

Panelists

PASCAL BONIFACE

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Symposium Partners

The Political and Geostrategic
Observatory of the United
States at the French Institute
for International and Strategic
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The Academy of
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The Urban and Social Policy
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PANEL II

Global Implications of the Presidential Election: Relations, Alliances, and Conflict Zones

AS PART OF A SERIES OF PANEL DISCUSSIONS organized by the Political and Geostrategic Observatory of the United States at the French Institute for International and Strategic Affairs (IRIS) and The Academy of Political Science, this symposium analyzed major issues of the 2024 presidential election. It was held in collaboration with the Urban and Social Policy Program at Columbia University's School of International and Public Affairs (SIPA) and the University of Quebec in Montreal. The second of two panels examined the global repercussions of the presidential election, including its effect on the United States' relationships with close allies, its impact on relations with China, as well as its impact on conflicts in Ukraine and the Middle East.

PASCAL BONIFACE: What will happen if Donald Trump is elected again in November? It is a major concern for European and NATO countries. There is a panic in most of the European capitals because a Trump reelection would be the end of NATO as we have known it. NATO is supporting a country which is at war against Russia. NATO is more important than ever. You have a paradox. NATO has never been stronger than now with 32 countries and U.S. leadership. But on the other hand, NATO is very weak because Trump's election to the White House could mean the end of NATO. So NATO is very strong and very weak at the same time.

What will European NATO countries do? The Baltic States and Poland will try to please Trump by buying more weapons from the United States. We have to do our best to make Trump happy with NATO. But for other countries like France, Germany, Italy, and Spain, we have to think about plan B. We were already in trouble between 2016 and 2020. A second term will be worse than the first term because now there is war in Europe.

There is panic. This is why Emmanuel Macron tried to take a leadership role in Europe by not excluding the possibility of sending troops to Ukraine. He wants to appear as a strongman in Europe, since the United Kingdom is out of the European Union and Olaf Scholz is the leader of a weak coalition in Germany. And so, Macron thought there is a possibility for him.

Trump's plan to end the war in Ukraine is to stop helping Ukraine. Without any American help, Ukraine will be forced to make a compromise with Russia that means defeat. If European leaders are very frightened by the

prospect of a Trump nation, there are three people in the world who are very happy with such a possibility.

The first of course is Vladimir Putin. It will be a victory for Putin. It not only guarantees that Russia will keep Crimea and Donbas, but it also guarantees victory for Putin in Ukraine. It will be very difficult for European countries to continue sending weapons to Ukraine on a large scale without American help. We have to think about the fact that there are far more Russians than Ukrainians. If you continue to send weapons but not troops, it will be difficult to reverse the situation. Of course, I think Macron's proposal to send some troops to Ukraine was foolish because during a cold war we have to avoid a direct confrontation between Russia and NATO countries. So, Putin would be very happy to see Trump elected because he will be guaranteed victory in Europe and division between America and European countries, which has been Putin's goal since the beginning. And, it will have been facilitated by an American leader. If the Pope does not believe in God, it is very difficult for others to believe. And if the U.S. leader does not believe in NATO, who will believe in NATO?

The second one would be Benjamin Netanyahu. I think that Netanyahu is trying to stay in power until November. If he survives the present events and if Trump is elected, it will be a golden card for him. Netanyahu and Trump will resume their very good relationship and it will be a new honeymoon between the United States and Israel. They have something in common—either they are in power or they could be in jail. There is a strong link between the two. So, Netanyahu is hoping that Trump will be elected.

The third one is Xi Jinping. The only point of agreement between Joe Biden and Trump is to oppose China. But for China's leader, a weak America is better than a strong America. With Biden, America is strong again. China is betting on the fact that Trump will weaken America because the United States will have a bad relationship with the European Union and will not be a world leader as it is for the time being. And so it is better for Xi Jinping to have Trump to guarantee a weak U.S. leadership and a strong card for China.

Countries like Saudi Arabia will be very happy to see Trump as president. For Latin America, I think that Javier Milei will be pleased to see Trump as president. But for some Latin America leaders, a repulsive American president is much better than an attractive one.

African countries will suffer because Trump will stop any help for Africa.

That Trump will be a catastrophe for the world is not a perception which is shared by everybody. Some very important world leaders may see a Trump presidency as an opportunity to advance their own agendas, even if those agendas are not very good for the rest of the world.

Climate policy and world governance will be worse off if Trump is elected. The United Nations would be very weakened by a second Trump administration. The United Nations system will be weakened—remember the World Health Organization during the COVID-19 pandemic. I think that worldwide governance will be affected by Trump, and those who want to fly solo without any international obligations like Putin, Jinping, and Netanyahu will be more than happy to see Trump again in the White House.

FRÉDÉRIC GAGNON: This panel addresses the potential impact of the November election on U.S. allies. I will offer a North American and Canadian perspective on the elections. Canadian media outlets cover American politics on a daily basis right now, which was not the case 10 years ago. Canadians have become particularly concerned about the future of American politics, the future of American democracy, and also the future of Canada-U.S. relations. One reason for this is that our strong relationship with the United States has made Canada extremely dependent on the relationship over the years.

