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Harris 1.0

What Kamala Harris' election would
mean for Australia and the world

SPECIAL FEATURE

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Cover image: Kamala Harris speaks during a campaign rally in Pittsburgh (Brendan Smialowski / AFP)

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Introduction

Sam Roggeveen

Compared to the upheaval promised by a second Trump administration, Kamala Harris is the continuity candidate.

The dramatic elevation of Vice President Kamala Harris to the top of Democratic Party's ticket for the US presidency has re-energised her party and recast the race, to be decided by American voters on 5 November. Republican nominee Donald Trump was the clear favourite while President Joe Biden remained in the contest. Now that he has made way for Harris, it is too close to call.

In August, Lowy Institute experts came together in a special digital feature to offer their forecasts of what a Trump presidency will mean for the world. Now, our experts contribute their insights into a Harris presidency.

As you will read, Harris and her team have said little about key issues of international security, trade, China policy, Asia policy, and more. Nevertheless, Australians appear to have made up their minds about Harris, with an overwhelming majority preferring her to Trump. Our contributors conclude that the best guide to a Harris presidency is the Biden term which precedes it. Harris will carry on many of the policies, have many of the same instincts, and contain some of the same senior staff, as the Biden Administration.

The Institute has no house position on Kamala Harris. The authors of these essays write in their own names. Their assessments vary depending on the region and issues they cover. Yet as you will read, our contributors agree on one thing: for the world outside the United States, Kamala Harris is the continuity candidate. A return of Trump to the White House portends far greater disruption to the global role of the United States than a Harris victory.

The Harris disposition

Michael Fullilove

KEY JUDGEMENT

It's much too early to identify a Harris doctrine, but she is firmly in the mainstream tradition of American leadership abroad.

What kind of foreign policy would Kamala Harris pursue if she is elected president in November? Some commentators are pronouncing confidently on this question, but in truth even people close to the administration are not sure what Harris' foreign policy would look like. At the presidential debate in September, the modest amount of foreign policy talk focused on Trump's past missteps.

As the sitting vice president, no one can say Harris is unprepared for the international demands of being president. For three and a half years, she has received the President's Daily Brief from the US intelligence community and attended meetings of the National Security Council. She has often represented the United States abroad, visiting 21 countries and meeting more than 150 world leaders.

However, she has not been a major player in the formulation of the Biden administration's foreign policy.

It is way too early, therefore, to identify a "Harris doctrine". However, drawing on her public statements, her record, and the people on whom she may depend, we can begin to discern a "Harris disposition".

Harris' principles

First, Harris identifies with the mainstream US tradition of American leadership abroad. At the Munich Security Conference in February, for instance, she said: "it is in the fundamental interest of the American people for the United States to fulfil our longstanding role of global leadership".¹ At the Democratic National Convention (DNC) in August, she pledged to ensure "that America, not China,

wins the competition for the twenty-first century, and that we strengthen, not abdicate, our global leadership”.²

By contrast, Trump defines America’s interests much more narrowly. As he once said: “I’m the president of the United States — I’m not the president of the globe.”³

Second, while Trump is sceptical of America’s alliances, Harris is an alliance believer. In the presidential debate, Harris said that US allies are thankful that Trump is “no longer president, and that we understand the importance of the greatest military alliance the world has ever known, which is NATO”.⁴ In June, she told the Summit on Peace in Ukraine that upholding rules and norms, defending democratic values, and standing with allies “makes America strong, and it keeps Americans safe”.⁵

Third, Harris’ belief in US leadership does not necessarily translate to a predilection for foreign interventions. In 2019, Harris told the Council on Foreign Relations that the United States’ biggest foreign policy mistake was “engaging in failed wars that have cost lives, destabilised the regions in which they have been fought, and undermined our leadership in the international community”.⁶ Notably, Harris supported Biden’s decision to withdraw completely from Afghanistan in 2021.⁷

In the debate, Harris noted proudly that for the first time this century “there is not one member of the United States military who is in active duty in a combat zone in any war zone around the world”.⁸ This is not the language of a hawk.

