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Trump 2.0

**What Donald Trump's return would
mean for Australia and the world**

SPECIAL FEATURE



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The Lowy Institute is an independent, nonpartisan international policy think tank. The Institute provides high-quality research and distinctive perspectives on the issues and trends shaping Australia's role in the world.

Cover image: Donald Trump arrives onstage to speak at the 2024 Republican National Convention (Jim Watson / Getty)

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Introduction

Hervé Lemahieu

For all the excitement of the US presidential race, the biggest upheaval will be the global policy implications if Donald Trump is re-elected.

On 5 November, Americans will go to the polls to elect their next president.

The choice is between Donald Trump, running for a second, non-consecutive term at the helm of a Republican Party moulded firmly in his image, and incumbent Vice President Kamala Harris, whose surprise elevation to the top of the Democratic ticket has re-energised her party.

President Joe Biden's decision to drop out of the contest has rebalanced the race for the moment. But the political landscape remains volatile.

Of two things we can be fairly certain. Trump is better positioned for a knife-edge victory now than he was ahead of his shock win as a political outsider in 2016. Second, compared to a Harris victory, a return of Trump to the White House portends far greater disruption to the global role of the United States.

Against that background, Lowy Institute scholars have set their minds to imagining a second Trump presidency, and what that would mean for American statecraft, Australia, and the world.

The Institute has no house position on Donald Trump. The authors of these essays write in their own names. Their assessments vary depending on the region and issues they cover. Some believe Trump would be less restrained a second time round. Others remain sanguine about his bluster and unpredictability.

But all agree the world has changed since January 2021 when Trump was last in power, and the stakes are higher.

The Russian threat has returned to Europe, the conflict in Gaza threatens to escalate into a wider Middle East war, China is inching closer to realising a post-American order in Asia, and it is making hay globally by claiming leadership of the disparate but increasingly influential Global South.

Whether the United States continues to champion allies, values, and norms under a re-elected Donald Trump has never been more consequential for friends and foes alike.

How Australia should deal with Trump

Michael Fullilove

Trump disparages the liberal international order. Australia may need to serve in its bodyguard.

KEY JUDGEMENT

There is no evidence that Donald Trump's beliefs have altered over the past four years. Indeed, Trump 2.0 may be less restrained than Trump 1.0. If he returns to the White House in January, US allies should neither turn away from Trump nor hug him too tight. Rather, Australia should engage a second Trump administration pragmatically, build up its own national capabilities, and work with like-minded nations to reinforce the liberal international order that Trump disparages.

The interests of the world's democracies — including Australia — are served when the United States is well governed, cohesive, appealing, and strong. During the Trump presidency, America was poorly governed, divided, ugly, and weak.

There is no evidence that Donald Trump's beliefs have altered over the past four years. Indeed, Trump 2.0 may be less restrained than Trump 1.0.

Alliance scepticism

In foreign policy, Australians' instincts run counter to Trump's impulses. Trump is sympathetic to isolationism; Australians are inclined towards internationalism. Trump swoons over autocrats and strongmen; Australia is an old democracy and a free society.

Trump is also an alliance sceptic, whereas Australians are alliance believers. Last time around, Trump treated allies not as friends but as freeloaders. He

threw shade on the principle of collective defence; he handled carelessly intelligence that allies provided to Washington.

Trump's plans to "make America great again" neglect a fundamental pillar of American greatness — its system of global alliances. Both China and Russia would dearly love to have alliance networks as powerful and cost-effective as that of the United States.

Questions on trade, China, and AUKUS

Canberra should brace for turbulence on the issues of trade, China, and AUKUS. Trump is hostile to free trade and has promised a 60 per cent tariff on all Chinese imports, a 100 per cent tariff on Chinese cars, and a 10 per cent tariff on all other imports to the United States. These tariffs and the retaliation they would provoke would be extremely damaging for a trading nation such as Australia.

It is hard to predict where Trump would take US relations with China. The Biden administration has maintained a stable relationship with China, despite Beijing's bluster. Many are concerned that Trump would be overly combative. Just as concerning, however, is the possibility that Trump would be attracted to the idea of a grand bargain with China, perhaps trading away the security interests of the United States and its Indo-Pacific allies in return for trade concessions. After all, this is the man who fêted Xi Jinping at Mar-a-Lago with "the most beautiful piece of chocolate cake".

We have heard second hand that Trump supports AUKUS.¹ His running mate JD Vance told me at the Munich Security Conference in February that he is a "fan of AUKUS", which has broad support among Republicans and on Capitol Hill.² However, given Trump's predilection for ripping up deals made by his predecessors, the situation is not without risk.

Australia's playbook

For Australia, the personal relationships at the summit would be different this time.

During Trump's last term in office, Australia was led by two Liberal prime ministers, Malcolm Turnbull and Scott Morrison. This time, Trump's Australian counterpart would be a Labor prime minister, Anthony Albanese. It is hard to think of two leaders who are more different from each other — in terms of origins, personalities, and values — than Albanese and Trump.

If Opposition Leader Peter Dutton were elected prime minister in 2025, he may have an easier relationship with Trump. Certainly, Dutton's worldview is more likely to be sympathetic to Trump's. However, ideological compatibility is no guarantee of harmonious relations with such a mercurial figure. A number of conservative leaders, including Theresa May and Benjamin Netanyahu, got on Trump's wrong side last time.

Critics, sympathisers, and pragmatists

I argued recently that during Trump's term in office, allied leaders fell into three categories: critics, sympathisers, and pragmatists.³

Angela Merkel was a prominent critic who never seemed comfortable with Trump and publicly contradicted him on refugees, tariffs, and other issues.

