

WEBINAR SUMMARY:

The Impact of the US Presidential Election on the International Order

With Dr. Pascal Lottaz, Dr Yu Jie and Dr Yuichi Hosoya, moderated by Dr Philip Shetler-Jones

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Q&A with speakers Dr Lottaz, Dr Jie and Dr Hosoya and moderator Dr Shetler-Jones:

Dr Shetler-Jones: Welcome to this Daiwa Foundation webinar on the impact of the United States election on the international order. We have three great speakers today. The 2024 United States election is expected to have a significant impact on the international order. The outcome of the election may have great implications for the war going on in Ukraine, conflict in the Middle East, to US policy towards China and relations between the United States and its traditional allies both in Europe and in the Asia-Pacific region including Japan. Let's begin with this question of order, and I'd like to begin with Pascal if I may, what kind of impact on order do you expect this election to have?

Dr Lottaz: Well, the difference between Kamala Harris and Donald Trump is quite large in terms of the way that they see foreign policy. If Kamala Harris wins I wouldn't expect any kind of significant change in terms of how the United States conducts foreign policy. She was of course the vice president of the current Administration and I do think she is quite close to the known Democratic and Neo-liberal and Neo-conservative policy making world. I would expect things to continue as they did under Mr Biden. However, Donald Trump has made it quite clear that he believes that he made mistakes in foreign policy in his first Administration. If he wins, he has said that that he wouldn't reappoint somebody like a neo-con like Mr Bolton, he would try to wind down the war in Ukraine, he would try to somehow stabilize US foreign policy and also pull back a lot of the engagement especially in Europe - maybe also in the Asia Pacific region, although that one he has been less clear. In

that sense, I would expect that under Donald Trump the United States will focus again more on itself and less on its Alliance building abroad.

Dr Shetler-Jones: Thank you Pascal. Do you think there is a difference in the candidates about how the effect works out in the quality of international order- is one more destabilizing than the other and what's that based on?

Dr Lottaz: I believe that Kamala Harris is definitely more hawkish, probably as the current Administration is and I believe that Donald Trump actually would try to wind down the wars that the United States are involved in. I do actually believe that Donald Trump would be a more pro-peace candidate, although not in all aspects.

Dr Shetler Jones: Thank you. I'm now going to move on to a question for Yu Jie about how the result of the US election is likely to affect the Indo Pacific region in particular and US relations with China?

Dr Jie: A Kamala Harris presidency compared to a Trump presidency will have a very different impact on the indopacific region. As we know much of Harris's foreign policy agenda will be a continuation to what the Biden administration's foreign policy agenda was: building up indopacific alliances to contend the influence within China. If we're going to have a Harris Administration then this will continue and also this sense of 'small yard high fence' targeted at China's technological press will continue.

However, with a Trump presidency, I think he particularly showed his dislike towards allies and towards America having to pay for the Indo Pacific security architecture, so we're potentially going to see a retreat of the United States in the Pacific to some extent. I'm not saying they're going to withdraw overnight but that sense of spending far less in terms of targeted military and security cooperation, and instead will give much further emphasis towards economic emphasis in the Pacific. For example, I think one of Trump's key advisors on trade and economics Bob Lighthize said quite openly that the 10% tariff will be imposed on every individual country that trades with the United States and 60% will be imposed on China. This could potentially impact the prosperity and economic well-being of a larger part of the Pacific. Secondly, with a Trump victory, I think much of the Foreign Affairs emphasis will be shifted to the Middle East and then much of the resources will be distributed and make America further get involved in the current Israel-Gaza conflict. The pro-Israeli core supporters have also been core Republicans, and supporters of Trump himself.

Regarding China, I think the answer is quite clear - irrespective of who will be sitting in White House for the next four years, the trajectory towards a China strategy won't change because I think the bipartisan consensus is that China has been the number one adversary of the United States. That pursuit of China containment will continue irrespective of who wins, however I think the differences will be that with Harris, we're going to have a sense of low intensity competition but much of the carry forward and carry on scenario like what we had with the Biden Administration. There will be very minimal stability between the US and China, as well as minimal communication and there will continue to be technology restrictions on China. However, if there is a Trump Administration, I expect more of a rollercoaster type of foreign policy. I think either President won't resolve the US-China conundrum.

Dr Shetler-Jones: That sounds like from the Chinese point of view, the Trump administration would be preferable as you said, it is likely that he will withdraw somewhat of his attention from East Asia and focus more on the Middle East. Would that broadly be in China's interest at least from the point of view of the geopolitical confrontation?