We cannot escape geography. First of all, Canada and the United States share the world's longest border and almost 70 percent of Canadians live within 60 miles of that border. I live in Montreal, but I was born in a small city north of Quebec City. I can tell you that we live close to the border because of climate. Secondly, we are not a superpower, so we must count on the U.S. military to ensure the defense of North America. And, we need free trade with the United States. We cannot escape that. Three-quarters of Canada's exports go to the United States. Canada-U.S. trade supports millions of Canadian jobs. In a forthcoming book entitled *America First, Canada Second*, I show that Donald Trump's presidency marked a turning point for Canada. It was a turning point for the world, but also for Canada—the effects of which are still being felt during Joe Biden's presidency.

To quote Chris Sands, a friend of mine who works at the Wilson Center and directs the Canada Institute, Trump has made Canadians realize that they can no longer count on special treatment from the United States. Like other U.S. allies, Canada must work with an American power that is less predictable than before—an America that is less convinced of the benefits of globalization and of a strong involvement in the world. America has also become more protectionist—more inclined to pursue national interests first, even with its closest friends. For Canada, this became particularly obvious as soon as Trump entered the presidential race in 2016. He promised to bring manufacturing jobs to the United States—to states like Pennsylvania, Wisconsin, and Michigan. Trump seduced many voters in these states with his discourse of putting America first.

And of course, NAFTA, the trade agreement with Canada and Mexico, was renegotiated during Trump's first term. He labeled the trade deal as the worst trade deal ever. The renegotiation was a challenge for Canada because Trump asked Ottawa to make important concessions, such as giving U.S. dairy greater access to the Canadian market. But that was not all. Two months after taking office, Trump imposed a 20 percent tariff on Canadian softwood lumber exports to the United States. In June 2018, in the name of National Security, Trump imposed additional tariffs of 25 percent on Canadian steel and 10 percent on Canadian aluminum. Canada and the United States have had trade disputes like this before. But one of the novelties with Trump, and a turning point, is that these trade impasses involved many issues at once—from NAFTA to softwood lumber, aluminum, steel, and milk.

Joe Biden's election in 2020 reassured many Canadians. But since his arrival at the White House, Biden has not completely broken with Trump's approach to Canada and international trade more generally. Like Trump, many of his policies aim to protect American workers first and to bring back economic production to the United States. He wants to seduce the same kind of voters that Trump won in 2016 in key states like Pennsylvania, Michigan, and Wisconsin. And, of course, he wants to win elections.

Biden has proposed policies that conflict with the economic and trade interests of Canada and U.S. allies. In the auto sector, for instance, climate change has prompted Biden to stimulate the production of electric

vehicles on U.S. soil. Like Europe, Canada has been particularly concerned that Washington's massive investments under the Inflation Reduction Act (IRA) is already attracting massive private investors to this sector in the United States, often to the detriment of U.S. allies. Ottawa has also expressed concerns about Biden's desire to strengthen buy-American policies, which increases the minimum amount of U.S.-produced content in federally funded stimulus projects. And like Trump, Biden has maintained tariffs on Canadian softwood lumber. He has also challenged Canadian trade practices that restrict the access of U.S. farmers to the Canadian market.

So on trade, the two presidential candidates are much less different than many Canadians would like. But Biden is still the best option for three reasons. I think the first reason is more predictability. We know what he says. We know what he wants. He is not going to tweet at night about Canada-U.S. relations. He is not going to tweet about Justin Trudeau at night. So that is reassuring for Trudeau right now. When Biden visited Ottawa in March 2023, I think we saw that he values the relationship with Trudeau. But more importantly, Biden thinks that Canada can play a key role in the competition with great powers, and with China in particular, in key sectors such as critical minerals and semiconductors.

A Trump return to the White House would be a challenge on many other issues that are fundamental for Canada. First, Ukraine was mentioned at the Biden-Trudeau March 2023 meeting in Ottawa. Both promised to maintain their unwavering support for Ukraine for as long as it takes. But as we have seen, it took months for Congress to pass a new \$60 billion aid package for Ukraine, and a growing number of Republicans, as well as Trump, signaled that they might cut off aid to Ukraine if they win in November. The future of Ukraine is a particularly sensitive issue in Canada. After Ukraine and Russia, Canada hosts the world's third-largest Ukrainian population. This diaspora strongly supports Trudeau's government and its position in the conflict. This diaspora could make a huge difference in our own federal elections, which are scheduled for October 2025. Trump's reelection could lead to a certain rapprochement between Washington and Moscow, while Canada has clearly sided with Ukraine since the start of the war and defined Russia as an enemy.

The second issue is the future of NATO. Trump has raised fears among U.S. allies that he might withdraw from NATO, even though Congress passed a law last year prohibiting presidents from unilaterally making such a move. But still, *The Washington Post* recently noted that Trump could very well punish countries that do not “meet their military spending pledges by withdrawing security guarantees or imposing trade tariffs.” I think Canada would be a prime target for Trump on this issue. NATO countries pledged to increase their military spending to 2 percent of their GDP in 2014. But *CBC News* recently noted that the latest national defense strategy released by Ottawa in April 2024 only calls for increasing military spending from 1.33 to 1.76 percent of GDP over the next five years. So, I can imagine Trump pushing the button on this issue.

