





[REDACTED]

s 22(1)(a)(ii)

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**From:** Kevin Rudd  
**Sent:** Monday, 4 November 2024 6:03 PM  
**To:** Jan Adams; s 22(1)(a)(ii) Kathy Klugman  
**Cc:** Jason Robertson; Suzanne Mccourt; Dougal McInnes; s 22(1)(a)(ii)  
**Subject:** United States: 2024 Presidential Election: Breaking down election count timing and challenges [REDACTED]  
**Attachments:** s 22(1)(a)(ii) - Election count.docx; Election Preview\_Attachment.pdf

[REDACTED]

Dear all,

As mentioned in my earlier message s 47E(d) the team has prepared the following (and attached) detailed report on the election count s 33(a)(iii)

Kevin

**Title:** United States: 2024 Presidential Election: Breaking down election count timing and challenges  
**MRN:** s 22(1)(a)(ii) 04/11/2024 s 22(1)(a)(ii)  
**To:** Canberra  
**Cc:** RR : Europe Posts, Indo-Pacific Posts, USA Posts  
**From:** Washington  
**From File:**  
**EDRMS**  
**Files:**  
**References:** s 22(1)(a)(ii)  
The cable has the following attachment/s -  
Election Preview\_Attachment.pdf  
**Response:** Routine, Information Only

### Summary

State and local election officials in the battleground states will begin reporting results on Election Day, but differing state laws mean some results will take longer than others. While the Associated Press, the traditional source of US election race calls, may declare a winner in the 24 hours following poll closure, it could also take days or even weeks. s 33(a)(iii)

Each state's governor will submit one official slate of electors for the Electoral College. Results will be certified by Congress on 6 January.

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Cable reports on the complications we are likely to face with the timing and clarity of the presidential election results, s 33(a)(iii)

### Election Day counting

2. With the administration of elections devolved to the county level in some states, and in the absence of a single government agency akin to the Australian Electoral Commission (AEC), the US has a **patchwork of policies and procedures governing the tabulation of election results.** s 33(a)(iii)

3. s 33(a)(iii) **counties and state election boards have enacted a number of initiatives to maintain accuracy and integrity of elections, while increasing efficiency.** While some nuance applies county-to-county, and personnel and machine resourcing will differ, in many states these changes include being able to process and count mail ballots up to several weeks before Election Day and count in-person Election Day votes as they come in rather than commencing once polls close. With over 78 million votes already lodged this cycle, almost evenly split between parties (38 per cent are registered Democrats; 36 per cent were registered Republicans), and in an historically close election cycle, we expect early leads – particularly in the battlegrounds – to be small.

4. Attached is a full battleground state vote counting process breakdown (s 22(1)(a)(ii) ). Given their processes, **North Carolina** and **Michigan** results are expected the most quickly, with **Georgia** and **Wisconsin** to follow next. This could be as soon as the 12 hours after the polls close, but extremely close races may take longer. **Nevada, Arizona, and Pennsylvania** are expected to have the lengthiest counts, and it is possible we wait days for these states' results (though they are endeavouring to move quicker).

5. Early results can skew toward one party early in a night because only a certain type of vote is reported first – creating an illusion or **'mirage' of one party being ahead.** For example, a red mirage in a county or state could appear if easier-to-count small towns are reporting faster than cities, or a blue mirage could appear if mail-in ballots (which skewed Democrat in 2020) from a certain area are reported faster than on-the-day vote.

### The role of the Associated Press (AP) and news networks

6. The AP, a not-for-profit news cooperative owned by US newspaper and broadcast members, is the oldest (since 1848) and largest (1,400 US newspaper members) of its kind. **It is the authoritative source for information about US elections** – from Presidential race calls to every state legislature race. In 2020, its declarations were correct for the Presidency, as well as every Governor, federal Senate and House race – and 99.9 per cent accurate overall.

7. Having compiled extensive research on each race (analysing voter demographics, most resonant political issues, candidate profiles and early voting numbers), after the polls close, the AP network of local reporters – some 4,000 this cycle – will collect vote results from the source (i.e. voting precincts and county election offices). On assessment of all information it hand, **AP will only declare a winner (in a state or overall) when absolutely certain a leader cannot be overtaken by trailing candidates.**

8. Ever since network television started covering presidential election nights in 1948, **there have only been two instances – in 2000 and 2020 – when the Presidential race was not called within 24 hours.** Like AP, major US networks – NBC, ABC, CBS, CNN, Fox – have deployed correspondents throughout the swing states in greater numbers, and signed on commentators to provide real-time expertise on election law, in the expectation of a drawn-out process. They also have their own analytical units that examine AP and other inputs before a “declaring” a winner in each state. **Regardless of their projections, AP remains the authoritative voice to heed on race calls and is the one we will be relying on.**

s 33(a)(iii)

█  
s 33(a)(iii)

#### Post-State Certification

13. Pursuant to the Constitution, **on 6 January 2025, all 535 Representatives and Senators will meet in the House chamber to count the Electoral College votes and declare the election winners.** Each state's electoral votes are considered alphabetically for certification. Congressional changes to the electoral law (through the Electoral College Reform Act, s 22(1)(a)(ii) ) s 33(a)(iii)

The Vice President's role in overseeing this process is affirmed as purely ceremonial (with no authority to change results) and each state's Governor is required to submit one single, conclusive official slate of electors.