But picking a fight with the world's most powerful person is not always smart. Allies rely on the United States, which has the capacity to project military power anywhere on Earth, to protect them from adversaries such as Russia and China and provide global leadership. Being at daggers drawn with Washington is rarely in an ally's interest. Merkel's poor relations with Trump, for example, contributed to his 2020 decision to withdraw 10,000 troops from Germany — a decision that Biden later reversed.

Scott Morrison was a sympathiser. He identified himself politically with Trump, even joining the president in Ohio in 2019 to address a crowd of Trump supporters. In May this year, during the criminal trial at which Trump was convicted on 34 felony counts, Morrison visited him at Trump Tower. "It was nice to catch up again, especially given the pile on he is currently dealing with in the US," Morrison later posted on X. "Good to see you DJT and thanks for the invitation to stay in touch."⁴

Sympathisers figure that they need to get close to Trump in order to influence him. True, Trump's administration was animated by egomania and narcissism, and Trump relishes flattery. Praise can lead to goodies such as investment, political support, and decorations. But being intimate with Trump is unlikely to be popular back home — or good for the soul.

Japan's example

The pragmatists included former Japanese Prime Minister Shinzo Abe, who worked hard on his personal relationship with his fellow conservative Trump.

In November 2016, Abe was the first world leader to call on the president-elect at Trump Tower. Over the next four years, he had dozens of conversations with

Trump in meetings, on the phone, and on the golf course. Abe was courteous and attentive without sacrificing his dignity or submerging himself in Trump's political identity.

As a businessman, Trump was a fierce critic of Japanese trading practices and ran newspaper advertisements accusing Japan and other allies of "taking advantage of the United States" by failing to pay for Washington's protection. But through his skilful dealings with Trump in office, Abe managed to soften that hostility. As president, Trump was well disposed to Japan and even signed off on a trade deal between Washington and Tokyo.

Malcolm Turnbull was also a pragmatist. When Trump threatened to walk away from an Obama-era deal between the United States and Australia on asylum seekers and to impose tariffs on Australian steel and aluminium imports, Turnbull argued him down. He did so mainly in private, however, resisting the temptation to talk down to Trump in public.

The Australian prime minister — whether it is Albanese or Dutton — may find the prospect of fraternising with Trump distasteful. But if this situation comes to pass, they will need to grimace and bear it. The alternatives — to turn away from the United States or hug Trump tight — are worse.

Australia would also need to work closely with other parts of the US system, including Congress, the agencies, and the military. Australia would need to continue to build up its own national capabilities and work with other allies and like-minded nations, especially in our region, to reinforce the liberal international order that Trump disparages.

As beneficiaries of that order, Australia may need to serve in its bodyguard.

A Trump win splits the East Asian triangle

Richard McGregor

Much commentary about China and the US election has suggested Beijing prefers Trump. In fact, the opposite might be the case.

KEY JUDGEMENT

Donald Trump's noisy unpredictability is anathema to China's cool and steely approach to gaining ascendancy. A re-elected President Trump might give up on US friends like Taiwan and Japan. But then again, he might not. Beijing has no idea, and they have good reason to fear the worst.

"Of course, China wants Trump to win."

This is something I have heard often in recent months — in Australia, in the United States, and in Europe — in relation to the idea that Chinese leaders see political advantage in a Donald Trump victory in November.

The same logic applied to Japan and South Korea — America's most important allies in north Asia — reaches the opposite result: an assumption that both Tokyo and Seoul will barrack for the Democratic Party candidate Vice President Kamala Harris.

But talk to officials and scholars on the ground in China, Japan, and South Korea, and a different picture emerges.

Plenty of upsides for Beijing

The reasoning for the Chinese preferring Trump is sound enough. A Trump win represents decline, dilapidation, and chaos in the world's most powerful democracy, and thus in theory helps Beijing in two ways.

Firstly, it would turn the United States inwards and diminish its ability to project power and support allies at the very moment that Beijing is challenging Washington head-on, especially in Asia.

Secondly, Trumpian chaos hurts the brand of democracy generally and bolsters Chinese advocacy for an alternative to the US-built and led world order.

In China, to be sure, there is not a singular view about the US election, even as the leadership anxiously awaits the outcome. As to what Xi Jinping himself thinks, that is a mystery.

But Chinese officials and scholars, in private conversations over many months, are largely exceptionally wary of a Trump victory.

The Chinese see Trump as corrupt and transactional, all qualities they thought they could exploit and indeed did in the early period of his first presidency after he was elected in late 2016. But the Chinese approach did not work in the long run.

But China fears Trump's unpredictability

In office, Trump eventually transformed America's China policy because he had no hesitation in doing things that his predecessors would not. The most headline-grabbing announcements were on trade and the imposition of tariffs.

But he also let his national security staff, and the likes of Mike Pompeo (Secretary of State) and Matt Pottinger (National Security Council), implement their own tough policies pushing back against China.

More than anything else, Trump is unpredictable and untethered by political precedence or commitments he may have made in the past, or even days, hours, or minutes before.

Trump's own secretaries of defence and chiefs of staff often had no idea what decisions he might take. How could the Chinese possibly know?

Beijing is executing a very deliberate salami-slicing strategy to gain ascendancy in the region, around Taiwan, in the South China Sea, and near the Senkaku Islands, or Diaoyu Islands, where their navy and coast guard are challenging Japan.

Trump's noisy unpredictability is anathema to China's ambitions in this respect. The idea of a grand bargain between the United States and China, brokered by Trump as the self-styled master dealmaker, seems as distant as ever. Trump tried that in his first term with North Korea and failed.

There is no reason to think he could succeed with China, even if he were minded to try.

Japan has warmed to a Trump return while South Korea is ambivalent

But what about Japan and South Korea and a second Trump presidency? For very different reasons, surely, they fear a Trump victory?

After all, Trump has made no secret of his disdain for traditional allies who he thinks free-ride on American power and military spending. Trump's earliest political statements in the 1980s attacked Japan, which was then running huge trade surpluses with the United States and competing head-on with America's core industries.

