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January 2025

Disruptor-in-Chief: A mandate for radical change?

Analysis of the American Presidential Election

Imprint

Published by

Friedrich-Ebert-Stiftung e. V.
Godesberger Allee 149
53175 Bonn
Germany
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January 2025

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ISBN 978-3-98628-670-5

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Content

| | |
|---|----|
| 1 Introduction: A populist shift to the right | 3 |
| 2 Looking back | 4 |
| 2.1 A campaign of divided perceptions | 4 |
| 2.2 Inflation beats investment | 5 |
| 2.3 Electoral realignment | 5 |
| 2.4 Unsolved problem of immigration | 6 |
| 2.5 Abortion – the topic that wasn’t | 8 |
| 3 Congressional elections | 10 |
| 3.1 Stalled Senate | 10 |
| 3.2 Republicans hold their ground in the House of Representatives | 11 |
| 4 Prospects | 12 |
| 4.1 Democrats need to reorient themselves | 12 |
| 4.2 Republicans in Trump’s hands? | 12 |
| 4.3 The EU has to buckle up | 13 |

1

Introduction: A populist shift to the right

American workers have delivered a clear message to the Democratic Party with the election of Donald Trump. The Republican Party's victory in the battle for the White House, the House of Representatives, and the Senate in the 2024 US elections raises many questions about the realignment of the electorate. While the Democrats' target audience in the campaign has remained the same, the Republican Party's electorate has grown and diversified: It is increasingly a home for blue-collar Americans, some young people, and demographic minorities.

The return of Donald Trump to the White House makes it clear that the populist shift to the right in the United States in 2016 was not an exception but rather the result of longer-term societal developments and realignments. With a Supreme Court dominated by a conservative majority (6 to 3 at the time of writing), the country will be influenced by Trumpian politics for the next few years. The Democratic Party must process its electoral loss, reflect, and redefine itself.

Donald Trump won the Electoral College with 312 of the required 270 electoral votes. It was a historically narrow victory, with Trump winning just under half of the votes (49.9 percent, 77,234,710 votes). Kamala Harris attained 226 votes in the Electoral College (48.4 percent, 74,938,722 votes). Though it was close, Donald Trump won the popular vote and is the first Republican to do so since 2004. The House of Representatives is now controlled by a conservative majority, with 220 Republican-held seats (just over the 218 seats needed for a majority). Again, the Republicans are narrowly ahead of the Democrats, who have 215 seats. At the Senate level, the Grand Old Party (GOP) flipped 4 seats and, therefore, will also hold the majority in the upper chamber, with 53 seats. The Democrats (including the independents who caucus with the party in the Senate) only achieved 47 seats (down four seats) and thus have lost their majority. That Trump's GOP was able to win both chambers, in addition to the White House, came as a surprise. Despite this Republican trifecta, it will be difficult for Republicans to govern unilaterally in the way Donald Trump envisions.

The new US political landscape is taking shape amid several polarizing culture wars and social upheavals, centered largely around the economy, inflation, immigration, abortion, and transgender rights. These debates have galvanized voters from all walks of life to vote for Donald Trump and Republican Party candidates at the national level. Conversely, preserving democracy, the issue promot-

ed by the Democrats, appears not to have the same mobilizing effect. With their election victory, Trump and his followers envision themselves as having a sweeping mandate that will allow them to remake institutions according to their wishes.

The Senate hearings for Trump's cabinet nominations are scheduled for the beginning of 2025. These high-ranking posts could be given primarily to loyalists, some of whom lack expertise and experience in their respective fields. The United States is at a historic juncture point that will significantly shape the country, international trade, and the security policy landscape. There are lessons to be learned. Some important insights can be gleaned from this campaign and the electoral results that will be instructive for the upcoming elections in Canada and Germany.

2

Looking back

2.1 A campaign of divided perceptions

The 2024 presidential election campaign was unique in a number of ways. Just 105 days before the election, Joe Biden was still the Democratic candidate. Voter concern regarding Biden's age and competence was ignored and dismissed by the Democratic Party despite frequent media coverage. The Biden administration was successful in passing significant, comprehensive pieces of legislation but was failing to communicate these successes strategically — a problem made painfully apparent by Biden's historically low approval ratings. Biden's disastrous performance during the debate against Donald Trump put a definitive end to the hope that he could win the election. On July 21, Joe Biden announced his withdrawal as the Democrats' presidential candidate in the campaign, largely as a result of calls to step down from within his own party. In his announcement, he endorsed Kamala Harris as the Democratic candidate.

With Kamala Harris, hope — and an extraordinary enthusiasm among progressives — returned. The campaign launched a massive social media push for Harris, which resonated with young voters in particular. The highlight of this early enthusiasm for Harris was the Democratic National Convention (DNC): an enormous show at which an array of artists, influencers, and politicians spoke in favor of Harris and her vision for the future. Thematically, the convention focused on abortion rights and the protection of democracy. Harris would go on to represent these themes as a candidate. In retrospect, the arena that held the event turned out to be like a UFO, vanishing from the earth after the DNC was over.

The DNC failed to deliver the outcomes necessary for the party. Problems for undecided voters soon arose, beginning with the struggle to define Kamala Harris. Harris accepted the nomination as a candidate just 74 days before the election. Who was she as a candidate for the White House in 2024? Was she the progressive candidate she purported to be during her failed 2019 primary campaign? Was she Biden's vice-presidential candidate, with a difficult reputation as his "border czar" — the person tasked with solving the hemispheric migration challenge most visible at the southwest border? Or was she the more conservative candidate her 2024 campaign appeared to be communicating to the public? Moreover, her demographic profile, as a black woman, made her bid for the country's highest office all the more difficult.

Harris only began to sit for interviews late in the race. In those interviews, she presented a long list of policy proposals for the economy. Yet, they lacked a compelling message and left a critical question unanswered: Would she give "Bidenomics" another go or leave it by the wayside? Harris walked a tightrope in these interviews, toeing the line between distancing herself from Joe Biden and his historically low approval ratings without disparaging the successes of her own administration. Despite her strong showing in the second and final presidential debate and high-octane enthusiasm among her supporters, Harris failed to win over large parts of the electorate. Trump's name recognition was an advantage to his campaign and his controversial and erratic statements were not disqualifying for undecided voters. Trump also had the advantage of nostalgia, as many had positive memories of the economy under his administration.