The last issue I would like to say a few words about is immigration and border security. Polls show that immigration will be a top issue in November. Why is it important for Canada? Because we share a very long border with the United States. On the one hand, Trump is promising an even harder line against undocumented immigrants and nationals of countries deemed at risk. He has promised the largest deportation effort in U.S. history and new travel bans. From a Canadian perspective, the big question is what effects such policies would have on migration from the United States to Canada. There are currently debates about immigration in Montreal and Canada, similar to those in New York and in the United States—even though it is not as big an issue in Canada as it is in the United States.

Trump and many Republicans in Congress have recently tended to portray the Canada-U.S. border in a more negative light than was the case during Trump’s first term because of the rising number of apprehensions by authorities at the northern border over the past three years. It is nothing like the 2 million apprehensions at the U.S.-Mexico border in 2023. But, there were nearly 200,000 apprehensions last year at the northern border. A growing number of Republicans, and Trump himself, have recently declared the need for tougher measures at the border with Canada in the future. A year ago, 28 house Republicans founded a new northern border security caucus to raise concerns about the border with Canada. If there are tougher measures at the northern border, it would negatively impact trade with Canada—as we saw after September 11.

So, these are some of the reasons why Canadians pay so much attention to American politics these days and why we are also so anxious to see what is going to happen in November.

GIDEON ROSE: It was great to hear Pascal and Frederick’s presentations because I agree with ninety-plus percent of what they say. Clearly, all of us are looking at the same reality. They have painted a very good picture of what is likely to happen if Donald Trump is elected. They described the stasis if Joe Biden is elected, including a continuity on trade relations. There is a neo-mercantilism that has now become common in American politics across both parties. Up to a few years ago there was division between the two parties. Now, because of the domestic political situation, both parties are in a populist protectionist mode on trade. So, not much variation on that is likely, even if Biden wins.

If we can agree that you will get continuity if Biden wins and that you will get some kind of change, along with some kind of continuity, if Trump comes in, the question becomes: How much change would you likely get with Trump? How radical will that be? We just do not know.

In 2008, during the depths of the financial crisis, everybody was freaking out. I asked a buddy of mine, who is a big finance guy, “This feels really dangerous. People are really worried. Why is this time so different than all the previous economic crises that I have experienced?” And he said, “Well, Gideon, there is maybe a 20 percent chance of another great depression.” I said, “Okay, that is bad. On the other hand, there is an 80 percent chance that we are not going to have another great depression, which seems pretty good odds. So why is everybody so afraid?” He said, “Gideon, you do not understand. There was supposed to be a zero percent chance of another great depression, and that is why we are freaking out.” That is how I feel about the Trump situation.

I was speaking to a NATO group yesterday and I said, “Think of it this way. There is a 20 percent chance that the Atlantic alliance will be in a real crisis. On the other hand, the good news is that there is an 80 percent chance we are not going to have a giant full-scale blow-up. Trump is not going to withdraw from NATO. We are not going to abandon everything, especially now that Congress passed additional aid to keep Ukraine in the fight for a little while longer. But

it was supposed to be a zero percent chance that we were going to have a transatlantic crisis.”

I think that it is likely that Biden will win. Even if Trump wins, I doubt that the worst-case scenarios will come to pass. But, we cannot be sure of that because Trump is so hard to predict and we do not know the extent to which structural forces will constrain various kinds of actions.

In international relations (IR), we have various different theoretical perspectives. They are usually about the relation of structure and agency. There are various kinds of structures in the world, which as Karl Marx said, “Men make their own history, but they do not make it as they please; they do not make it under self-selected circumstances, but under circumstances existing already, given and transmitted from the past.” So, the structural features in various kinds of theories—in world politics, domestic politics, the economy—force similarly situated players to act in similar ways. An IR perspective like realism, will say, “You do not need to know anything about the domestic politics of country X because the external situation, the relative balance of power, and the challenges will force countries to behave in a certain way.” Now, we do not actually see systemic factors operating in practice. There is no big giant hand of God, just like there is no invisible hand that physically comes down from the market and arranges things, but it is a metaphor.

If you look at what happened just last week with regard to the Ukraine aid, you could see this in very realist terms, not in John Mearsheimer realist terms, but in classic IR realism terms. There was an external situation. Ukraine was about to fall. The United States aid was crucial for Ukraine. When that reality became serious enough, there was strong agreement among the U.S. national security elites about what would happen if the aid was not continued. The pressures made themselves felt on the domestic political system and flipped the Republican leadership of the House. You can see this as a classic example of how international relations theory is supposed to work. Eventually the pressure is more than they can bear, and things change.