14. **Members of Congress can object to certifying a given state's results,** but the joint session of Congress only considers the challenge if one-fifth of congressional members object (previously one member could trigger the review). If this threshold is reached, the two chambers separate and each debate the question for a maximum of two hours. They each then vote separately to accept or reject the objection. They then reassemble and announce the results of their respective votes. An objection to a state's electoral vote must be approved by both chambers in order for any contested votes to be excluded from the Electoral College count; the count then proceeds.

15. **Should there be a tie in the Electoral College, the Constitution empowers the House of Representatives to decide the presidential winner,** and the Senate to decide the Vice President. For the Presidential vote in the House, each state will have one vote. s 33(a)(iii)

text ends

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Sent by: s 22(1)(a)(ii)

Prepared by:



Approved by: HOM

Topics: POLITICAL-ECONOMIC/Domestic Political

s 22(1)(a)(ii) – this page, together with the following pages (8-17) are irrelevant and have been removed.

s 33(a)(ii) – this page, together with the following pages (19-21) are irrelevant and have been removed.



s 22(1)(a)(ii)

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**From:** Kevin Rudd  
**Sent:** Friday, 8 November 2024 6:38 AM  
**To:** Peter Sawczak; Jason Robertson  
**Cc:** Dougal McInnes; Suzanne Mccourt; Ian Gerard; Elly Lawson; Elizabeth Le Bas  
**Subject:** Re: Well done[SEC=OFFICIAL]

**OFFICIAL**

Thanks Peter

The team have been great here. At all levels. s 33(a)(iii)

Kevin

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**From:** "Peter Sawczak" <[Peter.Sawczak@dfat.gov.au](mailto:Peter.Sawczak@dfat.gov.au)>  
**Date:** Thursday, November 7, 2024 at 11:31:23 PM  
**To:** "Jason Robertson" <[Jason.Robertson@dfat.gov.au](mailto:Jason.Robertson@dfat.gov.au)>, "Kevin Rudd" <[kmrudd@dfat.gov.au](mailto:kmrudd@dfat.gov.au)>  
**Cc:** "Dougal McInnes" <[Dougal.McInnes@dfat.gov.au](mailto:Dougal.McInnes@dfat.gov.au)>, "Suzanne Mccourt" <[Suzanne.McCourt@dfat.gov.au](mailto:Suzanne.McCourt@dfat.gov.au)>, "Ian Gerard" <[Ian.Gerard@dfat.gov.au](mailto:Ian.Gerard@dfat.gov.au)>, "Elly Lawson" <[Elly.Lawson@dfat.gov.au](mailto:Elly.Lawson@dfat.gov.au)>, "Elizabeth Le Bas" <[Elizabeth.LeBas@dfat.gov.au](mailto:Elizabeth.LeBas@dfat.gov.au)>  
**Subject:** Well done [SEC=OFFICIAL]

**OFFICIAL**

Dear Kevin, Jason and Team Washington,

A short note to add my voice to the many I've heard expressing appreciation and admiration for your extraordinary work on the election and its aftermath.

You have covered all bases with exquisitely timed inputs, advice and products, and coordination between our teams in Canberra and Washington has been as tight as it's been broad.

s 33(a)(iii)

I hope you get whatever rest there's to be had over the weekend.

Best,

Peter

**Dr Peter Sawczak**

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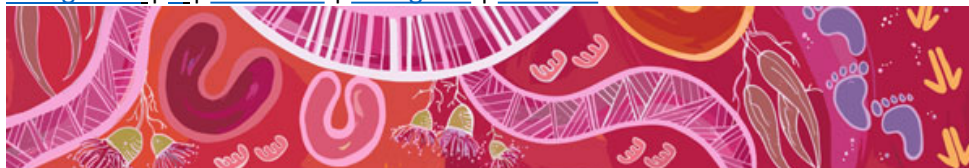
First Assistant Secretary

Geostrategy and Partnerships Division | Strategic Planning and Coordination Group

Department of Foreign Affairs and Trade

s 22(1)(a)(ii)

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*We acknowledge the Traditional Custodians of Country throughout Australia, and their continuing connection to land, waters and community. We pay our respects to all First Nations peoples, their cultures and to their Elders, past, present and emerging.*





[REDACTED]

s 22(1)(a)(ii)

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**From:** Kevin Rudd  
**Sent:** Sunday, 10 November 2024 6:00 PM  
**To:** George Mina; James Baxter  
**Cc:** Jan Adams; Elly Lawson; Jason Robertson; Cathy Raper; Juliana Nam; s 22(1)(a)(ii) ; Peter Sawczak  
**Subject:** Re: s 33(a)(iii), s 33(b) [REDACTED]

