EXPLAINER

US Elections
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The 2024 US presidential election holds critical implications for global politics and economies with countries like India closely watching the outcome. This analysis compares key policy positions of Donald Trump and Kamala Harris highlighting how each candidate's potential leadership could shape Indian economy and bilateral relations.

To understand dynamics at play, it's worth revisiting narrow 2000 election between Al Gore and George W. Bush where each candidate gained and lost modest leads throughout the race, ultimately ending in deadlock. The 2024 election is distinctly different with results reflecting a decisive shift in favour of Republicans in an increasingly polarized political landscape. Donald Trump and Republicans that emerged victorious face the daunting task of governing an increasingly divided nation.

Polls indicated a tight race, yet beneath these numbers were profound shifts in American politics, some of which spotlighted key issues in Harris's record and underscored difficulties she would have faced if she had won the White House.

Demographic shifts and Harris Challenges

Harris struggled to secure support among minority voters that Democrats have typically relied upon, a challenge that could have substantial implications for swing states. Former President Barack Obama was the first candidate to win a US election with less than 40 per cent of white vote in 2012, reflecting a significant demographic shift. Hillary Clinton, however, could not capture this coalition in 2016, resulting in a loss with only 37 per cent of white vote. Four years later, Biden managed to secure over 40 per cent which helped him to victory podium. Harris, despite being touted as a progressive choice, has seen these coalitions begin to fragment, largely due to her lack of concrete, action-oriented policies that resonate with these communities.

A recent Marist Poll conducted in collaboration with NPR and PBS showed Harris leading with 45 per cent of white vote, potentially the largest share for a Democrat since 1976. However, her lead over Trump had narrowed significantly due to Trump's gains among Black and Latino voters, two groups the Democrats have traditionally counted on. The erosion may be exacerbated by what critics describe as Harris "symbolic" support rather than substantive policy shifts for minority communities, leaving her vulnerable to Republican inroads with these groups. The results proved so!

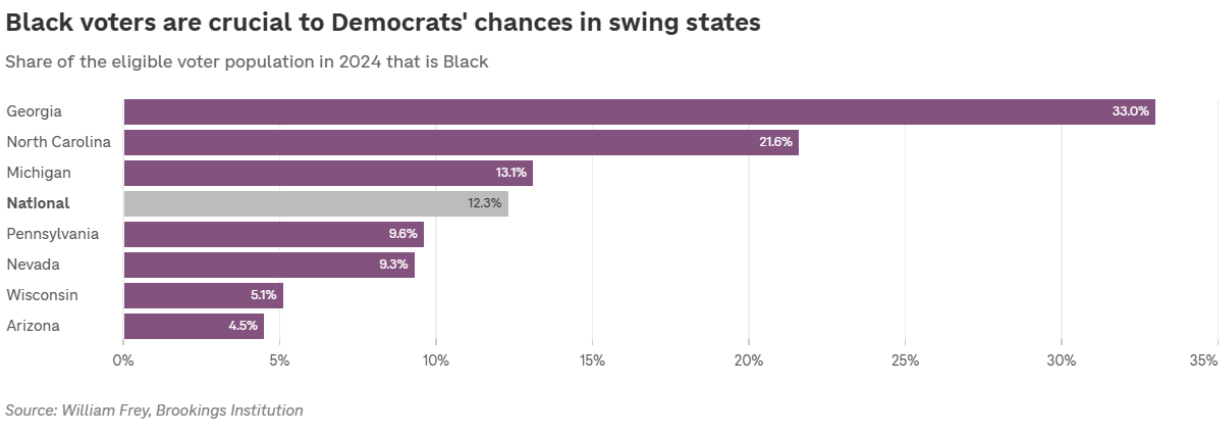
Harris Limited Impact on Key Issues

1. **Reproductive Rights and Overturning of Roe v. Wade**
   While Harris and Democratic Party emphasized reproductive rights as a rallying cause post-Roe, her leadership was unable to translate this into tangible action. Despite securing a historic share of women voters in 2020 (57 per cent), this big chunk of voters did not witness major policy achievements from Harris that differentiated her from her predecessor, Biden. Many female voters remained skeptical on Harris driving meaningful legislative change if elected, seeing her policies as largely aligned with the existing administration's incrementalism.

