UAE, Saudi Arabia, Jordan and Egypt to discuss regional security cooperation in early Jun 2024.

The idea of an Arab NATO is not new either. As the geopolitical competition and security concerns against Iran's aggressiveness in the Gulf region began taking precedence over the Palestinian issue, whose importance started waning gradually in the 2000s, the Sunni countries began to gravitate towards Israel against a common Iranian threat. The de facto alliance that emerged in 2017 and received greater attention in February 2019 at the US-led Middle East conference in Warsaw, which Benjamin Netanyahu, in a now-deleted tweet, described was the outcome of a meeting with Arab leaders to reach a common interest of war with Iran and Mike Pompeo described as a global coalition against Iran, only to later backtrack under pressure from European peers. In fact, Netanyahu's alliance is basically a rehash of the 'Middle East Strategic Alliance' that was announced by the then US President Donald Trump

during his visit to Saudi Arabia in May 2017 as a security alliance of GCC states along with Egypt, Jordan and led by the United States against Iran. From the United States perspective, this mechanism allows the US to partly disengage from the region and focus on other geopolitical priorities while not leaving a vacuum for Russia and China to fill in.

While “the Abraham Alliance” is likely to receive bipartisan support in the United States, the intensity of support from the two factions will differ. For the Trump camp, this will be one of the cornerstones of their foreign policy, while for the Harris camp, this will figure much lower down the list of foreign policy objectives. When Trump says Israel will cease to exist after 1 or 2 years if Harris takes office, he is sending a clear signal that his administration will give a very high priority to this region. It echoes the rhetoric that the Harris’ camp uses for Ukraine, suggesting that it is an existential war for Europe against Russia, for which Ukraine is only the beginning of its Imperial ambitions. Trump, in essence, claims that Israel deserves the attention of the United States with the same sense of urgency that the Harris-Biden team imply when they refer to the situation with Russia. The Arab nations are keenly aware of the difference in the priorities between the two camps and will likely decide on their future course of action based on who wins in the White House. They will likely interpret a Trump win as leading to the United States refocusing its attention on the Middle East. In contrast, a win by Harris would be construed as the United States drifting further away from being concerned with the affairs in this region and shifting its attention towards the more geopolitically important Eurasian region. The rapprochement between Iran and the other Arab nations that started during the Biden administration will likely accelerate in that second scenario. Still mostly sitting on the fence watching the geopolitical game, Saudi Arabia and Turkey will invariably drift further towards the BRICS+ project in this scenario. China and Russia are likely to get more involved in the affairs of this region, and the fanaticism of the far-right in Israel will likely be restrained, with Benjamin Netanyahu almost certainly out of the picture.

For the oil producers in the Middle East, a Trump victory will be welcome, not least because of Trump's denial of climate change and opposition to the move away from fossil fuels. This is a double-edged sword, however, since while Trump's policies are likely to halt or at least slow the global pressure to invest in alternate energy sources; he is also expected to significantly ramp up the exploration and production of oil and gas domestically, that will have negative ramifications on the global oil market. While Harris has made a U-turn on her policy to ban fracking, as she has done on several other policy positions, she is nevertheless a strong supporter of actions needed to tackle climate change and will continue to support initiatives to reduce reliance on fossil fuel.

In conclusion, Iran will be rooting for a Harris victory and will use her presidential term to consolidate its regional position. Benjamin Netanyahu understands the stakes and is rooting for Trump's win. A ceasefire in Gaza will be a significant foreign policy victory for Harris, alleviating the concerns of the Progressives in the party and potentially ending the rift. This is why he has all but ruled out any possibility of a ceasefire before the election. On the other hand, he is doing everything he can to provoke a broader conflict in the region despite strong warnings from the US not to escalate tensions. Iran is fully aware of these machinations of the Netanyahu administration and consequently has been exercising enormous restraint against Israel, to the dismay of Netanyahu and, increasingly, even its allies in the region, who are getting impatient with Iran's reluctance to retaliate against the blatant provocations of Israel. There were reports that in a recent meeting of Iran with its regional allies, members of its allies exchanged heated words with Iran for not retaliating and showing weakness and even walked out, only to return after some time. Netanyahu is aware of these pressures on Iran from its allies to act, and its latest escalation in Lebanon, purportedly to return the Israeli citizens to the North, is aimed at further increasing the pressure on Iran and forcing its hand in acting in a reckless manner that Netanyahu can then use as the pretext to expand the war. This is a war of nerves for Iran and its regional

allies against Israel. A wider war in the Middle East will significantly boost Trump's chances of winning the election and force Harris to focus her campaign on this sensitive issue, an issue that might end up being the Achilles' heel for her Presidential election bid.