[REDACTED]

Thanks George

I'm doing my best to help s 33(a)(iii)

K

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**From:** "George Mina" <[George.Mina@dfat.gov.au](mailto:George.Mina@dfat.gov.au)>  
**Date:** Sunday, November 10, 2024 at 3:57:45 PM  
**To:** "Kevin Rudd" <[kmrudd@dfat.gov.au](mailto:kmrudd@dfat.gov.au)>, "James Baxter" <[James.Baxter@dfat.gov.au](mailto:James.Baxter@dfat.gov.au)>  
**Cc:** "Jan Adams" <[Jan.Adams@dfat.gov.au](mailto:Jan.Adams@dfat.gov.au)>, "Elly Lawson" <[Elly.Lawson@dfat.gov.au](mailto:Elly.Lawson@dfat.gov.au)>, "Jason Robertson" <[Jason.Robertson@dfat.gov.au](mailto:Jason.Robertson@dfat.gov.au)>, "Cathy Raper" <[Cathy.Raper@dfat.gov.au](mailto:Cathy.Raper@dfat.gov.au)>, "Juliana Nam" <[Juliana.Nam@dfat.gov.au](mailto:Juliana.Nam@dfat.gov.au)>, s 22(1)(a)(ii) "Peter Sawczak"  
<[Peter.Sawczak@dfat.gov.au](mailto:Peter.Sawczak@dfat.gov.au)>  
**Subject:** Re: s 33(a)(iii), s 33(b) [REDACTED]

[REDACTED]

Kevin, James

Many thanks for this.

s 33(a)(iii)

██████████  
s 33(a)(iii)

We are looking forward to working with you and your teams on all this.

George

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**From:** "Kevin Rudd" <[kmrudd@dfat.gov.au](mailto:kmrudd@dfat.gov.au)>  
**Date:** Monday 11 November 2024 at 12:34:57 am  
**To:** "James Baxter" <[James.Baxter@dfat.gov.au](mailto:James.Baxter@dfat.gov.au)>, "George Mina" <[George.Mina@dfat.gov.au](mailto:George.Mina@dfat.gov.au)>  
**Cc:** "Jan Adams" <[Jan.Adams@dfat.gov.au](mailto:Jan.Adams@dfat.gov.au)>, "Elly Lawson" <[Elly.Lawson@dfat.gov.au](mailto:Elly.Lawson@dfat.gov.au)>, "Jason Robertson" <[Jason.Robertson@dfat.gov.au](mailto:Jason.Robertson@dfat.gov.au)>, "Cathy Raper" <[Cathy.Raper@dfat.gov.au](mailto:Cathy.Raper@dfat.gov.au)>, "Juliana Nam" <[Juliana.Nam@dfat.gov.au](mailto:Juliana.Nam@dfat.gov.au)>, s 22(1)(a)(ii)  
**Subject:** Re: s 33(a)(iii), s 33(b) ██████████  
██████████

Happy to help James

K

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**From:** "James Baxter" <[James.Baxter@dfat.gov.au](mailto:James.Baxter@dfat.gov.au)>  
**Date:** Sunday, November 10, 2024 at 8:13:17 AM  
**To:** "Kevin Rudd" <[kmrudd@dfat.gov.au](mailto:kmrudd@dfat.gov.au)>, "George Mina" <[George.Mina@dfat.gov.au](mailto:George.Mina@dfat.gov.au)>  
**Cc:** "Jan Adams" <[Jan.Adams@dfat.gov.au](mailto:Jan.Adams@dfat.gov.au)>, "Elly Lawson" <[Elly.Lawson@dfat.gov.au](mailto:Elly.Lawson@dfat.gov.au)>, "Jason Robertson" <[Jason.Robertson@dfat.gov.au](mailto:Jason.Robertson@dfat.gov.au)>, "Cathy Raper" <[Cathy.Raper@dfat.gov.au](mailto:Cathy.Raper@dfat.gov.au)>, "Juliana Nam" <[Juliana.Nam@dfat.gov.au](mailto:Juliana.Nam@dfat.gov.au)>, s 22(1)(a)(ii) @dfat.gov.au  
**Subject:** RE: s 33(a)(iii), s 33(b) ██████████  
██████████

Thanks for this message, Kevin.  
s 33(a)(iii), s 33(b)

Thanks  
James  
James Baxter (*he/him*)

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Ambassador and Permanent Representative  
Australian Permanent Mission to the WTO, UNCTAD & WIPO  
s 22(1)(a)(ii)

██████████

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**From:** Kevin Rudd  
**Sent:** Thursday, November 7, 2024 7:58 PM  
**To:** George Mina  
**Cc:** Jan Adams ; Elly Lawson ; Jason Robertson ; James Baxter ; Cathy Raper ; Simon Clayton ; Juliana Nam ; <sup>s 22(1)(a)(ii)</sup>  
**Subject:** s 33(a)(iii), s 33(b) ██████████  
██████████

