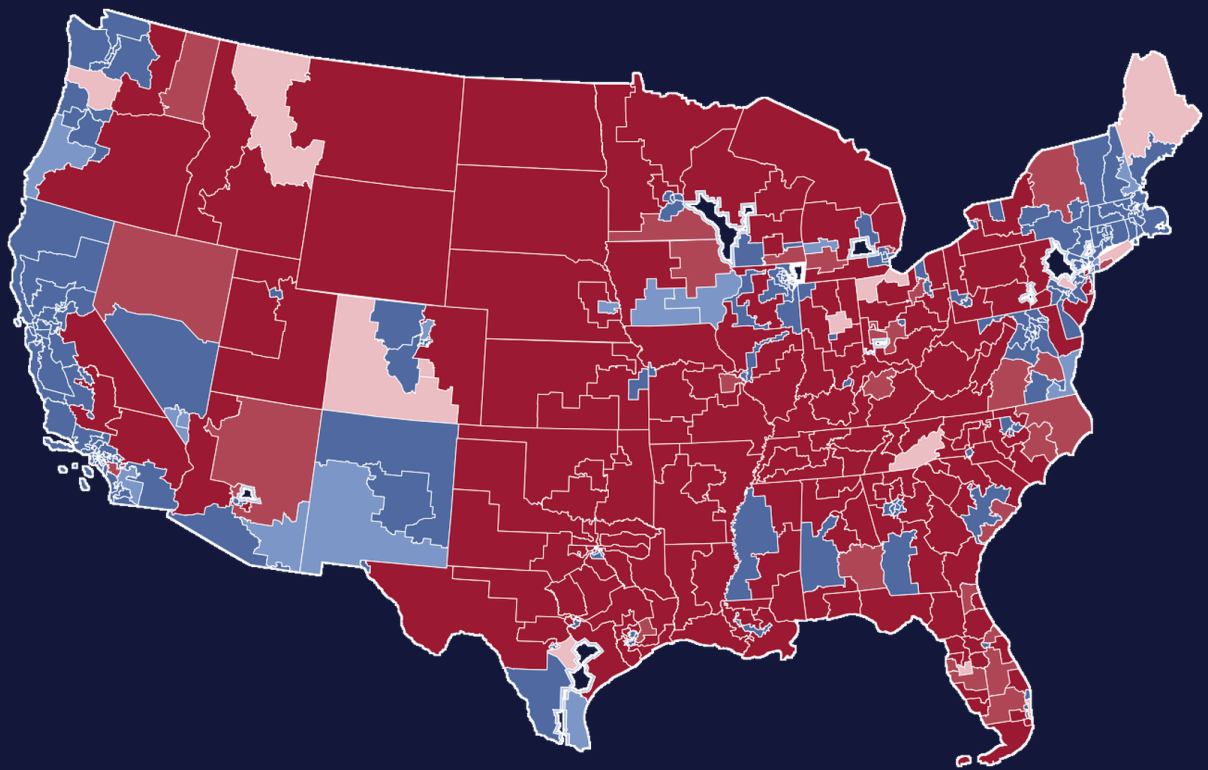
This document is a translation of the original French text. It may contain errors; the French version is the reference text.

MIDTERMS 2026: THE KEYS TO THE VOTE

Why each race tips: Le Millénaire's electoral, cartographic and political analysis

By **William Thay**, President of Le Millénaire
Sean Scull, United States specialist at Le Millénaire
Augustin Bataille, analyst at Le Millénaire

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> *This document is a translation of the original French text. It may contain errors; the French version is the reference text.*

FOREWORD

Iowa, which Donald Trump carried by 13.2 points in 2024: that is where the 51st Senate seat will be decided. In the House, the majority runs through Arizona's 1st district, which he won by 3.1 points. On November 3, 2026, 435 House seats, 35 Senate seats and 36 governorships are at stake. The Le Millénaire forecast gives Democrats a 78.1% chance of winning back the House. By contrast, it gives them only a 39.8% chance of controlling the Senate.

The question we will ask is the following: how can voters who disapprove of Donald Trump hand the House back to Democrats while leaving the Senate to Republicans? And what tips Texas, Maine, Iowa or Arizona's 1st district? The House, the Senate and the governors each also have their own in-depth note.