One thing is clear: This campaign was one of divided perceptions. Despite the strong economy, persistent high inflation and high prices weighed heavily on the working class. In the end, the Harris campaign was not able to break through to the voters it needed with a convincing message. This campaign also made clear how divided the media landscape has become and how many communication channels campaigns must be present on. There is no more nine o'clock news, no single broadcast where everyone receives the same information. Everyone gets their facts from different sources, and they can choose those sources based on their political leanings. There are "conservative" and "liberal" newspapers, TV channels, podcasts, and radio shows. Influencers in particular played an outsized role in this campaign cycle.

Donald Trump's electoral victory has definitively ushered in a "post-truth" era. Attempts to counter misinformation and lies fall largely on deaf ears. The essentially unregulated power of social media companies and individual donors who can invest virtually unlimited amounts of money to support candidates via political action committees (PACs) exacerbates this problem. During the election campaign, Trump garnered the support of tech billionaires in Silicon Valley, especially in the crypto industry. Notably, Elon Musk played a massive role in Trump's election campaign. He donated around 200 million US dollars through his "America PAC" to support the Republican candidate. What is more problematic from a democratic perspective is his ownership of social media company "X" and his more than 200 million followers on the site, mean Elon Musk has a massive platform, which he uses at his own discretion to push his political and economic interests. This changes the basis for modern, transparent, and democratic election campaigns — not only in the USA.

2.2 Inflation beats investment

Economic policy was perhaps the most painful lesson of 2024 for Democrats. Jared Bernstein, Chairman of the White House National Economic Council and chief architect of Bidenomics, reflected on voter “confusion” and “cognitive dissonance” after the election. How could Americans punish the government responsible for the historic post-COVID-19 economic comeback and strong labor market? In post-election polls in the seven battleground states, four in ten voters cited the economy and jobs as their most important issues ... but not in a positive light. The rising cost of living topped the list of voter concerns. And a majority of voters trusted Donald Trump to tackle the problem: He beat Harris [54 percent to 45 percent on economic competence and 54 percent to 46 percent on the issue of lowering the cost of living](#). For the voters that ranked the economy their most important issue, [four out of five voted for Trump](#).

Biden and his team had reason to hope that the COVID-19 rescue package (American Rescue Plan) and the massive investments from the Inflation Reduction Act (IRA), Infrastructure Act, and CHIPS and Science Act would pay political dividends. The three investment acts alone were intended to pump more than 2 trillion US dollars into the domestic economy. These legislative packages and the investments that came along with them also targeted sectors of the manufacturing industry, new technologies, and regions that had been negatively impacted by structural change and the liberal trade policies of previous decades. With these investments, Democrats were supposed to become more attractive to white workers in the industrial heartland who found Trump’s economic populism appealing. The gamble did not pay off.

Biden’s macroeconomic record is impressive. Economic growth has been between 2.1 percent and 5.9 percent in the last four years and will be around 2.5 percent in 2024. [Unemployment](#) reached historic lows in 2023, both for white workers (3.1 %) and African-Americans (4.8 %). The [labor force participation](#) rate is now higher than it was before the pandemic. Employee productivity has also risen [by 8.9 percent in the last five years](#). But the “coronavirus hangover” of rising prices proved too persistent: Inflation reached nine percent in 2022 and has since declined slowly. Wages rose but only began to keep [pace with rising prices from 2023 onwards](#). Democrats underestimated how many workers were no better off economically than they were in 2019 despite positive macroeconomic trends. Even an [analysis](#) published by the White House in October 2024 came to this conclusion. Moreover, opinion polls painted a clear picture: [less than a quarter of Americans rated the economic situation as good in spring 2024](#).

Republicans argued that Biden’s expansive spending policy was to blame for the rise in prices. Kamala Harris was unable to convincingly counter Trump’s narrative of a disastrous economic situation and simple-sounding, populist solutions to the problem. She vacillated between defending Biden’s economic approach and her own independent, detailed plan for an “[opportunity economy](#)” built for the

middle class. She was unable to distill many good, promising policy ideas into a concise and compelling message that convinced enough Americans that her economic approach would make life more affordable for working people. In the end, Bidenomics provided more headwind than tailwind for Harris — a particularly bitter pill for Joe Biden and the Democrats, who had crafted their entire economic policy with the interests of workers and unions in mind. Trump will most likely reap the rewards of the Democrats’ labor and long-term investments and claim them as his successes. This is supported by the fact that perceptions of the economic situation increasingly correspond to political attitudes — Republicans were already much more optimistic about the economy immediately after the election.

2.3 Electoral realignment

Voters’ frustration with the cost of living this electoral cycle masks a larger and more significant structural development. Perhaps even more influential with regard to the election outcome (and a major concern for the Democratic Party) is the structural realignment of their voter base. Over the past eight years, Trump has made inroads with traditionally Democratic voter groups, including Americans with less formal education and lower incomes — both white voters and ethnic minorities — as well as with unionized workers. In 2024, the national shift to the right could be found across almost all demographic groups.

According to preliminary [post-election polls](#), Harris won voters with incomes of over 100,000 US dollars but lost middle-class income earners (50,000 to 100,000) and those with incomes of less than 50,000. Some union voters, traditionally a safe bet for Democrats, also deserted them. Although Harris was seven points ahead of Trump with unionized voters (53 % to 45 %), Biden had nearly [double that advantage – 16 points](#) among the same group four years ago. African-American and Latino voters also moved in Trump’s direction; he gained 19 points with the former and 29 points with the latter. The difference is even more stark when the level of education is considered: Trump gained a full 37 points among non-white voters without a university degree. The 2024 election shows a sizable electoral realignment has occurred. The country is now not only divided politically into almost equally sized groups of supporters but also more divided demographically.

Progressive critics of the Harris campaign and the Democrats accuse them both of not only a brand problem but also of representing an elite that has increasingly distanced itself from the working class. This may be more the case for socially polarizing topics than for the Democratic economic and social policy positions. The voting behavior of union workers suggests that post-material factors have superseded material considerations.

Does Trump’s electoral victory, and the coalition that bore him to this win, mean that Democrats have lost political

majorities for the foreseeable future? The outlook isn't that bleak yet. Trump's coalition will not be easy to recreate in 2026 and 2028. And his victory in 2024 was closer than it often appears in the media. Trump may have won the popular vote, but [less than 50 percent of Americans](#) wanted him to be president. His victory was due more to Democratic weakness than to his own strength; although he received two million more votes than four years ago, Democrats lost seven million voters compared to Biden's 2020 total. Looking forward, something else could benefit the Democrats in 2026 and 2028.

