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*The 43rd in our series of expert comment and analysis, by **Dr Brian Klaas**, Associate Professor in Global Politics University College London; Columnist, The Washington Post. As always, the views expressed are those of the author and not of Global Strategy Forum unless otherwise stated.*

What I'm Watching On Election Night

When we say that the US election is coming up in a few days, it's not really true: the US election has already arrived. Eighty million Americans have already cast their ballots, a stunning number given that total turnout in 2016 was around 130 million. In Texas, the number of early ballots already cast is equivalent to 94 percent of the total 2016 turnout, suggesting not just an unprecedented number of early votes, but also an unprecedented turnout.

Unless you live in a cave, you've probably heard about the polls that show Joe Biden up big against Donald Trump. But there are still credible pathways back to the White House for President Trump. So what should you look out for early Wednesday morning as the returns come in?

Texas, North Carolina, and Florida

American elections are not national contests, but rather 51 locally organized elections (50

states plus Washington DC). Each jurisdiction has set not just their own ballot rules, but also their own counting rules. That means that there is a maddeningly complex array of procedures that will affect how to interpret any early returns. But three states stand out as early indicators of what is about to happen, and they are all states that Trump won in 2016: Texas, North Carolina, and Florida.

The reason they are states to watch is two-fold. First, if Biden wins any of them, that's the ballgame: Trump will not get re-elected. There is no viable path in the Electoral College for Trump that doesn't go through all three of those states. Second, they have all adopted counting rules that ensure they will report mail-in ballots and any early in-person balloting fast.

As a result, we should have a pretty good picture of where things stand in those three states by, say, between 3am and 8am UK time on Wednesday, November 4th. Currently, the election guru Nate Silver has projected that Biden will win both Florida and North



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Carolina, with Texas as a statistical tie. If that happens, or Biden wins any of those three, it's going to be a very bad night for Trump.

Pennsylvania

If Biden doesn't win Texas, North Carolina, or Florida, then all eyes turn to Pennsylvania. There, the state Republican party has insisted on not counting early ballots until the polls close. That means that we won't know whether Biden won Pennsylvania for some time, possibly for days, even weeks if it's really close. Pennsylvania is currently a state that Biden is favoured to win – and if he does, it's very likely that Trump will lose. But if Trump ekes out a victory there, then he's got about a 50/50 chance of re-taking the White House. It's the swing state that is currently most likely to prove decisive.

Wild Card: Trump

How will Trump behave *if he loses?* There is a real risk of a scenario that some pundits have started calling the 'red mirage' and the 'blue shift.' Trump voters are disproportionately likely to vote in-person on Election Day, partially because Trump has falsely claimed that mail-in ballots are rife with fraud (they are not). Biden voters are disproportionately likely to have voted early (partly because they are also more likely to take Covid-19 seriously). In some states, the early returns will only show Election Day voters, creating the 'red mirage' of Trump support. As the mail-in ballots get added, the pendulum will swing back, creating the 'blue shift.'

In the intervening period, Trump may go on Twitter and proclaim victory and start trying to get the courts to force state governments to stop counting ballots (he has publicly said he plans to launch those court challenges). Such behaviour, combined with his unwillingness to commit to accepting the peaceful transfer of power raise disturbing questions about what Trump would do if he loses – and how destructive he could be during the 'transition' period between November 3rd and January 20, 2021 when the president is sworn in. I have never before been so worried about the 'tail risks' of a presidential election – by which I mean statistically unlikely events that are so damaging that they have to be taken seriously.

The bottom line is this: the closer the race, the longer the uncertainty will drag on. And the longer the uncertainty drags on, the greater the scope for attempted manipulation of the election, or creating a misleading public narrative around it by Donald Trump. But perhaps it will be a landslide and none of this will matter. We'll see in a few days.

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