## Russia-Ukraine war and the future of NATO

Joe Biden is a foreign policy veteran who has fixed visceral feelings about world leaders, global policy drivers, and the role of the US in world affairs. His experience from the Cold War era has played an essential role in shaping his foreign policy direction and convictions, especially concerning Russia and Europe. His statements on the indispensability of the American role in global affairs and the like often appear to be anachronistic and lack an acknowledgement of the changing geopolitical tide in global affairs, which signals the advent of multipolarity. There seem to be two camps within the current US administrative and governing circles (or the Deep State) – one prioritises confronting Russia, while the other prioritises confronting China in the geopolitical competition. Notably, both camps believe that China is the main geopolitical rival of the United States; however, the first camp believes that Russia must be the immediate concern and must be decisively dealt with before it shifts its attention to the more formidable rival, China. The second camp believes Russia is distracting the United States from focusing on the most critical matter of China's emergence as the global superpower and the primary challenger to the US hegemony. Joe Biden, who appears to have a visceral hatred towards President Putin of Russia, certainly seems to belong to the second camp, likely due to the prejudices from his prior experiences serving in the US administration, and this has precipitated the extremely hawkish foreign policy of the United States towards Russia during his Presidency. The Middle East is a distant third on the list of priorities, which is why the Biden administration is irritated when Netanyahu tries to escalate the situation in the Middle East and distract the attention of the US from what the overwhelming

majority in the current US administration appears to consider are the more pressing matters. With Donald Trump, on the other hand, the Middle East is the top priority, primarily driven by the demands of his patron, Dr Miriam Adelson. This precedence of the issues in the Middle East was clearly manifested during his presidency when he promptly checked all the boxes of Israel-related requests that were made of him. Based on his rhetoric of ending the war in Ukraine, it can be reasonably concluded that Trump does not share the enthusiasm of Biden on the issue of hostility with Russia. He was also very visibly sidestepping a direct response to the question of whether he supports Ukraine winning the war during the Presidential debate with Kamala Harris. His Vice-Presidential nominee, JD Vans, has also been very vocal against any further support for the war in Ukraine, claiming that the United States has contributed more than its fair share to this war and must cease to do any further. JD Vans has also been very critical of the European allies, chastising them for behaving as client states and depending on the United States while undermining their economies, deindustrialising themselves by adopting self-defeating green policies rather than taking initiatives to enhance their global competitiveness and acting as true allies to the United States in a mutually beneficial relationship, referring to Israel as one which does so. Donald Trump pays no heed to the deep feelings of hatred among the current leaders of Western European allies against Putin when he refers to Putin in favourable terms and admires Hungarian leader Victor Orban, knowing fully well how much the other leaders in Western Europe, the traditional allies of the United States, resent him. The European leaders, of course, are well aware of the lack of enthusiasm in Donald Trump for his transatlantic allies and had consequently received the prospect of Donald Trump winning in the wake of the disastrous debate with Biden (disastrous for Biden, of course) with immense consternation. They had instituted committees to develop strategies for dealing with a Trump win and started taking urgent and desperate steps in conjunction with the Biden administration to make the Ukraine project Trump-proof. The emergence of Kamala Harris as a strong contender, who appears to say all the right things (from their perspective) about Europe and the Ukraine project, has been a

massive relief to these European leaders. Kamala Harris has criticised Trump, who she says had threatened to abandon NATO and who, along with his Republican supporters, had delayed the “vital” \$60 Billion military aid for Ukraine for several months and all but greenlighted Russia to invade Ukraine and other European countries.

Foreign policy is not among Kamala Harris's strengths, to say the least, unlike her predecessor, and her Vice-Presidential candidate, Governor Tim Walz, does not score high in this regard either. In general, she is likely to only marginally differ from President Biden on foreign policy matters and is expected to be a light version of her predecessor. However, one issue where there is a likelihood of a substantial shift is the priority between Russia and China. Given that she does not share the visceral feelings of Biden towards Russia and Putin in particular, she might very well sway to the camp of those who prioritise China and consider Russia as a distraction. From the geopolitical competition standpoint, this would indeed be deemed the more pragmatic approach from the realist perspective. The European nations who are keenly aware of this future possibility have been trying to align themselves with this anti-China stance, talking about the expansion of NATO to include countries who could be potential allies against China (such as Japan and Australia), in effect, conflating the two into one and ensuring that the US continues to be fully engaged with the NATO alliance.

