



POWERING FORWARD

*Election Scenarios and
Impacts for the Clean Energy Economy*

October 27, 2020 | 12-1 pm ET





POWERING FORWARD

Examines the unique impacts facing clean energy industries during the COVID-19 epidemic, along with the vital role of our sectors in our future economic recovery

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a coalition of companies and trade associations



Energy Efficiency



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Recommendations for Energy and Climate Change Policy

ISSUED OCTOBER 2020

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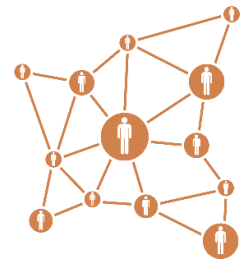
the small business voice for the clean energy economy



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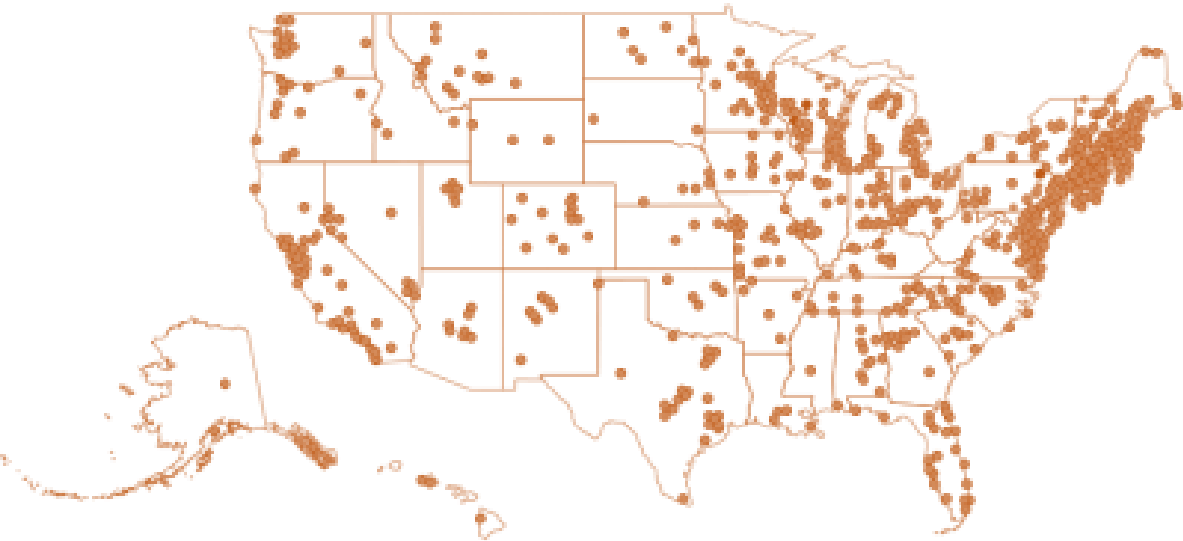
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Success Stories of the
2020 Sustainable Energy
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POWERING FORWARD

PANELISTS
October 27, 2020



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The background of the slide is a photograph of the U.S. Capitol building in Washington, D.C., taken at dusk. The building's dome and classical architecture are illuminated with warm yellow lights, contrasting with the deep blue twilight sky. A large, semi-transparent geometric shape, composed of several overlapping polygons with red outlines, is positioned on the left side of the image. The title text is centered within this shape.