Figures without a footnote come from the Le Millénaire forecast, in its November 1, 2026 update: 200,000 simulations of the election, based on polls, past results in each state and each district, campaign money and a few structural factors[1]. To these we add our daily tracking of the early vote and, for the campaign itself, the American press. Five pollsters, called into question over fabricated figures or hidden sponsors, have been removed from all calculations.

First, we look at what is at stake on November 3, Donald Trump's unpopularity and the 2024 map. Second, at the 2.3-point correction the model applies to Democrats and at six mechanisms that tip races. Third, at the links between the three sets of elections, before a few benchmarks for election night.

Although comparison is not proof, if we were to draw a parallel with France, legislative elections there follow the presidential election by a few weeks and the president generally wins a majority. In the United States, the election falls

[1] Le Millénaire, 2026 US midterms forecast, https://forecast.lemillenaire.org/etats-unis/midterms/2026/.

in the middle of the term of a president elected for four years, and the president's party lost an average of 25.8 House seats from 1946 to 2022. Cohabitation, or *divided government*, is therefore commonplace. Nevertheless, it complicates the exercise of executive power. If a president loses his majority in the House of Representatives, his budgetary, legislative and oversight power is hampered. On the budget, it is the House that holds “the power of the purse”: every tax or revenue-raising bill must originate in the House[2]. On the legislative side, a bill can only pass if it wins a majority in both the House of Representatives and the Senate. Furthermore, it is the House of Representatives that has the power to initiate impeachment proceedings against a president or a member of his cabinet. As for the Senate, if the executive loses its majority there, this hampers its ability to confirm judicial nominations and members of the executive branch, to ratify international treaties, to pass laws and to secure the two-thirds majority needed to convict in an impeachment trial.

[2] History.house.gov. (2026). Power of the Purse. https://history.house.gov/Institution/Origins-Development/Power-of-the-Purse/

TEN KEY POINTS

- House: a 78.1% chance for Democrats, with 228 seats expected for a 218-seat majority. Senate: only 39.8%, allied independents included, and 50.0 seats expected.
- The most likely outcome is a divided Congress, with a Democratic House and a Republican Senate, in 40.0% of simulations. Democrats take both chambers in 38.1% of cases, and Republicans keep both in 20.3%.
- There are two maps. The 218th House seat is in a district Trump won by 3.1 points, the 51st Senate seat in Iowa, which he won by 13.2 points.
- The model is more cautious than the polls, because it corrects for the underestimation of Republicans observed in the 2006 to 2022 midterm elections. On the polls alone, Democrats would have 53 Senate seats and 244 House seats.
- In the Senate, eleven races are within 7.5 points. For a majority, Democrats need Michigan, Minnesota, New Hampshire, Maine and North Carolina, plus at least two states among Texas, Iowa, Louisiana, Kansas, Ohio, Alaska and South Carolina, which Trump won by 11 to 22 points.
- Mid-decade redistricting was supposed to deliver up to nine seats to Republicans. In the 2026 climate, it will be far fewer, and above all it has created toss-up districts in the Latino areas of Texas and Florida.
- Governors: little change, with 23 Democrats expected out of 48 governorships computed. Iowa would flip to Democrats and Kansas to Republicans; Wisconsin is the most competitive, and Ohio is more competitive than our model says, according to American analysts.
- Everything is linked. With the House, Democrats have a 49.0% chance in the Senate; without it, 6.9%.
- With a polling error like 2020 or 2024, Republicans would keep the House more than eight times out of ten.
- Early voting is massive, more so than in 2022, but its signals are contradictory: very good for Democrats in North Carolina, better than in 2022 for Republicans in Pennsylvania and Iowa.

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WHAT IS AT STAKE ON NOVEMBER 3

THREE ELECTIONS, THREE MAJORITIES

Republicans currently control both chambers of Congress. In the House, they hold 218 seats to 214 for Democrats, with Kevin Kiley, a California representative who left the Republican Party in March, sitting as an independent in the Republican conference, and two seats are vacant[3]. Taking into account Florida's vacant Democratic seat, Democrats are three net seats short of 218.