As the recent elections in various European countries such as the UK, France, Germany and Italy have shown, populist parties are on the rise in Europe. A common stance almost all of them appear to share is apathy or even, in some cases, antipathy towards the Ukraine project, which they believe is distracting their political elites from the more pressing domestic issues of high inflation, rampant and unchecked immigration and lowering standards of living. These developments are expected to significantly undermine the NATO project, which will be amplified further with Donald Trump’s election win.

There is a good chance that NATO will not survive another Trump Presidency. If elected, Donald Trump has promised to end the war in Ukraine before he takes office, and a part of his peace plan will be the promise of neutrality for Ukraine—in other words, Ukraine will never become part of NATO. Given the decisive victory of Russia, which Trump has referred to as a war machine, on the Ukrainian battlefield on all the active frontlines and the significant attrition suffered by Ukraine, both in terms of manpower and weapons, it is inconceivable that Russia would make significant concessions from the latest peace deal that President Putin has offered, that effectively talks of annexation of the four Ukrainian oblasts - Donetsk, Kherson, Luhansk and Zaporizhzhia, into Russia, demilitarisation of Ukraine and guarantees of neutrality of Ukraine. Europe will view this as an embarrassing defeat against Russia and a betrayal by the United States. President Putin also talks of a sustainable new Eurasian security framework, which he will invariably create after due discussions with Donald Trump and his allies in the BRICS that will allay fears and concerns among the European nations of the imperial ambitions of Russia and remove the Casus belli for the existence of NATO itself. While the above-stated scenario is an extreme case, likely though, the actual situation might be one of a weaker and less effective NATO.

Within the Democrats, the current US administration, the Pentagon and the incumbent leaders among the West European allies, there appear to be two factions emerging – one that is calling for an escalation of the war in Ukraine and the other that wants an off-ramp. The tussle between the two camps has been on display in recent days when one of the flagbearers of the first camp, Sir Kier Starmer, Prime Minister of the UK, egged on by the US Secretary of State, Anthony Blinken, paid a visit to the US for a high-level meeting with the US President Biden and his top officials to get the US approval for the use of Storm Shadow missiles, the long-range missiles that the UK has provided to Ukraine, for strikes in the Russian territory, not the newly annexed regions but the Russian mainland that the world unanimously agrees is part of Russia. Sir Kier Starmer proceeded with this despite the urging from his



foreign office to refrain from such a provocation and despite the strong opposition from his other West European allies to engage in similar provocative actions. German Chancellor Scholz, for instance, has completely ruled out the use of Taurus missiles by Ukrainian forces, referring to such an act as a significant escalation and an action that will get Germany directly involved in a war with Russia, echoing the statements of Russian President Putin on the issue. French President Emmanuel Macron, who was himself making belligerent statements about escalating the war in Ukraine and suggesting ideas of sending the French troops to Ukraine, has since backed off from the aggressive stance after being disciplined by the other Western allies and after realising the public sentiments within the country, who through their voting have conveyed a strong opposition to further involvement of the country in the Ukraine war. France and Italy joined Germany in distancing themselves from the UK in allowing Ukraine to use long-range missiles to attack Russian territory, wary of the consequences that might drag them into a direct confrontation with Russia. Russia expelled six British diplomats from Russia as a pre-emptive warning. While the UK Prime Minister was on his way to Washington, Putin sent out a warning in the following words, “The West would be directly fighting with Russia if it allowed Ukraine to strike Russian territory with Western-made long-range missiles. It is not about allowing the Ukrainian regime to strike Russia with these weapons or not. It is about deciding whether NATO countries are directly involved in military conflict. If this decision is made, it will mean nothing less than the direct participation of NATO countries, the United States, and European countries in the war in Ukraine.” The US National Security Advisor, Jake Sullivan, appeared to be the person who was creating the hurdle for Biden to approve. Of course, Sullivan has the strong support and backing of the entire Pentagon, including the Secretary of Defence, Lloyd J Austin, who, only a few days earlier, had rejected any significant military benefit to Ukraine from long-range missile attacks into Russia. The defence establishment in the United States is clearly taking Putin’s red line seriously, and is wary of testing his resolve and falling into the trap of the hawks in the West. The ultimate intention of these Western