POWERING FORWARD: ELECTION SCENARIOS AND IMPACTS FOR THE CLEAN ENERGY ECONOMY

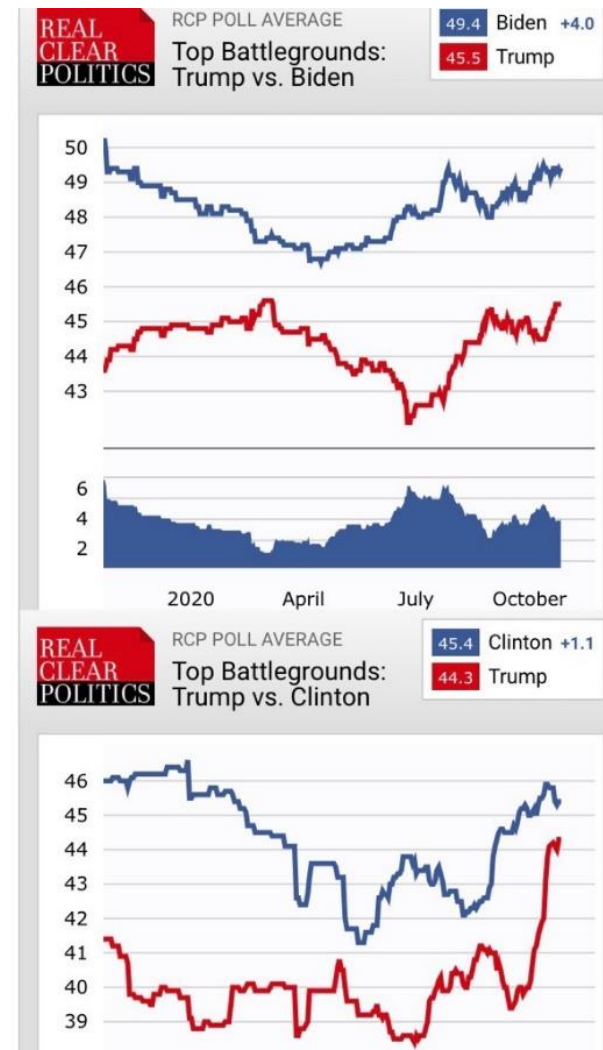
October 27, 2020

DON'T OVERTHINK IT

- The fundamentals of this race are crystal clear:
 - Unpopular President...
 - negative approval for 4 years; tops out at 45% (44.1 in RCP avg; 42.5 per 538)
 - Facing intense opposition...
 - in final NYT/Siena poll, 46% “strongly disapprove,” 48% “very unfavorable”
 - During a once-a-century pandemic...
 - Majority disapproves of Trump’s handling; 2-1 say US is on “wrong track” (31-62)
 - Against a generic opponent...
 - Biden is net favorable; generally seen as more moderate than national Dems
- At some level it’s more surprising that the race is as close as it is.
 - Trump needs some combination of a last-minute shift in polling as well as massive systemic polling error to overcome the current deficit. So far this has not materialized.