2. **Trump's Appeal Among Male Voters**
   The gender gap has widened with Harris relying heavily on female support while Trump garnered strong support among men and youngsters. According to NPR poll, this gap was to reach a historic 34 points—a sign of Harris's difficulty in appealing across demographic lines. This imbalance suggested that Harris approach, often perceived as catering narrowly to bracketed progressive causes, and alienated segments of the population who felt overlooked by her policies.

Harris Struggled to Connect with Young Black Men

Trump made concerted efforts to draw young Black men away from Democratic Party, an endeavour that was initially difficult to quantify in polling due to large margins of error in national surveys. Harris, however, was unable to manage and create a compelling counter-narrative or policy platform specifically tailored to this demographic. Her lack of decisive action on criminal justice reform, despite promising rhetoric created a perception of inconsistency and unfulfilled promises, allowing Trump to exploit this disillusionment. In 2020, Biden secured 87 per cent Black voters, comparable to previous Democratic candidates, yet Harris could not muster same levels of enthusiasm or trust, particularly among young men.



Exit polls in counties with high Black populations provided insight into Trump's gains with this segment. Even with Black voters making up just 13 per cent of national vote, their impact was critical especially in swing states like Georgia, North Carolina, and Michigan, where their eligible voter percentages were above the national average. Harris inability to consolidate support among these communities underscored a broader issue: her failure to craft a distinct identity separate from Biden's, left to face the criticism of "all talk, no action."

Harris Progressive Image, Limited Results

Despite her portrayal as a progressive candidate, Harris policy record and public messaging largely echoed that of the Biden administration, reflecting minimal change. While her stance on human rights and coalition-building sounded promising, it lacked clarity and focus that many voters sought. Her challenges with minority and young voters reflected broader issue: a failure to differentiate herself with impactful policies, leaving many of her core supporters questioning her ability to deliver real change.

In contrast, Donald Trump's more straightforward, pragmatic approach offered India clearer path for economic and security cooperation, directly addressing strategic and economic issues that align with India's priorities. Trump's policy framework appeared more cohesive and grounded in clear objectives, offering a level of engagement that may be more relevant for Bharat's aspirations on the global stage.

US Elections & Indian Economy

Indian economy is poised to feel the ripple effects of the 2024 US presidential election, with trade, foreign investment, geopolitical dynamics, and technological cooperation likely to be influenced. While United States remained a vital economic and strategic partner for India, nuances of this relationship could have taken a contentious turn, if Kamala Harris ascended to greater power. For stakeholders in India, understanding potential shifts in US policy will be crucial to navigate the challenges and opportunities that arise post-election.

Trade Relations & Economic Policies

US is India's largest trading partner with bilateral trade crossing $190.1 billion. This trajectory of trade relationship could have turned uncertain, with Harris stance potentially complicating matters. Her progressive leanings might have led to regulatory measures that prioritize US domestic interests over mutually beneficial trade, potentially sidelining Indian exports.

While Trump's trade policies are characterized as protectionist, his administration has previously sought to maintain favourable relations with India in light of broader strategic considerations. Harris, in contrast, could have focused on enforcing stricter trade conditions that despite appearing liberal, could have added layers of complexity for Indian products and services entering US market.

In terms of foreign investment, Harris approach could have posed additional barriers. Her inclination toward policies favouring US labour markets could have dampened investment climate for Indian companies and curtailed flow of American capital into India. The Trump administration, by contrast, may adopt a more pro-business stance, potentially fostering an environment where US firms face fewer hurdles when investing in India.

On foreign policy, Harris emphasis on multilateralism would seem inclusive but might not serve India's immediate geopolitical interests. Her approach veer towards diplomacy that emphasizes alignment with US allies and partners potentially overlooking India's regional security concerns in favour of broader coalition-building. In contrast, Trump's stance on a strong Indo-Pacific military presence resonates with India's security interests and offers a more targeted approach to countering China's growing influence.

While technology remains cornerstone of U.S.-India relations, Harris views on tech regulation might have curbed flow of innovation-friendly policies. Her support for stricter controls on data privacy and tech monopolies could have led to policies that, though well-intentioned, could hamper agility needed in India's fast-evolving digital economy.