There is nothing about Trump's team, which includes billionaires like Elon Musk, Howard Lutnick, and Scott Bessent, or his stated economic and social policies that suggest that he will be able to successfully reduce the cost of living for working people. On the contrary, [according to an analysis by the Peterson Institute](#), Trump's tariffs alone could increase household expenses by 2,600 US dollars a year. His planned program of mass deportation of immigrants and proposed cuts to social programs to finance tax cuts for high earners could also cause resentment among the base if it becomes clear that they are slowing growth, reducing incomes, and leading to increased unemployment. Over the next four years, Democrats should constantly remind American workers that Trump promised them tangible improvements and argue that the American people should measure him by his actions. Democratic states must also make a strong PR push for policy action in blue states and show voters that what Democrats are putting on the table offers them more tangible benefits.

2.4 Unsolved problem of immigration

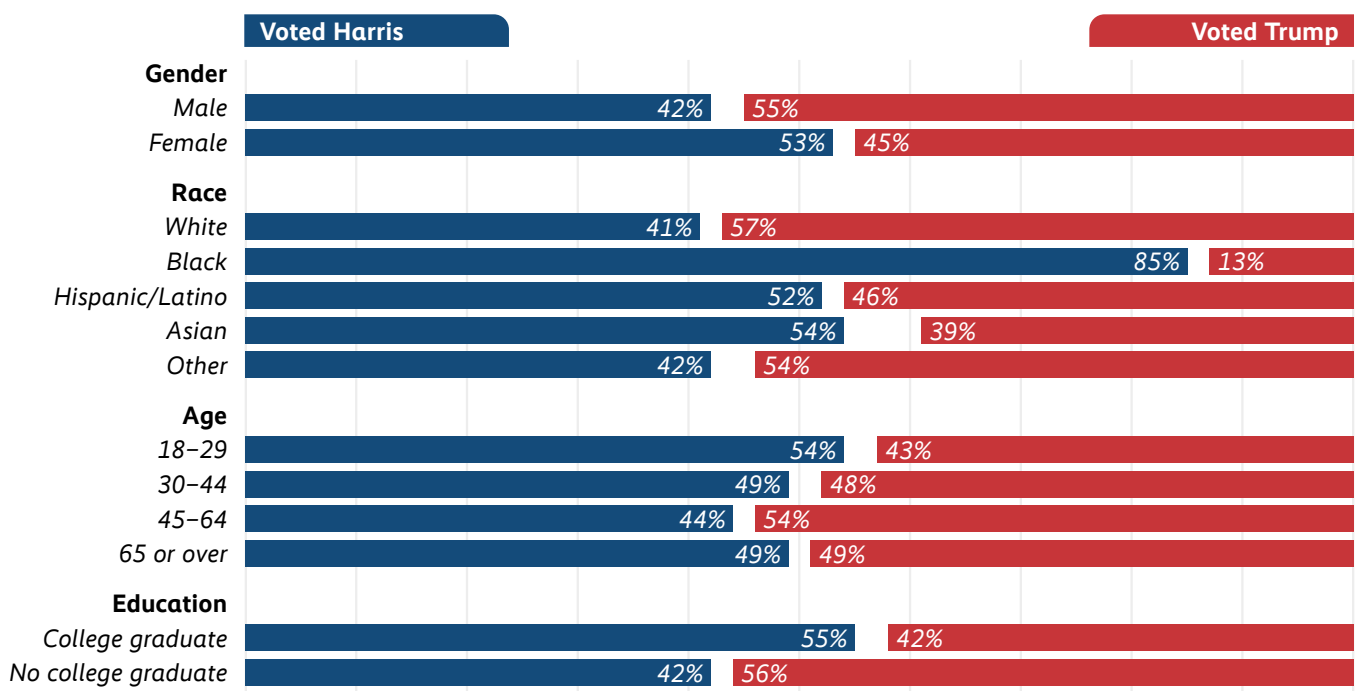
Immigration, and especially so-called illegal immigration, was the biggest concern for voters in the US this cycle. According to a number of polls, only inflation outstripped immigration as an issue area. Immigration was, therefore, a major issue in this election — partially because the Republicans made it so. This is always a hot-button issue for Republicans and is one that brings their core voters to the polls; a remarkable 48 percent of the Republican electorate said in a poll that immigration was the most important issue for them in this election.

The topic of (illegal) immigration, more than any other issue, has been vital to Trump's political resurgence. It was also the issue where he had the largest lead over Harris (nearly 15 percentage points, according to one poll). Immigration has always been Trump's main issue, and [public opinion has shifted](#) in his favor over the past four years. In July 2024, a [Gallup poll](#) showed that 55 percent of Americans support restricting immigration (compared to 28 percent in 2020). And policies on immigration that were controversial in the past have become less controversial. For example, a [majority of Americans](#) now support the construction of a wall on the southwest border (53 %). Polls on support of mass deportations ([supported by only 34 percent of voters in 2016](#)) show increasing support — between 51 percent and 62 percent of Americans are in favor, according to 2024 polls.

The American people's concerns about immigration were directed at the southwest border. Voters were obviously