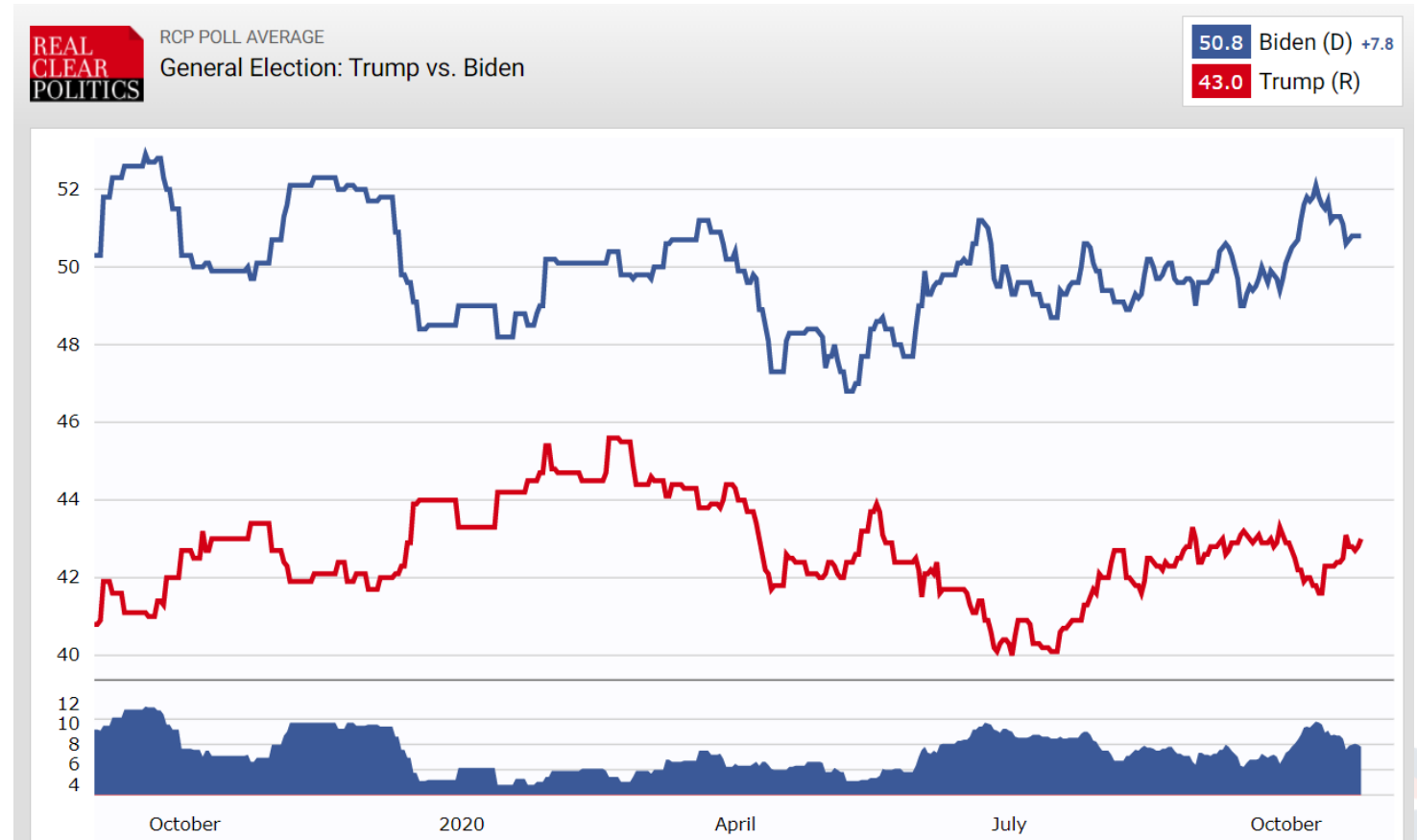
2016 REVISITED

- Trump was elected despite poor numbers by being the lesser of two evils
 - According to exits, Trump won 61% of the “double haters” (better in MI/WI/PA)
 - Root of the polling miss—HRC got her share, but late deciders broke hard for Trump
 - Harder to reprise this dynamic against Biden (+5 favs vs. -13 for HRC)
 - Took 25+ years for Rs to turn Clinton into a bogeyman; Trump campaign has a week
 - Sleepy Joe? Corrupt Joe? Hunter’s Laptop? So far nothing sticks.
 - Polls show Biden decisively leading this (smaller) group of voters in 2020
 - 57-8 according to an October tracking poll by Civiqs
- Success of socioeconomic arbitrage depended on HRC as a foil
 - Trump did *well enough* with college-educated white voters while making big gains w/ WWC
 - Biden accelerates HRC gains in affluent metro suburbs while losing blue collar whites by less; big X-factor: POCs
- Perhaps most importantly, Trump surged at the end
 - Poll closed down 1pt in battlegrounds, 3pts overall
 - No sign of a late surge for Trump, and indeed the undecided voters appear friendly to Biden

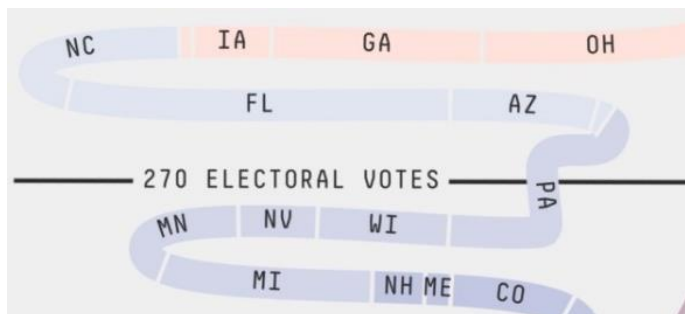
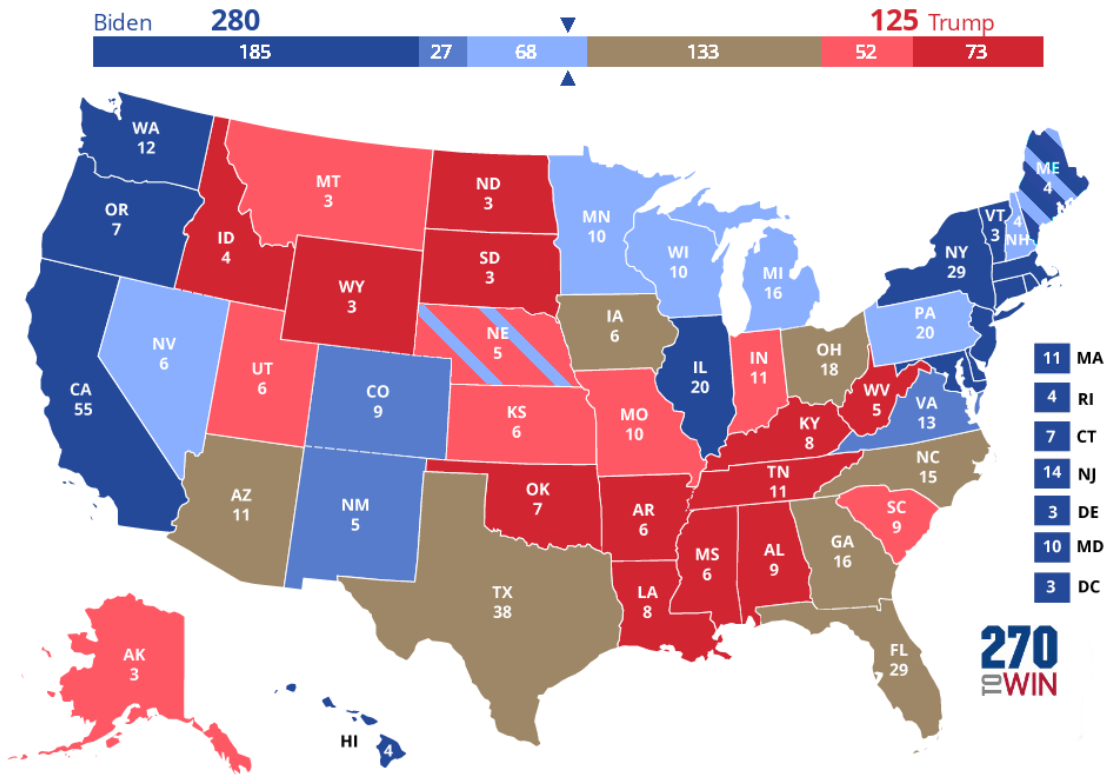


PRESIDENTIAL RACE: NATIONAL POLLING

- 7 days out in 2016, Clinton led by 2.2 points (final margin 2.1); Biden's current lead is 7.8pt. (9.2 per 538)
- Importantly, Biden remains steadily at or over 50%, a threshold Clinton never crossed during the general election (47.5 on this day in 2016, 46.8 on election day.)
- At this point in 2016 Trump was surging as the Access Hollywood scandal was eclipsed by the Comey letter (and partisans coming home.) 2020 remains fairly stable.
- Focus on share, not margin!!