Fourth, Harris is more pro-trade than Trump — which isn’t saying that much. Trump has promised tariffs of 10 or even 20 per cent on all imports.⁹ At the debate, he claimed that “other countries are going to finally, after 75 years, pay us back for all that we’ve done for the world”. Harris called this plan a “Trump sales tax” on American consumers.¹⁰

In Harris’ 2019 presidential primary campaign, she said that Trump’s trade war was “crushing American farmers, killing American jobs, and punishing American consumers”.¹¹ But she also opposed or voted against free trade agreements such as the Trans-Pacific Partnership and the United States–Mexico–Canada Agreement due to their lack of environmental and labour protections. Her campaign has pledged to “employ targeted and strategic tariffs”.¹²

Fifth, Harris’ background as a lawyer and prosecutor may play into her approach to foreign policy. “Presidents’ approaches to foreign policy are inevitably shaped by their backgrounds,” a senior Biden administration official told me. “For example, former governors sometimes think that dealing with foreign leaders is akin to dealing with party bosses. Like UK Prime Minister Keir Starmer, Harris was a prosecutor. It’s notable that Harris has emphasised

international law in her speeches.” Harris may well be more focused on human rights than Biden has been.

Sixth, it seems likely that Harris would hew closely to Biden in her approach to Europe. She has strong Europe policy foundations on which to build. Biden’s response to Russia’s brutal 2022 invasion of Ukraine was a successful exercise in statecraft and alliance management that has not only frustrated Putin’s aims and assisted Ukraine, but strengthened and expanded NATO. As vice president, Harris has visited Europe often and has spoken three times to the premier transatlantic forum, the Munich Security Conference. At the DNC, she vowed to “stand strong with Ukraine and our NATO allies”.¹³ At the debate, Harris said to Trump that Putin is a dictator “who would eat you for lunch”.¹⁴

Seventh, there would likely be a contrast between the Harris and Biden administrations when it comes to the Middle East. Harris called for an “immediate ceasefire” in Gaza in March, before other senior administration officials did so.¹⁵ It has been reported that she will probably conduct a full analysis of US–Israel policy if elected, and may be open to imposing conditions on some aid to Israel.¹⁶ However, her language on the conflict has been cautious, emphasizing Israel’s right to defend itself. And while Harris can’t match Biden’s long and emotional connection with the country, in the debate she noted: “I have, my entire career and life, supported Israel and the Israeli people.”¹⁷

Finally, what about the other principal theatre of operations: the Indo-Pacific? The Biden administration has been unusually focused on Asia. Typically, Democratic administrations have been more seized of transatlantic relations than transpacific ones.

Unlike President Barack Obama, who initially seemed interested in pursuing a grand bargain with China, Biden has taken an “allies-first” approach to Asia. His administration has brought Japan and South Korea closer together, quickened America’s connections with India and Vietnam, stood up AUKUS, and convened both the Quad (the United States, Australia, Japan, and India) and the “Squad” (the United States, Australia, Japan, and the Philippines). At the same time, the administration has worked effectively to manage its strategic competition with China.

It is hard to say how much continuity we would see in Harris’ Asia policy. As vice president, Harris has visited seven Asian countries, including four of Washington’s five Asian treaty allies (Australia being the exception). How much of a priority would Asia be for Harris as president, though? “The Biden–Harris administration has deepened and strengthened Washington’s Asian alliances in historic ways, including AUKUS,” one senior administration official told me. “The question for a Harris–Walz administration is how to build on this and encourage more cooperation between the US and its allies, and between the allies themselves.”

Ultimately, the weight that a President Harris would put on Asia would depend on events — and personnel.

Harris' people

In addition to Harris' own disposition, the interests and inclinations of the people around her would be important. For example, Biden's National Security Adviser Jake Sullivan and Deputy Secretary of State Kurt Campbell have been critical to the success of President Biden's Asia strategy.

Harris' adviser Philip Gordon has her confidence and seems to be a lock for the role of National Security Adviser should she become president. Gordon was a colleague of mine at the Brookings Institution in Washington, DC. He is a smart operator and a decent person; a listener who is open to persuasion. Gordon published a book in 2020 examining America's repeated failures to bring about regime change in the Middle East. He is a cautious pragmatist, however, not an ideologue. He believed Obama should have bombed Syria after Assad crossed Washington's red line, and opposed Biden's decision to withdraw completely from Afghanistan in 2021.¹⁸

What about the key Cabinet positions? CIA Director Bill Burns is spoken of as a possible Secretary of State. Burns is a highly impressive player, a career foreign service officer who has been responsible for the administration's shadow diplomacy in recent years. Alternatively, Harris could choose a former senator, governor, or Cabinet officer — the current Commerce Secretary Gina Raimondo, for example, or Transportation Secretary Pete Buttigieg.