Exit polls: key demographics

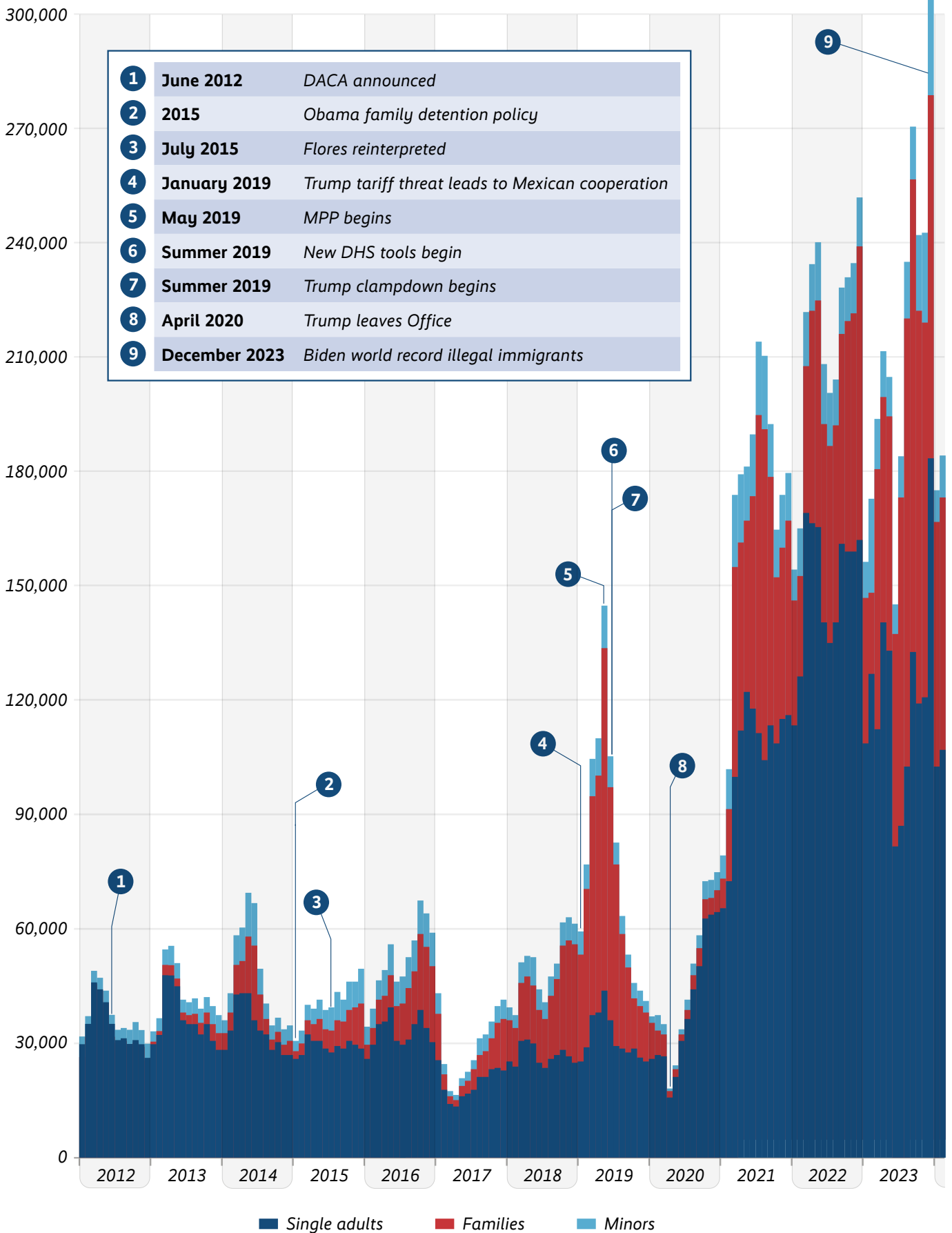
Fig. 1



Note: Sample size: 22,509 respondents. All figures have a margin of error. Bars may not sum to 100% because of other candidates and rounding.
Source: "How America voted in maps and charts", in: BBC News, November 8, 2024.

Illegal immigration into the US

Fig. 2



Source: Bump, Philip (2024): "Updating (and fixing) Trump's favorite chart", in: Washington Post, October 24, 2024.

frustrated by the Biden administration's approach to the border, consistently voicing that they felt the border was out of control. Trump often showcased his "[favorite chart](#)" showing the surge in border crossings during the Biden administration during his rallies and public appearances (see figure 2).

Though the story is more complicated than the chart makes out, the graph is factually correct: There was a record number of arrivals at the southwest border under the Biden administration. Pent-up demand from the pandemic, economic hardship, political unrest, and newly created migration routes combined as push factors to drive large numbers of migrants to the border. The strong US labor market also served as a powerful pull factor.

Immigration has always been a weak issue for Democrats, and their approach has long been to simply ignore it. As a result, the party has no forward-looking narrative or vision and has mostly resorted to playing defense on the issue. In response to Republican attacks, Democrats portrayed themselves as more conservative on immigration, in part through a fairly conservative [immigration and border bill](#) that failed to pass because [Trump wanted to preserve immigration](#) as a wedge issue for the election. Biden also responded to voter dissatisfaction by [changing his approach](#) to the issue three years after entering office, focusing more heavily on border enforcement, migration restrictions, and legal consequences and penalties. Harris continued this more conservative approach on the campaign trail, focusing heavily on border security and surveillance.

This change, and the corresponding drop in arrival numbers, came too late for voters. [Lies about immigration](#) and immigrants from Republicans and Trump, corresponding shifts in public opinion, and a [lack of vision](#) from Democrats on the issue have made immigration a losing issue for the party.

Anti-immigrant sentiment in the country is also linked to the state of the economy and concerns about inflation and the economy – [anti-immigrant sentiment historically increases](#) as domestic economic anxiety increases. Immigration is also often linked to housing prices and [crime](#), issues that voters were concerned about during this election.

Republicans, and Donald Trump in particular, have successfully used the issue of immigration as a [weapon](#) against Democrats, capitalizing on economic concerns, a broken and [overburdened immigration system](#), and fear and fatigue about the border. It will also become evident to Republicans that the approximately eleven million undocumented immigrants are part of the U.S. economy, with many even contributing to the tax system despite their undocumented status. Furthermore, expert analyses indicate that the U.S. requires an annual influx of around four million immigrants to meet its economic and demographic needs.

2.5 Abortion – the topic that wasn't

Democrats emphasized abortion and access to abortion as a major issue in the campaign, spending [more money on TV ads](#) focused on abortion in Senate races – 175 million US dollars – than on any other issue (e.g., the economy, immigration, or healthcare). Vice President Harris also made abortion rights a focus of her campaign, and she was generally perceived as a better ambassador for the issue than Biden. Experts said [she performed best](#) during the debate when it came to abortion rights. She made abortion rights a central focus in her "[final message](#)", alongside the economy and a broader message on democracy and freedom.

Abortion was an issue that helped Democrats make gains in the 2022 midterm elections. Republicans have [recognized abortion as a weak point](#) for the party, in part because there is broad public support for abortion access; 63 percent of Americans believe [abortion should be legal](#) in all or most cases. Democrats, therefore, felt that the issue could also be decisive in the presidential contest, especially because they hoped the issue would be an albatross for Trump, as he is ultimately responsible for the rollback of *Roe v. Wade* (through his appointment of the three conservative judges that proved decisive votes in the *Dobbs* decision). They managed to add abortion-related ballot measures to the ballot in ten states in the hopes that it would buoy Democrats across the ticket. Seven of the ten ballot measures to expand or secure abortion access [were successful](#), while three failed. In all ten states, the ballot measures on abortion [ran ahead of Kamala Harris](#). In these states, a significant number of those who voted in favor of protecting abortion rights also [voted for Trump](#) (at least three in ten voters in Nevada, Missouri, and Arizona, for example, [voted to protect abortion rights and for Trump](#)).