The challenge with Trump is that he is not a normal political actor. He is partly a classic, right-wing populist politician. We know the basic platform. That is one angle with which to look at Trump. We also know that he is a charismatic demagogue who has an extraordinary bond with his base. He has passionate

support. He therefore has a great deal of political freedom to do what he wants. He can get his party to go along with it, which makes him more than just a regular right-wing populist politician. It makes him a right-wing populist politician who has extraordinary political power in his community and the ability to be free of his base’s requirements.

But he is also Trump. Trump, the person, is a real wild card. He is essentially a self-interested actor. He has a definite isolationist ideology in his gut sense. But as a person, he is not bound by the constraints that bind many other people. He is utterly shameless, reckless, self-interested, and transactional. We have a colleague up at The Fletcher School at Tufts University, Dan Drezner, who wrote a very good book about the first term of Trump’s presidency, and it was called *The Toddler in Chief*. It was the best frame with which to analyze Trump, because he is somebody driven by very short-term personal and emotional things. It is a wild card as to how he is going to act.

There is the 20 percent chance that all the bad things that Pascal and Frederick were talking about will happen. I think what Frederick said about NAFTA is the best-case scenario. First of all, every American politician has been critical about NAFTA, especially since the results were unpopular in the Midwest. But what usually happens is that you come into office and then you just ignore what you said on the campaign trail. Trump kept his promise, rather than back away. But what did he do? He did not abandon NAFTA. He basically took it off the agenda—forced a slight change, relabeled it, and then passed it back. Yes, there are some minor variations between the new agreement and the old agreement. But in the grand scheme of things, it is not that different. If that is all Trump will do with NATO, it is going to matter for Ukraine most of all, but it is not going to fundamentally change the structural alliance. But we just do not know because Trump himself is such a wild card and because of the power that the American political system gives to a president. Whoever gets the presidency this time will get Congress too—making it a much more decisive election than we are used to. We are going to go from a slightly divided government with a status quo party in charge to somebody who is either completely devoted to overturning things or somebody who has the authority to keep things going.

I love Pascal’s analogy about a pope who does not believe. Although that was presented as a paradox, the Roman Catholic Church has lasted for two millennia and there have been many popes who did not truly follow the Lord. But at some point during the Middle Ages, the gap between theory and practice in the Catholic Church led to popular dissatisfaction and resulted in protest movements that forced a reformation. Even then, that did not mean the end of the Catholic Church. So, I think that NATO will still exist just like the Catholic Church.

But the question then becomes: If the leader of the organization does not believe in it, how effective will that organization be? What kind of role will it play? We just do not know. I would expect that the forces that back Trump are fundamentally forces that are reactive to changes in the economy and society of recent years. This is a backlash against liberalization. And just like the other backlashes against liberalization in the west, they will ultimately pass and we will move forward, but it is going to be a turbulent set of years.

If Trump wins the election, the worst-case scenario is a four-year interim of more troubles similar to those during his first term, but it will ultimately pass. We just do not know. It scares me, just like it scared my friend in 2008 because there was a chance of not just an ordinary crisis, but of the big one coming. We had a little earthquake here recently. It was not the big one. California is still waiting for the big one. Will this next Trump term be the big one? I do not know. I hope we will survive it. I think we will, but nobody can be sure. And that is the scary part.

ELIZABETH N. SAUNDERS: I associate myself with almost everything that has been already said. I want to look at how foreign policy gets made and how the politics might look after the election. I do not want to talk just about Donald Trump or the particulars of what Joe Biden and NATO might do. I want to talk about what happens if Biden wins and the idea that we will all exhale the way we did in 2020, because I think it is clear that we exhaled too quickly and that there is a lot that goes on beneath the surface. I think of foreign policy as trying to avoid icebergs, and that takes a lot of skill. What will happen if we do not get a second Trump term? Why should we stay vigilant?

Trump has very few fixed beliefs, but he has been very clear for a long time on the things he really cares about. Tom Wright, who was at the Brookings

Institution and is now in the Biden Administration, wrote a piece that was published on January 20, 2016 exactly a year before Trump was inaugurated. He pointed out that there are three things that Trump has believed in for a long time, which go back to the 1980s. One is that he really does not like free trade, and multilateral free trade agreements in general. Two, he really does not like alliances in general, and especially big multilateral alliances. Three, he really admires authoritarianism. I think those three things have been borne out. He may have compromised in this or that. NATO still exists, and there was some transactionalism. But his core beliefs have held up. There is a lot of evidence that presidents do not change their minds much on these core beliefs. If he wins again, his own advisors and his prior statements suggest that he will try to withdraw from NATO. Congress has passed a law saying he cannot do that. I do not think that matters because he has so much power. As Gideon alluded, this is power that has accrued to the presidency over time, especially since the dawn of the nuclear age and post September 11.

Trump could do so many things to undermine NATO that it would be gutted—effectively withdrawing in all but name. He could choose not to deploy the ambassadors. He could choose to bring the U.S. troops home. As president, he is the ultimate arbiter of where U.S. troops are deployed. He could slash funding. Doing any of those things would undermine NATO and get to the big problem Pascal identified, which is that the fundamental thing holding up NATO is the belief that the United States is committed to it. Might NATO still continue to exist? Of course. Maybe it will be an independent force in a way that it had not been. But I think we cannot be so focused on the details and the *de jure* concerns about what Congress could stop him from doing. He can do an awful lot with the power that just comes from winning the election.