hawks, goaded by none other than Ukrainian de facto leader Zelensky himself, is to drag NATO, primarily the United States, into a direct war with Russia. They see this as the only chance to reverse the dismal situation on the battlefield. Biden's anger at not being able to approve this escalation for the time being was very much visible in the meeting. While Biden kicked the can down the road and said that further discussions on the subject would be taken up in the upcoming UN General Assembly meeting, there are no signs of Sir Kier Starmer or Zelensky relenting on this project, as the former began a campaign to try and get this Western European allies to agree with him while the latter has ramped up drone attacks on Russia to prove the feasibility and effectiveness of his proposed winning strategy (to attack deep inside Russia). NATO Secretary General Jens Stoltenberg, in his interview with the Times, downplayed Putin's warnings against the use of long-range ballistic missiles over pre-2014 Russian territory. The article said, "He (Stoltenberg) rejected Putin's warning that using the missile would be a 'red line' that would put Russia 'at war' with NATO." "He (Putin) has declared 'red lines' many times before, and he has not escalated, including by directly involving NATO allies in the conflict," the publication quotes Stoltenberg as saying. It is noteworthy that the rhetoric by the West that they have crossed several Russian redlines earlier without any consequence is misleading. The only Russian red line that the West had crossed in the past few years was trying to get Ukraine into NATO, and Russia promptly responded by launching its special military operation. All other alleged 'redlines' are the ones that the West attributed to Putin, but Putin never made any such claim. Launching long-range missiles into the Russian motherland is a 'red line' that President Putin has confirmed several times and will be the first one that the West will cross since the start of the Ukraine war in Feb 2022. Putin will invariably respond to this escalation, and the response will not be asymmetric through an ally in the Middle East or elsewhere but a direct one which can be attributed to Russia unambiguously.

The United Kingdom has invested heavily in the Ukrainian war, both financially and politically. The UK will view a Ukrainian defeat as a defeat of the UK itself against an adversary, Russia, against which the United Kingdom has had a historic animosity. President Biden, with his visceral hatred against Russia and Putin, in particular, cannot leave a legacy of a Presidency that handed a decisive victory to Russia and consolidated Russia's and Putin's dominance over the Eurasian region. Zelensky's political and even physical survival rests on continuing the war against Russia. All his Western allies have been pulling back from their support for the war due to their challenging domestic financial situation and an increasing realisation among them that the Ukrainian war, for all practical purposes, has been lost. If the events are allowed to their natural course from here, Russia will have a decisive victory over Ukraine in a year, as it grounds the Ukrainian military and artillery in the aggressive attrition war and, in the end, dictate the terms of surrender for Ukraine. If those in the camp of escalation prevail, the escalation will be endless, starting with the use of long-range missiles for an attack in Russia, to ultimately the deployment of NATO ground troops in Ukraine, thereby initiating a world war against a nuclear-armed country, Russia, that considers that war as an existential one, that it needs to win at all costs.

## Countering the rise of China and BRICS+

Asia has historically been the dominant civilisation, with its contribution as high as 60%, even up until the early part of the 19<sup>th</sup> century. However, due to early Western industrialisation and imperialism, Asia

lost its dominance, precipitating a decline in its economic contribution to as low as 20% by the end of the Second World War. Then came the era of what economists term the natural phenomena of **economic convergence**. The Asian countries started catching up with their Western counterparts, beginning with the rise of Japan and the Asian tigers and later followed by the rise of China, Russia and India. The economic activity has once again started gravitating towards these Asian civilisations who, despite their growing financial clout and a desire for a more assertive role in influencing global geopolitical and geoeconomic discussions, increasingly find themselves sidelined and excluded from the international political and economic affairs and subject to hostile behaviour from the West that is increasingly resenting their challenge to the Western hegemony. These and other emerging powers have come together under the umbrella of BRICS+, a club of disparate emerging nations gradually transforming into an alliance of the Global South. The group is still in its formative years, with Russia and China at its vanguard, shaping its governance, agenda, scope, scale and vision. The upcoming BRICS+ meeting in Kazan, Russia, in October 2024 will be a pivotal moment in the development of this grouping, but the most significant development that will decide its future course will be the outcome of the 2024 US elections.