If Lloyd Austin were not asked to stay on at the Pentagon for a year or two, as some rumours have it, Harris may choose to appoint the first female Secretary of Defence. There are several strong candidates, including former Undersecretary of Defence Michèle Flournoy, Army Secretary Christine Wormuth, and Deputy Secretary of Defence Kathleen Hicks. There are many other elected officials and high-profile individuals with expertise on defence, including Senator Jack Reed.

Finally, Harris' running mate, Minnesota Governor Tim Walz, would bring to the administration an unusual association with China for a top-tier American politician. Walz has visited the country some 30 times since he taught English in Guangdong province after university.¹⁹ He is knowledgeable about China and affectionate towards the Chinese people. On the other hand, when he was a member of the US House of Representatives, Walz was an outspoken critic of China's trade practices and human rights abuses.²⁰ It would be interesting to see what role a Vice President Walz plays in foreign relations in general, and on the China file in particular.

The stakes for Australia

What would a Harris presidency mean for Australia?

Harris' mainstream outlook on foreign policy means that she would be more in tune with Australians' instincts than Trump would be. Trump is sympathetic to isolationism; Australians are inclined towards internationalism. Trump is viscerally hostile towards free trade; Australia is a trading nation.

Given that AUKUS is one of the Biden–Harris administration's notable foreign policy achievements, it seems highly unlikely that Harris as president would walk away from it. On the other hand, Trump has no personal stake in AUKUS and in the past he has been happy to renege on deals made by his predecessors.

If Harris is elected, she would gel with Anthony Albanese. The two have met several times and have a warm relationship. There are some similarities between California liberals and members of the New South Wales Labor Left. At a lunch Harris hosted for Albanese at the State Department in October 2023, she emphasised their similar views on the rights of Indigenous people, the LGBTQ+ community, and workers.

What if Peter Dutton were to become prime minister at the next election? Prime Minister Dutton and President Harris would have less in common on domestic issues. On the other hand, Dutton's muscular approach to defence, and his instinctive pro-American position, would appeal to any US president.

We cannot really know what foreign policies Kamala Harris would advance as president. Speeches delivered at think tank conferences and party conventions rarely translate into decisions taken in office. If elected, developments abroad will be crucial. Given that foreign policy is not Harris' chief interest, the instincts of her key advisers will be unusually important.

However, we can say that the Harris disposition fits within the mainstream of US foreign policy since the end of the Cold War. The Trump disposition does not.

Harris and China: Competition and antagonism, continued

Richard McGregor

KEY JUDGEMENT

Harris is largely a blank slate on China policy. She is likely to stick to Biden policy positions and instincts, which means relations will remain rocky.

During the 2020 US election campaign, Beijing considered whether it should surreptitiously attempt to interfere in the contest by putting a thumb on the scale on behalf of either of the two candidates, Donald Trump or Joe Biden.

In the end, Beijing didn't bother, according to a new book by David Sanger, the longtime *New York Times* national security reporter, because the leadership concluded "there was no prospect for a pro-China administration" whatever the outcome.²¹

This time around, has China's interference calculus changed in an election pitting Kamala Harris, the vice president and Democratic candidate, against Trump? In other words, does China care that much about who will win?

Beijing prefers a Harris win, but only just

Beijing probably fears a Trump victory more than the alternative because of the Republican candidate's sheer manic unpredictability. But Chinese leaders have likely reached a similar conclusion in 2024 as they did four years earlier: interfering in the contest wouldn't be worth the trouble.

In the words of Zhao Minghao, a professor of the Institute of International Studies and Center for American Studies at Fudan University, quoted in the *Financial Times*: "Trump and Kamala Harris are two bowls of poison for Beijing. Both see China as a competitor or even an adversary."²²

In many respects, Harris is a blank slate on China policy, just as she is on foreign policy more broadly.

But President Joe Biden’s administration, in which she has largely faithfully served for nearly four years, and the Democratic Party constituencies that Harris has emerged from, have a substantial hinterland on China.

Steady as she goes

The Biden administration’s policy has eschewed old notions of engagement and instead adopted a stance of competing on all fronts: regional, economic, military, and technological. In terms of regional diplomacy, the Biden administration has focused on tightening ties with allies — especially Japan, the Philippines, and Australia — and engaging new partners, such as India.

