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The US Presidential Election 2024 – Two Outcomes, One Set of Challenges

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Germany as Europe's leading economy and the host country to the majority of US legacy military installations on the Continent, continues to lag behind NATO's eastern flank allies when it comes to rearmament. Berlin's long-term relations with Washington, as well as its overall ability to influence the direction of Europe's evolution and the future of NATO will ultimately depend on how it responds to the challenge of rearmament.

The United States is in the midst of a presidential election campaign that at multiple levels defies past experience. If the nominees are in fact President Joe Biden and former President Donald Trump, American politics is about to experience a political Groundhog Day of sorts, with the 2020 election replayed but under rapidly changing and less stable domestic and international conditions.

Today, the United States is arguably more polarized and divided than at any time since the end of the Vietnam War. While partisan lines remain sharply drawn, intra-party divisions and internecine fights plague both parties, from economic policy issues, migration to culture wars bringing about a degree of unpredictability and turmoil to the US political scene reminiscent of the late 1960s and early 1970s.

Unlike those decades, however, today we face the added stress of a relative decline of US power position worldwide vis-à-vis China, and the rising "axis of dictatorships" – Russia, China, Iran, and North Korea – intent on revising and replacing the US-led global order. Moreover, the country continues to struggle to come to terms with the consequences of strategic failure in Afghanistan and aftereffects of twenty years of the Global War on Terror. Meanwhile, Washington is increasingly at loggerheads on its strategy for Ukraine, where both depleted munitions stocks, even though Congress eventually passed the aid package for Kyiv, and questions about the Biden administration's Ukraine strategy – not to mention the ascendant "China first" school – have contributed to the rancor.

Historically, US presidential elections are predominantly about domestic politics, unless the country has been directly attacked or pulled into a major war. If an incumbent is running for reelection, it is also a referendum on the past four years, with the "are-you-better-off-today?" question front and center for the opposing candidate. Consequently, much of the debate going forward will be about economics, the Southern border, etc.; however, in a putative Biden-Trump match-up both candidates will be subject to such a referendum, for they both bring to the table their records as Presidents.

And while most European analysts seem to be principally concerned about the prospect of another Trump presidency,[1] the reality going forward is that regardless of whether Joe Biden or Donald Trump is sworn in as the next President, there will remain a number of constants that either leader will have to contend with, the principal among them being the inadequacy of allied military power to address our increasingly unstable security environment.

In effect, the outcome of this election will not alter the set of challenges facing the United States and its allies, most fundamentally: How to return NATO to its principal collective deterrence and defense roles against a neo-imperial Russia, while freeing Washington's resources to deal with the gathering storm in other theaters, especially the Indo-Pacific? To put it differently, will the Continent's leaders muster the resolve to step up and rebuild Europe's armed forces to the extent that they can provide the bulk of conventional capabilities in NATO, thereby overcoming the current crisis and stabilizing the Eastern flank? Or will the policy of neglecting defense that has marked the last thirty years continue? How Europe answers this question is arguably more important than who will come to occupy the White House in 2025.

For Germany as the largest economy in Europe and the host country to the majority of US legacy military installations on the Continent, the answer to this question will set the course of Berlin's long-term relations with Washington, as well as its overall ability to influence the direction of Europe's evolution and the future of NATO. How Germany responds to the challenge of rearmament will shape the strength of the transatlantic bond, and determine how the United States engages with the allies most exposed to the Russian threat along the Eastern flank of NATO.

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EUROPE AND THE NEXT BIDEN ADMINISTRATION

The Biden administration has prioritized working with Brussels and Berlin as its preferred mode for engaging with Europe. The recent visit to Washington by Chancellor Olaf Scholz underscored the close working relationship between the United States and Germany, Secretary of State Antony Blinken calling Germany "an indispensable ally and an indispensable partner," and Foreign Minister Annalena Baerbock underlining "how important our close cooperation is."[2]

A few months before Russia's second invasion of Ukraine in 2022, the Biden administration waived sanctions on a company building the Nord Stream 2 gas pipeline between Russia and Germany – a move that signaled Washington's sensitivity to Berlin's energy policy and the project's supposed importance for German industry. The waiver included lifting sanctions both on Nord Stream 2 AG and its chief executive, Matthias Warnig, a former East German intelligence officer who had been singled out in a State Department report for engaging in sanctionable activities.[3] Following the Russian invasion of Ukraine and Chancellor Scholz's *Zeitenwende* speech at the Bundestag on February 27, 2022,[4] for the most part Washington and Berlin have been in lockstep on their Russia policy, despite occasional friction such as, for instance, when Scholz refused to commit to sending Leopard 2 tanks to Ukraine until the United States delivered some of its Abrams, and more recently during the ongoing debate about whether or not Berlin should deliver the Taurus missile to Kyiv.

During Christine Lambrecht's tenure as defense minister, Berlin was slow to push for increased defense spending, though since the appointment of her successor, Boris Pistorius, it has ramped up defense spending and committed to increase ammunition production, but not yet where Germany's commitment and capacity should be.