Dear George,  
s 33(a)(iii), s 33(b)

Kevin  
Kind regards,  
Kevin  
**H.E. The Hon. Dr. Kevin Rudd AC**  
Australian Ambassador to the United States  
Embassy of Australia

s 22(1)(a)(ii)

[usa.embassy.gov.au](http://usa.embassy.gov.au)

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*We acknowledge the Traditional Custodians of Country throughout Australia, and their continuing connection to land, waters and community. We pay our respects to all First Nations peoples, their cultures and to their Elders, past, present and emerging.*

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**Title:** United States: Trade/Agriculture: US election 2024, what it means for US agriculture

**MRN:** 01/11/2024 s 22(1)(a)(ii)

**To:** Canberra

**Cc:** USA Posts , Agriculture Posts , Geneva WTO , Aust Economic Posts

**From:** Washington

Sent by: s 22(1)(a)(ii)

**References:** s 22(1)(a)(ii)

**Attachments:** s 22(1)(a)(ii)

**Response:** Routine, Information Only

**Summary:**

Both sides have continued to tout the benefits of their trade and agricultural policies in efforts to woo rural voters in battleground states. s 33(a)(iii)

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With less than a week until the US election on 5 November, both Republican and Democratic camps are focused on their last big push to get the vote. In an election where every vote could make a difference, the campaigns are targeting voters of all demographics, including rural voters – many of whom rely on agriculture – who make up a sizable constituency in the battleground states.

s 33(a)(iii)



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4. The American Soybean Association (ASA) and National Corn Growers Association have been the most vocal, highlighting that retaliatory tariffs on their farmers would result in lower exports (around 82 per cent lower for corn and 52 per cent lower for soybeans to China) and lower commodity prices s 22(1)(a)(ii)

5. Democratic members of the US agriculture industry from across the US, including US Chief Agricultural Negotiator, Doug McKalip, have continued to highlight the shortcomings of Trump's tariff proposal during the campaign. Even some Republicans have joined the chorus, with Ann Veneman, former USDA Secretary under George W. Bush, calling Trump's tariff plan 'dangerous for rural America'.

s 33(a)(iii)

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s 33(a)(iii)

13. Harris and Walz recently announced their plan for rural America, which included lowering healthcare costs for farm families as well as following through on a range of Biden agricultural commitments. These included: continued funding for climate smart initiatives, other farmer support packages as well as cracking down on lack of competition in the farm sector for such things as meat processing. s 33(a)(iii)

**Possible choices for a new Agriculture Secretary**

s 33(a)(iii)

s 22(1)(a)(ii)

s 33(a)(iii)

16. For Democrats, current **Agriculture Secretary Vilsack** has not yet ruled out if he would continue as USDA Secretary under Harris s 33(a)(iii)

**Comment**

s 33(a)(iii)

18. Cable prepared in consultation with Department of Agriculture, Fisheries and Forestry at Post.

Sent By: s 22(1)(a)(ii)

Prepared By:

Approved By: Nam

Topics: TRADE/Market Access , TRADE/Policy General , POLITICAL-ECONOMIC/General Economic

**Washington distribution**

Cc: DFAT

Trade Section Head

**Canberra distribution**

s 22(1)(a)(ii)

s 22(1)(a)(ii) – this section/page, together with the following pages (35-55) are irrelevant and have been removed.

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**Title:** United States: 2024 Election: Harris vs. Trump on Economic (Cost of Living) Pledges

**MRN:** 02/11/2024

**To:** Canberra

**Cc:** Aust Economic Posts

**From:** Washington  
Sent by: s 22(1)(a)(ii)

**References:** s 22(1)(a)(ii)

**Response:** Routine, Information Only

**Summary:**

Throughout the course of the US presidential election campaign, candidates Kamala Harris and Donald Trump have put forward a raft of cost of living policies to woo voters. Harris has focused on creating an ‘opportunity economy’ full of tax credits and grants for low to middle-income households. Trump has prioritised big tax cuts and universal tariffs, with higher-income households standing to benefit the most. The economy consistently ranks as the number one issue for voters, and many will vote based on this issue alone. s 33(a)(iii)

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United States Vice President Harris and former President Trump have set out their economic policy commitments in their respective presidential election manifestos. Over the past few months, they have also added new economic ideas as they campaigned.

2. Harris’s focus has been on fiscal help for the middle class in housing, childcare and everyday expenses. For reference, the median income for American households is calculated at around AUD 120,000 whereas the Australian equivalent is around AUD 95,000. Trump has targeted aggressive deregulation, tariffs and tax cuts in a bid to please his base. With the economy as the number one issue for voters in this election, it is worth exploring what each candidate has promised.