There is no suggestion that Harris has plans to substantially change this approach. In fact, her public comments on China thus far reflect that policy. In a speech at the Economic Club of Pittsburgh, Harris said the United States should lead “the world in the industries of the future, making sure America, not China, wins the competition for the twenty-first century”.²³

In any case, whatever Harris thinks, even given the power of the presidency, it would have to be balanced against the rest of Washington, which is almost uniformly wary, suspicious, and often outright hostile towards Beijing. Neither Congress, the national security bureaucracy, nor the military are likely to offer Harris many options that would allow her to radically change direction, nor are there any signs she wants to.

“Harris appears to be signaling that she is committed to ensuring America outperforms China and continues to lead,” said Ryan Hass, a former Obama administration China adviser, in a post on X, the social media site. “She views self-strengthening at home, coordination with allies, and hard-nosed diplomacy as essential to the task.”²⁴

As Hass notes, Harris has been involved in policy discussions and intelligence briefings relating to China for the past four years. She has met with the leaders of all five US treaty allies in Asia (Japan, South Korea, Thailand, the Philippines, and Australia) and visited all but Australia.

Harris’ efforts to paint Trump as soft on China have not always hit their mark. In their only one-on-one debate, Harris accused Trump of shipping “advanced semi-conductor chips to China, which helps them upgrade their military”.

Trump pointed out, correctly, that most of the chips were made in Taiwan, by TSMC, the world’s largest semi-conductor manufacturer, albeit often with US

intellectual property.

The extensive China experience of Tim Walz, Harris' running mate, both as a young teacher in China and then later in building commercial ties as Minnesota governor, has also been examined for clues of a Harris administration China policy.

Walz's experience may make him useful as an occasional envoy too, if such a role is envisaged. Certainly, Walz was firmly in the "engagement" school of China policy as governor, which put him in the mainstream at the time.

But prior experience with China does not translate into support for China, despite campaign attacks to the contrary from Republicans. Walz, after all, has made a point of commemorating the brutal military crackdown of 4 June 1989 in Beijing and elsewhere.

A Harris administration, then, is likely to pursue a steady-as-she-goes policy towards Beijing. Given the mutual antagonism between the two countries, that means relations won't be steady at all.

Harris and national security: The rising cost of military leadership

Sam Roggeveen

KEY JUDGEMENT

Harris is unlikely to reverse America's eroding military advantage over China.

On the question of America's global security role, the choice between presidential candidates has rarely been starker than in 2024.

Trump has been a transformative figure, the first president since the Second World War to denounce American global leadership, call for a renunciation of alliances, and demand a much narrower interpretation of US foreign interests. There is still a contest underway in the Republican Party to see how far Trump's retrenchment efforts will go, but the direction of movement is clear.²⁵

That leaves the Democratic Party, now led by Vice President Harris, as the last champion of American foreign policy exceptionalism, the final redoubt for those who believe that the United States has global interests which must, if necessary, be protected by a military force that is second to none.²⁶ Former Republican Vice President Dick Cheney's recent endorsement of Harris can be interpreted in this light.

In her address to the Democratic National Convention accepting the presidential nomination, Harris promised to "strengthen — not abdicate — our global leadership", and that America will always have "the strongest, most lethal fighting force in the world".²⁷

The military balance

There is no question that Harris can maintain America's status as the leading military power in the world, but this ranking would be secure under Trump too, such is America's lead. It has by far the world's biggest military budget, the

biggest navy by tonnage, and the biggest air force by aircraft. It boasts an unequalled technological base to develop new weapons. For more than two years, the United States has led international efforts to support Ukraine, frustrating Putin's ambitions while spending just 0.16 per cent of its GDP.²⁸

But Russia is a comparatively weak foe. Whether Harris is judged to have upheld the tradition of global military activism supported by Cheney and embodied in Joe Biden's claim that "American leadership is what holds the world together" will not be decided on the battlefields of Ukraine. It will be judged by the extent to which the United States tries to reverse its eroding military advantage over China.

China is a much harder challenge than Russia because Beijing has so many more resources at its disposal, most importantly a massive economy that has devoted an estimated US\$474 billion to its military in 2024, or a bit more than one-third of the Pentagon's budget.²⁹ For that comparatively modest outlay, China has built a modern and capable air and maritime force that can threaten the United States and its allies close to China's shores. It cannot compete with the United States in ship tonnage or aircraft numbers, but it doesn't have to, because China doesn't (yet) have global military ambitions. Even so, China now threatens America's lead in critical respects. It is quadrupling the size of its nuclear arsenal, and its navy already has more ships than the US Navy.