Let us say that Biden wins. Everybody will exhale. There will be a spate of articles about how we overreacted. I think we have to be mindful about what it will mean on a number of fronts. We are still dealing with important structural forces that, if not weakening, are losing their effectiveness. Everybody has a kitchen drawer with a bunch of rubber bands. Some of those rubber bands have been there since the 1950s. And when you try to use one for something, it snaps because it has lost its stretchiness.

There are a few factors that no president can really control. One is just the passage of time. There are aging populations. There are populations in many of these countries that do not remember why NATO or the U.S.-Japan Alliance or the U.S.-South Korea Alliance formed. They do not have a visceral connection to the origin of these alliances. I think that is something political scientists could do a lot more work on. I am starting some research on that. If the alliance gets a push in some direction, whether it is from Trump or elsewhere, will it just crack in a way that we cannot foresee? The second is that we have potentially the dawn of a three-great power competition era instead of just two. There are competing priorities. We have seen an effort to pivot away from the Middle East. Three presidents in a row, two of them Democrats, have tried to pivot away from the Middle East into Asia, and it is not going well.

Governing is setting priorities and making choices. This was 90 percent of what George Kennan, the architect of the Cold War containment strategy, wrote about. You cannot defend everything. So we have to have a serious conversation about our priorities. It is very hard to make a list of priorities, announce them, and then stick to them. That is what these presidents have discovered. Politically, this was hard for presidents in the Cold War, especially if you are a Democrat. You cannot make a speech and say, “You know what? Vietnam might go Communist. And that is okay.” It is politically easier to succumb to the desire to do something to show yourself as tough. It leads to mission creep, but it does not change the fact that resources are limited and that the U.S. military is not currently strong enough to do all the things it wants to do.

The industrial base has eroded. If you listen to Biden Administration officials talk about the great challenges of our time, they will talk about the dearth of welders. That is a very big problem that the Biden Administration is worried about. The industrial capacity of the United States, United Kingdom, and other classic military powers is just not there. You may think that is a good thing or a bad thing, but it is an input into some of the challenges that is not going to go away and does not depend on the outcome of the election.

I also want to talk about some of the things that a Biden win would highlight. The Biden team is very

good at what I like to think of as the invisible parts of foreign policy. A tremendous amount of foreign policy is conducted invisibly. Meaning, we do not hear about it. Or when we hear about it, it is long over. There are numerous examples of this. One of the best examples of this is the lead-up to the war in Ukraine, which the Biden Administration was not able to stop. But through its diplomacy—and recovery from the George W. Bush years and the skepticism of U.S. intelligence—there was a calculated plan to selectively disclose high-level intelligence to the allies who, like the rest of us, looked around and said, “There is no way Vladimir Putin is really going to do this. He cannot be serious. This would be so strategically stupid.” The Biden Administration had the evidence and convinced them of what Putin was planning to do. There is some evidence that it bought an extra week, which is not nothing in an existential crisis when you are going to be invaded. There is also evidence that it prevented Putin from using a tactic that he is very fond of, which is the false flag, where he would attack across the border, blame it on the Ukrainian side, and then use that as a pretext for invasion. So, we cannot take that for granted. Managing that is no joke, even though the Biden administration has made plenty of mistakes. It is a skill to be able to pull off that silent, invisible diplomacy. It greases the wheels of American foreign policy traditionally, and it is what Trump does not do. He does not want to appoint the people who have the expertise to do it. He is only interested in the stuff that gets the headlines. So that is a difference.

As analysts of American foreign policy, the problem we need to be thinking about is that if either Biden or Trump wins, you will have had 20 years or five presidential terms since the last mainstream Republican administration. So we will have had two terms of George W. Bush, two terms of Barack Obama, one term of Trump, and then Biden. Now we are going to have either Biden or Trump as president. It is hard for the same party to win three terms in a row. So if Biden wins again, it is likely that a Republican will win in 2028. There are people around from the Bush years who can be appointed to serve at the very high levels as department leaders and deputies. But in the last 20 years, those people have not been cycling in and out of power. Those deputies did not hire deputies, staffers, or interns who then move up the chain and go out of power when the Democrats are in power. I think this

dynamic, which is often pejoratively referred to as the revolving door, is very important. It is important for elites to be willing to lose power and to feel that they can do well when they are not in power. This is a very basic aspect of democracy. It induces moderation. You need to be able to know that if you give up the power, you have a chance to come back at some point later.

We have an enormous missing cohort of people to fill the jobs that make possible the invisible part of foreign policy. Apart from that, we are inculcating a group of people for whom there is no alternative when they leave office, and that is quite dangerous. I think we saw some of that on January 6th. Some officials were so invested with Trump that they followed him down the path of denying the peaceful transition of power.