PRESIDENTIAL RACE: THE ELECTORAL COLLEGE



2020 Scenarios

If Democrats hold Clinton states, they would need 38 electoral votes; two potential routes to 270 include:

- Winning any 3 of Michigan, Wisconsin, Pennsylvania or Florida
- Winning Florida and any of Michigan, Wisconsin, Pennsylvania

Other wildcards:

- Sun Belt: AZ (11), GA (16), and NC (15) all too close too call
- Rust Belt Tier 2: OH (18) and IA (6) both within reach for Biden

Important to remember...

- National polling is based on a notional popular vote
- **Only thing that matters** is earning a majority of 538 electoral votes (270 to win)
- Battleground made up of roughly 13 truly competitive states worth ~200 electoral votes
- Biden currently has a polling lead of 3pts or more in enough states to carry 280 electoral votes
- PA currently the most likely “tipping point” for victory

PRESIDENTIAL RACE: KEY BATTLEGROUND

State (EVs)	Polling Avg (RCP)	Margin	2016 Margin	Swing	JRB vs. HRC
AZ (11)	Biden 48.8%; Trump 46.4%	Biden +2.4	Trump +3.5	D +5.9	Biden +4.2
FL (29)	Biden 49%; Trump 47.2%	Biden +1.8	Trump +1.2	D +3	Biden +1.3
OH (18)	Biden 46.2%; Trump 46.8%	Trump +0.6	Trump +8.1	D +7.5	Biden +3
GA (16)	Biden 46.8%; Trump 47.2%	Trump +0.4	Trump +5.1	D +5.1	Biden +1.5
IA (6)	Biden 47.2%; Trump 46.4%	Biden +0.8	Trump +9.5	D +10.3	Biden +5.5
MI (16)	Biden 50.6%; Trump 41.6%	Biden +9	Trump +0.2	D +9.2	Biden +3.6
NC (15)	Biden 48.8%; Trump 47.6%	Biden +1.2	Trump +3.7	D +4.9	Biden +2.6
PA (20)	Biden 49.8%; Trump 45%	Biden +4.8	Trump +0.7	D +5.5	Biden +2.3
TX (38)	Biden 45.4%; Trump 48.6%	Trump +3.2	Trump +9	D +5.8	Biden +2.3
WI (10)	Biden 49.8%; Trump 44.3%	Biden +5.5	Trump +0.7	D +6.2	Biden +3.3
All (179)	Biden 48.3; Trump 46.2	Biden +2.1	Trump +4.2	D +6.3	Biden +2.7

BUT WHAT IF THE POLLS ARE WRONG?!!

	POLLING LEADER	IF POLLS ARE AS WRONG AS THEY WERE IN...	
		2016	2012
U.S.	+9 Biden	+6	+13
N.H.	+11 Biden	+8	+14
Mich.	+9 Biden	+5	+14
Minn.	+9 Biden	+1	+10
Wis.	+7 Biden	<1	+10
Nev.	+7 Biden	+8	+9
Neb. 2*	+7 Biden	+8	+1
Pa.	+6 Biden	<1	+7
Ariz.	+4 Biden	+2	+3
Maine 2*	+4 Biden	+7	+9
Iowa	+3 Biden	+5	+6
Fla.	+3 Biden	<1	+4
N.C.	+3 Biden	+2	+2
Ga.	<1 Biden	+1	<1
Ohio	+2 Trump	+9	+2
Texas	+3 Trump	+5	+4

UPDATED OCT. 26 5:24 PM ET

- If current polls are precisely accurate...
 - Biden would carry 357 electoral votes
- If polls missed as they did in 2016...
 - Biden would win 280 electoral votes
- If polling error mirrored 2012...
 - Biden would win 341 electoral votes

Remember, the polls were actually fairly accurate in 2016, we just mis-applied the lens of 2012.

Lesson: don't fall into the trap of fighting the last war.

This year polls are telling a consistent story: At every level—national, state, district—Trump is seeing a steep drop-off from 2016 levels.