Tokyo and Seoul already contribute large amounts of cash to pay the costs of the US troops stationed in their countries, and they did not like Trump's overbearing threats during his first term to force them to pay more.

But at the same time, the Japanese in particular, for all their resentment towards the United States, know they cannot manage China without Washington's support.

In that respect, they like to see the United States display its power. What some outsiders see as warmongering, many senior Japanese applaud as deterrence.

On top of that, the Japanese have in recent decades generally favoured Republicans over Democrats in the White House, as they see them as more focused on the kind of hard power that can keep China at bay.

Such attitudes drive people like Kurt Campbell, now Deputy Secretary of State and a longstanding, hard-nosed Democratic national security official, around the bend.

The likes of Campbell can point to the record of Joe Biden's administration, which has taken a tough line on China and worked hand-in-glove with the Japanese on bolstering deterrence.

As far as one can tell, Kamala Harris, should she win the election, would represent continuity in this tough-on-China foreign policy, at least in the short term.

But on a recent trip to Tokyo, I was surprised to hear Japanese officials still muttering about the possible pitfalls of a Democratic win. "They are too intellectual," one senior Japanese official told me.

The South Koreans do not necessarily align with the Japanese on policy towards the United States. Their tech companies have been less willing to fall into line with US-led sanctions against Beijing than have the Japanese. Seoul's foreign policy also still largely revolves around North Korea.

Any preference for Trump in Tokyo and Seoul, such as it is, is heavily qualified by the former president's indulgence of Russia and his infatuation with Vladimir Putin.

Russia's close ties with China and North Korea — which are both providing essential support for Moscow's war in Ukraine — are red flags in Tokyo and Seoul.

However much value they might see in Trump, then, they clearly understand that the downside is precipitous as well.

Trump would put personality over policy in the Middle East

Lydia Khalil

Trump's overarching impulse towards the Middle East can be boiled down to: look strong, but don't do too much.

KEY JUDGEMENT

If re-elected in November, US Middle East policy would be swayed by Donald Trump's impulses, personal interests, and his desire for retribution against the so-called deep state, otherwise known as the functioning US government bureaucracy. But his dealmaking would likely stop at the most intractable regional conflict of all. Trump seems sufficiently self-aware not to claim he can resolve the Israeli–Palestinian conflict.

A recent *New York Times* editorial weighing Donald Trump's suitability for a second presidential term aptly observed how, instead of being driven by a cogent vision for America's future, Trump's desire to come back to power is above all motivated by three things: "to use the levers of government to advance his *interests*, satisfy his *impulses*, and exact *retribution* against those who he thinks have wronged him".⁵ By adapting this prism, we can also begin to sketch a second Trump administration's approach to the Middle East.

Impulses

Trump's overarching impulse towards the region can be boiled down to the following: look strong, but don't do too much. For a region notorious for its complexity and intractability, this is not necessarily a bad approach. It could save the United States from further catastrophic and misguided follies, like the 2003 invasion of Iraq. In many ways, this approach would also represent a continuation of America's "hegemonic retreat" from the region — a dynamic that pre-dates Trump.⁶

However, “looking strong” is not the same thing as exercising regional leadership. Nor does a less involved United States mean more stability in the Middle East. Far from ushering in a period of benign neglect, a re-elected Donald Trump is more likely to expand a vacuum in the Middle East that demands to be filled. The region is already subject to the alternative designs of Iran, Russia, and China, among others.

This would sharpen the calculations of every US ally including Saudi Arabia, the United Arab Emirates, Jordan, Egypt, and Israel. These players have already hedged against US retreat, and are bracing for the possibility that US adversaries will have freer rein under a second Trump presidency. This may continue positive developments, such as deepening the China-brokered détente between Iran and Saudi Arabia, or it may intensify interregional competition, particularly if the US–Saudi security agreement comes through.

More problems may arise when Trump’s impulse to look strong leads to incoherent and risky policies, such as his first administration’s decision to withdraw from the Iran nuclear deal, which has only served to accelerate Iran’s production of uranium enriched to near-weapons grade levels.⁷ Similarly, the US assassination of General Soleimani, the commander of the Iranian Quds Force, in Baghdad in 2020 was an ill-considered decision that kicked off a round of escalatory violence.⁸ This same impulsiveness would likely continue to govern any future Trump administration’s regional approach, for example, when dealing with the problem of Houthi attacks on ships in the Red Sea and Gulf of Aden.

While Trump’s impulsiveness and unpredictability offer little comfort to US regional allies, his actions are not entirely beneficial for adversaries either. Trump’s capricious tendencies could also make it more dangerous for Tehran and its regional proxies to agitate against US interests in the region.

Personal interests

With Trump back in office, the national interest would almost certainly come to be defined in much narrower terms. US Middle East policy will be pursued first and foremost to serve the self-interest of the president, rather than the United States as a nation or the wider interests of a broad network of allies. This may mean that US policy drivers towards a key strategic partner such as Saudi Arabia will be governed more by the Trump Organization’s real estate development plans in Jeddah.⁹ Or, given his propensity to flattery, decisions will be swayed by Trump’s personal relations with the regional leaders who do best at fanning his ego.

It is also in Trump’s interests to be seen as a dealmaker. The first Trump term did bring the Abraham Accords. Whether this diplomatic breakthrough was due to Trump’s talents as a dealmaker or those of his son-in-law turned mediator Jared

Kushner, or merely a formalisation of discreetly growing ties between Israel and the UAE in years prior is up for debate.¹⁰ But a second Trump administration would be keen to burnish this legacy and lock down the next phase of the Abraham Accords, which aims at normalisation between Israel and Saudi Arabia, a goal that was also doggedly pursued by the Biden administration.