In the Senate, Republicans hold 53 seats, against 45 Democrats and 2 independents who vote with them. Of the 35 seats up (including two special elections, in Ohio and Florida), Republicans are defending 22 and Democrats 13 by our count, and Democrats need four net seats, since in a 50-50 tie Vice President J.D. Vance's vote gives Republicans the majority.

As for governors, they are being elected in 36 states, while Republicans currently lead 26 of the 50 states[4].

Table 1. What is at stake on November 3

Chamber	Outgoing composition	Up for election	Majority	Democratic chances
House of Representatives	218 R, 214 D, 1 I, 2 vacant	435 seats	218 seats	78.1%
Senate	53 R, 45 D, 2 I	35 seats	51 seats (50 + vice president)	39.8%
Governors	26 R, 24 D	36 governorships	not applicable	23 D expected out of 48

Sources: Ballotpedia, 270toWin, accessed October 27, 2026; the Le Millénaire forecast, November 1, 2026 update.

[3] Ballotpedia, "Vacancies in the 119th United States Congress (2025-2026)", accessed October 27, 2026, https://ballotpedia.org/Vacancies_in_the_119th_United_States_Congress_(2025-2026); ABC30/AP, "California Rep. Kevin Kiley says he's leaving Republican Party", March 10, 2026, https://abc30.com/post/california-rep-kevin-kiley-says-hes-leaving-republican-party-will-serve-independent/18699488/.
[4] Ballotpedia, "Gubernatorial elections, 2026", accessed October 27, 2026, https://ballotpedia.org/Gubernatorial_elections,_2026.

HISTORY WORKS AGAINST THE PRESIDENT'S PARTY

From 1946 to 2022, the president's party lost an average of 25.8 House seats and 3.6 Senate seats in midterm elections, and it gained ground in the House only twice, in 1998 and 2002[5]. The average loss even rises to 37 seats when the president's approval is below 50%[6]. The Senate follows this rule less closely (the president's party gained two seats there in 2018 and one in 2022), because the list of seats up for election often matters as much as the national climate, and Donald Trump's first term illustrates this: in 2018, Democrats gained 41 House seats, while Republicans gained two Senate seats[7].

A NATIONAL CLIMATE UNFAVORABLE TO THE PRESIDENT

Donald Trump enters the final week of the campaign at the lowest point of his two terms, with the Decision Desk HQ average putting him at 38.3% favorable and 60.3% unfavorable[8] and the Silver Bulletin average at a net rating of minus 24.3 points[9]. The latest polls point the same way, with 36% approval among likely voters for the New York Times and Siena College (October 12 to 19), 32% among adults for CNN and SSRS (October 15 to 18) and 31% among adults for Reuters and Ipsos[10]. He is, moreover, the least popular president in an October before the midterms since Harry Truman in 1946[11]. The slide is sharpest on the

[5] Brookings Institution, Vital Statistics on Congress, Table 2-4, November 2024, https://www.brookings.edu/wp-content/uploads/2024/11/2-4-Full.pdf.
[6] Gallup (Jeffrey M. Jones), “Midterm Seat Loss Averages 37 for Unpopular Presidents”, September 12, 2018, https://news.gallup.com/poll/242093/midterm-seat-loss-averages-unpopular-presidents.aspx.
[7] Georgia Recorder (Jacob Fischler), article of October 19, 2026 republished by the Cobb County Courier, https://cobbcountycourier.com/?p=113769.
[8] Decision Desk HQ, Donald Trump approval average, accessed October 27, 2026, https://votes.decisiondeskhq.com/polls/presidential-approval/donald-j-trump-5/national.
[9] Silver Bulletin, “Trump approval ratings”, updated October 26, 2026, https://www.natesilver.net/p/trump-approval-ratings-nate-silver-bulletin.
[10] Forbes (Sara Dorn), October 21, 2026, https://www.forbes.com/sites/saradorn/2026/10/21/trumps-approval-rating-hits-record-low-in-third-new-poll-this-week-boosting-democrats-midterm-chances/; Forbes (Sara Dorn), October 20, 2026, https://www.forbes.com/sites/saradorn/2026/10/20/trumps-approval-rating-hits-record-low-31-in-latest-poll/.
[11] Cohn, N. (2026). Democrats Have a Wide Lead in Our New Poll as Trump Slides. The New York Times. https://www.nytimes.com/2026/10/21/upshot/times-siena-poll-trump-midterms.html

economy, with AP-NORC measuring only 26% approval, and 17% on the cost of living[12].