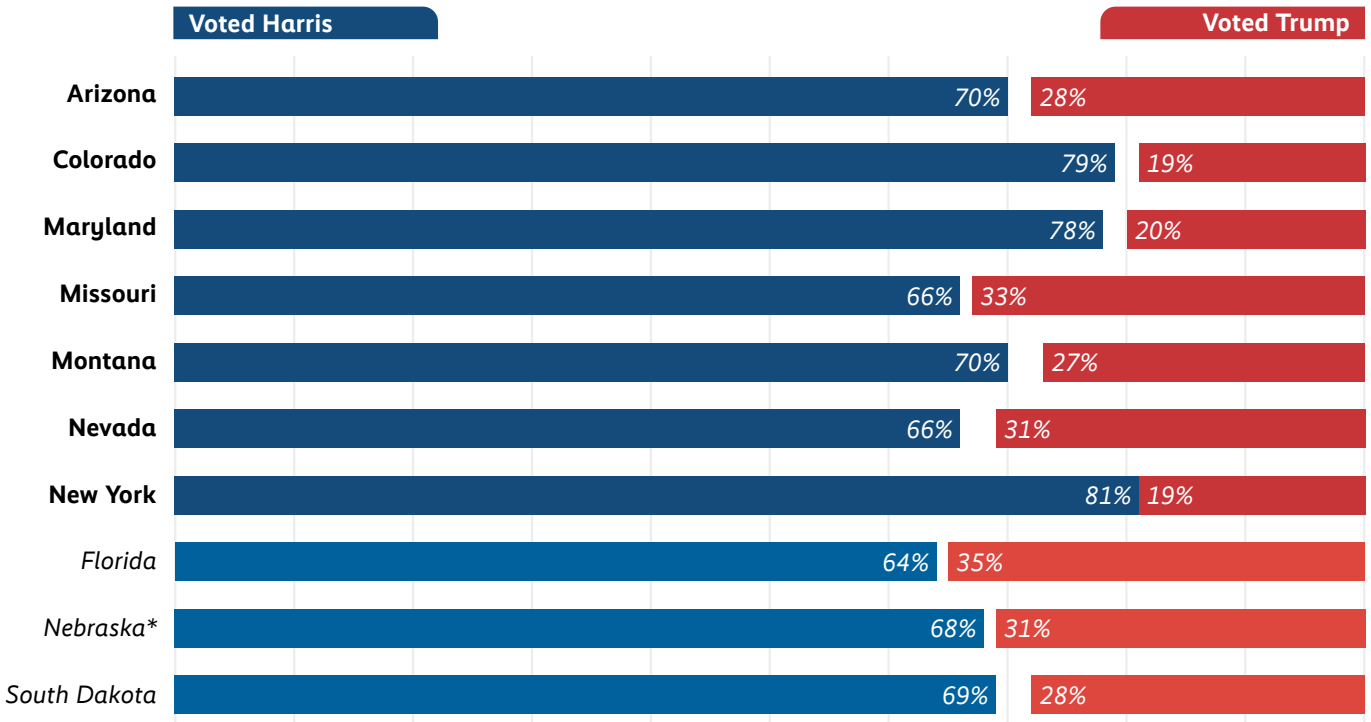
This result shows that Trump's more "[moderate](#)" [positioning on abortion](#) (his promise that he would leave abortion to the states) [may have worked](#), somewhat "[neutralizing](#)" [the issue](#). Voters may have felt more comfortable voting for Trump because they believed abortion rights would be protected by these ballot measures.

Polls have also shown that protecting abortion rights was the top issue for highly educated, politically engaged Democrats, which, of course, is a very different group than swing voters in presidential elections. This is [one reason](#) why it may have worked better as an issue in 2022 than in 2024; highly engaged voters are more likely to turn out in off-cycle elections than voters who are less engaged.

Polls have consistently [found that concerns](#) about the economy (especially [inflation](#)) [ranked higher](#) than the issue of abortion. This cycle, the economy (and, to some extent, immigration) drove more people to the polls than abortion rights.

Voting results among voters who voted to protect abortion rights

Fig. 3



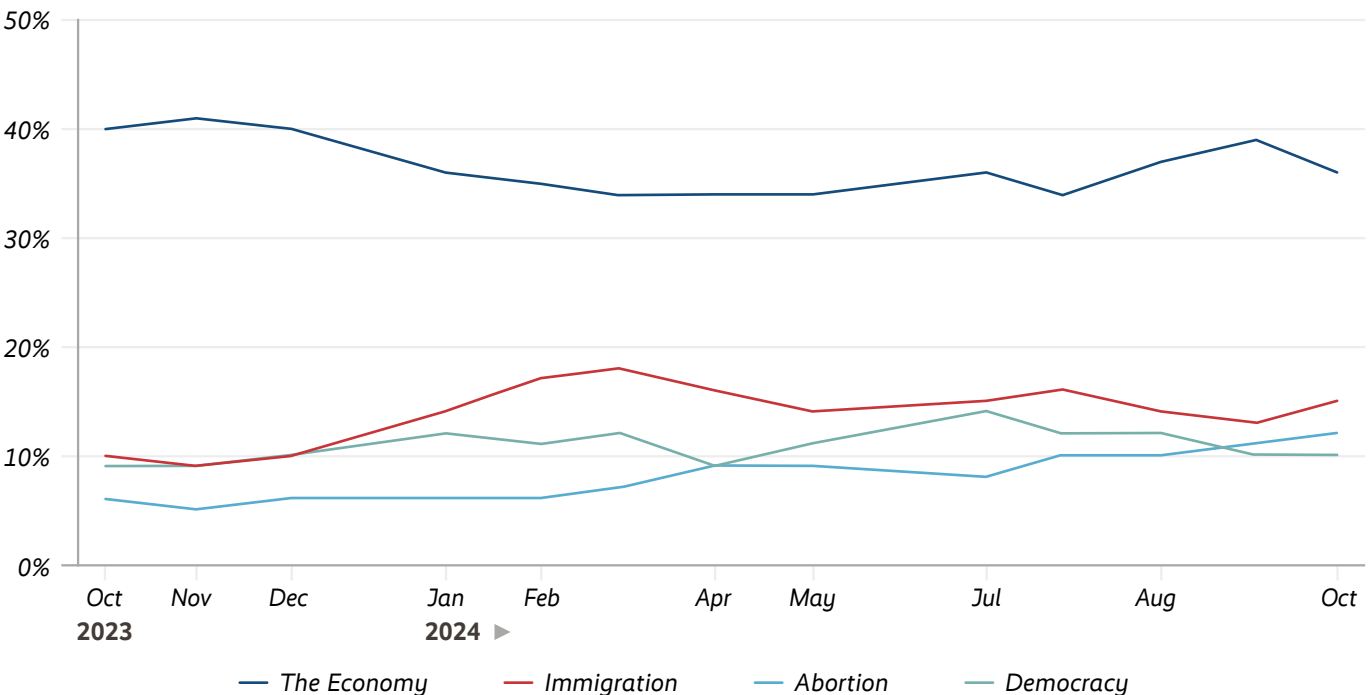
Note: * Among voters in Nebraska who voted in favor of the initiative to protect abortion rights. Nebraska is the only state in this election to have to competing abortion-related ballot measures. States highlighted in bold indicate states where ballot measures aimed at expanding abortion access passed.