Dr Jie: Well, I'm not saying that he will withdraw the military support. I think it mostly depends on who advises him because Trump says one thing and his advisor says another. If he has advisors like Robert O'Brien, or Elbridge Colby, I think the support towards the Indopacific won't be withdrawn, but actually strengthened. I think China would much prefer to have someone who is more predictable, and someone they'd be willing to make a deal with.

Dr Shetler-Jones: Thank you. Well that leads us on to Japan, thinking about the closest allies to the US in that region. Let's ask Yuichi: Could you tell us from Japan's perspective - how do you think the outcome of this election will impact Japan's security and other interests?

Dr Hosoya: Of course, Japan is an important ally to the United States in the region of the Indo Pacific, but at the same time I think Japan is entering a time of political instability, particularly after the 27th of October, the Japanese general election. We have a LDP-Komeito coalition government, as the LDP failed to win a majority, so now the Japanese government is greatly weakened with a minority government. In addition to this, we don't have Shinzo Abe who could create a strong partnership with Trump, unlike many Western leaders. Without Prime Minister Abe, and a much weakened political foundation of the current Japanese government, naturally we think that a US-Japan alliance will face more challenges.

One thing I would like to emphasise is that I have a feeling that both Kamala Harris and Donald Trump will further reduce the American Global Leadership - whoever wins it is quite probable that the US is going to reduce the heavy influence that the US currently has in global conflicts. This also relates to the current American strategy based upon things like integrated deference- with these American policies, I think regional powers like Germany, France, UK, Japan, Korea have a much heavier burden to play a role in creating a much more stable predictable International order. I mean, the UK, France, Japan and so on have their own domestic political problems so it will prove to be much more difficult.

Dr Shetler-Jones: Thank you, I wonder if you could give us your brief analysis - looking at the way Japanese people vote in the election we just had, there was various possibilities of what kind of new coalition might form, depending on the position of the smaller parties - can you give your assessment about whether it's more likely that a coalition will emerge which is more ambitious to play a role in the region, or more isolationist or modest perhaps in terms of what Japan will do to provide its own security?

Dr Hosoya: Most of the candidates of the recent LDP presidential election, including Takaichi and Kobayashi have all said that Japan should play a larger role in global conflicts. I think they all have a common understanding that under the current international environment, Japan needs to play a larger role in global politics. They all understand that the problem is not their political leadership, the problem is the weakened LDP power base, as it is quite probable that the LDP and coalition partner Komeito will form a minority government.

I think that the current government will face difficulty in passing bills and they will struggle with the budget as well, so by tackling these increased difficulties in domestic policies it is natural to assume that a Japanese government under the current Prime Minister will be much less willing or possible to play a role in international relations unlike previous Japanese prime ministers like Abe.

Dr Shetler-Jones: Thank you. Pascal, if I could come back to you at this stage, looking at different perceptions from different countries and regions, I know that you're a specialist in the topic of neutrality and it seems at least from the European side of the world, neutrality is somewhat going out of fashion. If you look at the enlargement of NATO to include formerly neutral countries like Sweden, is this a trend you see as a result of changes in the strength and stability of US Global leadership and if so where do you see this going?

Dr Lottaz: I just had a conference that I organised in Kyoto last week and one of the outcomes was that we agreed that what we're seeing at the moment is a weakening of neutrality in Europe, but also a

strengthening of neutralism or non-alignment in the larger world. We just had the Brics Kazan Summit which was huge in Russia, and the interest in Brics is huge in the global South. We can clearly see that countries in Asia are pivoting towards their own positions not so much toward the US or China, but just towards themselves. India is a wonderful example, part of the Brics of course, it has border disputes with China but they're managing those and still collaborating in certain areas. India is sometimes regarded as an ally of China by the US, but India doesn't perceive itself as such. India still also trades with Russia. We see that in general, Asia isn't happy that they are being forced to choose between sides, and thus a third party position is actually strengthening. This will only increase by the results of the US Presidential election because whoever the winner is going to be; the chances for violence in the aftermath of the election and a political crisis is huge, and whether or not the US will choose to engage more with its traditional allies will not matter much for the rest of the world. In Europe however, Sweden, Finland and a couple other countries have clearly decided that they want to go under the US security umbrella, although Georgia this weekend just voted not to do so.