However, Trump's dealmaking would likely stop at the most intractable regional conflict of all. The Israel– Hamas war has no upside for Trump, and even accounting for his inflated assessment of himself, Trump seems sufficiently self-aware not to claim he can resolve the Israeli–Palestinian conflict. While Trump has been a strong supporter of Israel in the past, he has stated repeatedly that the war in Gaza must end quickly and has more recently been lukewarm at best towards Israel's Prime Minister Benjamin Netanyahu. Nevertheless, Trump will have no sympathy towards the Palestinian movement and is unlikely to place further pressure on Israel regarding the prosecution of this war.

Retribution

Lastly, beyond Trump's *direct* interests and impulses, what will impact US statecraft in the Middle East is his desire for broader retribution against the so-called deep state, otherwise known as the functioning US government bureaucracy.

Much has been made of Project 2025, a tome published by the Heritage Foundation that purports to offer a blueprint for a second Trump term.¹¹ In reality, it is little more than a grab bag of longstanding, and at times contradictory, libertarian and conservative positions. Some of what is laid out in these papers accords with his stated objectives: cutting funding for government agencies, eroding their authority, and ensuring there are no functioning executive agencies to blunt his agenda. A re-elected Trump would also likely make significant cuts to the US foreign aid budget, which would have serious implications for countries such as Jordan, Egypt, Syria, Lebanon, and Yemen. Cutting off funding to UNRWA, the UN humanitarian and development agency operating in Gaza and the West Bank, seems a near certainty.

A likely purge of the US federal government also means that, outside of Trump's coterie of advisers and loyalists, there may be very little institutional expertise left on US Middle East foreign policy. This time around, there would be far fewer "adults in the room".

Trump may surprise us on the Ukraine war

Mick Ryan

If Trump can't achieve a quick solution in the Ukraine war, he could well turn on Putin and increase US support to Ukraine.

KEY JUDGEMENT

Donald Trump has claimed that he would end the Ukraine war quickly if he were elected. However, quick solutions to the protracted conflict will prove elusive. It is just as likely his fear of looking weak would lead a second Trump administration to make very different decisions about Ukraine.

The timing of the US presidential election in November and the inauguration of the next US president in January will likely coincide with a lower tempo period in the Ukraine war as both sides hunker down for the winter. This does not mean that the fighting stops, but it does mean that military activity will appear to decline relative to the higher tempo spring and summer months. It is likely neither side will be able to make decisive inroads during this time. While a re-elected Democratic administration may continue its current level of support for Ukraine even if it is unclear who is winning the war, what might a newly elected Trump administration do?

Russia's stalled momentum

Over the last seven months, Russia has attempted to exploit the failure of the 2023 Ukrainian counter-offensive, the late 2023 civil-military crisis in the Ukrainian government, and the long debate on US aid to Ukraine that deprived the Ukrainians of much needed munitions and equipment in early 2024. The Russian military has been conducting a large-scale offensive campaign on the ground and in the air to pummel the Ukrainian military and to influence the political calculus of Ukraine's government and its Western supporters.

But for all its efforts, and the loss of 180,000 troops in that time, Russia has only made minor territorial gains. It has not changed the willingness of the Ukrainian military to fight, or the will of the Ukrainian government to continue its defence against what they view as an existential war being waged upon them.

As Russia's current offensives continue but begin to lose momentum, Ukraine has been focused on the reconstitution of its forces in the wake of the 2023 counter-offensive and a long and bitter debate over mobilisation. The Ukrainians, however, have recently shocked the Russians, and their supporters, with a major operation in Russia's Kursk Oblast.

Four factors will influence the war in 2025

Four things will have a major influence on the war.

The first is the impact of Russia's ongoing offensive and whether it will take additional territory before the Russian ground forces culminate. While the prospect of a Russian breakthrough cannot be discounted, Moscow will most likely continue to undertake assaults on multiple axes, which will force Kyiv to commit troops and firepower it would prefer to preserve for the offensives to come.

A second influence will be the outcome of the ongoing Ukrainian operation inside Russia's Kursk Oblast. Having already humiliated Putin and the Russian army with their surprise attack last week, Ukraine has multiple options for how it can politically and strategically exploit its successes in this new operation.

A third impact on Ukraine's 2025 operations will be the winter. Ukrainians have a miserable winter coming because of Russia's destruction of about 50 per cent of the country's power-generating capacity needed for the winter months. This will have a political impact on Ukrainians' view of their government and the war. The winter will also be a time when both the Ukrainian and Russian militaries will be conducting long-range strike operations and making final assessments, plans, and logistic stockpiling for ground operations in the spring.

However, while the Ukrainian Kursk operation is attempting to change the status quo in the war, the biggest impact on the dynamics of the conflict could be a return of Donald Trump to the White House.

Trump camp's views on Ukraine

There are some indicators about which way a second-term President Trump might lean. Presidential candidate Trump has claimed that he would end the Ukraine war quickly if he were elected. A plan drawn up by two former members

of Trump's National Security Council staff, Keith Kellogg and Fred Fleitz, proposes a ceasefire based on current frontlines on the battlefield, however this is not known to have been endorsed by Trump.¹²

Vice-Presidential candidate JD Vance has been very open about his views on Ukraine. After Russia invaded Ukraine in February 2022, Vance stated that "I don't really care what happens to Ukraine one way or another."¹³ And, in a *New York Times* opinion piece in April 2024, Vance wrote that "Ukraine's challenge is not the GOP; it's math. Ukraine needs more soldiers than it can field, even with draconian conscription policies. And it needs more matériel than the United States can provide. This reality must inform any future Ukraine policy."¹⁴

Notwithstanding the apparently cordial Zelensky–Trump phone call in the wake of the Republican National Convention, a Trump administration will be difficult to navigate for the Ukrainians.¹⁵ In the most recent Pew Research Center survey, published in May, less than half of Republican Party voters have a favourable view of NATO compared to 75 per cent of Democratic Party voters. Nearly half (49%) of Republican voters believe the United States is giving too much aid to Ukraine.¹⁶

If these sentiments are taken together with Trump's role in encouraging a four-month interruption in US assistance to Ukraine in 2023, his assertions that he would let Russia "do whatever the hell they want" to NATO countries that did not spend enough, and his recent comments about Taiwan not paying America enough to guarantee its defence, a picture begins to form about how a US administration under Trump might approach the world.¹⁷ But it remains an opaque view at best.