Source: "Abortion Was a Motivating Factor for Many Voters in Tuesday's Election but Ranked Lower Than Concerns About the Economy", in: KFF, November 6, 2024.

Swing-state voters' biggest concerns

Fig. 4

Responses to "what is the single most important issue to you when deciding how to vote in the November 2024 election for US president?"



Mufarech, Antonia (2024): "How Abortion Motivated US Voters", in: Bloomberg, November 6, 2024.

3 Congressional elections

In addition to the presidential election, a third of the Senate and the entire House of Representatives were also up for election. The Republicans hoped to gain control of both chambers of Congress and thus the chance to implement as much of Donald Trump’s agenda as possible. The Democrats, on the other hand, realized that their chances of holding the majority in the Senate were slim and hoped to win a narrow majority in the House of Representatives. They did not succeed. The Republicans won control of the Senate and narrowly defended the House of Representatives, losing just two seats. With such slim margins, Republican success now depends on how disciplined the newly elected Senate Majority Leader John Thune and House Speaker Mike Johnson can keep their caucus.

3.1 Stalled Senate

In the Senate, 33 seats were up for election in 2024. Democrats had to defend 23 of these 33 seats in order to maintain their current majority (51–49). With the resignation of Joe

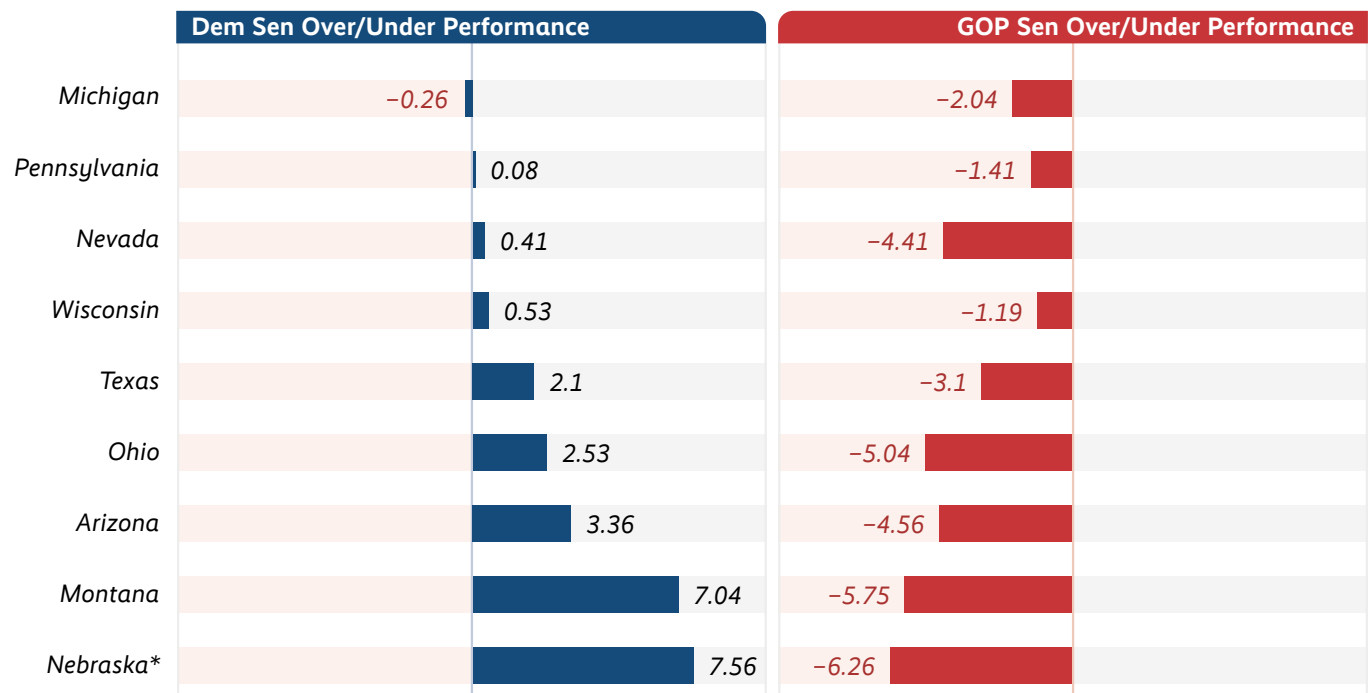
Manchin in West Virginia, one state was lost before the election, making the races in the other states all the more important. Senate elections were held in 5 of the 7 swing states; Democrats only lost Pennsylvania. Ruben Gallego prevailed in Arizona against the very unpopular Kari Lake despite Trump winning the state. Elissa Slotkin won a close race in Michigan against Mike Rogers. Jacky Rosen narrowly defended her seat in Nevada against Sam Brown, as did Tammy Baldwin in Wisconsin against Eric Hovde. However, several Democrat incumbents in otherwise Republican states lost their races: The Republicans gained 4 seats, including West Virginia, a bitter result for the Democrats but far better than the worst-case scenario for Democrats feared. Twelve senators were elected for the first time — 6 Republicans and 6 Democrats.

Three Democrats in otherwise republican states (Joe Manchin in West Virginia, Sherrod Brown in Ohio, and Jon Tester in Montana) are no longer serving in the Senate. Their presence was emblematic of a time when the Democrats were the party of the working class. The migration of working-class voters to the GOP has been ongoing. With the re-

Democratic vs. Republican Senate Over/Under Performance

Fig. 5

The difference between the percentage of candidate vote share in the Senate vs. Presidential races



Note: *Nebraska featured an independent and not a Democrat.