1 Arancha González Layla et al., "Trump-Proofing Europe: How the Continent Can Prepare for American Abandonment," *Foreign Affairs*, February 2, 2024: https://www.foreignaffairs.com/united-states/trump-proofing-europe.

2 US Department of State, "Secretary Antony J. Blinken and German Foreign Minister Annalena Baerbock Before Their Meeting," January 16, 2024: https://www.state.gov/secretary-antony-j-blinken-and-german-foreign-minister-annalena-baerbock-before-their-meeting-5/.

3 BBC News, "Biden lifts US sanctions on major Russian pipeline," May 19, 2021: https://www.congress.gov/117/meeting/house/114185/documents/HHRG-117-GO00-20211028-SD006.pdf.

4 German Federal Government, "Policy statement by Olaf Scholz, Chancellor of the Federal Republic of Germany and Member of the German Bundestag, 27 February 2022 in Berlin": https://www.bundesregierung.de/breg-en/news/policy-statement-by-olaf-scholz-chancellor-of-the-federal-republic-of-germany-and-member-of-the-german-bundestag-27-february-2022-in-berlin-2008378.

More importantly, Germany has followed the Biden administration when it comes to balancing the amount of aid to Ukraine against concerns over the conflict's vertical escalation, and remained in lockstep with the United States during the Vilnius NATO summit, refusing to offer a firm timeline for Ukraine to join NATO. More recently, however, Berlin has increased its Ukraine aid pledges, taking the significant decision to support 180,000 rounds of artillery ammunition to Ukraine under a plan developed by President Petr Pavel of the Czech Republic – a major departure from Germany's traditional approach of ensuring that defense spending prioritized its national defense industry.[5]

A Biden victory in November would raise the larger question of whether Berlin would be able to move beyond the current slow if steady investment to resource Ukraine to what is urgently needed, i.e., increase in the country's defense budget to rebuild the Bundeswehr. As conditions in Ukraine deteriorate, the next Biden administration would likely focus on finding a negotiated cease fire in place, but more importantly on pressing NATO's European allies to generate real, exercised military capabilities tied to the regional plans accepted at Vilnius by the leaders of all NATO countries. The regional plans represent clear political commitments and, in this respect, could serve as a "forcing function" that will, hopefully, end the cycle of European disarmament.

For Germany, the question of military capabilities will likely be a key issue in its relations with the United States and the next Biden administration, especially as tensions in the Indo-Pacific continue to rise. Hence, the close and relatively smooth relationship during Biden's first term could see rough patches emerge should Berlin continue to lag on rearmament. On the other hand, the next Biden administration would likely see eye-to-eye with Berlin on climate policy and Europe's energy transition, and could be expected to position its trade and investment policy on China within the "de-risking" bandwidth preferred by Berlin and Brussels. Last but not least, the tenor of the relationship would be unlikely to change, with formal and informal channels working in ways both Washington and Berlin have been accustomed to.

EUROPE AND THE NEXT TRUMP PRESIDENCY

The prospect of another Donald Trump presidency remains among the most discussed scenarios in major European capitals, with signs of rising anxiety as candidate Trump's campaign rhetoric continues to rattle the policy community on both sides of the Atlantic. Judging by the previous Trump presidency, a second term would likely bring a degree of unpredictability coupled with an unorthodox direct engagement style to transatlantic relations, possibly even more so when compared with his first term. Much of the tenor of the relationship would depend on whom President Trump would appoint to key positions at the Department of State and the Department of Defense, and who would become the next National Security Advisor to the President. A key question for Europeans to consider is whether foreign policy would occupy as much of the new president's attention as it has for the Biden administration.

Even so, it is reasonable to assume that much of the Biden "green deal" would be reversed, with oil and gas drilling central to US energy policy. Such a shift on energy policy is more generally tied to how the GOP views energy production, for during the primaries both Donald Trump and Nikki Haley alleged that the Biden administration's environmental policy had hamstrung domestic production, attacking Biden's record on oil and gas and pledging they would enact policies boosting production if elected.[6]

> For Germany, the question of military capabilities will likely be a key issue in its relations with the United States … especially as tensions in the Indo-Pacific continue to rise

The two greatest unknowns in the next Trump presidency would be US policy on Ukraine and the extent to which European NATO allies, especially Germany, would be pressured to significantly increase their defense spending and to provide the bulk of conventional forces in the Alliance. On the former, candidate Trump's recent declarations

5 Radio Free Europe/Radio Liberty, "Germany To Support Ukraine With 180,000 Artillery Shells Via Czech Initiative," April 2, 2024: https://www.rferl.org/a/germany-artillery-shells-ukraine-czech-aid-initiative/32887628.html.