Quick solutions will prove elusive

The Russians have previously stated that any peace plan proposed by a Trump administration would have to reflect the reality on the ground in Ukraine, but that Putin remains open to talks. To this must now be added the reality on the ground in Kursk. However, should Trump not be able to achieve a quick solution in the Ukraine war, he could well turn on Putin and increase US support to Ukraine.

There is much that might happen to impact voter intentions between now and the November election. But one thing is certain. The Ukrainians understand what is at stake if they lose Russia's war of aggression. Even if a Trump administration attempts to force them into an unsustainable armistice, Ukraine would likely choose to fight on without US support. That is still a better option than subjecting themselves to what is likely to be only a short-term reprieve from ongoing Russian predation.

Southeast Asia has low expectations of America, including Trump

Susannah Patton

For a region already sceptical of US reliability and commitment, Trump's return to power would be worrying, but not gravely alarming.

KEY JUDGEMENT

Southeast Asian countries have less to lose from a second Trump administration than much of the world. Southeast Asia will not be a focus for a re-elected President Trump, which may allow other parts of the US system, including Congress, State Department, and US Indo-Pacific Command, to drive US engagement. On the issue of rebalancing alliances — a focus for Trump — no Southeast Asian country is likely to be in the frame.

The region sees itself as less dependent on the United States than, for example, Europe, Japan, South Korea, or Australia. A common view within elite circles, especially in mainland Southeast Asia, is that the United States is a distant power, whose engagement has waxed and waned since the end of the Cold War. Especially in the region's Muslim-majority countries, Washington is not necessarily seen as a benign actor that abides by international rules.

In authoritarian countries, by contrast, Trump's possible return to the White House may be seen as a positive. Myanmar's generals and Cambodia's autocratic elite would likely welcome the prospect of a US president less focused on democracy and human rights. The Biden administration's global democracy promotion agenda always sat uncomfortably in a region as politically diverse as Southeast Asia. Even in the region's largest democracies, Indonesia and the Philippines, "strongman" leaders have political appeal and cut-through.

US neglect is fine, but China escalation is not

The main regional concern of a second Trump presidency would be the risk of a more confrontational China policy. Southeast Asian countries worry about US–China competition escalating into conflict. Moving away from the “managed competition” with the guardrails of the Biden administration would not be welcomed by Southeast Asian capitals. Many have been reassured by the Biden administration’s efforts to build up direct communications with Beijing; repudiating these would be seen by many as provocative and stoking tensions.

A “tough on China” policy might also see the United States push Southeast Asian countries to make choices in a counterproductive way. Under the first Trump administration, “tough on China” policies saw a proliferation of regional initiatives, many of which lacked nuance. These included trying to convince Southeast Asian countries to ban Huawei from 5G networks, without offering an alternative, and funding a social media disinformation campaign to discredit Chinese Covid-19 vaccines in the Philippines.

Philippines the outlier

The Philippines is a possible outlier to this picture. Unlike the rest of Southeast Asia, which will continue to avoid aligning with either Beijing or Washington, Manila under President Ferdinand Marcos Jr has doubled down on its alliance with the United States. It faces a tough challenge from China within its Exclusive Economic Zone, especially at the Second Thomas Shoal. The credible commitment of the United States to defend its treaty ally is an essential component of Manila’s strategy.

However, the Philippines also wants to retain room for independent manoeuvre, for example, by re-establishing diplomatic dialogue with Beijing. If a second Trump administration wanted to play a more active role in the South China Sea, Manila might find that it was informed, rather than asked, about a stepped-up US military presence. This is better than a scenario in which the United States failed to back the Philippines, but could still cause problems for Manila.

Vietnam has much to lose in a trade war

On economics and trade — Southeast Asia’s highest priority — the region will have low expectations. Few will grieve the Biden administration’s Indo-Pacific Economic Framework (IPEF), which Trump has vowed to “kill”. While some in Southeast Asia saw IPEF as a useful way of keeping America talking on trade, it never offered improved access to the US market for Southeast Asian exports. Even more modest goals of a digital trade agreement were scuppered in 2023.

The best-case scenario for US economic engagement under Trump would be a maintenance of the status quo in which the US private sector is active, but with little by way of supporting economic statecraft. Increased protectionism or across-the-board tariffs would harm trade-exposed Southeast Asian countries. It is possible that Vietnam could be specially targeted for higher tariffs — its trade surplus with the United States has grown steadily and is now the fourth-largest in the world. Hanoi's reputation as a key beneficiary from the relocation of supply chains from China prompted by the first US–China trade war will not endear it to a second Trump administration.

Pragmatism means most in Southeast Asia are calm about the idea of Trump returning. However, they, like the rest of the world, will need to reckon with the prospect of a diminished, more unpredictable America providing less leadership and stability than before.

Trump has clashing instincts on Asian security, but China competition will continue

Sam Roggeveen

Ideological and policy tribalism is a feature of every presidency. The new Trump team will be no different.

KEY JUDGEMENT

Three foreign policy tribes are competing for ascendancy in a second Trump administration, with different prescriptions for America's role in the Asian security order. We can assume none will be decisive. However, one thing seems pre-ordained because all three tribes want it: an escalation of economic and technological competition with China.