**It's the Economy, Stupid**

3. A Washington Post-Scholar School Poll found the top two issues of ‘extreme importance’ to voters were inflation (66 per cent) and the economy (65 per cent). These were followed by threats to democracy (61 per cent) and the rising costs of health care (55 per cent). Despite voter sentiment and candidate messaging, the US economy continues to perform strongly, growing 2.8 per cent in the third quarter of 2024 with steady unemployment at 4.1 per cent, defying ‘every prediction of a recession’ in recent years, according to the New York Times. Nonetheless, there is a pervasive feeling amongst voters that everyday costs are too high and they are worse off now than they were before the Covid-19 pandemic. Grocery prices are up about 20 per cent compared with four years ago, total household debt has now reached a record high of \$17.8 trillion, and monthly average mortgage repayments on a typical house have surged by over 90 per cent in the last four years, according to real estate company, Zillow.

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s 33(a)(iii)

5. Both candidates have released manifestos outlining some of their big-ticket economic pledges to lower the cost of living. s 33(a)(iii)

Below is a look at what economic pledges have been made during this campaign by each candidate.

### Harris

6. Economic philosophy: 'A New Way Forward for the Middle Class', also known as 'the Opportunity Economy,' is centred on providing support for the middle-class as well as entrepreneurs, small businesses, and homeowners (s 22(1)(a)(ii)). Some of the more widely articulated tenets include to:

- Establish a downpayment support for **first-time homebuyers of up to \$25,000**.
- **Expand the Child Tax Credit** from \$2,000 per child to a total maximum credit value of \$6,000 for newborn children.
- Grant up to **\$50,000 for new startup expenses**, either up front or as a future tax credit.
- **Not increase taxes for those earning less than \$400,000 a year and increase the top individual income tax rate to 39.6 per cent on income above \$400,000** for single filers and \$450,000 for joint filers.
- **Increase the long-term capital gains tax rate** for individuals earning \$1 million a year or more from 20 to 28 per cent (10 percentage points lower than what President Biden had proposed).
- **Raise the corporate tax rate** from 21 per cent to 28 per cent, estimated to raise an additional \$1.1 trillion according to the Penn Wharton Budget Model.
- Introduce a **minimum income tax on billionaires**. This would likely resemble President Biden's proposal to apply a billionaire income tax rate of 25 per cent, measured by including unrealised capital gains. There are approximately 813 billionaires in the US. The US Treasury has estimated this could raise approximately \$500 billion over ten years.
- Introduce a **federal ban on price gouging**, along the lines of similar legislation already in place in 37 states.
- **Extend the \$35 cap on insulin and \$2,000 cap on out-of-pocket drug costs** to all Americans (currently just for seniors).
- **Raise the federal minimum wage to \$15 per hour** (current federal minimum is \$7.25 per hour, though 30 states already have a minimum wage higher than the federal wage).
- **Eliminate taxes on tips**. The Budget Lab at Yale estimates just over 4 million workers (approx. 2.5 per cent of the country's workforce) work in tipped occupations.

7. The Penn Wharton Budget Model assesses that lower and middle-income households would

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generally benefit from Harris's proposed tax credits and transfers, while high-income households would be worse off. Overall, these policies would lower GDP by 1.3 per cent by 2034 (compared to baseline), lower capital investment, lower working hours and reduce wages by 0.8 per cent in 2034. Harris's proposals would increase the public debt by 4.4 per cent from baseline by 2034.

## Trump

8. Economic philosophy: 'A Return to Common Sense' centring on 'defeating' inflation, building the 'greatest economy in history', bringing back the American dream and 'making it affordable', and protecting American workers from unfair trade. Some key aspects include to:

- **Impose universal tariffs** of up to 20 per cent worldwide and 60 per cent for China (s 22(1)(a)(ii) ).
- **Cut the corporate tax rate** from 21 to 15 per cent.
- **Slash federal spending** (presumably including industrial policies, although the President's ability to cut large legislated spending commitments such as those in the Inflation Reduction Act, is limited. See s 22(1)(a)(ii) .)
- **Extend the Tax Cuts and Jobs Act (TCJA)**, implemented by Trump in 2018, which cost \$1.9 trillion according to the Committee for a Responsible Federal Budget. Many provisions, including individual income tax cuts, are due to expire in 2025. A full extension of the cuts would add \$4.6 trillion to the national debt over the next decade according to the Congressional Budget Office.
- **Eliminate taxes on Social Security benefits**. Recipients currently pay taxes on 50-85 per cent of benefits depending on their income.
- **Make interest on car loans fully tax deductible**. More than 100 million Americans, with consumers purchasing a new car in 2024 set to pay – on average – over \$1,300 a year in interest over the life of their loan.
- **Begin deportation of 'illegal aliens'**. The number of people to which this policy applies is unclear. s 33(a)(iii)
- **Lift the State and Local Tax (SALT) deduction cap**. Taxpayers who itemise their filings can claim a federal tax deduction of up to \$10,000 already paid in property, sales or income taxes to state and local governments. Trump introduced the cap as part of the TCJA, but has since campaigned on the promise of removing it. According to the Tax Foundation, the SALT deduction disproportionately benefits high-income taxpayers.
- **Eliminate taxes on tips**.
- Though Trump has signalled his intention to exert more **control over the Federal Reserve**, this is not a formal GOP position s 33(a)(iii)

s 33(a)(iii)