AUKUS and American resolve

A new report by India's Observer Research Foundation finds that China's nuclear-powered submarine program has finally matured, too.³⁰ If, as the report projects, the new Bohai shipyard can indeed produce three to four nuclear-powered attack submarines (SSNs) per year, that translates to a fleet of 30 to 40 in a decade. By this same point in time, Australia is expected to have inducted perhaps two Virginia-class SSNs under the AUKUS arrangement, while the US Navy will likely have 50 to 60 SSNs.

These are long-term projections, yet decisions made by the Harris administration will determine if they meet reality. A Harris administration can decide to invest in the US military-industrial base so that the United States can match Chinese shipbuilding rates, and it can boost defence spending to correct the tilt away from US dominance in Asia. A Harris administration can elect to leave European security to the Europeans so that the United States can concentrate its forces in Asia.

But as with so many aspects of Harris' worldview, the little information we have about her preferences suggests her presidency will produce continuity rather than change. We should expect more initiatives like those the Biden team initiated in Asia, such as AUKUS, expanded US basing in the Philippines, and a

strengthened nuclear deterrent agreement with South Korea. But we should not expect dramatic new military investments or a major rebalancing of forces to Asia, since none of her post-Cold War predecessors have done this either.

Under a Harris administration, then, the Asian military balance will continue to shift away from the United States and towards China. As with so many of her predecessors, Harris would maintain rhetorical fealty with America's tradition of muscular internationalism, but also like them, she would find it impossible to pay the increasingly steep price required to enact it.

Harris and the Pacific Islands: Delivering on a Pacific vision

Dr Meg Keen

KEY JUDGEMENT

Pacific Island countries want to hear more from Harris about how she will support greater climate action, boost economic development, and address legacy environmental issues.

In the whirlwind of speeches to cement Kamala Harris' presidential credentials, the Pacific Islands have hardly rated a mention, but on critical regional issues relating to existential climate threats and hard economic times, a Harris win bodes better than a Trump triumph.

The Pacific hope for Harris is that she will deliver on promises made in the Pacific Partnership Strategy, the two Pacific Islands–US summits (2022 and 2023), and the many diplomatic visits under President Biden. The question is: What will her administration do better, or differently?

The climate crisis and rising insecurity

Climate change is the top security issue in Pacific Island countries. There is an urgent need to act, with a recent UN report providing scientific evidence of increasing Pacific climate vulnerability.³¹ The Democratic Party's 2024 platform recognises the climate crisis as "an existential threat" and commits to enhanced global climate leadership, but Harris has provided few details.

When pressed during the campaign, she promised to "tackle the climate crisis with bold action to build a clean energy economy, advance environmental justice, and increase resilience to climate disasters".³² Pacific leaders expect her to honour the Biden administration commitments to support climate adaptation and mobilise climate finance, including Harris' own 2023 pledge to boost US funding to the Green Climate Fund by US\$3 billion.³³

One area where Harris will stand firm is security. Despite US Deputy Secretary of State Kurt Campbell's "hot mic" comments in August about "giving the [policing] lane" to Australia, the United States is sidestepping, not walking away.³⁴ Defence diplomacy has been booming since the 2022 Solomon Islands–China security deal, and there are no signs it will slow down while China is knocking at the Pacific Islands' door.³⁵ The US Defence Department is ramping up bilateral ship rider agreements, security training, and equipment provision.

Any wavering by the West on climate, security, or development commitments will be exploited by China, and Pacific Island countries will leverage all sides to survive.

Summits promise big, but are yet to deliver

The two Pacific Islands–US summits under the Biden administration, as well as the US-initiated Partners in the Blue Pacific, promised big. The summits alone committed more than US\$1 billion to resilience, regionalism, and sustainable development. A Harris administration is likely to honour pledges to increase the US diplomatic and development footprint in the Pacific.

Still, Harris has a lot of ground to make up, given decades of near absence in the South Pacific. Kurt Campbell admitted that "there have been periods where we have not been as deeply engaged as we should have been".³⁶ Harris' views on foreign aid are not clearly articulated.

Excepting the US Compact states (Micronesia, Marshall Islands, and Palau), the United States is not a top aid and trade partner in the Pacific. In countries such as Papua New Guinea, there is concern that US interest is too focused on geopolitics and strategic issues to the detriment of Pacific development priorities. To maintain credibility, a Harris administration would need to open more economic and social development opportunities.