Increased cooperation in areas like AI, biotechnology and cybersecurity might have stalled if Harris introduced stringent regulatory frameworks that limit collaboration. Trump's more business-focused approach, however, may facilitate a smoother exchange of technological advancements that benefit India's digital economy and innovation.

The market's reaction to election outcome will likely influence investor sentiment in India. While Trump's economic policies may inspire investor confidence, resulting in positive market responses, Harris initiatives could have initially triggered apprehension, given their potential impact on sectors dependent on less regulation. Such shifts could lead to fluctuations in capital flows and affect the strength of the Indian Rupee as markets respond to any shifts in US economic policy.

In summary, US administration under Democrat Harris could have brought policies that appeared collaborative on the surface yet prioritized US domestic agendas in ways that may sideline India's interests.

Harris would have leaned on multilateral rhetoric, her policies might have lacked the targeted, bilateral pragmatism that India needed for economic and technological growth.

Donald Trump vs. Kamala Harris vis a vis Bharat

India-Centric Issues	Kamala Harris	Donald Trump
Farmer's Protests	Expressed support for Indian farmers, framing the issue as one of human rights. This stance signals possible involvement in India's internal policies, risking diplomatic friction over agricultural trade and sovereignty.	Avoided direct involvement in India's domestic protests, focusing on macro trade issues. Aims to streamline bilateral trade without interference in local issues.
Jammu and Kashmir	Criticized India's handling of Jammu and Kashmir, viewing it through a human rights lens. Potential for imposing trade conditions linked to "rights standards," which could strain diplomatic ties.	Respected India's sovereignty in Jammu and Kashmir, refraining from public criticism. Likely to support India's stance on sovereignty, thus strengthening trade and defense ties.
Terrorism and National Security	Supports multilateral coalitions against terrorism but might lack India-specific action. Focuses on broader alliances that may not address India's unique security concerns with Pakistan-based terrorism.	Strongly supported India's counter-terrorism measures, often targeting Pakistan-based terror financing. Emphasis on direct bilateral support against terrorism that aligns with India's security needs.
Indo-Pacific Strategy	Emphasizes diplomacy and coalition-building but might avoid assertive posturing toward China. Multilateral approach may dilute India's Indo-Pacific strategy.	Advocated for a robust military presence in the Indo-Pacific, aligning with India's security goals. Supports a strong U.S.-India-Japan-Australia Quad alliance to counter China's influence.

Trade Relations	Prefers regulatory policies that may enforce strict labor and environmental standards on imports, complicating India's exports, especially in textiles and IT.	Advocates for reduced trade barriers and is likely to support a streamlined trade approach that benefits both U.S. and Indian businesses.
Foreign Direct Investment	Might introduce restrictions to ensure investments benefit local U.S. jobs, which could complicate U.S. investment in India.	Encourages U.S. investment abroad, including in India, with fewer restrictions, fostering a more open business environment.
Technology and Innovation	Advocates for strict data privacy and tech accountability, potentially limiting data-sharing agreements. Regulatory emphasis may hinder fast-evolving tech partnerships with India.	Favors fewer regulations on tech, encouraging U.S.-India tech partnerships, particularly in AI and digital economy, with open collaboration.
Biotechnology and Healthcare	Supports healthcare reforms that prioritize U.S. interests, which may restrict biotech and pharmaceutical collaborations. Could impose limitations affecting India's pharmaceutical exports.	Pro-business stance favors open biotech and healthcare collaborations with India, supporting affordable global healthcare solutions.
Climate and Energy Policy	Likely to focus on stringent climate policies, which may restrict fossil fuel imports and add compliance costs for Indian energy exports to the U.S.	Supports a flexible approach to energy partnerships, focusing on mutual energy goals without imposing strict climate-driven barriers.
Market Sentiment and Financial Markets	Progressive domestic agenda may create uncertainty for U.S. investors looking at India, potentially affecting capital flows. Stringent compliance could deter investment.	Clear pro-business approach likely to foster positive market reactions, attracting more U.S. investments in India, benefiting capital flows and Rupee stability.