BRICS+ is a result of two phenomena that have occurred simultaneously during the past few decades but have taken a particularly sharp turn in recent years – economic convergence and geopolitical divergence. The natural phenomenon of economic convergence, which, in its earlier years, was, as a matter of fact, facilitated by the United States that promoted free trade and globalisation with its proponents in the West essentially declaring the end of borders in the early part of the 21<sup>st</sup> century and an irreversible shift to the concept of a “flat earth.” The free exchange of goods, services, and technology accelerated the economic convergence of countries such as China and India, whose exports to the West burgeoned. When China joined the World Trade Organisation in December 2001, the then

US President said, "Today the House of Representatives has taken a historic step toward continued prosperity in America, reform in China, and peace in the world. . . it will open new doors of trade for America and new hope for change in China. "It was sometime during the second decade of this century that the United States became alarmed at the rise of potential economic powerhouses that could challenge the hitherto undisputed full-spectrum dominance of the United States since the end of the Cold War. Since then, the United States began to resent the economic rise of these countries and has started embarking on strategies to contain their influence and growth. In March 2023, Xi Jinping, President of the People's Republic of China, said, "Western countries led by the U.S. have implemented comprehensive containment, encirclement and suppression against us, bringing unprecedented severe challenges to our country's development." In essence, the United States has been trying to slow down the process of economic convergence by creating barriers and restrictions for these countries in the areas of trade and technology. These actions have included attempts to exclude the countries from the supply chains, imposing sanctions on trade with the countries and, in extreme scenarios, regime change attempts and military actions against them. These actions have led to the second phenomenon – the geopolitical divergence that has, in effect, led to the emergence and elevation (in importance and urgency) of non-Western alliances, such as SCO and BRICS+. BRICS+, in particular, is posturing itself as the leader of the new world order. It is not that the Global majority was happy with the world order imposed by the US hegemony, but they had no other choice. They had to either accept the rules-based world order that was designed to perpetuate US hegemony or face the wrath of the US Deep State, including economic and political isolation, or, in the worst-case scenario, a regime change.

For the first time since the advent of unipolarity, the United States finds itself in competition against an economic juggernaut in China and a military juggernaut in Russia, with massive industrial capacity, access to natural resources both at home and through its strategic relationships with resource-rich

nations, a formidable military-industrial complex, an aspiration and increasingly demonstrated capability to acquire the latest and most advanced technology and displaying the finest diplomacy that the combined West has nearly forgotten. The Deep State in the United States, comprised of the intelligence agencies, think tanks, media, the military-industrial complex, corporate giants, banking and financial conglomerates, who employed their combined might against Russia in the war that they waged through their disposable proxy, Ukraine, failed to achieve success against it. The sanctions war that was supposed to turn the Russian Ruble to rubble instead boomeranged and destroyed the economies of the European Union. As the recent economic report by Mario Draghi suggests and as the financial reports of top corporates in the continent, such as Volkswagon, make apparent, the European Union is going through an irreversible deindustrialisation, having decoupled itself from the Russian economy, under the dictates of its benefactor, the United States. All the wonder weapons of the collective West, including Abraham tanks, Storm Shadow missiles, ATACMS missiles and others, have proved to be of no avail against the formidable Russian military might, while the Russian hypersonic missiles and multi-layered defence system found no match or response from the West.

The Global South has keenly watched these developments and, for the first time, sees that BRICS can create a viable alternative platform to face down Western hegemony's coercions and protect them from the wrath of the collective West for daring to take independent and sovereign decisions and actions that are in the interest of their nations rather than that of the hegemon. The Biden administration, aligned with the philosophy and approach of the Deep State, continues to double down on their approach despite the apparent setbacks. They have been working on proxies to engage China and have achieved some success with the Philippines, which has been taking a hostile stance against its largest trading partner, China, which is a self-defeating strategy against its own interests. While the United States has adopted a strategy of 'strategic ambiguity' on the issue of Taiwan with China, Biden has, on four

instances, violated this by stating that the United States would defend Taiwan in the event of an attack by China. While countries such as the Philippines and Taiwan are the proxies analogous to Ukraine in the conflict with Russia, the equivalent of the EU (the allies in the fight against Russia) in the context of conflict with China are the AUKUS and QUAD groupings. However, to the utter dismay of the United States, India has not been toeing the line of the United States; instead, it is stressing its sovereignty by adhering to a foreign policy of 'strategic autonomy' and is, consequently, under immense pressure from the United States to get back in line. Kamala Harris is likely to continue the policies of Biden and the current Deep State, which are aligned with the Democrats. Sanctions against the adversaries of the United States, building alliances that will work to counter their rise, grooming proxies to carry out the dirty work and using coercive actions and policies against the countries that do not join them will be the modus operandi of Kamala Harris' Presidency, a continuation of Biden's or rather that of the existing Deep State.