One critical area is health security, clearly outlined in the 2024 Pacific Islands Forum Leaders' Declaration. The Democratic Party's commitment to the World Health Organization (WHO) augurs well, in contrast to the previous Trump administration's withdrawal from the WHO during the pandemic. Even so, coordinated US action for health gains has room to improve.³⁷

Regional realities and rivalries

Some regional commitments of high importance are locked in, whoever takes the oath of office in January. The US Senate has approved more than US\$7 billion for Compact states over 20 years to assist with infrastructure and development in exchange for US military access and exclusivity. New embassies

have been established in the region, and finances to support summit commitments approved.

But a Harris administration can't coast.

There is a resentment about US deportees to the Pacific Islands who are associated with violent crimes and the drug trade. Emotions are also running high on the failure of all sides of American politics to take action on the US nuclear weapons testing legacy. Harris has been silent on these issues, but the Pacific Islands will keep pushing for justice.

Greater US engagement is welcome, but not geopolitical rivalries that reduce development options. The 2022 US National Security Strategy aims to “effectively compete with the People’s Republic of China”.³⁸ Harris needs to clarify how this will translate in a region eager to remain “friends to all”, China included.³⁹

Pulling together

With so many pressures on the United States for global engagement, leveraging strategic partnerships with Australia, New Zealand, Japan, and others in the Pacific Islands will be essential. The Democrats have a better track record than their opponents on Pacific collaboration, especially for delivering enhanced connectivity and critical infrastructure. However, more innovation is needed to tailor actions to Pacific development needs.

The United States has the assets to deepen people-to-people relations, and to strengthen government, business, and civil society networks. In the words of a Pacific Islands senior official in Canberra, “it is not only about US dollars, what we need is US relationships that are deep and enduring”. The Biden administration did the diplomatic courting, put words on the policy page, and splashed cash. Harris needs to have a Pacific policy vision and show she can deliver.

Harris and the Indo-Pacific: Correcting the attention deficit

Susannah Patton

KEY JUDGEMENT

We should expect continuity from the Biden era, which had some successes. But many Southeast Asian countries already see the United States as a more distant and less reliable partner.

The Biden administration sees its Asia policy as an overlooked success story — attracting much less attention than Ukraine or the Middle East, but noteworthy for the administration’s shoring up of alliances and partnerships.

It’s likely, then, that a President Kamala Harris would maintain the Biden administration’s broad suite of Asia policies, especially the deepening of alliances with Japan, the Philippines, and Australia, and the networking of these partnerships via the Quad, AUKUS, the “Squad” (including the Philippines, Japan, and Australia), and various trilateral groupings, including with Japan and South Korea.

However, several pitfalls could prevent Harris from living up to the Biden administration’s Asia track record.

Personnel is policy

The first is personnel, starting from the top. Harris has engaged regularly with Asian leaders and travelled to Asia five times, including to Singapore, Vietnam, the Philippines, and Indonesia.⁴⁰ Harris has met President Ferdinand Marcos Jr of the Philippines six times, more meetings than with any other world leader, and has travelled to the Philippines, including Palawan, close to disputed features in the South China Sea. While Harris has sought to portray this as reflecting prioritisation of the region, many see vice-presidential travel as reflecting the reverse: a delegation of less important priorities (such as

attending the 2023 ASEAN summit in Jakarta) to the president's deputy. And while Harris' engagements in the region seem to have been positive, she represented administration policy, rather than articulating a distinctive vision. So it is difficult to discern Harris' true level of interest in, or focus on, the region.

Whether Harris can retain key personnel such as Deputy Secretary of State Kurt Campbell, central to Biden's Asia strategy, will also be of high importance. She has appointed US Ambassador to ASEAN Yohannes Abraham to her presidential transition team. Abraham brings fresh regional experience but his appointment, which has already pulled him back from Jakarta, also signals that the ambassadorship to ASEAN is far from a vital position for the United States (it was largely vacant over a five-year period until Abraham took it up in 2022).

Attention span

A second (and perennial) challenge for US policy in Asia, especially Southeast Asia, is the question of resourcing and focus. Harris' Democratic National Convention speech was illuminating in this respect, containing only glancing mentions of Asia and China, with other more politically salient foreign policy challenges such as Ukraine and the Middle East receiving more detailed treatment. It remains an open question whether Harris and her running mate, Tim Walz, will be able to sustain a focus on Asia, including through practical steps such as appointing ambassadors to key positions, travelling to relevant summits, and staffing a much higher tempo of bureaucratic engagements with Asia, which the Biden administration has established.