I do worry about a 20 percent chance of something terrible to come. The remaining 80 percent includes some chance of Trump winning again and that it will not be as bad as we expect. Biden winning comes with some big structural problems that have nothing to do with Biden, other than the fact that he is a Democrat. Even if Biden wins, we will be living with the consequences of the 2024 election for a long time.

DISCUSSION

ROBERT Y. SHAPIRO: I would like to give the panelists a chance to respond to each other. Over the long term, I think the point about the revolving door of new leaders in administrative positions is very important. In the short term, my concern is with regard to guardrails on a potential Trump administration. Gideon pointed out the idea of Trump winning with unified Republican government—control of the House and the Senate—which the recent presidents have all had. Upon taking office, they were able to move things to the left and to the right. In the case of Trump, Republicans dominated court appointments. And so, with a unified government, the guardrail of Congress goes out the window. If Trump were to think about his party and elections, the other guardrail is how the electorate would accept what he does.

With regard to foreign policy, we have increased partisan conflict in foreign policy today. Democrats and Republicans in the electorate, for example, disagree strongly on NATO. Republicans have become

more opposed to NATO as the base takes their cues from Trump.

If the electoral constraint disappears, the only other constraint is the individuals appointed to administrative positions. The guardrails worked last time. The problem now is that Trump is very upset about those appointments. He does not want that to happen again. To what extent should we be worried about this?

ROSE: This is a great question, and we just do not know. Bob, you have so authentically written about the rational public, which engaged in retrospective voting. The rational public was sensible and translated things into actual results. Now we have what seems to be an irrational public, which does whatever the guy at the top says. Henry Adams commented at one point that he defined politics as the systematic organization of hatreds. And I used to think that was a funny line, a cynical joke. But now that is our reality. American politics is being driven by all sorts of populist and xenophobic passions on all sides.

We do not know how the guardrails will play out. If you think of U.S. government and its policies as a ship on the ocean with a large anchor floating down in the water to the base, it is hard to change things. We do not know the constraints.

It gets back to what is Trump like? Trump does not like crisis. He likes the appearance of crisis, which he can then appear to resolve. The question is: Will he be risk-acceptant or risk-averse in practice? If he moved forward with some of the most controversial items on his agenda, it would cause a whole lot of turmoil. And he has shown that he does not want to cause huge amounts of turmoil. This is why he appointed establishment Republicans to high-level economic posts to keep the economy going well. Giant ruptures in the alliance might cause the kind of conflict that he himself would not necessarily want. He likes to do what he did with Korea. There was no actual crisis with North Korea in the first term. He ginned up a crisis so that he could then pose as the guy walking in to solve the crisis. We may see more of that kind of pseudo crisis with a pseudo resolution that takes place in the headlines, rather than in reality.

In Europe, because of parliamentary systems and European structures, populist parties need to get majority support. Therefore, they are not able to put their right-wing populism into power even when they get into power. Because of America's outsized role in

foreign policy and a system that enables minority parties to maintain power in government, Trump will have the opportunity to do real damage.

We do not know that much about how parties work and the role they play. There are controversial and different theories about this. Will the degradation of the Republican Party that Trump has enacted and the extent to which his followers infiltrate the party result in congressional pushback? Will there be any institutional pushback, even with a presidency under Republican leadership? Or will the president, an ideological leader of his party, be able to get whatever he wants? We just do not know. So this will all be a great political science experiment.

In the last generation, we saw that unconstrained power of the United States was bad for the world. The old-fashioned realists were right. Post-September 11 America did a lot of things that it would have been better not doing. Maybe the response to a Trump presidency will be the revival not of a pure imperial presidency, but of domestic constraints on that. Maybe the lack of faith in a benevolent, powerful hegemonic United States, will get the other members of the alliance to step up, pay a little more for their defense, and take a little more active role.

I am not in favor of strategic autonomy, and I do not think the Europeans will go towards strategic autonomy, because there is no significant third path they can take. But a rise in European and non-American strategic capacity would be a good thing. The single biggest problem we have right now is less strategy than defense industrial capacity. And we all need to do better on that front.

SAUNDERS: And notably, presidents from Clinton onwards have all been saying: Spend your two and a half percent. That is not new. It is totally bipartisan. However, it has not usually been used as a threat to any alliance.

During the first Trump term, I was editing a blog that used to be called the *Monkey Cage*, and now it is called *Good Authority*. We would get all sorts of “sky is falling” kinds of submissions. The word unprecedented is thrown around too much. So, we have to try hard as political scientists to separate the truly unprecedented.

I do think we know about presidents and how they evolve over time. And some of this comes from my

own research. One, presidents do not fundamentally change their views on much. It is hard for them. Trump is not going to suddenly discover the value of NATO or of free trade. But two, does it matter that we keep electing people who say they do not have a lot of foreign policy experience, but that they have a bunch of excellent people to appoint. This is what George W. Bush said on *Meet the Press* in the 2000 campaign. He appointed Condoleezza Rice and Colin Powell, for instance. If you were an inexperienced candidate, why would you appoint people with no experience?