6 Shelby Webb, "Trump and Haley say they would drill more oil. Is that possible?", *E&E News by Politico*, January 23, 2024: https://www.eenews.net/articles/trump-and-haley-say-they-would-drill-more-oil-is-that-possible/.

that he would "settle the war in 24 hours"[7] suggest that his administration would prioritize a negotiated end to the war; on the latter, the next Trump administration would likely put considerable pressure on our European allies to spend more on defense. Reports suggest that if he is elected President, Donald Trump would offer Vladimir Putin a deal to end the war in exchange for territory – a prospect which President Zelensky of Ukraine has thus far rejected as a nonstarter.[8] Regardless of whether Trump would pursue such a policy, it is likely that – notwithstanding the specific details of such an offer – it would align with Berlin's view of what is achievable in this conflict, and could create an opportunity for the German government to cooperate on this issue with the Republican administration come 2025, even though it might at the same time increase friction between Germany and other NATO allies along the eastern flank.

However, the overall tenor of the relationship could be tested over the residual issue of Germany's insufficient defense spending levels. It is also worth remembering that in the summer of 2020 the Trump administration announced that it would withdraw 12,000 troops from Germany, shifting half of them to other bases in Europe – possibly to the Baltics and the Black Sea region – on account of Berlin not meeting its defense spending commitments.[9] Donald Trump's campaign rhetoric suggests that he would likely take a hardline position on the European NATO allies' failure to spend at sufficient levels on defense. An added element of potential friction could be differences on energy policy should the Trump administration significantly expand fossil fuel exploration and use, moving the country in the opposite direction of the "green deal" promoted by Berlin and Brussels. In addition, it is likely that during the next Trump administration Washington's China policy would prioritize "decoupling" over "de-risking," creating additional areas of disagreement with Berlin. Should it come to that, Germany would need to think long and hard about the relative weight of its economic priorities versus the imperative of siding with Washington on this key national security issue.

Another variable that could become the most difficult factor to predict in transatlantic relations in the event of a second Trump administration is the European Union's plans to revise the Union Treaty, including a possible EU military and defense policy, a defense commissioner, and a possible European army. The military and defense aspects of EU treaty revisions would likely strain the Washington-Berlin relationship, but to a second Trump administration, talk of an EU military would likely be seen as a zero-sum game in which the resources that should be allocated to rearming European NATO were being redirected to the EU military project. Hence, similar to the issue of defense spending by European NATO allies, especially Germany, institutional reform that steers the conversation away from NATO rearmament to the separate project of establishing an EU military could become a significant bone of contention in transatlantic relations.

DEFENSE: THE KEY TO MAINTAINING THE TRANSATLANTIC RELATIONSHIP

Although speculation and emotions about the outcome of the next US presidential elections run high, the reality remains that regardless of whether Joe Biden or Donald Trump become America's next president, the rapidly devolving global security environment and competition for limited American military resources will continue to be the principal problem set for the next US administration. The current National Defense Authorization Act (NDAA) has set the United States defense spending at about 3.1 percent of GDP, while the nominal size of the Joint Force stands at 1.3 million personnel.

To put this in perspective, during the Cold War the United States military never fell below 2 million and its defense spending averaged around 5 to 6 percent of GDP (in 1967 at the height of the Vietnam War it approached 10 percent of GDP, with 3.5 million military personnel). At the time, the United States confronted one superpower adversary in one principal theater, yet the US posture was structured for two major theaters, plus a secondary one. Today, the United States faces two principal adversaries in two theaters – Russia in Europe and China in the Indo-Pacific – with Iran and North Korea poised to "widen the front" should an opportunity present itself. Today the US military is formatted for one major theater and one secondary theater only.

This has clear implications for the European NATO allies. Notwithstanding the atmospherics that would, admittedly, be different depending on which

7 Wall Street Journal Video, "Watch: Trump Says as President He'd Settle Ukraine War Within 24 Hours," May 11, 2023: https://www.wsj.com/video/watch-trump-says-as-president-hed-settle-ukraine-war-within-24-hours/0BCA9F18-D3BF-43DA-9220-C13587EAEDF2.

8 Rachel Bowman, "REVEALED: Trump has 'secret plan' to end the Ukraine-Russia war by getting Kyiv to give up land to Putin as former president boasts he could negotiate a peace deal 24-hours after being elected," *Daily Mail Online*, April 7, 2024: https://www.dailymail.co.uk/news/article-13281381/Trump-plan-Ukraine-cede-territory-Russia-war-peace-election.html.

9 Phil Stewart and Indrees Ali, "US to withdraw about 12,000 troops from Germany but nearly half to stay in Europe," Reuters, July 29, 2020: https://www.reuters.com/article/idUSKCN24U20A/.

candidate wins in November, the stark reality of deepening systemic instability worldwide and attendant US security commitments, is that the relationship between the United States and Europe – and Washington and Berlin in particular – will rise or fall depending on what America's allies in Europe do to shore up their militaries, so as to allow not for "burden-sharing" but for "burden-transferring" when it comes to conventional deterrence and defense in NATO. If Germany moves in short order to significantly expand its defense industrial base and rebuild the Bundeswehr, it will be well positioned to build a strong working relationship with the next US administration, irrespective of which candidate wins. But to get there requires decisions in Berlin on defense spending today, without hedging one's bets on the outcome of the US election.

The views expressed in this commentary are those of the author and do not necessarily reflect the views of the Action Group Zeitenwende or DGAP.

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