The expertise and focus of a Harris administration would matter, because it would face some real challenges in Asia, especially in Southeast Asia. These include managing the spillover effects of a more confrontational approach to China on a region that largely prefers to hedge between the superpowers rather than take sides, providing a compelling economic offering despite rising protectionism in the United States, and managing a divergence with the region on the questions of democracy and liberal values.

Harris' more progressive politics means many analysts have questioned whether democracy promotion will become a pitfall in her engagement with less democratic countries in Southeast and South Asia, including India. If Harris seeks to replicate the Biden team's success in Asia, she is unlikely to let values stand in the way of closer pragmatic partnerships with countries such as India and Vietnam. Even so, excessive rhetorical emphasis from Harris or Walz on democracy and liberal values could keep some relationships in the region lukewarm. Harris' slightly more critical approach to Israel could help US standing in Muslim-majority countries such as Indonesia and Malaysia, where the Biden administration's strong backing of Israel's war on Hamas has adversely impacted perceptions of the United States.

While US allies would enthusiastically welcome the prospect of continuity from the Biden administration, most Southeast Asian countries will be more ambivalent about a Harris presidency. Many already see the United States as a more distant and less reliable partner that will come and go according to its domestic and global priorities. They will wait and see where Southeast Asia fits in the hierarchy of US priorities.

Harris and trade: Better than the alternative, but not much

Jenny Gordon

KEY JUDGEMENT

Kamala Harris is the continuity candidate. That means no fundamental revision of America's drift into protectionism and subsidies, no new free-trade measures, and more competition with China.

Judging by the lack of major policy announcements from the Harris campaign, her administration is likely to largely maintain the Biden trajectory.

Tariffs and industry policy

Under Joe Biden, the United States continued most of the Trump-era tariffs on China, and introduced others. Biden did suspend some tariffs, but most policy movement was in the opposite direction. In 2022, the *Inflation Reduction Act* (IRA) was passed, providing for US\$370 billion in tax concessions and subsidies mostly targeting renewable energy. In the same year, Biden also extended tariffs on solar panels. In May 2024, Biden increased tariffs on Chinese electric vehicles to 100 per cent, and expanded other tariffs on China.

A Harris administration would likely continue to use tariffs (mostly on China) to address what the United States views as unfair competition and to accelerate the energy transition to meet the US emissions reduction goals. Policies based on “techno-nationalism” are also likely to continue, although perhaps less aggressively than under a Trump presidency. This will make it harder for other countries to invest in their energy transition because domestic industries will be crowded out by larger US-subsidised projects.

Industry policy with an environmental focus is also likely to continue under a Harris administration. With emissions trading politically toxic in Washington, the United States is pursuing second-best policies to reduce greenhouse gas

emissions. The IRA is all carrots and no sticks, providing subsidies and tax incentives for renewable energy investments. While Trump would struggle to reverse the IRA, under Harris, the program will be assured. Given Harris' strong sentiments on US jobs and on the environment, she may strengthen the use of industry policies.

Harris has been highly critical of Trump's policy of a blanket import tariff, which he has said may go as high as 20 per cent. Recognising the impact of tariffs on US families, a Harris administration may be more reluctant to use them as an economic weapon, particularly against allies. However, whether Harris will reduce the current level of tariffs, which has resulted in US households paying an extra US\$200–300 annually as tariff costs are passed on in higher prices, remains to be seen.

Trade as a scapegoat

In years past, Japan was accused of predatory pricing that undermined US manufacturing, and similarly, the formation of the European Union was met with claims of “fortress Europe”. Now it is China's turn, but through its central role in many global value chains, it has considerably more economic power than either Japan or the European Union ever had.

It appears to be gospel in Washington circles to attribute the current account deficit and the hollowing out of the middle class to unfair practices by trading partners, primarily China. These concerns have been increasingly linked to national security, with Biden accusing China of seeking to undermine US military capabilities by competing away manufacturing jobs. But while there are elements of truth in the claim that trade, and China's growth, have accelerated structural economic change in the United States, the decline of US manufacturing was made inevitable by robotics and automation. Blaming trade, and blaming China, does not help the impacted communities to adjust. Nor does protection help reduce America's current account deficit, which is more a reflection of high domestic spending and low saving. The US budget deficit also plays a role.

While Harris may tone down the rhetoric driving recent reversals of global economic integration, the direction is unlikely to change. The United States will maintain a “high wall” for industries it considers strategic, including by punishing its trading partners if they export potentially militarily sensitive (“dual use”) technologies to China. Like the IRA, which restricts access to the lowest-cost clean energy technology, US policy imposes costs on the rest of the world.

