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Can the Next US President Achieve a Breakthrough in US-China Relations?

By Drew Thompson

SYNOPSIS

Whoever becomes the next US president will have to deal with the securitisation of US-China relations. Chinese President Xi Jinping's foreign policy choices to counter what he sees as a hostile US could make the relationship worse.

COMMENTARY

Every US presidential election season brings intense speculation around the world about the next administration's foreign policy. Election rhetoric and themes are primarily domestic, however, as these are the issues voters care most about. The 2024 election is no different, but that does not dampen the desire to know what the election might mean, particularly for those countries closely tied to the US either by alliance, dependence or competition.

The complex US-China relationship is perhaps the most consequential in the world, accounting for the high degree of concern throughout the Asia Pacific about its future. It must be noted that Washington's China policy is part of an overarching approach to Asia, where relationships with treaty allies take precedence, while strengthening partnerships is the perpetual foreign policy goal. China is critical for US policy and strategy as both a major trading partner and a security challenge, just as it is for other countries in the Asia Pacific.

Securitisation of US-China Relations a Concern

There have been significant changes in China's governance since Xi Jinping came to power in 2012 which will influence US strategy, regardless of the next president in Washington. The Chinese Communist Party (CCP)'s influence and power over all aspects of society, the economy and government have increased considerably,

shifting policy and decision making closer to the centre of the party, and away from regular interlocutors engaged by the US government and business community.

National security and counter-espionage laws, pervasive censorship and nationalism intimidate and disadvantage the foreign business community. Independent civil society has also vanished, negating the utility of people-to-people exchanges. Xi said, the party leads in all things, north, south, east and west.

Perhaps most significantly, China's development model has shifted, with the party's security becoming a higher priority than economic development. The next US president will have to manage the securitisation of the bilateral relationship.

China's economy has struggled over the last four years, with rising costs, increased competition and declining consumption leading global manufacturing and new investment to [shift away from China](#). Many US companies are increasingly pessimistic about their future prospects in light of growing nationalism and industrial policy such as Made in China 2025 which makes the playing field uneven for foreign companies.

China's industrial manufacturing capacity far exceeds domestic demand, which along with systemic government subsidies raises fears of dumping and decimation of domestic manufacturing firms unable to compete with a [flood of cheap Chinese imports](#). The US business community which used to advocate for positive relations with China to facilitate their market access and business interests are now seeking protections to ensure their own survival at home.

Military Flexing Bears Watching

China's dramatic military modernisation, expanding capabilities and willingness to use the People's Liberation Army (PLA) to coerce and intimidate China's neighbours, particularly US allies will be a central issue for the next US president to manage.

The US and China have a long history of military-to-military engagement, including established frameworks of strategic and operational dialogues and mechanisms, which can be leveraged to enhance strategic stability and reduce the risk of misperception or miscalculation.

The PLA's [launch of an Intercontinental Ballistic Missile](#) into the Pacific Ocean on 25 September this year highlighted China's military might and its resolve to defend the party's interests. Beijing's advance notification of the missile's launch was a positive development, however, and an indicator that Chinese leaders appreciate the value of strategic stability, creating opportunities to cultivate risk reduction and confidence-building mechanisms that can be employed to achieve it.

The US Congress will also have influence over foreign policy and the president's choices, particularly the confirmation of cabinet members and senior officials responsible for Asia, oversight, as well as the budget. Both political parties in the US see China as a national security and economic challenge, if not an outright threat, creating a baseline for the next president who has little incentive to seek a modus vivendi without significant concessions or reassurances from Beijing.

With these factors in mind, it is difficult to confidently predict how the two candidates will deal with China, Asia, and foreign policy more broadly. The next president will have little ability to reverse strategic trends, however, and thus far neither presidential candidate has addressed them as they campaign. That said there are some generalisations one can safely make.

Trump's Own Style of Strategic Ambiguity

Donald Trump represents uncertainty due to his personality and perspectives on governance. He takes risks and ignores conventions, such as his effort to engage North Korea's Kim Jong-un to normalise relations and open it to the outside world, and his campaign to charm Xi Jinping to re-define the US-China trade relationship, both of which ended in failure. He is likely to be surrounded by foreign policy hawks who are deeply sceptical of China and strong supporters of Taiwan.

While he can be influenced by senior staff and personal confidants (though his relationship with advisors can be tenuous and capricious), his decision making is largely shaped by his perception of benefit. His penchant for transactionalism, desire for "a deal", and his negotiating behaviours often include intentionally misleading statements, which decrease predictability and increase the degree of uncertainty about his future policies.

When asked in April if he would come to Taiwan's defence if it were invaded, he responded, "...I've been asked this question many times and I always refuse to answer it because I don't want to reveal my cards..." Trump has his own style of strategic ambiguity.

Kamala Harris has little foreign policy experience, and her current advisers have relatively little experience dealing with China or the most sensitive issue in the US-China relationship — Taiwan — making it difficult to extrapolate her administration's Asia strategies, or how they might differ from Biden's.

Her most prominent national security adviser Phil Gordon is a Middle East expert, and it is uncertain whether senior Asia officials in the Biden administration will stay on if Harris wins. While Harris' running mate [Tim Walz](#) previously lived in China, vice-presidents generally do not have a significant role in foreign policy, so it is questionable his views will significantly shape Harris'.

Harris' Administration May Not Deviate Far From the Path

Some analysts in Beijing hope that a Harris administration would be pragmatic and seek accommodation with China. Gordon signed a 2019 Washington Post letter titled, "China is not an enemy" but that may not reflect his views today.

Beijing thought President Biden would return to a more accommodating policy like the Obama administration following four years of the Trump administration's assertiveness. Beijing was therefore surprised and disappointed when Biden retained tariffs; strengthened alliances like the quadrilateral security dialogue (Quad), established AUKUS comprising Australia, the US and the UK; restricted high-tech

exports; and encouraged reshoring and friendshoring to [de-risk and secure US supply chains](#).

While Harris may not recycle the Biden playbook, it is unrealistic of Beijing to think that a Harris administration will take a completely different path.

All signs point to continued friction in the US-China relationship, regardless of who is president. Xi Jinping's outlook, strategies and resulting policies put him at odds with the US and its allies, making it difficult if not impossible for an elected president to seek a path other than intense competition.

Xi's foreign policy choices to counter what he sees as a hostile US could make the relationship worse. Beijing might seek to drive a wedge between Europe and the US, but poor prospects for European investors in China, the deteriorating Chinese economy and EU-China economic relationship, coupled with China's support for Russia's invasion of Ukraine, make Europe wary of China.

China's economic struggles and military assertiveness against Japan, the Philippines, and Taiwan drive countries in the region to pursue economic de-risking and collective security strategies, strengthening regional bilateral and mini-lateral relationships.

The US is certain to respond positively to increasing demands from allies and partners to strengthen security and economic relations, even if it frustrates Beijing. The door to cooperation between Beijing and Washington is not closed, however, but it will be difficult for the next president to achieve a breakthrough with China.

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