Dr Shetler-Jones: Thank you. Yu Jie, I want to come back to one of the things you mentioned when you talked about the first experience we had of President Trump, which was one where he was quite abrasive to allies, especially on the question of burden sharing and whether or not the relationship offered a good deal for Americans. At the same time it had almost a paradoxical effect in the case of NATO, where NATO got a rough treatment rhetorically, but actually the result was they spent more and they committed further to the alliance. I mean how do you see this kind of paradoxical pattern playing out around China now because the situation's moved on quite a long way in some areas, from where we were with the Trump Administration four years ago, especially with issues like the Korean Peninsula. Things have changed quite a lot under the influence of the relationship to Russia following the Ukraine war from 2022, so do you think this kind of abrasive but consolidating effect of Donald Trump's politics offers more opportunities for China, or actually more of a risk that it might lead to a tightening of some of the US alliances around China?

Dr Jie: I think on one hand, the tiny silver lining of a Trump Victory would be that perhaps it would offer an opportunity for Beijing to mend its relationship with a large part of Europe, but this also depends on how quickly the war in Ukraine will end, and in whatever format it ends. I think this is also due to the fact that there's only so much resources that the United States can devise, whether in Ukraine or Gaza. How Trump acts will also determine how Europeans will respond. Now even Ukraine has begun to talk to China on a regular basis, and that perhaps indicates that all sides are ready to end the war. It will be interesting to see how NATO plays a role in this: firstly whether NATO will allow Ukraine to join as a full member and secondly whether there will be the whole notion of Asia

and NATO- if the whole notion of Asia-NATO comes into substantiation I think that will alert the Chinese even more than anything else. This is the first big unknown.

The second big unknown is how Trump sees the overall Taiwan Strait situation, because at the moment I think really judging from the the tension on both sides across Taiwan, I think it's fair to say the very dangerous element of military escalation is there and both the United States and China must have some kind of crisis management mechanism to be able to deescalate the situation rather than just let it into a free fall. Whether Trump will be successful in that and whether Trump's advisers are willing to have that sense of Crisis management is quite unlikely at the moment. If we have Harris, she will follow the mindset of Biden, but for Trump it is uncertain how he is going to handle the Taiwan situation.

Dr Shetler-Jones: Thank you. Yuichi, coming back to Japan on this, the potential impact in the Taiwan Strait, or a war involving the United States and China would be really almost incalculably large for Japan. Despite the effect of the recent Japanese elections that has resulted in a still unresolved process of working out a new government- even if the result is one where Japan is not really ready to play this bigger role, isn't it inevitable that Japan will still have to respond to this deteriorating security environment, both with respect to increased risk of conflict around Taiwan but also as today we saw the launch of what seems to be the most long range, solid fuel ballistic missile from North Korea, landing in the Sea of Japan. I'd like you to also mention if you can of what you see coming for Japan from the Korean Peninsula, as well as the risk of the Taiwan crisis.

Dr Hosoya: Firstly I think that the Japanese government will respond to these crises that you mentioned quite effectively, based upon the quite solid current of Japanese foreign policy, towards the region. There are three possibilities that Japan and the United States would do in responding to the Taiwan contingency: firstly, both the United States and Japan would do something to strengthen the security of communications in their area including the Taiwan Strait. The Japanese and the US government had been mentioning this in their Summit meeting as well. Of course, both Japan and the United States should be responsible for defending the safety of the communication surrounding Taiwan. The second thing that the two countries would do is provide some kind of a support to Taiwan without military engagement- this is what the United States is now doing in Ukraine, without dispatching troops there, so this is quite probable that both Japan and the United States would do. Thirdly, it would be to do something militarily to defend Taiwan and this is what we do not know because of the strategy of ambiguity that the United States have adopted for the last several decades. Many leading scholars in the United States are mentioning the importance of enhancing deterrence towards China because if something happens, that will be extremely damaging to the United States,

Taiwan and Japan, as well as all the surrounding countries, possibly including China. In order to prevent this from happening, it would be the number one priority, so that's why all these countries like Japan, Taiwan and Korea must strengthen their deterrence towards China. At the same time, these countries do not want to escalate the tension in the Strait, so in this way, I think that Japan would be effective in maintaining or recovering some kind of stability in that region.

I would also like to emphasise the importance of North Korea because of the closer link between the two countries: North Korea and Russia. North Korea is becoming much more provocative and its current relationship with China is becoming much more complicated. This would actually bring some kind of unexpected results in the peninsula, so many experts around this region are talking about the North Korean contingency. We have to watch carefully what the North Korean government is trying to do in the region. Russia would support those North Korean provocations, and we cannot stop Russia from doing this, so Chinese law would be important.