Then Trump came along. Trump appointed some experienced people the first time around. But he also appointed people who had very little experience. And over time he got madder and madder at the experienced people because they reined him in or because they were not listening to him on Middle East policy. This time around, Trump does not count as inexperienced anymore. If he wins, he knows more about the way this all works. He is clearly signaling that he is going to gut a huge swath of the federal bureaucracy. And he can. He has an apparatus this time, Project 2025, which is working to help him do that.

Trump is vetting names, and some of those people served before. But previously he also appointed acting heads in so many roles or just simply did not fill the positions. This has two consequences. One is the erosion of the guardrails, which Bob rightly pointed out. The other is that we need people to keep the lights on in the places around the world where the unforeseeable crises are going to be after the election is over. Governmental responsiveness, which keeps things going in invisible ways, will be an absolute vacuum. Trump could do a lot, and we do not know where this is going to matter until it is too late.

GAGNON: I agree with Gideon and Elizabeth that the renegotiation of NAFTA was not the end of the world. But it depends on where you sit. We have towns and cities that are very similar to Erie, Pennsylvania in Canada. We depend so much on this relationship. Small tweaks to a trade deal can make a huge difference for families.

I was born in a small town called Alma, Lac-Saint-Jean. It is north of Quebec City. The economy of my city depends on aluminum. Rio Tinto Aluminum has a huge factory there. When Trump imposed his tariffs on aluminum, Rio Tinto decided to postpone the

development of key projects. As a result, members of my family were not able to get jobs in that sector that were promised by the company. Canada has a population that is the size of California. It is a very small country if you look at the population. And just a little tweak to a trade deal can make a huge difference.

If I want to be optimistic, I think the Trump presidency has also been good for Canada. Even though many people in Canada complained about what Trump did on Canada-U.S. trade and relations, I think it was good because it forced our government to stop taking the relationship for granted. Canada invested more resources into managing that relationship—being more present on Capitol Hill, because Congress, not just the White House, makes very important decisions on key issues that matter to us.

I have conducted interviews with members of both parties in states that share a border with Canada. I was at a Trump rally in Manchester, New Hampshire because I wanted to understand why these voters love him so much. And I think you are right, Gideon. One of the reasons many people love Trump is that they feel he promises things and then follows up. He keeps his promises on issues like trade for instance. He said that he would renegotiate NAFTA, and he did it. Barack Obama also said it. But after the 2008 election, he decided to do something else. So, I think it was a turning point for that reason also.

QUESTION & ANSWER

How does the upcoming election affect France’s foreign policy in the Middle East and Africa?

BONIFACE: For the Middle East, we were on different sides 20 years ago. France was on the Palestinian side, with the United States on the Israeli side. And now, I think that French diplomacy is less pro-Palestinian and U.S. diplomacy is less pro-Israel. We have moved closer to each other compared to the beginning of the century.

Regarding North Africa, France has a problem, but it is not related to U.S. policy. It is related mostly to French internal policy. There is a lack of visas. The anti-Muslim speech in the French public debate affected the French vision for this part of the world. If France is less popular in North Africa and in West

Africa, it is mostly due to the restriction of visas and speech in the media and the public scene, which are considered anti-Muslim and anti-mainland.

How does the upcoming election, and further reform of NAFTA, affect Canada’s foreign policy? What countries or markets do you see Canada aligning itself as a substitute to America?

GAGNON: Canada is trying to diversify trade relations with other regions in the world—with other countries in Europe and the Indo-Pacific region. We have had this debate for decades. How can we diversify? Pierre Elliott Trudeau, who was Justin Trudeau’s father, tried to diversify. But it is very difficult because of geography. It is easier to do business with the United States than with other countries in the world, even though we can do things in certain areas—in digital trade for instance—which we could not do decades ago. Also, the supply chains are so integrated between both countries. In many sectors, including the auto sector, it is very difficult to build or change supply chains.

The strategy of Ottawa has been to focus on the Canada-U.S. relationship—making sure that the renegotiation of NAFTA would be okay for Canada. It is still a big issue because there will be a revision of the trade deal in a few years. And if Trump is re-elected, Ottawa will have to invest resources, time, and energy to make sure Canada can avoid a catastrophe.

How long will the \$51 billion package for Ukraine, which passed yesterday, last? Will it last until before the election or until after the election? And if there were an attack on a U.S. base in Asia by North Korea, is it attacking NATO at the same time?

SAUNDERS: By that logic, the attacks on the bases in the Middle East would have already triggered that. Alliances in general are only as good as the credibility behind them. The Cold War was a story of how to make an alliance credible from a very long distance. Would we actually fight for Berlin? Would we trade Paris for San Francisco? If somebody decided to get up and make a speech that said, “This attack on the base in the Middle East is an attack on NATO,” it may not be technically true, but it would get a lot of attention and debate.

As a legal matter, no. The September 11 attack is the only time when the European Allies invoked Article V to say there has been an attack on one of its members. There is a famous article, “Anarchy Is What States Make of It.” Alliances are somewhat what states make of them. People devote their whole careers to studying the problem of how to maintain alliance credibility. Do you deploy nuclear weapons on your allies’ soil? Does that help or does it hurt? You have to continually invest in making the allies believe you will be there when they need you.

