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USA: midterm elections, post-electoral scenarios and outlook for the Trump administration

An overview

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1. Introduction

The midterm elections of 3 November 2026 will renew all 435 seats in the House of Representatives and 35 of the Senate's 100 seats. The outcome will determine the balance of power in Congress for the second half of Donald Trump's term, with Republicans currently holding majorities in both chambers, and shape the administration's ability to advance its agenda.

This note examines the possible consequences of a loss of the Republican majority in either or both chambers, focusing on the president's remaining room for manoeuvre and his potential responses to a Congress controlled by Democrats.

2. Presidential approval and electoral prospects

The November vote takes place against a backdrop of growing difficulties for the current administration. Domestically, inflation has risen from 2.7% in November 2024 to 3.7% in September 2026, while controversies over immigration management and ICE operations have fuelled public discontent and polarization. Internationally, tariff policy, tensions with allies and the use of military force, culminating in direct conflict with Iran, have increased the political and economic costs of presidential action. Meanwhile, the Russia-Ukraine war remains unresolved.

Polling reflects this picture. Trump's approval rating stands at around 40%, while 60% of respondents express a negative view of his performance. In the national congressional vote, Democrats maintain a lead of approximately 8–9 percentage points over Republicans. Several Senate seats remain competitive, particularly in Texas, Alaska, Iowa and Kansas, where declining support among independent voters is putting Republican candidates under greater pressure. The outcome nevertheless depends on the geographical distribution of the vote and the dynamics of

individual races: a national Democratic lead does not automatically translate into control of both chambers.

The loss of a congressional majority by the president's party would not, in itself, be an exceptional precedent in recent US history. This occurred under Bill Clinton in 1994, George W. Bush in 2006, Barack Obama in 2010 and 2014, Trump himself in 2018, and Joe Biden in 2022. The greater uncertainty lies in how the current administration would manage a situation of divided government, particularly given the central importance Trump places on the direct exercise of presidential power and his limited inclination to treat institutional constraints as a reason to scale back his initiatives.

Allowing for the uncertainty inherent in polling, two main scenarios emerge.

2.1. Democratic majority in the House of Representatives (high probability)

A Democratic takeover of the House of Representatives would enable the opposition to exercise more extensive oversight of the Trump administration. The new majority could launch congressional investigations, summon officials, and request documents, increasing political pressure on the White House and bringing potential controversies surrounding presidential actions into the public spotlight.

On the legislative front, Democratic control of the House would make it more difficult for Trump to secure approval for his initiatives and budgetary measures. It could also increase constraints on military action through control of funding and the exercise of Congress's constitutional powers in matters of war, although it would not eliminate the president's powers as commander-in-chief of the armed forces.

The new majority could also initiate impeachment proceedings. However, the eventual removal of the president would remain unlikely without a two-thirds majority in the Senate.

2.2. Democratic majority in both chambers (medium probability)

Democratic control of the Senate would add a further source of pressure on the Trump administration. In addition to being able to block presidential nominations subject to Senate confirmation, the Senate would play a decisive role in any impeachment proceedings: following the House's approval of articles of impeachment, senators would conduct the trial and vote on whether to convict the president. Removal would require the support of two-thirds of senators present, making conviction difficult without significant Republican backing.

A Democratic majority in both chambers would also strengthen the opposition's ability to advance an alternative legislative agenda, although Trump could veto bills passed by Congress. Overriding a veto would require a two-thirds majority in both the House and the Senate.

3. Trump's potential response to an electoral defeat

Losing the midterms would turn Trump into a *lame duck*, weakening his ability to translate his programme into legislation. This would not, however, necessarily lead to a moderation of presidential action.

In the face of a hostile Congress, Trump could instead make greater use of executive instruments to continue implementing his agenda. The existing record is significant: as of 1 October 2026, he had signed 288 executive orders during his second term, bringing the total across both terms to 508. Further reliance on this instrument could allow the administration to pursue its objectives without waiting for new legislation, while remaining subject to the constraints imposed by existing law, judicial review and Congress's budgetary powers.

A second factor concerns the political incentives shaping the final phase of the term. The absence of electoral constraints and the impossibility of serving a third term could lead Trump to prioritize his political legacy, adopting a more assertive approach and showing a greater willingness to take risks, particularly on the international stage. He could therefore pursue ambitious initiatives even in the face of strong public disapproval and rising political costs, without being deterred by the potential domestic repercussions.

4. Potential implications for US foreign policy

An electoral defeat could reinforce trends already evident in Trump's foreign policy, with differing effects across the main international dossiers.

- *Renewed military escalation against Iran*

  A pause or reduction in military operations ahead of the elections could give way to renewed escalation once voting has concluded. Trump could resume bombing campaigns to intensify pressure on Tehran and attempt to achieve by force objectives not secured through the previous military campaign. An electoral defeat could strengthen the incentive to demonstrate resolve internationally, despite the costs and risks of further widening the conflict.

- *Reduced support for Ukraine*

  The administration could deepen its shift towards reducing support for Kyiv and increasing pressure on Volodymyr Zelensky, whom Trump regards as an obstacle to a settlement. An electoral defeat could reinforce this shift, while continued energy cooperation with Moscow and the prospect of normalizing relations with Russia could form part of a broader effort to redirect US resources towards competition with China, further widening divisions with European allies.

- *Further deterioration in transatlantic relations*

The White House could reassert its priorities more forcefully, intensifying pressure on European allies over defence spending and demanding full access for American technologies to European markets, while opposing regulatory restrictions. Differences over the Russia-Ukraine war, combined with a more confrontational approach to relations, could further widen the gap between Washington and European capitals, weakening Western cohesion.

- *Continuation of the truce and managed competition with China*

  In relation to Beijing, the administration could maintain its recent approach, prioritizing the management of strategic competition and the preservation of the trade truce. Recent bilateral summits could facilitate limited agreements on trade and critical raw materials, without resolving underlying strategic and technological differences. The truce would therefore remain fragile, vulnerable to renewed tensions over Taiwan, Iran, rare earths and trade restrictions.

5. Conclusions

Losing the midterms would weaken Trump's ability to implement his agenda through Congress, without necessarily reducing his presidential activism. Freed from electoral constraints, he could become more willing to pursue controversial objectives despite rising political costs. The final phase of his term could therefore bring a more assertive and less predictable US foreign policy, with tensions involving allies and international crises becoming instruments for asserting presidential leadership rather than opportunities to contain conflict.

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