Unlike the case of Russia, which the United States and the collective West made the mistake of underestimating as a "gas station masquerading as a country", they hold no such delusions about China, which they regard as a formidable adversary. One of the responses of the United States to this emerging threat, from both the Democrat and Republican camps, has been to go back to the classic tried-and-tested model that economists have termed the 'industrial policy'. President of the Information Technology and Innovation Foundation, Rob Atkinson, defines industry policy as "a set of policies that try to affect the outcome of some particular industry or industries." The three typical ways of implementing this policy are imposing tariffs on imported goods, providing tax incentives to favourable industries and direct investments.

The Western efforts, primarily led by the United States, to slow or preferably reverse the economic convergence process have bi-partisan support in the US Congress and will invariably continue under the

new administration irrespective of who comes to power. Both presidential candidates go to great lengths to demonstrate how tough they are against China, while the other candidate is not. US Vice President Kamala Harris stated during the Presidential debate, “Trump invited trade wars. Trump ended up selling American chips to China that helped them improve and modernise their military and basically sold us out.” Any approach demonstrably able to slow the economic convergence of China, especially in matters of relevance to security, such as advanced technologies in AI, will find overwhelming bipartisan support in the US Congress. A case in point that provides a useful template for the expected approach of Kamala Harris’ administration towards the new green industries or other strategically important ones (EV, solar panels, chips, AI technology etc) is the ‘CHIPS Act of 2022’ (Creating Helpful Incentives to Produce Semiconductors for America) that President Biden signed into law on August 9th, 2022. This act states that the government will intervene in the chip industry, give billions of dollars to private companies, and create an environment that facilitates semiconductor production at home. This legislation offers \$ 52.7 billion in direct investment along with several tax incentives to reinvigorate the semiconductor manufacturing industry in the United States. A significant chunk of this amount (\$ 40 Billion) is earmarked to relocate the fabs (semiconductor factories) to the United States. While the United States continues to dominate the higher end of the supply chain involving chip design, the majority of the lower end of the chain that deals with manufacturing, assembly, and testing has moved to China, South Korea and Taiwan over the last 20 years, with China’s share of the pie increasing at an accelerating pace, rising from nearly 0 in 1990 to 15% in 2020, a consequence of the natural phenomena of ‘economic convergence’ discussed above. The US share, on the other hand, has fallen from 37% to 12% in the same period. An ardent Democrat supporter of the CHIPS act, Senator Warner, who sees this as a national security issue, said about this act, “If we don’t do this, I don’t think there will be another chip manufacturing facility built in America.” The US buys 90% of its advanced chips from Taiwan, a geopolitical hotspot and a significant point of contention with China. Notably, this CHIPS act received



rare bi-partisan support from the US Senate. The Republicans, who espouse the free market and generally mistrust the government's ability to spend money better than the free market, nevertheless supported this bill as they considered it an exception. Republican Senator of Texas, John Cornyn, for instance, highlighted the vast amount that China is spending on this sector, using it as a justification for why the US needs to do so too to keep up with China and to compete.

Kamal Harris is expected to continue the legacy of President Joe Biden and approach global diplomacy through the prism of 'friends and allies' versus 'foes and enemies'. 'Friends and allies' are the countries that have accepted the hegemony of the United States and completely aligned their policies to the United States' foreign policy interests. The United States, under this model, exercises 'zero' tolerance for any divergence from the 'expectations' of the United States and uses incrementally tougher means to coerce its partner to 'get in line' if it does indeed sway. Italy, for instance, had to excuse itself from participating in the 'Belt and Road' project of China, despite this being against the interest of Italy, and Scholz had to respond with a smile when Biden threatened to blow up the Nord Stream pipeline in front of him, a threat that was promptly executed later. Donald Trump is no different with his 'allies', demanding them to make additional contributions to NATO and rebuking the Democrats for even allowing Germany to acquire the Nordstream pipeline with Russia in the first place. However, Biden's approach, expected to be inherited by Vice President Kamala Harris, combines 'carrot and stick' while the carrot is either completely missing or is too insignificant with Trump. This is essentially what Trump means when he talks about the 'America First' principle: the 'carrots to the allies' should instead be used to bolster and enhance the domestic situation in the United States. This effectively means that the 'allies and friends' of the United States are left with the only option of grudgingly accepting the dictates of the United States and are either completely sidelined or marginalised in any diplomatic endeavour that Donald Trump undertakes, much to their chagrin. These are the 'carrots of allies' that Donald Trump