Trade inertia

Apart from being a useful scapegoat, trade has little political traction in the United States. While Barack Obama promoted the Trans-Pacific Partnership (TPP), it was not supported by Hillary Clinton in the 2016 election, and Trump formally pulled out. In 2022, President Biden introduced the Indo-Pacific Economic Framework (IPEF) to promote cooperation among 14 Asian countries (but not China) on four pillars: supply chains, clean economy, fair economy, and trade. But in November 2023, the United States dropped the trade pillar over concerns that any concessions would hurt US workers. Kamala Harris has said nothing about IPEF specifically, but her administration is unlikely to make it a priority, given her track record. She has expressed scepticism about the North American Free Trade Agreement, its Trump-era revision known as the United States–Mexico–Canada Agreement, and the TPP.

On the urgent need to reform the global architecture of trade, we should also expect little from a Harris administration. Biden continued to refuse approval of the appointment of allegiant judges to the World Trade Organization (WTO). Despite Harris' 2021 congratulatory call to the Director-General of the WTO, Ngozi Okonjo-Iweala, and agreement to work together on WTO reform, little has happened. This does not bode well for Harris administration efforts to restore the WTO's judicial function and to reform the international rules relating to trade and investment.

The best thing about the trade policies of a Harris administration would be that they will not be the policies of Trump. Australia must continue to work with other middle powers to advance a global trade agenda that will support development and productivity growth at home and abroad. As long as this does not hurt the United States, a Harris administration is unlikely to intervene. The same might not be true for Trump.

Harris and Ukraine

Mick Ryan

KEY JUDGEMENT

The only nation with a viable theory of victory is Russia. Harris must decide if the United States will change that equation.

During the recent US presidential debate, moderator David Muir posed the following question to the two candidates: “I want to ask you a very simple question tonight. Do you want Ukraine to win this war?”⁴¹

Former president Donald Trump failed to provide a yes or no answer. He was criticised for this by Vice President Kamala Harris during the debate and by commentators in the wake of the event.

But while Harris provided a long-winded answer to the question, she too failed to say yes or no.

This is illustrative not only of the respective candidates’ views but of the US policy for Ukraine. It is not really clear that the United States wants Ukraine to win the war. While America obviously supports Ukraine, its primary strategic objective appears to be to avoid war with Russia. Avoiding World War III is a topic frequently raised by President Joe Biden.⁴²

After 33 months of war, there is still no public US strategy beyond slogans like “as long as it takes” (although a classified strategy was reportedly delivered to Congress recently).⁴³ And while Ukraine is now briefing US policymakers on a victory plan, it is not clear that this is anything more than a grab bag of military and financial requests.⁴⁴

The only nation that appears to possess a clear strategy, and a viable theory of victory, is Russia.

Thus, a future President Harris would need to deal with a central problem in America’s support for Ukraine: does it want Ukraine to beat Russia and is it

willing to provide the military, diplomatic, and financial resources to do so?

If the answer to this question is yes, it will require the United States and NATO to shift their strategy, and will demand a closer alignment of NATO and Ukrainian strategy to see the war through to victory. It will also require trade-offs in scarce military resources that might be required to confront China, a tougher approach on China's support for Russia, and a different strategy for dealing with Russian nuclear sabre rattling. Russia will be sure to escalate its campaign of sabotage, misinformation, and general mischief around the world in the wake of such a decision.

Alternatively, Harris might decide to continue the current course of the war. The Ukrainians believe this probably dooms them to a slow strangulation as Russia bleeds Ukraine of people and resources.

There are some in the US policy debate and in US Congress who believe that this would not be catastrophic for US interests. In her statements on Ukraine during the debate and elsewhere, it is clear that Harris sees the war in Ukraine as a strategic and a moral issue. But whether she can convince more members of Congress of this, and gain the funding to continue support for Ukraine, remains to be seen. Even if she wanted to pursue a goal of Ukrainian victory, she must deal with Congress on a range of issues, and funding domestic priorities or confronting China might trump funding Ukraine.

As the war in Ukraine heads towards three years since the large-scale Russian invasion, and nearly 11 years of conflict overall, NATO, other US allies, and Ukraine have no clear view of US policy and support after the first week of November. Unfortunately, in war, the absence of strategy and long-term thinking is fatal. A Harris administration will have little time to decide whether it really wants Ukraine to defeat Russia. Its decision will have profound consequences for the future of Ukraine and for America's stature and global influence.

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