### What's Actually Doable?

10. Congressional enactment would be required for most of the proposals and is not a foregone conclusion. The winner of the election will almost certainly face hurdles and delays in Congress, depending on its final composition. To pass many of these proposals would require a majority in both houses, s 33(a)(iii)

### As for Australia?

11. The impacts for Australia will mostly be indirect, save for universal tariffs under a returned President Trump (see s 22(1)(a)(ii))

12. Regardless, large Australian businesses in the US remain bullish on the US economy. They are drawn to the US market to go big and go global. s 33(a)(iii)

Investment figures show a 12.3 per cent year on year increase in Australian investment stock in the United States in 2023, totalling AUD 1.2 trillion. US investment in Australia reached AUD 1.17 trillion by 2023, an increase of 6.7 per cent from 2022. This reflects yearly investment flows of near parity (AUD 210 billion from the US to Australia and AUD 206 billion from Australia to the US in 2023).

### The Verdict?

s 33(a)(iii)

14. As for voters, 51 per cent of the respondents in the Washington Post-Scholar School Poll believed Trump would do a better job on the economy, opposed to 36 per cent for Harris. Similarly, a CNBC poll revealed that voters believed they would be 'better off financially' under Trump, by a margin of 42 to 24 per cent against Harris.

Sent By: s 22(1)(a)(ii)

Prepared By:

Approved By: Juliana Nam

Topics: TRADE/Policy General , POLITICAL-ECONOMIC/General Economic ,  
POLITICAL-ECONOMIC/Taxation , ECONOMIC DIPLOMACY/General

s 22(1)(a)(ii) – this page, together with the following pages (61-62) are irrelevant and have been removed.



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**Title:** United States: s 33(a)(iii)  
**MRN:** s 22(1)(a)(ii) 02/11/2024 s 22(1)(a)(ii)  
**To:** Canberra  
**Cc:** China Posts , Indo-Pacific Posts  
**From:** Washington  
Sent by: s 22(1)(a)(ii)  
**References:** s 22(1)(a)(ii)  
**Attachments:** s 22(1)(a)(ii)  
**Response:** Routine, Information Only

s 22(1)(a)(ii)



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s 22(1)(a)(ii)

s 33(b)





Exported s 22(1)(a)(ii)

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s 33(b)





s 22(1)(a)(ii)

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s 33(b)

s 33(a)(iii)

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**Sent By:** s 22(1)(a)(ii)

**Prepared By:** Vera Holenstein

**Approved By:** HOM

**Topics:** TRADE/Policy General , POLITICAL-ECONOMIC/International Political ,  
INTERNATIONAL SECURITY/Strategic Policy

s 22(1)(a)(ii)



s 22(1)(a)(ii) – this page, together with the following pages (68-72) are irrelevant and have been removed.



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**Title:** United States: Trade: The politics of steel in the 2024 elections

**MRN:** s 22(1)(a)(ii) 02/11/2024 s 22(1)(a)(ii)

**To:** Canberra

**Cc:** USA Posts , Geneva WTO , Aust Economic Posts

**From:** Washington  
Sent by: s 22(1)(a)(ii)

**Response:** Routine, Information Only  
s 33(a)(iii)

2. At least since the late 1970s, **the US steel industry has enjoyed bipartisan support at the highest level.** President Carter (1977-1981) created a *Trigger Price Mechanism* under which an automatic anti-dumping investigation would be launched when the price of certain steel imports fell below a pre-determined level. President Reagan (1981-1989) negotiated voluntary import restraint agreements. (As Deputy USTR in the Reagan Administration, Bob Lighthizer ran those negotiations). Presidents Clinton (1993-2001) and G.W. Bush (2001-2009) imposed import tariffs. All were considered free traders yet sought relief for the domestic steel sector, albeit sometimes to head off the possibility of even more significant action (e.g. import quotas) from Congress.

3. More recently President Trump (2017-2021) imposed section 232 ‘national security’ tariffs on steel imports, including from allies. President Biden has kept some of those in place but did remove some allies after negotiating quotas with them. He has also raised the idea of tripling the existing 301 tariff rate on Chinese steel.

s 33(a)(iii)

4. **‘Unfair’ foreign competition has been and continues to be a key rationale for US steel protectionism.** Not surprisingly, Chinese practices have been a focus in recent years. Given the deep bipartisan concern with the ‘risks’ and ‘threats’ posed by China across the board – e.g. economically and with regard to national security – s 33(a)(iii)

5. Indeed, **US national security imperatives will be among the drivers of expected steel protectionism under either a Harris or a second Trump Administration.** There is a prevalent view here that the US needs its own steel industry for defence purposes (notwithstanding media reports in 2018 when the section 232 tariffs were originally pursued that suggested the military only needed three per cent of the US' steel and aluminium production). We have already seen the security argument play out on the campaign trail in the context of Nippon Steel's bid to acquire US Steel. Candidates Harris and Trump have both said they would block the deal, including because US Steel needed to remain an American owned and operated company. While some dismiss such views as political posturing, there are also some who genuinely believe US national security could be compromised.

