

Tuesday, September 7th, 2021

To Hawthorn Friends & Family -

We are **38 months from the 2024 U.S. presidential election**, although not a day passes without political “news” from the 2024-focused Trump world.

We are **14 months from the 2022 mid-term elections**, when the Biden administration could suffer a massive blow, losing either U.S. House and/or Senate, along with the governorship of Virginia.

But there is a **LOT going on RIGHT NOW**.

As Afghanistan and congressional infighting take their toll on the Biden administration, as unemployment benefits end and rent evictions re-start, as hospital numbers continue to confirm a COVID crisis, as fires rage in the West and 500,000 customers remain without power in Louisiana, as millions more struggle to bury their dead and try recover in the South and Northeast:

California’s Governor Recall is next Tuesday, **September 14th**, with early voting already underway.

Virginia’s Governor Election early voting starts next Friday, **September 17th**.

Canada has a national election on Monday, **September 20th**.

California --

Unless the Democrat (read “teachers and unions”) turnout effort, massively funded by the governor’s stupendous political war chest, totally fails, **Governor Gavin Newsom** SHOULD survive the recall.

California MAILS a ballot to EVERY registered voter, so even the Democrats – whom polls tell us are considerably less enthusiastic than Republicans – only have to drop a ballot in a mailbox, not go to a polling place and stand in line.

Although at notable political risk as COVID and wildfires decimate the state, disrupting schools, businesses and lives . . . unable credibly to claim a solution to the growing homeless crisis . . . and personally unpopular, with a “tin ear” for politics (who else would, on the EVE of a recall election, sell their Bay Area home for \$5.9 million???) . . . Gavin is helped most by facing no appealing, popular opponent (Unlike in 2003 when Arnold Schwarzenegger’s popularity drove Gray

Davis from the governors' office). The "leading" GOP opponent is right-wing radio demagogue Larry Elder, who appears increasingly self-destructive and of whom "Politico's California Playbook" noted this morning (after reporting his anti-abortion views and attacks on U.S. Senator Diane Feinstein):

"Over the weekend, Elder told conservative pundit Candace Owens that slave owners are "owed reparations" and said sex education has "no place" in California schools. And CNN reported that Elder once admitted being accused twice of sexual harassment, saying that one of his accusers was too ugly to be credible."

We THINK Newsom survives the recall attempt.

Virginia --

Running for a second term four years after he left office (Virginia prohibits consecutive terms and only ONE governor in its recent history has come back after sitting out a term) former Democrat **Governor Terry McAuliffe** is nowhere near as far ahead in the polls as he should be.

A popular governor with little bad baggage, he is running ahead of a pro-Trump business executive who has never run for office (albeit spending tens of millions of dollars on this effort) by little more than the margin of error in most polls, a bit more in some, less in others.

Most troubling for McAuliffe are (1) his bad numbers with the independent voters (although there are not many of them in this increasingly polarized world); and (2) a lack of enthusiasm among Democrats.

That said, we THINK Terry should still be o.k., although the GOP has targeted the state heavily, including trying to win back legislative control for the session that will do redistricting.

Canada --

It's hard enough for this old Missouri pol to keep up with and try to comment intelligently on U.S. elections, let alone Canadian. But **Prime Minister Justin Trudeau** has called – arguably for all the wrong reasons, thereby creating untimely self-inflicted damage – a national election in less than two weeks: Monday, September 20th. However it comes out – dismissal or survival of the Liberal national government – it is probably a stretch to try to apply "lessons learned" to the Biden administration and the up-coming mid-terms in the U.S., but it could be instructive, provided more expert analysis than mine.

In truth, I've done some political work in Canada, when the late Matt Reese

dispatched me to help the Liberal Party decades ago, then still the party of the current Prime Minister's late father, the legendary Pierre Elliott Trudeau. It was then I had the honor to meet one of the most brilliant minds in Canadian politics, the chief of staff to the elder Trudeau, the great Tom Axworthy, OC, later a professor of mine at the Kennedy School of Government at Harvard. We have continued to work with him over the years as he has helped us with Hawthorn clients in Canada and worldwide as Secretary General of the Interaction Council, the international association of former heads of state.

When I asked Tom for his current take on the Canadian political scene, he wrote:

First two weeks were a referendum on Justin (which he lost) with Libs losing five points nationally, Conservatives taking the lead, and if momentum continued a plurality of seats.

But now midway, Liberal freefall has ceased and pattern stabilized (Conservatives 33-34, Libs 31-32, NDP 20).

This week is the key one with two leader debates and key questions: Can Conservatives regain momentum, can Justin turn away focus on his failings and on to Tory policy positions which most Canadians do not support, etc.?.

There are about 50 battleground seats in Canada where incumbents won by less than 5 % and tiny regional swings of 1% can have a large impact.

With the major parties essentially tied now after a dreadful Liberal start it is too close to call with two weeks to go.

Justin also suffered in first two weeks because the fiasco at Kabul was a top-of-the-line story. We had many translators and their families who worked with our mission there and did not get all of them out. Veterans and others took to the airwaves to ask why were we having an unwanted election rather than responding to a foreign policy crisis?

Over 70 % of Canadians say in polls this election was unnecessary (except for partisan or personal ambition) so in first two weeks Justin could not get the focus on his issues of childcare and health. Every story about Kabul reminded voters that implementation is not the government's strong suit. But we are finally past that first phase now though it has sunk any hopes for a Liberal majority.

Trudeau is a good debater and he will use the national debate forums to remind potential NDP left leaning voters of the dangers of Conservative government and that the Liberal Party is the only one that could stop that eventuality. And for his part, Erin O'Toole, leader of the Conservatives, now has the country looking at him seriously as a possible Prime

Minister and in the debate he will not want to disappoint. A week may indeed be a long time in politics but in the Canadian election we only have two weeks to go. With the two large parties virtually tied all the chips are on the table

It is, as noted, an incredibly busy political time in a non-election year . . . and when pundits are also assessing, among other things, the damage COVID and his denial of it has done **Florida Governor Ron DeSantis** as he faces re-election next year and tries to position himself as the heir in 2024 to his great benefactor President Trump, should he decide NOT to run. More on state political consequences of COVID in future weeks (including an assessment of the outcome of the California recall).

More on the 2022 and 2024 election scene AFTER we get through more of 2021.

John

PS: I'm old enough to remember when presidential campaigns didn't start until Labor Day weekend OF the election year, for Democrats always at Cadillac Square in Detroit. And conventional wisdom was no one paid attention until AFTER the World Series ended. Ah, for those simpler days of yesteryear.