2020 HOUSE RACES

The GOP needs **18 seats** to retake control of the House

To do so, the GOP must:

- Defend all 15 lean-R seats
- Flip 9 toss up seats
- Win 11 from lean-D column
- Avoid losses among 16 R-toss ups

But there is a clear path:

- 30 Dems in seats won by Trump
- Flip 13 seats Trump won by 6+
- Win 5 of 17 he won by <6
- Hold 3 seats won by Hillary Clinton

Bottom line:

- Environment must improve for Republicans to pick up seats
- House could be in play if Presidential race narrows to within 5 points

Cook Political Report Ratings of Competitive 2020 House Seats

Lean Democrat

AZ-01 O'Halleran
CA-48 Rouda
GA-06 McBath
GA-07 Open (Woodall)
FL-26 Mucarsel-Powell
IA-03 Axne
MI-08 Slotkin
MI-11 Stevens
NJ-03 Kim
NJ-07 Malinowski
NV-03 Lee
OR-04 DeFazio
PA-08 Cartwright
PA-17 Lamb
SC-01 Cunningham
TX-23 Open (Hurd)
VA-02 Luria
VA-07 Spanberger
WI-03 Kind

17 Dem, 2 GOP

Toss Up

CA-21 Cox
IA-01 Finkenauer
IA-02 Open (Loeb sack)
MN-07 Peterson
NM-02 Torres Small
NY-11 Rose
NY-22 Brindisi
OK-05 Horn
UT-04 McAdams

9 Dem, 16 GOP

Lean Republican

AZ-06 Schweikert
CA-25 Garcia
IN-05 Open (Brooks)
MI-03 Open (Amash)
MN-01 Hagedorn
MO-02 Wagner
NE-02 Bacon
NJ-02 Van Drew
NY-02 Open (King)
NY-24 Katko
OH-01 Chabot
PA-10 Perry
TX-21 Roy
TX-22 Open (Olson)
TX-24 Open (Marchant)
VA-05 Open (Riggleman)

AK-AL Young
AR-02 Hill
CA-50 Open (Hunter)
CO-03 Open (Tipton)
FL-15 Open (Spano)
IL-13 Davis
MI-06 Upton
MT-AL Open (Gianforte)
NC-08 Hudson
NC-09 Bishop
NC-11 Vacant (Meadows)
NY-01 Zeldin
PA-01 Fitzpatrick
TX-03 Taylor
TX-10 McCaul

15 GOP

Democrat-held seat

Republican-held seat

Independent-held seat

Source: Cook Political Report (10/21/2020)

2020 HOUSE RACES:

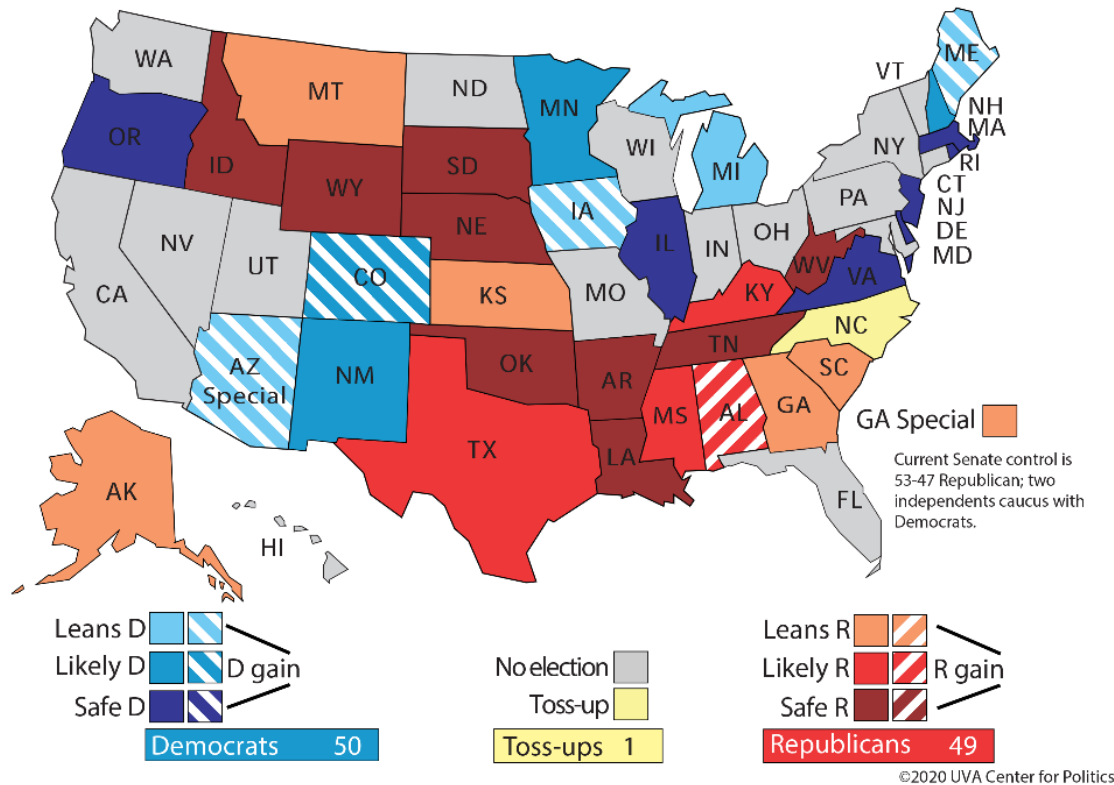
- 30 Dems in seats won by Trump
 - Given polling shift, likely only favored in a handful
- Race has been polled in 69 House districts since March [Analysis via @brand_allen]
 - 54 won by Trump in 2016
 - Avg margin R +6.3
 - Currently leads in just 20
 - Avg margin D +4.1
 - ~10pt swing reflects national trend
- Dems favored to net 5-15 seats