Trump's first-term record in Asia was less radical than promised. He ended US involvement in the Trans-Pacific Partnership trade deal, and his overtures to North Korea strayed far from Washington policy norms. Yet despite three summits with Kim Jong-un, the fundamentals of American policy on the peninsula remained untouched. And despite expressing regular frustration with allies, Trump did not oversee major reductions in US military commitments in Asia.

The lack of progress in implementing Trump's instincts was partly a result of his own inability to drive change, but also due to resistance from his senior advisers. In a second Trump administration, that resistance will probably decline because he will choose senior officials closer to his own worldview.

Primacists, prioritisers, and restrainers

Yet Trump's foreign policy instincts will not go unchallenged. The US analyst Jeremy Shapiro divides the senior officials likely to shape Trump's national security policy into three tribes: primacists, prioritisers, and restrainers.¹⁸

The primacists are led by former Secretary of State Mike Pompeo, and they argue for continued global strength and leadership. The prioritiser school is exemplified by Elbridge Colby, a senior defence official in Trump's first term whose book, *The Strategy of Denial*, calls for America to reduce its commitments to Europe and the Middle East to focus on the China threat. Trump's running mate, JD Vance, could also be counted in this school.¹⁹

Finally, the restrainers are interested primarily in economic competition with China, not geopolitics. They want America to wind back its global military commitments. Trump himself is the leading member of this tribe, though his first-term record does not reflect consistent adherence to its principles.

Which tribe will be ascendant in a second Trump administration? We can assume none will be decisive. Ideological and policy tribalism is a feature of every presidency, and senior advisers always compete for influence. A new Trump team would be no different.

One thing seems pre-ordained because all three tribes want it: an escalation of economic and technological competition with China. But in service of what policy? Here the tribes disagree. While the restrainers are uninterested in security competition with China, the primacists and prioritisers aim to weaken China so that the United States can win a regional security contest.

AUKUS and alliance scepticism

It is unclear where the three tribes stand on AUKUS, under which Australia will get as many as five Virginia-class nuclear-powered attack submarines (SSNs). US shipbuilding may not be able to ramp up quickly enough to meet demand from both the US Navy and Australia, and this has caused consternation in the Trump camp. Elbridge Colby has tweeted: "SSNs are our jewel in the crown and we have too few. It would be highly imprudent to part with them absent an iron-clad guarantee they can be employed at the will of the United States."²⁰

But Colby's position on AUKUS appears to have softened, and when former Prime Minister Scott Morrison met with Donald Trump in May, he told reporters afterwards that "There was a welcome level of comfort about AUKUS in our discussion".²¹ Defence Minister Richard Marles has heard similar signals: "Every engagement we've had with the Trump camp ... there is support for what is playing out in relation to AUKUS."

Yet on AUKUS, as with his approach to Asian geopolitics more generally, we must not discount Trump's impulsiveness and volatility, as well as a lifelong public antipathy to America's alliances.

America's military forces in Asia — 79,000 active-duty military personnel in Japan and South Korea, plus major force elements in Hawaii, Guam, and elsewhere — are formidable. But their power comes only partly through their military capabilities. It also comes through the American president's willingness to use it.

Trump's reticence in this regard is well known. He has consistently questioned why Americans should make sacrifices for the defence of its allies, including Japan and South Korea. In January, he declined an opportunity to commit America to the defence of Taiwan.²² In February, he said he would encourage Russia to attack NATO unless its members increased their defence spending. As president, he refused to give a speech referring to America's unwavering commitment to Article 5 of the NATO treaty.²³ And he excoriated his own generals and senior advisers when they tried to school him on why America needed to defend the rules-based international order.²⁴

Allies will invest in self-defence

This may encourage China to behave more boldly on Taiwan or its territorial claims in the South China Sea. It may also encourage Washington's allies to go further in ensuring their own defence. Japan has announced a doubling of defence spending, and South Korea is investing in its own non-nuclear strategic deterrent force.²⁵ This is not just a response to Trump but to a 30-year erosion of America's military predominance. Since China launched its military modernisation drive in the early 1990s, US force levels in Asia have remained roughly constant.

Trump is unlikely to reverse that trend — whether the primacists, prioritisers, or restrainers win the battle for Trump's attention, there is no prospect of US military predominance being restored. A more achievable goal would be to settle for a balance of power with China, but whether that will satisfy the ambitions of the tribes is an open question.

Trump 2.0 would not derail the global energy transition

Michelle Lyons

Any decline in US climate change ambition will serve to strengthen Chinese dominance of clean energy industries.

KEY JUDGEMENT

A global climate policy framework without the United States would be substantially weakened. But a second Trump term is unlikely to derail global action on climate change over the long term. The reallocation of capital taking place to meet net zero emission targets works on timeframes far longer than a four-year presidential term, with investments extending well beyond US borders.

There is no doubt that Trump's re-election as president would reduce the pace of US efforts to support the Paris Agreement's goal of holding global temperature increases to well below 2°C.

Withdrawal from the UNFCCC would be unprecedented

Trump 2.0 would come at a critical juncture in global efforts towards achieving a net zero energy transition by the middle of this century. There is no scope for delay in cutting global emissions. Yet Trump's campaign has indicated that if re-elected he may opt to withdraw from both the Paris Agreement and its underlying structure, the UN Framework Convention on Climate Change (UNFCCC).²⁶

Unlike Trump's presidential decree to exit the Paris Agreement in his first term (later reversed by President Biden in 2021), a US withdrawal from the UNFCCC would likely be permanent. It would also be unprecedented; 198 countries have ratified the convention, and no party has ever withdrawn.

This would increase political uncertainty around the net zero transition. Uncertainty is not a friend of energy investment; a truth Australians know all too well.

Strengthening the negotiating hand of China and the Global South

Any decline in US climate change ambition will also serve to strengthen Chinese dominance of clean energy industries. There are strong security and economic imperatives for all countries to diversify clean energy supply chains and provide ambitious levels of climate finance to developing countries as they decarbonise.