6. Also motivating are the perceived **electoral benefits of steel protectionism.** The 5 November presidential **election will be won or lost** in seven battleground states, including three – Michigan, Pennsylvania and Wisconsin – **in the so-called Rust Belt where manufacturing job losses, particularly during the mid 1970s through the 1980s, still loom large in the national consciousness.** US steel makers, for example, employed well over half a million workers in 1970 down from a peak of over 600,000 in the 1950s. Today it employs under 85,000. Despite the various reasons for the industry's diminishment, unfair foreign competition often receives far more than its share of the blame.

7. Locked in a dead heat, both Harris and Trump have been courting voters in these Rust Belt states. In Pennsylvania in particular, every vote counts. Not only could it be decisive for the presidential race, but control of the US Senate – whether retained by the Democrats or flipped to Republicans – could turn on Pennsylvania. This means that, **even though the steel sector's importance to the Rust Belt states' economies is not what it once was, the industry's political capital is still very strong.** As evidence look at the steel stakeholder visits made by US Trade Representative Katherine Tai and other Biden cabinet officials in the months leading up to the election. Most recently, Tai and Acting Labor Secretary Julie Sue visited a Cleveland-Cliffs facility in Pennsylvania.

8. **That clout won't fade once 5 November passes.** There are steel facilities and therefore steel workers spread across multiple states including outside the Rust Belt, which broadens the sector's political clout. According to the Alliance for American Manufacturing, electric arc furnace facilities, which produce 70 percent of American made steel, operate in over 20 US states. [s 33\(a\)\(iii\)](#)

### *So, what might new steel protections mean for Australia?*

9. The impact of any new Harris or Trump Administration steel protections on Australia would depend in part on the type and size of trade relief provided to the US industry. [s 33\(a\)\(iii\)](#)

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s 33(a)(iii)

10. We could also **expect to see more Australian companies moving to set up shop in the US**  
s 33(a)(iii)

### Comment

11. The domestic steel industry and manufacturing more broadly remain an iconic part of the US' self-image, even though manufacturing jobs have shrunk by a third since 2000. To some degree the origins of the Biden Administration's 'worker-centric' trade agenda and the Trump Administration's tariff policies can be found in these job losses, for which many blame trade agreements like NAFTA and globalisation more generally.

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**Sent By:** s 22(1)(a)(ii)

**Prepared By:**

**Approved By:** Juliana Nam

**Topics:** TRADE/Market Access , TRADE/Policy General , POLITICAL-ECONOMIC/General Economic

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**Title:** United States: 2024 Election – North Carolina: Perspectives from a purple state

**MRN:** 03/11/2024 s 22(1)(a)(ii)

**To:** Canberra

**Cc:** USA Posts , Europe Posts , Americas Posts , Indo-Pacific Posts , G20 Posts

**From:** Washington

Sent by: s 22(1)(a)(ii)

**References:** s 22(1)(a)(ii)

**Response:** Routine, Information Only

**Annotation:** Cable prepared jointly by Congressional and Political branches

**Summary:**

National issues like migration, the economy and abortion are top of mind for voters in North Carolina, while Hurricane Helene introduces uncertainty for turnout in affected areas. Unaffiliated voters, now the largest bloc in the state, are expected to play a decisive role as both parties vie for their support. s 33(a)(iii)

The state has hosted multiple visits from Trump, Harris, Biden, Walz, Vance and various surrogates, with both parties investing heavily in securing North Carolina's 16 electoral votes and engaging the growing bloc of unaffiliated voters. In the final week of campaigning, Democrats and Republicans alike were engaged in a flurry of rallies, canvassing, analysis of early voting, and micro-targeting of voters yet to cast their ballot. Leaflets and yard signs abounded.

**What makes North Carolina crucial?**

3. North Carolina is a key 2024 battleground s 22(1)(a)(ii) with tight margins in recent presidential cycles – Trump won by 1.3 per cent in 2020 and 3.6 per cent in 2016. Obama's narrow victory in 2008 punctuated an otherwise unbroken string of Republican wins since 1980. With a rapidly growing and increasingly diverse population of over 10 million, migration and border issues (and related crime and safety concerns) resonate with voters – despite the fact the state capital is almost 2,500 kilometres from the US southern border. Once a reliably conservative state, North Carolina's swing-state status emerged with urban growth, changing demographics, and a growing cohort (over one-third) of unaffiliated voters who increasingly determine electoral outcomes. North Carolina is central to Trump's re-election prospects – there is almost certainly no path to victory for him without winning the state s 22(1)(a)(ii) . s 33(a)(iii)