ROSE: With regard to Ukraine, this will get us past the election, and then the question will be revisited with whoever is president and whatever Congress we have. If it is Biden and the Democrats, then you will get more like this to keep Ukraine in the fight. Then we will see what happens.

If Trump comes in, all bets are off. We have absolutely no idea. He will clearly try to push them into some sort of settlement. I do not think that Trump, whether he wants to or not, will be able to end the war. It might end up subsiding into a frozen conflict—the way the situation was post-2014, but with further parts of Ukraine under Russian control.

SAUNDERS: We just do not know, but I think it is probably the last big package Ukraine is going to get, no matter who wins. I think it is a very heavy lift. The Republican Party is trending one way and Congress is hard to mobilize for anything.

ROSE: What is hurting Ukraine now is the perceived lack of progress on the ground. There is a perceived Russian advantage. If the tide of war turns yet again and it seems like there is value to staying in the fight, I could see it going further. But we do not know.

The Trump era has shown me that the American public and Congress is much more easily led than we might have thought. There is a famous scene in *Star Wars* where Obi-Wan Kenobi goes to an Imperial Stormtrooper and says, “These are not the droids you are looking for.” And the Stormtrooper says, “These are not the droids we are looking for, pass through.” When Trump says X, people seem to do it. For example, the Ukraine vote only went through because Trump chose at the last minute to give a yellow light

and allow the House Republicans to do it. We do not know what he would do later. He might do the same.

SAUNDERS: Ukraine is one dimension. The other is Russian aggression and interference—what Russia could do in Europe. If that becomes the frame, you might see more aid to Ukraine in the service of countering Russia. But you have to have the view that Russia is a threat.

Drawing on Bob’s excellent work, I think the American public and Congress were always being led. There was agreement on where they should be led to, until Trump. It is the first time that that view captured the big prize of the presidency. And so, it seems like they are being led more now, but it is because everybody was going in the same direction before.

The reason democracy is in crisis is not because capitalism itself is in crisis. Pascal mentioned that there is no democracy without social equality. Unless we address that, are we stuck with having crises?

ROSE: The crisis of capitalism has been occurring ever since the mid-19th century. The great economist Karl Polanyi talked about a double movement of capitalism. When you turn things over to markets, it produces dynamism, economic growth, and activity. It also produces turmoil, turbulence, and inequality.

Society protects itself with a reverse movement that shuts down the operation of markets because it wants to protect itself from capitalism’s turbulence. This cycle ended after World War II, when it came to a crisis in the 1930s and 1940s with the acceptance of social democracy, or some version of it, by all advanced industrial countries. All the countries have mixed economies that control capitalism, while still having a major free market economy.

We lost the notion that this is always going to be the challenge. The post-Cold War era had the same challenge. There was a surge forward of liberalization in markets and a backlash that produced protectionism.

We are never going to solve the problems of capitalism. It is always going to be creative destruction and turmoil. We are going to be living in that going forward just as we always have been. It is a real problem, but it is not a new problem.

My question pertains to the nuclear agreement that was signed between Iran and the United States, and five other major war powers in 2015. What do you think will happen to the Joint Comprehensive Plan of Action (JCPOA)?

SAUNDERS: I think the JCPOA is now officially dead. I think Iran had an interest in returning to some kind of agreement. The Biden administration tried hard. Now it is too late.

I think the larger problem is political polarization. It is a miracle that Obama achieved a controversial, difficult arms control agreement like the JCPOA. He could not make a treaty, which he probably would have preferred, because a treaty cannot pass unless it is something like admitting Finland and Sweden to NATO. You cannot make treaty commitments, like those which the United States routinely made in the Cold War, because you cannot get 67 votes in the Senate. No matter who controls the Senate, it is impossible. We make arms control agreements with our enemies, not with our friends.

There is some excellent work by a scholar, Rachel Myrick at Duke University, who has shown that polarization means that U.S. credibility and durability of commitments are much reduced under these conditions, where you are just rejecting what the previous guy did without thinking about what comes next.

GIDEON ROSE: If we were having this discussion 75 years ago, people would not have expected that we would have no great power conflict for the longest period in modern history, and yet still a continuation of nation-states, regular conflict, and international trouble. We do not know the actual causes and how nuclear issues will pan out. We did not get nuclear use with Joseph Stalin, Mao Zedong, three generations of the Kim family, or nationalists in India. We think we know a lot about deterrence, but we do not.

The Ukrainians, and some of us supporting Ukrainians, think that the United States has been self-deterred from providing Ukraine what it needed to help itself because of unnecessary fears of Russian escalation. And we have no way of answering this until a bomb goes off somewhere, because every time it does not go off, you can explain, “I stopped it from going off” or “There was never even a low chance.”

Legal negotiated attempts to restrict the Iranian nuclear program are not going to stop it, and may not

work at all. That does not necessarily mean that there will continue to be proliferation. And even if there is, it does not necessarily mean that things will go off. It is a great time to study IR, even if living in interesting times is difficult and challenging.

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