The US election in November also coincides with UNFCCC negotiations for countries to agree to post-2020 climate finance goals in Baku at COP29.

The exit of the world's second-largest greenhouse gas emitter, who bears substantial responsibility for historical emissions, would be viewed as an abdication of leadership, particularly by developing countries. It would strengthen the negotiating position of the disparate but increasingly salient groupings of Global South countries, while reducing the power of Australia's negotiating block, the Umbrella Group, just as we seek to co-host the UN climate conference with Pacific Island countries in 2026. It would also encourage the petrostates and other climate laggards in the UNFCCC to stymie efforts to ratchet up global ambition.

A full domestic rollback is impossible

Domestically, Trump has been dismissive of the Inflation Reduction Act (IRA), which he has described as “the biggest tax hike in history”, but it is unclear if he would seek its repeal.²⁷ Within the Republican Party, there are divergent views about whether the IRA should be wound back. Where possible, the Biden administration designed IRA funding to be dispersed before the election, (such as the US\$27 billion in funding for Green Bank programs), so a full rollback would be impossible. But the tax credit provisions of the legislation that provide the majority of funding through the IRA are more open to being revised or repealed.

Trump has been more forthcoming about his support for the fossil fuel industry if re-elected, proclaiming that he will “drill baby, drill”. Trump will likely enact a series of executive orders to reduce regulation of the oil and gas industry. These would repeal a range of measures introduced by the Biden administration, including a ban on routine flaring at new oil and gas wells, monitoring for methane leaks, new standards for equipment, and reduced leasing of lands for oil and gas development.²⁸

A Trump administration will almost certainly enact sweeping changes to environmental public service agencies, beyond political appointments, as was the case in his first term. The Environmental Protection Agency and Department of Energy will see significant reductions in funding for core programs.²⁹

Regulators would roll back environmental measures including the climate disclosure laws recently enacted by the Securities and Exchange Commission.

The final important consideration when gauging the impact of a second Trump term on climate change action is the degree to which subnational and business action can counterbalance any reduction in Federal US climate change ambition. In President Trump's first term, some states led by Democratic Party governors implemented ambitious climate change policy measures, and many large corporations committed to net zero emissions to show strong support for the Paris Agreement. While some subnational and business actors could again increase emission reduction efforts, we are not in the heady days of 2016 when the Paris Agreement had just been signed, when borrowing money was cheap, and many actors had little idea how challenging decarbonisation would be.

It is difficult to predict the climate change impacts of a second Trump term, but they will very likely be worse than his first. While weak US action on climate change for the next four years would slow the pace of the net zero transition, it will not derail global efforts to decarbonise. Ironically, it would likely serve to strengthen China's dominance of clean energy technologies and diminish US prosperity by reducing their future share of these industries.

Trumpian economic nationalism is not what the world or America needs

Roland Rajah

Trump's policies are a recipe for higher global inflation, greater fragmentation, and more inequality.

KEY JUDGEMENT

It is difficult to tell the difference between Donald Trump's bluster and what policies might result were he to win office again. However, the direction a second Trump presidency would pull the world economy seems reasonably clear. Trump's signature policies would foster a future world economy that is more divided, less prosperous, and increasingly unstable. Domestically, his policies would likely have analogous effects, reinforcing the economic cleavages fueling political polarisation and thus also the forces behind America's retreat from international openness and cooperation.

Trump has promised to impose 10 per cent tariffs on all imports coming into the United States. China specifically would be hit by 60 per cent tariffs across the board. Trump also wants Congress to pass the Reciprocal Trade Act, which would enable him to impose tariffs on specific products to match what other countries impose on the United States. Reciprocal tariffs could notionally be used as bargaining chips to force open other countries' markets. But more likely, they would simply be used to cherry-pick fights over specific products.

On the budget front, a key Trump policy is to extend expiring income tax reductions introduced under his 2017 Tax Cuts and Jobs Act. Trump also promises to slash government spending. However, American politics, let alone Trump's populism, imply any spending cuts would likely be limited. That means bigger budget deficits. Trump might seek to repeal key Biden-era industrial policies — the CHIPS and Science Act and Inflation Reduction Act — but as

these substantially benefit many “red states”, Trump might instead opt to largely keep these in place with relatively minor adjustments.

Trump also wants to substantially curb illegal immigration, including through expanding his border wall, tougher law enforcement, removing work rights, and mass deportations. At the extreme, this could include following through on a threat to deport roughly 11 million illegal immigrants currently residing in the United States.

Higher inflation and interest rates

One predictable result from all this is higher inflation. More expensive goods from tariffs, increased demand from a bigger budget deficit, and reduced labour supply due to less immigration and more deportations would all push up inflation. This would in turn mean higher interest rates as well as a stronger US dollar as more capital is pulled into the United States.

To Trump’s chagrin, the trade deficit would likely expand, not shrink, with a higher dollar making imports cheaper and exports less competitive, while a bigger budget deficit would add demand to an economy already operating beyond full capacity, again encouraging higher imports and fewer exports.

Vicious spiral and currency wars

As the trade deficit is, erroneously, seen by Trump as a key measure of success, a higher deficit would likely spur further tariff escalations. Robert Lighthizer — the US Trade Representative during Trump’s first term, one of his most effective lieutenants, and a candidate as Trump’s Treasury Secretary — thinks America should go further to target a lower US dollar. Achieving this would be very difficult without the active cooperation of other major economies, which is unlikely. Unilateral action — direct currency intervention by the Treasury or Trump pressuring the Federal Reserve to act — would add a contentious currency war to Trump’s repertoire of beggar-thy-neighbour policies.

All of this mirrors the economics of Trump’s first term in office. The only question, as last time, is exactly how far he goes. This time, the potential costs could be much higher.