The cost of living does indeed dominate the campaign. Gasoline has reached $4.28 a gallon, up $1.20 from a year ago, as a result of the war against Iran launched on February 28 and the blockade of the Strait of Hormuz[13]. There are also tariffs, reinstated at 15% on a different legal basis after the Supreme Court struck them down on February 20. And there is the conduct of the immigration police, ICE, three shutdowns in one year and the expiration of the enhanced Obamacare subsidies[14].

THE GENERIC BALLOT, AND WHY WE CORRECT IT

The generic ballot is the question asking voters which party they will choose for the House, without any candidate names. In our average among likely voters, before any correction, Democrats led by 6.1 points on August 1 and by 7.2 points on November 1. Nate Silver's Silver Bulletin goes further, at 9 points[15].

[12] AP-NORC, poll published October 1, 2026, reported by UNI, https://www.uniindia.com/world/us-trump-approval-rating-record-decline/199475.
[13] Reuters (Nolan D. McCaskill), “Explainer: three issues defining the 2026 US midterm elections”, October 20, 2026, republished by Internazionale, https://www.internazionale.it/ultime-notizie-reuters/2026/10/20/explainer-three-issues-defining-the-2026-us-midterm-elections; ABC News/Good Morning America (Bill Hutchinson), May 7, 2026, https://www.goodmorningamerica.com/news/story/4-phases-iran-war-key-moments-start-epic-132703824.
[14] NPR (Mara Liasson), February 23, 2026, republished by APR, https://www.apr.org/politics-government/2026-02-23/the-political-implications-of-the-supreme-courts-ruling-on-trumps-tariffs; Reuters, October 20, 2026, op. cit.
[15] Silver Bulletin, “Generic ballot average”, October 26, 2026, https://www.natesilver.net/p/generic-ballot-average-2026-nate-silver-bulletin-congress-polls.

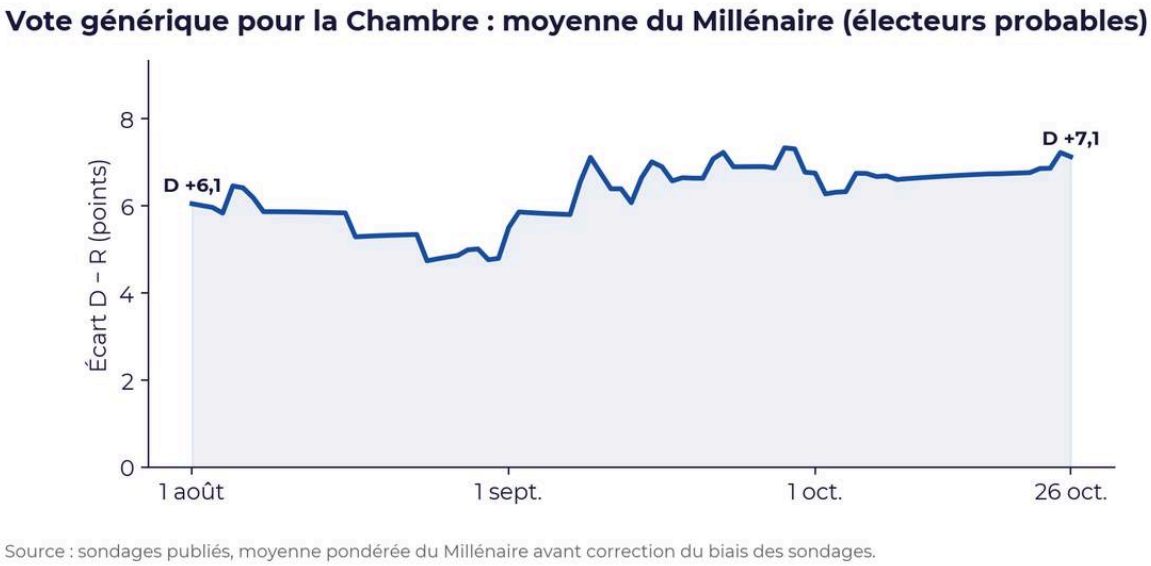


Figure 1. *Generic ballot: polling average among likely voters, from August 1 to November 1, 2026.*