GOP House Seats Where Clinton Won	Republican Incumbent (3)	Rep vs. Trump	2018 US House			2016 President			2012 President		
			Dem	Rep	Margin	Clinton	Trump	Margin	Obama	Romney	Margin
New York's 24th	John Katko	8.9	47.4	52.6	5.3	48.9	45.3	3.6	57.0	41.1	16.0
Texas' 23rd	Will Hurd	3.8	48.7	49.2	0.4	49.8	46.4	3.4	48.1	50.7	2.7
Pennsylvania's 1st	Brian Fitzpatrick	4.5	48.7	51.3	2.5	49.1	47.1	2.0	50.2	48.6	1.6

Dem House Seats Where Trump Won	Democratic Incumbent (31)	Dem vs. Clinton	2018 US House			2016 President			2012 President		
			Dem	Rep	Margin	Clinton	Trump	Margin	Obama	Romney	Margin
Minnesota's 7th	Collin Peterson	35.0	52.1	47.8	4.3	31.0	61.8	30.8	44.1	53.9	9.7
New York's 22nd	Anthony Brindisi	17.3	50.9	49.1	1.8	39.3	54.8	15.5	48.8	49.2	0.5
Oklahoma's 5th	Kendra Horn	14.8	50.7	49.3	1.4	39.8	53.2	13.4	40.8	59.2	18.4
South Carolina's 1st	Joe Cunningham	14.4	50.6	49.2	1.4	40.4	53.5	13.0	40.2	58.3	18.1
Maine's 2nd	Jared Golden	11.5	50.6	49.4	1.2	41.1	51.4	10.3	53.0	44.4	8.6
New Mexico's 2nd	Xochitl Torres Small	12.1	50.9	49.1	1.9	39.9	50.1	10.2	44.9	51.7	6.8
New York's 11th	Max Rose	16.3	53.0	46.6	6.4	43.8	53.6	9.8	51.6	47.3	4.3
Pennsylvania's 8th	Matt Cartwright	18.8	54.6	45.4	9.3	43.7	53.3	9.5	55.3	43.4	12.0
New York's 19th	Antonio Delgado	12.0	51.4	46.2	5.2	44.0	50.8	6.8	52.1	45.9	6.3
Michigan's 8th	Elissa Slotkin	10.6	50.6	46.8	3.8	43.9	50.6	6.8	48.0	51.1	3.2
Utah's 4th	Ben McAdams	7.0	50.1	49.9	0.3	32.4	39.1	6.7	30.2	67.2	37.0
Virginia's 7th	Abigail Spanberger	8.4	50.3	48.4	1.9	44.0	50.5	6.5	44.1	54.6	10.5
New Jersey's 3rd	Andy Kim	7.5	50.0	48.7	1.3	45.2	51.4	6.2	51.8	47.2	4.6
New Jersey's 2nd	Jeff Van Drew	12.3	52.9	45.2	7.7	46.0	50.6	4.6	53.5	45.4	8.2
Wisconsin's 3rd	Ron Kind	23.8	59.7	40.3	19.3	44.8	49.3	4.5	54.8	43.8	11.0
Michigan's 11th	Haley Stevens	11.1	51.8	45.2	6.7	45.3	49.7	4.4	46.9	52.3	5.4
Iowa's 2nd	Dave Loebsack	16.3	54.8	42.6	12.2	45.0	49.1	4.1	55.8	42.7	13.0
Illinois' 14th	Lauren Underwood	8.9	52.5	47.5	5.0	44.8	48.7	3.9	44.2	54.2	10.0
Iowa's 1st	Abby Finkenauer	8.6	51.0	45.9	5.1	45.2	48.7	3.5	56.2	42.5	13.7
Iowa's 3rd	Cindy Axne	5.7	49.3	47.1	2.2	45.0	48.5	3.5	51.4	47.2	4.3
Virginia's 2nd	Elaine Luria	5.6	51.1	48.8	2.2	45.4	48.8	3.4	48.2	50.5	2.3
Pennsylvania's 17th	Conor Lamb	15.1	56.3	43.7	12.5	46.8	49.4	2.6	47.2	51.7	4.5
New York's 18th	Sean Patrick Maloney	12.9	55.5	44.5	10.9	47.1	49.0	1.9	51.4	47.1	4.3
New Hampshire's 1st	Chris Pappas	10.1	53.6	45.0	8.5	46.6	48.2	1.6	50.2	48.6	1.6
Georgia's 6th	Lucy McBath	2.5	50.5	49.5	1.0	46.8	48.3	1.5	37.5	60.8	23.4
Minnesota's 2nd	Angie Craig	6.7	52.7	47.1	5.5	45.3	46.5	1.2	49.1	49.0	0.1
New Jersey's 5th	Josh Gottheimer	14.8	56.2	42.5	13.7	47.7	48.8	1.1	47.9	50.9	3.0
Arizona's 1st	Tom O'Halleran	8.8	53.8	46.1	7.7	46.6	47.7	1.1	47.9	50.4	2.5
Nevada's 3rd	Susie Lee	10.1	51.9	42.8	9.1	46.5	47.5	1.0	49.5	48.7	0.8
New Jersey's 11th	Mikie Sherrill	15.5	56.8	42.1	14.6	47.9	48.8	0.9	46.6	52.4	5.8
Illinois' 17th	Cheri Bustos	24.9	62.1	37.9	24.2	46.7	47.4	0.7	57.6	40.6	16.9