alludes to when he refers to the lucrative deals of the traditional US allies (lucrative for the allies at the cost of the US), including Canada, Mexico, Japan, South Korea and Europe, that he finds disagreeable. He touts the implementation of a principle of reciprocity in international trade and security agreements, alleging that these allies have been taking the United States on a free ride for all these years. Another carrot of the European allies that he has expressed strong resentment towards was the significantly greater support of the United States in the Ukrainian war, and he vowed to leave the entire mess of defeated Ukraine for Europe to handle. In the case of Taiwan, for instance, he said that Taiwan had benefited immensely from effectively taking over the manufacture of chips and needed to consider the United States as an insurance company and shell out a lot more to support its defence. Unlike Kamala Harris, who sees Taiwan as a valuable proxy against its conflict with China, Trump looks at Taiwan as nothing more than a useful bargaining chip in a negotiation with China. Donald Trump is a businessman who views America too as a company for which he needs to win big deals. His approach towards diplomacy is largely transactional. The taboos of the Biden administration of zero or very little engagement with the leaders of adversarial countries, who they refer to with names such as ‘dictators’ and ‘autocrats’, do not exist for Donald Trump. He had no inhibitions even to engage in direct meetings with the Taliban leaders, a point that Kamala Harris used promptly against Trump disparagingly. In his earlier presidency, Donald Trump demonstrated the ability to engage in direct diplomacy with the leaders of adversarial nations, including Putin, Kim Jong Un, and Xi Jinping, and he has often spoken about them in a very respectable manner. He will invariably engage with them again bilaterally in his new term and try to get deals done with them that address the primary goals that he has touted for his country – getting industries and manufacturing to the United States, reducing the trade deficit and preventing the de-dollarization process underway.

While Kamala Harris's camp relies on sanctions and increasingly confiscates USD-denominated foreign assets of adversarial countries, Donald Trump is more wary of this strategy. He believes that the reckless use of sanctions pushes the countries to find alternatives to US\$ and undermines the hegemony of USD, as has been the case with Russia and Iran. He believes the sanctions must be used judiciously, and the Biden administration has over-used this tool for too long. Instead, Donald Trump plans to use tariff and trade as the primary negotiating tool, leveraging the strong consumer market in the United States and using access to this lucrative market as a negotiating tool with both friends and foes. It should be noted that Trump wishes to use tariffs as a tool to achieve other ends, but tariffs are not necessarily the ends in themselves (although they may be in some cases). His earlier term was marked with aggressive tariffs, especially against China, that initiated the trade wars, and he threatened to have a repeat of that strategy in his second term across the industries. Kamala Harris is sceptical of using tariffs, which she argues will increase inflationary pressures on domestic consumers.

Overall, Trump is likely to be more flexible in his approach, while Kamala Harris will be too rigid, hardline and ideological, looking at global diplomacy through the binary prism of 'us versus them' and 'good versus evil'. The latter will only amplify and accelerate the process of geopolitical divergence and increase the probability of armed conflicts. Trump is not entirely incorrect when he says there is a high chance of a world war under the presidency of Kamala Harris, while his approach, at least in the Russian and Chinese theatres, is likely to minimise the chances of an armed conflict significantly. The rise of China and BRICS and the move towards multipolarity is inevitable. A Trump presidency will likely lead to deals that will ensure that the BRICS develops in a manner that is not too adversarial to the interests of the United States. The process of de-dollarisation is already underway. 90% of bilateral trade between China and Russia is executed outside the USD. BRICS will soon launch an alternative to the US\$-based SWIFT platform to ensure that the US\$ cannot be weaponised in global trade. The Global South is

already diversifying its reserves, buying a lot of gold, and reducing its share of US treasuries and other US\$-denominated investments. The coercive tactics of the current Deep state of the US that will continue under Kamala Harris will only accelerate this process of de-dollarisation.