Source: Taylor, Jessica (2024): "What Was Behind the Return of Senate Split-Ticket Voting", in: Cook Political Report, November 19, 2024.

tirement of Joe Manchin and the defeats of Tester and Brown to a businessman (Tim Sheehy) and a used car salesman (Bernie Moreno), respectively, that shift is now complete. Both Sherrod Brown and Jon Tester distanced themselves from Harris and campaigned on their own as conservative Democrats in conservative states. This campaign strategy proved successful: both received more votes in their states than Kamala Harris, but in the end, both candidates fell short. Overall, Democratic Senate candidates (and an independent in Nebraska) generally did better than Harris in the states they narrowly lost. Only in Michigan and Pennsylvania did they fare worse by a few decimal points. The most progressive senators, Bernie Sanders of Vermont and Elizabeth Warren of Massachusetts, won their seats but fared worse than Harris in their respective states.

Pennsylvania was the toughest loss for the Democrats and the best state for the Republicans, especially because it is traditionally considered one of the blue wall states: Harris failed to win the state and Senator Bob Casey lost his re-election to Republican Dave McCormick by 0.2 percent, adding another seat for a Republican total of 53 seats in the Senate. In addition, the Pennsylvania GOP gained two Democratic-controlled seats in the House of Representatives.

3.2 Republicans hold their ground in the House of Representatives

The Republican victory in the House of Representatives came as a surprise. Before the election, pundits had expected a narrow majority for the Democrats. However, the unexpectedly strong shift of voters towards Donald Trump and the Republicans in this election meant that the Republicans were able to narrowly retain their majority in the House of Representatives. Given the overall election turnout, the results in the House could have been significantly worse for the Democrats, who gained two seats. Structurally, the House of Representatives remains close. With just around 7,500 more votes in 3 districts, the Democrats could have won control of the House of Representatives. A total of 9 incumbents lost re-election: 5 Democrats and 4 Republicans. Mary Peltola's loss in Alaska hit particularly hard. The centrist Democrat had only just won her seat in a special election in early 2024. On the other hand, Marcy Kaptur and Jared Golden's narrow victories in Ohio and Maine, respectively, came as a relief. They both won by margins of less than 0.7 percent in states which Trump carried by more than 9 points.

A big question in this election was how the Democrats' Israel policy would play out at the ballot box. This issue carried more weight for the presidential election but also influenced races in the House. On the one hand, Joe Biden and the Democrats were accused of aiding and abetting genocide, while on the other, the Republicans and the American Israel Public Affairs Committee (AIPAC) pushed the narrative that the Democrats were anti-Semitic and did not support Israel. AIPAC invested more than 100 million dollars in the election campaign. Members of the Squad, a coalition

of left-wing Democrats, were particularly targeted. AIPAC promised to fund opposing candidates in both the primaries and the general election. They had two successes in the primaries: both Cori Bush (Missouri) and Jamaal Bowman (New York) lost their primaries. Nevertheless, the Democrats won these two districts in the general election. Other Squad members won their races without any problems. For example, Ilhan Omar and Rashida Tlaib, both very outspoken in their criticism of Joe Biden and the only Muslim women elected in the history of Congress, won by 50 percent and 45 percent margins, respectively, and thus sit in two of the most Democratic districts. This makes it clear that, at least for the House of Representatives, Israel policy did not decisively affect control of the chamber.

With 220 Republican and 215 Democratic Representatives, the margin is even tighter than after the 2022 mid-term elections. With this slim majority, Republicans can only afford to lose two votes. Trump also announced that he will nominate several Republican members for posts in his cabinet and as ambassadors. This means that the number of Republicans in the House of Representatives may shrink to 217 by mid-April at the earliest, meaning that any individual House member can stop the Republicans from passing legislation. Speaker Mike Johnson is already struggling to keep his caucus together effectively. Now, he will be under more pressure than ever to push through Donald Trump's agenda in the first months of his second administration.

There are also roadblocks in the Senate. Despite a majority (53-47) in the Senate, the Republicans will have some difficulties. Just as Joe Manchin was a thorn in the side of the Democrats, there are 5 Republican Senators who could make Majority Leader John Thune's life difficult: Lisa Murkowski of Alaska and Susan Collins of Maine are relatively moderate and have been known to vote with the Democrats on individual issues. Thom Tillis from North Carolina sits in a swing state and is up for re-election in 2026. Mitch McConnell, the former Senate Majority Leader, is not running again in 2026 and has been critical of Trump in the past. Finally, John Curtis from Utah will take over Mitt Romney's seat. Curtis is a former Democrat and sat as a Republican in the House of Representatives from 2017 to 2024, where he was considered a moderate.

The Democrats may have escaped with scratches instead of mortal wounds this time, but there is no reason to celebrate. As the 2024 results have shown, Senate seats in Texas or Florida will not flip blue in the foreseeable future, and there are few upcoming opportunities for pick-ups other than Tillis' seat in North Carolina and Collins' seat in Maine. Democrats, therefore, have little chance of gaining more than 54 seats in the Senate in the coming years.

Donald Trump may have achieved the so-called trifecta (control of the White House, the Senate, and the House of Representatives), but with these narrow majorities, he does not have the sweeping mandate to implement all of his policies that some pundits have credited him with.

4

Prospects

4.1 Democrats need to reorient themselves

Kamala Harris's defeat has hit the Democratic party hard. The analysis of statistics on voter behavior shows that it was workers, Latinos, and, to some extent, black and young voters who chose a Republican Party candidate who did not shy away from making racist remarks. Pinpointing the cause of the loss will be crucial, especially since the Democrats' election campaign did not suffer from a lack of volunteers, money, or top US and international showbiz personnel.

The party now has to deal with the accusations that have been leveled against it for some time: the party is being called out for being arrogant in its dealings with the lost electorate, elitist in its external communication, incapable of prioritizing issues, and ignorant of the needs of the working classes and minorities. Of course, this does not apply in every case or across the board. For the Democrats, it is about rediscovering and revitalizing the American dream first defined almost a hundred years ago. Above all, it is about the possibility of leading a good and fulfilling life through honest work without constant worry.

It does not make things any easier for the Democrats that the Republican victory did not take on the proportions of a landslide. Only the raw electoral college results suggest a clear victory for the Republicans. With just over 70 million votes, Kamala Harris achieved a historically good result. Moreover, in their short but united election campaign, the Democrats clearly explained their vision for the next four years, while Trump painted a disastrous picture of the USA and presented solutions to problems that point more to an attack on democratic institutions than to answers that benefit citizens.

What's more, how should the Democrats deal with a political opponent who no longer cares about the truth or even considers it superfluous to achieving political goals? How do you deal with a population that, according to surveys, no longer believes in the American dream within the framework of the existing system and its institutions — a population questioning the system for this very reason? According to surveys of the young population, this pessimistic view is widespread.