Hindu Rights	Harris's approach has been limited or neutral on Hindu rights, often aligning with a broad human rights narrative that does not specifically address anti-Hindu violence or discrimination in South Asia. This stance may indicate a lack of direct support for Hindu communities facing challenges globally.	Trump administration has been vocal about religious freedoms globally, including condemning religious persecution in South Asia. His stance has included expressions of concern about Hindu rights and other minority protections, aligning with India's efforts to address anti-Hindu violence and extremism.

The outcome of the 2024 U.S. presidential election holds significant implications for India's economy, security, and social landscape. The differing approaches of Kamala Harris and Donald Trump toward India-centric issues such as trade, security, technology, and human rights highlight contrasting philosophies. Harris's stance often reflects a cautious, regulatory approach that may complicate trade and diplomatic relations, while Trump's business-oriented policies appear more aligned with India's economic and strategic goals. The following table compares their perspectives on key issues impacting India's interests, illustrating the potential benefits and challenges each administration could bring.

The comparison highlights how Harris's broader, human-rights-centered approach may introduce complexities in U.S.-India relations, potentially impacting trade, investment, and regional security cooperation. On the other hand, Trump's administration likely represents a more straightforward path to strengthening U.S.-India ties, particularly in areas of shared security concerns, economic openness, and support for religious freedoms. For India, navigating these approaches will be crucial in optimising its partnership with the next U.S. administration, as both present distinct opportunities and limitations for India's growth and stability.

Key Observations

The 2024 US presidential election has placed Kamala Harris and Donald Trump in the spotlight with each candidate representing starkly different approaches to both domestic and foreign policy. For India, this election could have far-reaching impacts on trade, technology, security, and diplomatic relations.

While Harris often promoted a progressive image, her policies and record reflected limited tangible change, largely mirroring her predecessor Biden. Trump's straightforward, business-oriented policies, in contrast, suggest a more pragmatic alignment with India's priorities.

Here are 10 key takeaways:

1. **Harris Progressive Image, Limited Action**: Despite a reputation as a progressive leader, Harris's policy record largely aligns with Biden's incrementalism, failing to offer India new opportunities or advancements in the bilateral relationship.

2. **Trade and Regulatory Barriers**: Harris's cautious, regulatory stance may complicate trade with India, focusing on labor and environmental standards that could restrict Indian exports, particularly in textiles and IT.

3. **Trump's Pro-Business Stance**: Trump's approach to reducing trade barriers and promoting a pro-business environment is likely to benefit India by facilitating smoother bilateral trade and investment.

4. **Inconsistent Support on Human Rights**: Harris's critical view of Indian policies in areas like Kashmir, framed as human rights issues, could introduce diplomatic friction, contrasting with Trump's stance respecting India's sovereignty.

5. **Geopolitical and Indo-Pacific Strategy**: Harris's focus on multilateralism may dilute U.S. support in the Indo-Pacific, while Trump's commitment to a strong U.S. presence aligns closely with India's strategic needs in countering regional threats.

6. **Technology and Data Privacy Challenges**: Harris's support for stricter tech regulations and data privacy measures could limit collaboration with India in digital and AI sectors, potentially hampering India's technological advancement.

7. **Trump's Openness to Tech Partnerships**: Trump's emphasis on fewer tech restrictions could foster stronger U.S.-India collaboration, facilitating growth in India's digital economy and innovation landscape.

8. **Religious Freedom and Hindu Rights**: Trump has been vocal in supporting religious freedoms, including Hindu rights, aligning with India's efforts to address anti-Hindu violence, an area where Harris's stance remains neutral or generalised.

9. **Market Sentiment and Economic Stability**: Trump's economic policies are likely to instil greater confidence among investors, encouraging capital inflows to India and supporting Rupee stability, while Harris's progressive policies may introduce market uncertainties.

10. **Harris Appeal and Voter Disconnect**: Harris's difficulty in resonating with minority and young voters highlights a broader disconnect that could weaken her electoral base, contrasting with Trump's gains in these demographics through targeted outreach.

Harris policies might have been appealing on the surface, but they fall short of offering substantive change for India. Trump's approach provides a clearer, more practical path forward, making him the more relevant candidate for Bharat's aspirations in trade, security, and technology.

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