2020 SENATE: THE BIG PICTURE

Current balance: 53-47 GOP Majority
(Two independents caucus with Democrats)



- **GOP playing defense in wake of 2014 wave**
 - 12 Democrats & 23 Republican
- **Democrats' path to power**
 - Net 4 seats for a majority (or 3 + White House)
 - 13 seats for a supermajority
- **Fighting Political Gravity**
 - One Dem incumbent in deep red seat (AL)
 - Two GOP incumbents in D-leaning states (CO/ME)
 - Every 2016 Senate race result matched its state's Presidential party lean
- **The Trump Factor**
 - With a few exceptions, most Republicans running even with or behind Trump vote share
 - Expect this to even out, but widespread ticket-splitting unlikely

2020 SENATE: A SHIFTING BATTLEGROUND

- The Core ~~Four~~ Five: AZ, CO, ME, NC, IA

- Primary focus of Senate attention for past two years
- Always going to be competitive no matter what
- Still the tipping point states, but no longer the center of gravity
- All once toss-ups, now all but NC “lean”/”tilt” Dem according to at least one major forecaster
- Dems need 4 of 5 for control (assumes AL loss)
- Biden even money or better in all 5 states
- Steep drop-off after Iowa (#51)...

- The Long Tail: GA, SC, TX

- As President Trump’s standing unravels in the suburbs, Democrats are making moves in the Belt states
- Biden should easily surpass historical Dem baseline, but is it enough?

- The Wild Cards: MT, KS, AK

- The President is likely win these states, but they have unique quirks that carry significant uncertainty
- Republicans favored in each, but Dems in range should the wheels fall off



2020 SENATE: THE BOTTOM LINE

- It's a sliding scale...
 - If Trump recovers in the next week, and/or polls are systematically underrepresenting his support, Senate Rs could hold their losses to 1 or 2 seats, even in a 2012-style electoral defeat
 - Their losses are insulated to some degree by a gap between swingy Iowa and the less elastic Sun Belt states, in part thanks to Georgia run-off rules
 - BUT if current polls are accurate, Democrats could break through the next tier and net as many as 7 or more seats.
- Huge implications beyond seat 50...
 - How big a Dem majority gets could determine the fate of a Biden agenda
 - The size (and leverage) of a GOP minority will set the parameters for the first 100 days and beyond, while informing the political will and practical ability of Democrats to kill the filibuster
 - Majority could hinge on January run-off(s) in GA

PV Scenario	Trump Margin	Dem Net
2016 Redux	-2	0-1
2012	-4	2-3
2008	-8	3-5
Current Polls	-10	5-7
Pro-Biden Error	11+	7-12 (?!)



REMAINING VARIABLES?

- ~~Return to “normalcy”~~
- ~~SCOTUS Vacancy~~
- ~~Vaccine by election day?~~
- Early vote vs. election day turnout
 - More than 60M so far, surpassing 2016 (58M)
 - on track for record turnout; disproportionately high in battleground states
 - Biden banking votes at an impressive clip; Rs expected to win E-Day vote
- Vote by mail (VBM)
 - Timing and outcome could come down to when and how mail ballots are counted; high rejection rate could hurt Dems at the margin
 - Trump casting suspicion on VBM has dampened GOP participation
- Late deluge of Dem cash
 - Dems raised \$1B since RBG passing, spread across map, up and down the ticket
- Undecided/Third Party Voters (5-6%)
 - Not enough to change the result in most places, but big impact at the margin
- EVENTS!
 - Past Comey Letter timeframe, but crazier things have happened



RANGE OF OUTCOMES

- Lesson of 2016: Humility!
 - Keep an open mind—in both directions
 - Trump can still win
 - If he does, all bets are off: Rs keep Senate, could easily win the House
 - Least likely scenario, but non-zero odds
 - Biden is the heavy favorite, but coattail effect remains unclear
 - Thanks to structure of map, GOP can hold serve in Senate in a close-ish loss.
 - Mode outcome: Narrow Senate Majority
 - Dems should be able to get to 50-51 barring a significant polling miss
 - Beyond that it gets tougher, BUT
 - Slippery slope beyond 52...
 - If margin stretches beyond 2008, watch out
- At this rate we're as likely to see a Biden landslide as we are a Trump victory
 - What would that look like?
 - Double digit PV win
 - 400+ EVs
 - Unexpected states flipping
 - Multiple red state senate victories
 - Comfortable, functional majority
- Crazy turnout opens the door to surprises
 - Could be highest since 1908 (65%)
 - Impossible to model when everyone is a likely voter, and difficult to weight when so many have already voted
 - Could wake up to some eye-popping results

POLICY IMPACTS: TRUMP VICTORY

- What would this look like?