**Demographics**

**OFFICIAL**

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4. North Carolina's shifting demographics are central to its emergence as a swing state. Only a handful of the state's 100 counties are Democratic strongholds (clustered around the urban population centres), while rural areas remain largely Republican (GOP). With the second-largest rural population after Texas, North Carolina's urban-rural divide shapes its competitive political landscape. Rapid population growth has made North Carolina the third-fastest-growing state, with unaffiliated voters now forming the largest voting bloc – outnumbering both Republicans and Democrats. The state has long had a significant Black minority population, and more recent in-migration (both international and inter-state) has seen growing Hispanic, Asian and Indian communities. There was debate amongst our contacts as to whether the demographic changes favoured Democrats or Republicans. The general consensus was that there were few truly undecided voters across the board – this election was more about mobilisation (getting voters to the polls) than persuasion.

s 33(a)(iii)

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## Impacts of Hurricane Helene

7. Hurricane Helene recently hit western North Carolina, particularly Buncombe County, one of the state's larger and predominantly Democratic areas, as well as several Republican-leaning counties. While initial expectations suggested the natural disaster might depress Republican turnout, over time commentators then thought Democratic voters may, in fact, be more adversely affected. The State Board of Elections has ensured that polling locations remain accessible (including by increasing the number of voting sites), and there was general consensus that voters could still reach the polls. Early voting numbers are showing turnout to be roughly on par with previous years. <sup>s 33(a)(iii)</sup>

Observers across the spectrum could not pick which way the chips would fall in terms of electoral impact.

## Key voter issues: all politics are...national?

8. Hot topics in North Carolina largely mirrored the national-level discourse, including on the economy (particularly cost of basic goods and housing affordability), abortion and women's reproductive rights, and border/migration issues (and by extension crime). Despite strong economic performance, rising costs and inflation were top voter concerns. Republicans highlighted pro-business policies, while Democrats emphasised a people-focused 'opportunity economy', though this message has struggled to resonate. Even in Charlotte, the state's largest city and a national financial services hub second only to New York City (often called the 'Wall Street of the South'), people worried about the state of the economy. <sup>s 33(a)(iii)</sup>

9. There are dissonant trends across different parts of the state, resulting in varying socio-economic outcomes for local populations. The research triangle around Durham (encompassing three of the country's powerhouse universities) has one of the US's highest concentrations of PhDs, and was purpose built to contribute to local economic development. <sup>s 33(a)(iii)</sup>

Elsewhere though, traditional manufacturing sectors have declined as a result of international competition – with many blaming globalisation and free trade agreements. Former textile mills and car plants that have been repurposed into hip food and bar destinations are a reminder of changing employment trends that are leaving some behind.

## Election integrity

10. North Carolina has a solid track record of delivering secure and transparent elections <sup>s 33(a)(iii)</sup>

As North Carolinian voters are expected to cast ballots in record numbers, both parties have ramped up efforts to safeguard the process <sup>s 33(a)(iii)</sup> deploying state and county observers to monitor polling. Republicans have taken further steps by employing 'roving attorneys' and a 24-hour hotline to address reported irregularities. Both sides already accuse each other of voter intimidation and interference tactics. Anticipating razor-thin margins, Republicans have filed 16 election-related lawsuits, and Democrats 12,

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setting the stage for even more post-election legal battles. s 33(a)(iii)

Everybody agrees it's no fun to be an election administrator – more than half of whom have left their post since 2020.

### Comment

11. In North Carolina, the presidential election runs simultaneously with the governor's race and elections for state council positions. Contrary to much of the rest of the country, which many speculate are increasingly straight-ticket voting as a result of polarisation, North Carolinians continue to split their ballots s 33(a)(iii) – reflecting the highly competitive situation in the state and complicating predictions. Republicans could, once again, take the state in the presidential, while Democrats retain the governorship, and down-ballot races result in a mixture of Republican and Democrat office holders.

12. The effect of Hurricane Helene in the western part of the state on both voter turnout and voter preferences is a wild card. The economic impacts of fading manufacturing industries and a stark urban-rural divide are now deeply familiar stories from other parts of America, including other battleground states s 22(1)(a)(ii)

13. The stakes for the presidential race are high; North Carolina is a 'must win' state for Trump. Harris, on the other hand, has multiple pathways to the presidency, and could still win the White House even if she loses North Carolina. A purple state for a reason, observers expect an exceptionally tight race, and either candidate is likely to win by only a small margin – paving the way for near certain legal contestation. The 40-million-dollar question is whether Harris can turn out Obama-levels of support to get her over the line. Either way, the state's changing demographics are helping to ensure it will remain purple well into the future.

s 33(a)(iii)

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**Sent By:** s 22(1)(a)(ii)

**Prepared By:**

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s 22(1)(a)(ii)

s 22(1)(a)(ii) – this page, together with the following pages 83-103 are irrelevant and have been removed.

s 33(a)(iii), s 33(b) – this page, together with the following pages (105-110) are irrelevant and have been removed.