Nevertheless, the Congressional elections, which took place at the same time as the presidential elections, also show that the Democrats can certainly win elections. While the people of Arizona favored Trump, the same

people voted for a Democrat for governor. This state was no exception. This is why the Senate and the House of Representatives are almost evenly divided, with a slight Republican advantage in both chambers.

The Democrats now face the challenge of reformulating the conclusions from the election analyses from the full spectrum of the party into clear political positions to offer a broad electorate solution to the problems facing the US, which are not in short supply. Successful examples exist in many communities and states. It is the Democrats' task in the coming years to credibly defend US American democracy and its institutions while at the same time considering the harsh and sometimes justified criticism of these very institutions.

4.2 Republicans in Trump's hands?

The winning Republican Party (GOP) is also facing major challenges. Thanks to its leading candidate and now re-elected President Donald Trump, the party has embarked on a political path that can hardly be called Republican or conservative. Similar to what Ronald Reagan, Republican president from 1980 to 1988, once propagated in his election campaigns, the party criticizes the state.

While to Reagan, the state was primarily the political elite in Washington, the Republicans' criticism under Donald Trump goes much deeper. It is not just the elite but the democratic system itself — the bureaucracy, the institutions, the legislation, and even the separation of powers. In contradiction to its claim, the party opposes the status quo and can, therefore, hardly be called conservative. Trump's announced politicization of the judiciary and military is an existential threat to the foundations on which the American experiment in democracy has been built for almost 250 years, that it is, above all, a "government of the people, by the people, for the people" as President Lincoln put it in the Gettysburg Address. In many ways, President Joe Biden's pardon of Hunter Biden is incomparable to Trump's attacks on the judiciary. Nevertheless, the decision will reverberate for a long time and serve as a further excuse to undermine the independence of the US judiciary and thus increasingly call into question trust in it.

In addition, Trump is putting forward fiscal positions that contradict the party's values. This is because Trump favors government intervention in the form of tax cuts, which will reduce the amount of money in the state's cof-

fers, and cuts little spending from the budget to compensate for the reduction. This imbalance was seen during the Reagan administration, too. The end result will be a growing deficit, as was the case during his first term in office. The path of the unrestrained market always pursued by the Republicans is thus narrowing remarkably.

A further challenge for the GOP is to present the newly won electorate, i.e., the working class, Latinos, and younger people, with results that will bind them to the party in the long term. And this with, a core electorate that still consists to no small extent of very high earners and has little in common with their new voters.

The directives from Washington increasingly demanded under Trump are not only at odds with the federalism of the US, but also with its own aspirations — against the elites in the capitol. In future years, Republican governors are more likely to look to their own state to ensure re-election than to implement the ideas of the central power in the event of conflicts of interest.

As clear as the Republican victory in the presidential election may appear on the surface, it was actually quite close in terms of the voting population. Out of a population of around 320 million, just under five million more people voted for Trump than for Harris. It was more of a personal election, as astonishing as that sounds given Donald Trump's personality, than an election for the party itself. In the coming years, the party will have no choice but to define which values still apply to it. This will not be answered by a party apparatus but by the sum of the representatives and senators in Congress.

4.3 The EU has to buckle up

In 2024, the US still led globally in many spheres. It generates around half of the gross domestic product of the G7, the major Western economies. It also has the strongest army with the most modern conventional and nuclear weapons. And yet, it will likely no longer play the same outsized role on the global stage as it did in the 30 years following the collapse of the Soviet Union and the end of the Cold War, as the world moves away from an interlude of American unipolarity towards a more multipolar world. A deemphasis on global engagement by Trump's team, which is driven by an "America First" mindset, and a loss of trust by allies in the US, has accelerated the global movement towards multipolarity.

The nominations of foreign and security policy decision-makers in the second Trump administration are proof of this sea change. Soon-to-be National Security Advisor Michael Waltz, a Florida Congressman, and incoming Secretary of State Marco Rubio, Senator from Florida, are not supporters of a globally active USA. They represent two currents. On the one hand, those who want to set foreign policy priorities for the nation and, on the other, those who

want the USA to prioritize its own country and take a more critical view of international engagement.

The prioritization relates above all to China, which has also been described as a challenge and threat by previous US administrations. Due to Beijing's economic strength and the increasing multipolarity of global insecurity, leading Republicans fear that this task will require the full attention of the US government, with strong support from American industry and the private sector. Other conflicts, such as those in the Middle East and Eastern Europe, will clearly take a back seat for the time being and not be prioritized.

This means the EU in general, and German in particular, will now need to refocus on European security by European means. This relates first to the European part of NATO, second to the joint organization of military industry within the EU alliance, and third to securing European trade routes worldwide. This will require a great deal of strategic expertise in a union that is often divided on foreign policy priorities. Due to the costs involved, the question of guns or butter, which was previously written off as history, will come to dominate the domestic political debate in quite a few EU states. The EU's security policy foundation may be pulled out from under its feet, especially as other democratic states, such as India, Brazil, and Turkey, are reorienting their military, foreign affairs, and economic security policies.

Moreover, the multilateral approach to international relations will be further called into question by the second Trump administration. Alliances, i.e., partnerships guided by values and interests in the medium and long term, will not be in the interests of the US. The new administration under Trump is likely to abandon its commitment to assume global responsibility. These will be replaced by short-term ad-hoc communities of interest that can be terminated at any time depending on the whims of the US Executive branch. Today's friend could be tomorrow's adversary — and vice versa, of course.

The EU thus runs the risk of becoming a political and economic middleman between the US on the one hand and China and Russia on the other. The clear Western pole, which the EU states have followed since the end of the Second World War and even more so since the end of the Cold War, may no longer exist. The EU would consequently bear a substantial responsibility to drive forward multilateral processes and institutions, along with environmental and human rights initiatives, even in the absence of the United States as a partner.

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Disruptor-in-Chief: A mandate for radical change?

The United States has elected its 47th president. Donald Trump not only won the electoral college, but also carried the popular vote. In addition, Republicans won a majority in the Senate and held the House of Representatives. This lays the groundwork for the implementation of Trump's preferred policies. His victory begs the questions: Which demographic groups swung toward Donald Trump and the GOP, and why? What were the key issues driving voters to the ballot box? How should the concurrent Congressional elections be assessed? What conclusions will Republicans and Democrats draw from the elections? What can the EU expect from the United States in the coming years?

Further information on the topic can be found here:

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