- Trump closes strong in final week, buoyed by big Q3 GDP number and 46%+ job approval
- Record turnout in suburbs belies Biden weakness w/ key base demos (Hispanic, AA)
- Polls systematically missing voters w/ low social trust who are more inclined to support Trump

- If he wins, likely does so narrowly, akin to 2016; messy aftermath
 - Relatively unlikely outcome (13% per 538, 5% per The Economist)
- Comes with significant House gains, up to a possible majority; GOP Senate all but assured
- Policy implications: largely status quo—Trump agenda still murky
 - “Energy dominance” agenda
 - GOP vision for COVID relief
 - Infrastructure week? More tax cuts?
 - Senate primarily a machine for confirming judges



POLICY IMPACTS: BIDEN VICTORY

- Narrow win, Rs Keep Senate

- Bumpy start out of the gate; Unclear how Rs would approach divided govt
- Slow confirmations; even slower legislative process
- Smaller Covid relief measure
- GOP Senate as legislative “safety” for virtually all progressive priorities as Rs hunker down and hold out for midterm
- Admin limited to executive action:
 - Rejoin Paris; methane; carbon risk disclosure; social cost of carbon ; slow leasing & permitting; ESA enforcement
 - Rollback of Trump rollbacks

- Biden wins, narrow D majority

- Biden gets his personnel, but Dem agenda stunted w/o GOP cooperation
- Rs wield significant power, but must choose their battles or risk radicalizing remaining institutionalists
 - Eventually Dems could go nuclear, but bounded by what a Joe Manchin (e.g.) would support
 - Until then, focus on executive actions
- Potential legislative pursuits:
 - Covid relief, (green) infrastructure, energy innovation spending
 - Taxes (inc. carbon tax) via reconciliation
 - Modest climate bill (natural solutions)

POLICY IMPACTS: BIDEN LANDSLIDE

- Dems hold all the cards (and a 53+ seat Senate majority)
- Republicans retain nominal threat of filibuster but it's over the minute they try to employ it against something Dems truly want
- Significant edge in the upper chamber (and votes to spare) means everything is on the table, for energy and beyond
- Senate/individual members no longer the limiting factor: question becomes which direction a President Biden wants to lead
- Energy discussion expands to much bigger spending package, clean energy standards, carbon border adjustment



SCHROEDINGER'S FILIBUSTER

- If the Senate should flip, Democrats' range of motion—and, ultimately, the fate of the Biden agenda—hinges on the fate of the 60 vote threshold for legislation.
- They could change the rules with a simple majority vote, but significant hurdles exist, not least stated opposition from a number of sitting Senators:
 - Manchin, Sinema have previously pledged to oppose; Feinstein skeptical
 - Most 2020 Senate challengers have kept their powder dry (as has Biden)
 - Realistically may need a cushion to get the votes; much easier with 53 or 54 seats
- But easier to oppose in the abstract—ultimately comes down to circumstances: what are Republicans blocking that otherwise has broad support
 - Blockade of COVID Relief, VRA reform, other consensus items could open the door to progressive wish list items from court expansion to DC/PR statehood to climate
 - A GOP minority must pick its battles



THE KEY PLAYERS

- Biden Administration: TBD (Climate Czar, DOE, EPA, CEQ)
- Congressional Leaders
 - E&E-related committees
 - Senate ENR: Barrasso, R-WY; Manchin, D-WV
 - Current Chair Lisa Murkowski (R-AK) term-limited
 - Senate EPW: Capito, R-WV; Carper, D-DE
 - Current Chair John Barrasso slides to ENR
 - House E&C: Pallone, D-NJ; R TBD (Burgess? McMorris Rogers? Latta?)
 - Current Ranking Member Greg Walden (R-OR) retiring
 - House NR: Grijalva, D-AZ; R TBD (Westerman?)
 - Current Ranking Member Rob Bishop (R-UT) retiring
 - Infrastructure
 - House T&I: DeFazio, D-OR; Graves, R-MO
 - Senate Commerce: Wicker, R-MS; Cantwell, D-WA
 - Tax
 - Senate Finance: Crapo, R-ID; Wyden, D-OR
 - Current Chair Chuck Grassley (R-ID) term-limited
 - House Ways & Means: Neal, D-MA; Brady, R-TX



QUESTIONS? COMMENTS?



policyresolutiongroup.com/pulse

2020 Post-Election Analysis Webinar

Wednesday, November 4
10:00 am - 11:00 am ET



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POWERING FORWARD

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October 27, 2020



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