

US politics watch: Four scenarios for 2020

With the US presidential election less than 18 months away, we're looking at the political and economic consequences of four different scenarios. Who and what might unseat Donald Trump? This is a collection of all our articles and videos, produced in association with Oxford Analytica

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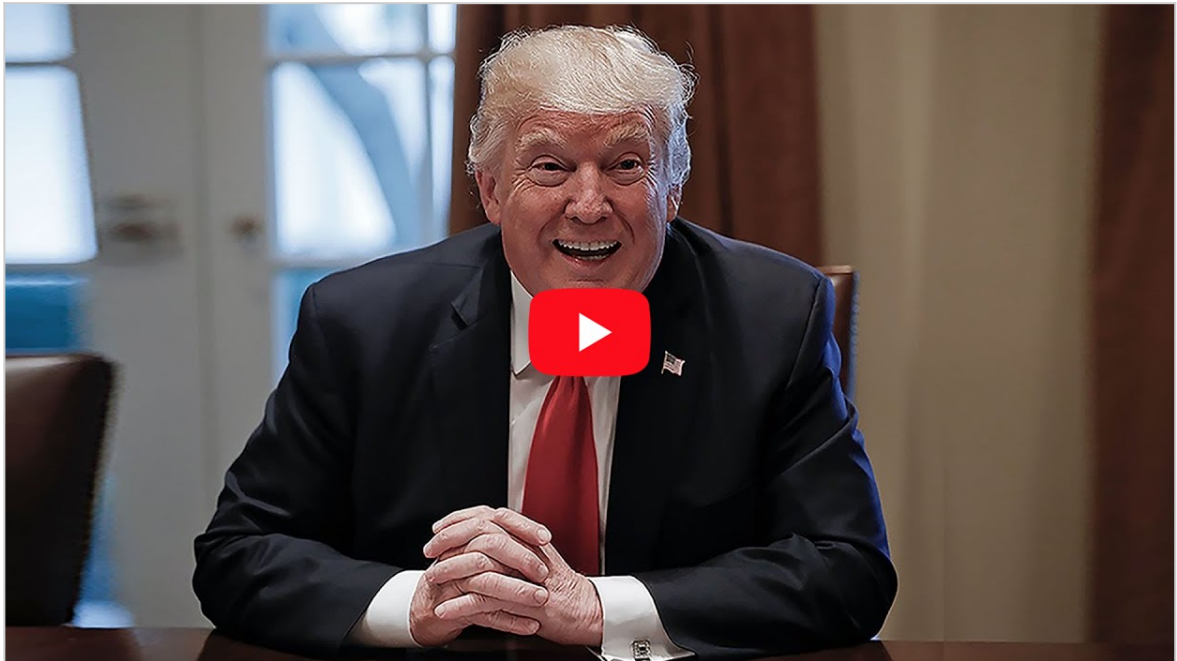
By James Knightley

US Politics Watch full report: Four scenarios for 2020 and beyond

The US Presidential election next year has the potential to be even more contentious and unpredictable than the last. This major report, written in conjunction with Oxford Analytica, looks at the political and economic implications of four key scenarios. We'll update the core findings every month until the vote is held



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US politics watch: What if...?

The race for the White House in 2020 is already on. ING's James Knightley takes us through various scenarios.

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Politics watch: 4 scenarios for America's next presidential election

Will Donald Trump be reelected in 2020 or will one of our other three scenarios come to pass? ING has teamed up with Oxford Analytica to present US Politics Watch, which will be updated monthly from now until the election



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United States of Trump

If President Trump is re-elected in 2020, most of his policy agenda would remain as it is now. But some differences may emerge as he consolidates his control over the Republican Party. This is one of four scenarios we've considered, in conjunction with Oxford Analytica. The full report is [here](#)



Source: Oxford Analytica, Shutterstock

Donald Trump's election campaign in 2016 ripped up the rule book on how to win the Presidency and he has been challenging convention ever since. But while he remains a political iconoclast, the result of the 2018 midterm elections showed that traditional political lessons still apply.

In 2020, Trump's re-election prospects rest on the balance between historical patterns that favour a president's second term in a good economy (especially in swing states), and demographic factors that suggest his defeat.

This report looks at some of the key events that could lead to Trump winning a second term and the impact this could have on the economy and financial markets.

We assume that Congress remains divided, constraining Trump's ability to pass major legislation. However, bipartisan action may be possible in areas such as infrastructure spending and middle-class tax cuts.

This should keep the economy, equities and the dollar supported initially, though concern about rising deficits and higher inflation risk an increasingly aggressive response from the Fed, and threaten to derail economic growth later on.

You can read the full report [here](#).



US politics watch: A Trump win?

What are the economic prospects for America if Donald Trump is re-elected in 2020? It's one of four scenarios we're watching.

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Video: US politics watch, a Trump win?

Donald Trump being re-elected President of the United States in 2020 is one of four scenarios we're considering in our US politics watch series. ING's James Knightley looks at possible future economic implications



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Consensus Builders Emerge

If a centrist Democrat were to win the White House in 2020, we could expect middle income tax cuts, modest infrastructure spending and an easing in trade tensions. But the risk of recession is higher. This is one of four scenarios we've considered, in conjunction with Oxford Analytica. The full report is [here](#)



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Video: US politics watch, a centrist Democrat to win?

The economic implications of a centrist Democrat winning the US election race in 2020 is one of four scenarios we'll be looking at over the coming 18 months. Watch ING's James Knightley consider the prospects



US politics watch: A centrist Democrat?

A centrist Democrat, such as Joe Biden or Kamala Harris, winning the race for the White House next year is just one of four scenarios we're looking at. So what would the economic implications of that be? James Knightley has the details

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A Republican Phoenix

If President Trump were to be replaced by another Republican nominee in the 2020 race, some of the current policy agenda would remain unchanged. However, some positions could depart significantly from those of the current administration. This is one of four scenarios we've considered, in conjunction with Oxford Analytica. The full report is [here](#)



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Video: US politics watch, a non-Trump Republican to win?

Don't assume Donald Trump will definitely be contesting the Presidential elections in 2020. The economic consequences of a non-Trump Republican winning the race is one of four scenarios we're considering

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A New New Deal

The election of a populist Democrat is predicated on the electorate's desire for change and is the most economically uncertain outcomes in the race for the White House in 2020. This is one of four scenarios we've considered, in conjunction with Oxford Analytica. The full report is [here](#)



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Video: US politics watch, a populist Democrat?

In what circumstances could we see a populist Democrat, such as Bernie Sanders or Elizabeth Warren, take the White House in 2020? It's just one of the election scenarios we're watching. Here, James Knightley looks at possible economic implications of such a win



US politics watch: A populist Democrat?

What would be the economic consequences if a populist Democrat were to win the White House in 2020? It's just one of four scenarios we're watching.

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