While Trump 1.0 was impeded by his own disorganisation and resistance from various parts of government, this time the Trump movement is reportedly much better organised and already planning to install loyal lieutenants across key government posts.

Global vulnerabilities

In addition, the world economy is in a much more parlous state compared to last time — still reeling from high inflation, interest rate hikes, the Ukraine war, and the after-effects of the Covid-19 pandemic. Global growth remains weak. Households the world over have been battered by a cost-of-living crisis. Government debt and budget deficits are much higher. Developing countries have especially suffered and progress in reducing global poverty is stalling. Rising global protectionism is becoming entrenched and China's renewed export surge since 2020 is adding fuel to the fire.

The world is also struggling to deliver the international cooperation needed to deal with ever more urgent shared challenges such as combating climate change, restoring global development, preventing future pandemics, and managing the rise of artificial intelligence. Not addressing these shared challenges would mean reduced global prosperity, more instability, and less security for all.

A return to Trumpian economic nationalism is not what the world needs. Unfortunately, the world does not get a vote.

Yet Trump's signature policies offer no solution to America's problems. Automation means reshoring manufacturing, and deporting immigrants would not bring back many working-class jobs. Trump's tariff hikes would hurt lower-income households the most, while his tax cuts benefit the rich. And an even bigger budget deficit only means larger future fights over who will ultimately have to pay for soaring government debt.

It is, then, doubly unfortunate for the world that a second Trump term would only aggravate the internal cleavages driving America's retreat from international openness and cooperation.

Revisionist powers would gain from Trump's challenge to the rules-based order

Ryan Neelam

Through hostility, breaches, and neglect, Trump 2.0 would cause lasting damage to internationally agreed rules, institutions, and cooperation.

KEY JUDGEMENT

America First is philosophically opposed to the idea of US accountability to global institutions, and to the notion that it shares some responsibility — if not leadership — in addressing global problems. Not only would a re-elected President Trump deal another body blow to international rules and norms established over decades, but he would give pretext for revisionist powers to do far worse.

As during Trump's first term, the United States would still look to the United Nations system opportunistically – whether to rally pressure on adversaries through the UN Security Council, or to invoke human rights where it aligns with political expediency.³⁰ But a piecemeal and inconsistent approach will undermine global cooperation, as well as the United States' own credibility.³¹

Trump would take a hostile approach to the parts of the multilateral system most antithetical to his worldview, including the World Trade Organization (WTO), and may go further than during his first term in actively targeting institutions.

But he would also do damage through neglect — depriving multilateral bodies of funding, attention, and leadership. That includes withdrawing the United States from the UN Human Rights Council (once more) and the UN Framework Convention on Climate Change, reducing their global authority and

effectiveness. This at a time when China and Russia are seeking to redefine global rules in their favour.

Three examples illustrate the threat.

Peace and security

Under Trump 2.0, the president's permissive attitude towards Russia would present a central challenge to the rules-based order. While an internal debate within the Trump camp is still playing out, most signs — from Trump's long-held admiration for Putin, and his assertion that he could end the Ukraine war in one day, to the views of some of his key advisors — point towards a re-elected Trump either halting or reducing US military assistance to Ukraine.³² A withdrawal of support to Ukraine would risk consolidating some of Russia's territorial gains in Ukraine, while a hasty peace deal could legitimise them. That would create a dangerous precedent for the UN Charter's fundamental prohibition on military aggression, and on respect for territorial integrity.

The repercussions would be far-reaching. An America that not only permits but facilitates a “might makes right” settlement would embolden authoritarian regimes from Iran to North Korea. Looking at Ukraine's losses, Xi Jinping might also calculate that Trump was unwilling to impose meaningful costs on aggressors, raising the risk of a forceful Chinese takeover of Taiwan.

Human rights

Trump would likely attack major human rights institutions. A repeat withdrawal from the UN Human Rights Council would further weaken the key body for promoting human rights globally.³³ Similarly, while America has never been party to the International Criminal Court, in office Trump went further by sanctioning ICC officials involved in investigating potential US war crimes in Afghanistan.³⁴ Reflecting his administration's broader scepticism of the United Nations, then-Attorney General William Barr described the ICC as “little more than a political tool employed by unaccountable international elites”.³⁵

Similarly, Trump's reverence for authoritarian strongmen, and his lack of regard for foreign human rights violations, would bolster global impunity.³⁶ A second Trump administration would be less active in holding foreign human rights violators to account. Worse, the United States would likely be seen to be aligning with efforts underway by Russia and China to prioritise state sovereignty over universal human rights.

Free trade

Of all the multilateral institutions, the fate of the WTO hangs most precariously in the balance. In fairness, the paralysis and slow decline of the world trading body is a bipartisan US initiative. In office, both Presidents Trump and Biden refused to appoint judges to the WTO's appellate body, crippling a key dispute settlement mechanism on trade.³⁷ Whether Trump or Vice President Kamala Harris wins in November, both can be expected to maintain large-scale manufacturing subsidies and measures to extricate supply chains from China. Focused on competition with China, neither would champion the cause of the global free trading system.

But Trump would go further still. His promise of a 10 per cent tariff on *all* global imports coming to the United States would not only hurt US consumers but contravene one of the WTO's founding pursuits — the removal of barriers to trade. Such a radical departure from rules-based trade could lead to a chain reaction of retaliatory protectionist policies, proving fatal to an already fractured WTO.³⁸

The death of multilateralism?

Can multilateralism withstand a second Trump presidency? Many countries would no doubt remain invested in the benefits of the rules-based system, universal human rights, and open trade.

But in the absence of US leadership, they will need to bear a heavier burden in promoting, enforcing, and abiding by established global norms, even if it invites the ire of a second Trump administration.

One thing is clear. The world would be poorer and less secure for the United States disowning large parts of the global order it helped create.

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