Dr Shetler Jones: Can I come to you Yu Jie, and get your reaction to how China is viewing this increasingly close cooperation between North Korea and Russia, and what Yuichi said about the perhaps raised potential for some kind of provocative incident that might come out of it.

Dr Jie: Well I very much agree with what you just said, I think the military cooperation between North Korea and Russia makes Beijing very nervous. I've compared the congratulation letter on the 75th anniversary of the China- North Korean diplomatic relationship with the 70th anniversary, and I found the tone and wording from Beijing has become much cooler compared to five years ago, perhaps to show the displeasure from Beijing with the North Korean and Russian alliance. I think overall, if North Korea plans to do something within the region, Beijing should be the first to be notified, but I don't think that's the case anymore. If we're talking about great power collaboration, this should really be the area that China and the United States discuss, about how to co-manage the parallel state.

Dr Shetler-Jones: Everyone will remember, a few years ago, when we had a six-party talk dealing with the proliferation issues of North Korean missile and nuclear weapons programs - it seems like a long time ago. Pascal, do you want to come in on this, and just talk a bit about what the prospects are for going back to a stage where we have a more common vision for solving this among the big Powers.

Dr Lottaz: I'm actually optimistic about this. One huge difference now compared to a year ago is that we now have a concrete North Korean-Russian security arrangement- the two have concluded a treaty. I looked at the text that the North Korean news agency published - now I cannot be sure that that's actually the treaty because we haven't seen that text, but the one that the North Koreans published is

quite interesting. It says that either party will consult the other one before it does any kind of military engagement in the region, which to me seems to sound as though North Korea would not have decided to do anything in this region without consulting with Russia. Russia at the moment has zero interest in more escalation on the other side because it already is fighting a war in Ukraine.

Secondly, that agreement also actually includes a neutrality clause which says that if either of the two parties should have military problems with a third party then either side will remain neutral and not help the third party. In terms of a 'third party' this can only mean China, so both countries are aware that their new relationship might be a problem for China. They wouldn't want to increase each other's troubles if one of them came into trouble with China, so looking at this gives me a feeling that North Korea is starting to think more of trying to somehow have a stable neighborhood. They also gave up their claim over the whole Korean Peninsula: Kim Jong Un said we know where our Southern border is and we'll leave it at that; we demand that the South doesn't want to reunite under their leadership. It seems to me that North Korea is moving towards trying to consolidate what is theirs, instead of trying to go after this paradigm of the past of trying to reunify everything under North Korea, which if true would make me rather hopeful that we wouldn't see a North Korean contingency uh in the near future.

Dr Shetler-Jones: This is my last question. We remember Donald Trump made actually quite an intense effort to form a new relationship with North Korea and it didn't come to fruition but considering now the new centrality of North Korea in these relations with China and Russia, how do you each see the prospect of a new Trump Administration having a second attempt at this, and whether or not that's something that could only be likely with Trump as President? Could I start with you Pascal, and then Yu and Yuichi as well.

Dr Lottaz: Well, looking at how Donald Trump acted before, I mean first he was extremely belligerent about North Korea and then extremely friendly, I mean I think he would try to build up on what he already had achieved with Kim Jong-Un, and he would have the power to do so because it's mainly to do with the charisma of these two people and the grip that they have over the media. With Kamala Harris, again, I don't think that she would change anything from the current course.

Dr Shetler-Jones: Thank you. Yu Jie?

Dr Jie: I think this actually gives credit not to Trump but to Kim Jong Un, that he's able to meet the three most powerful leaders in the world and have some kind of relationship with all of them. This actually gives more credibility to Kim himself and makes the Chinese even more nervous. I think

nothing will get resolved but Kim Jong Un will use this opportunity to show that he's someone who actually carries substantive weight within the region for regional security.

Dr Shetler Jones: Yes, it does seem like he's gained a lot of leverage compared to where we were at the end of the last Trump Administration. How do you see it, Yuichi?

Dr Hosoya: I feel that North Korea is in a much better situation than four years ago under the last Trump administration, firstly because of the security of the United Nations security. The North Korean sanction panel was already dissolved, and Russia has no intention to revitalize that kind of international sanction. North Korea has also defined itself as a nuclear power equal to the United States more or less so under the current situation I think Trump should be willing to have some kind of a transactional approach to North Korea. This will only be possible with a clear strategy of a good team of advisors, which Trump is unlikely to have. I think North Korea wants to see Trump win the election, as if a transactional negotiation is reached, this would likely better the international perception of North Korea.