Yet in the last five midterm elections, polls published 45 days before the vote always overestimated Democrats. The error was only 0.2 points in 2018, but it reached 3.2 points in 2010, 3.9 points in 2014 and 4.5 points in 2022. The model therefore takes this into account. It removes part of this average error from the generic ballot, before translating the result into a national climate that is added to each district.

Table 2. The generic ballot versus the results, midterm elections

Election	Polls 45 days out	National vote	Gap, vote – polls
2006	D+9.2	D+8.0	R+1.2
2010	R+3.6	R+6.8	R+3.2
2014	R+1.8	R+5.7	R+3.9
2018	D+8.8	D+8.6	R+0.2
2022	D+1.8	R+2.7	R+4.5

Source: the Le Millénaire forecast (polls 45 days out and national House vote).

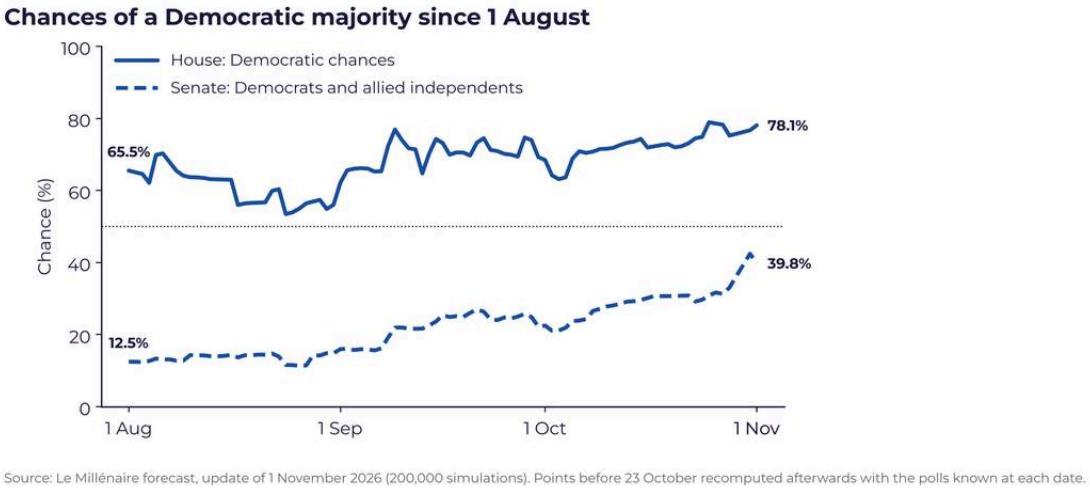


Figure 2. *Chances of a Democratic majority in the House and the Senate, from August 1 to November 1, 2026.*

Since August 1, Democratic chances have risen from 65.5% to 78.1% in the House and from 12.5% to 39.8% in the Senate. The House tracks the generic ballot, while the Senate has moved faster, as state polls have improved for Democrats more quickly than the national climate; in Michigan, Abdul El-Sayed's chances thus rose from 46% to 66%, in Texas James Talarico's from 32% to 51%, in Alaska Mary Peltola's from 8% to 19% and in Kansas Adam Hamilton's from 2% to 21%.

THE 2024 MAP, THE STARTING POINT FOR 2026

A COUNTRY THAT SHIFTED RIGHT EVERYWHERE

Everything starts from 2024, when Donald Trump won a trifecta, that is, the White House and majorities in the Senate and the House of Representatives. Donald Trump won that presidential election by gaining ground in almost every county in the country, and it is this vote that our model, like most American models, takes as its starting point: a district or a state is first judged on its recent presidential vote, then corrected for its own specific features and for the year's climate.

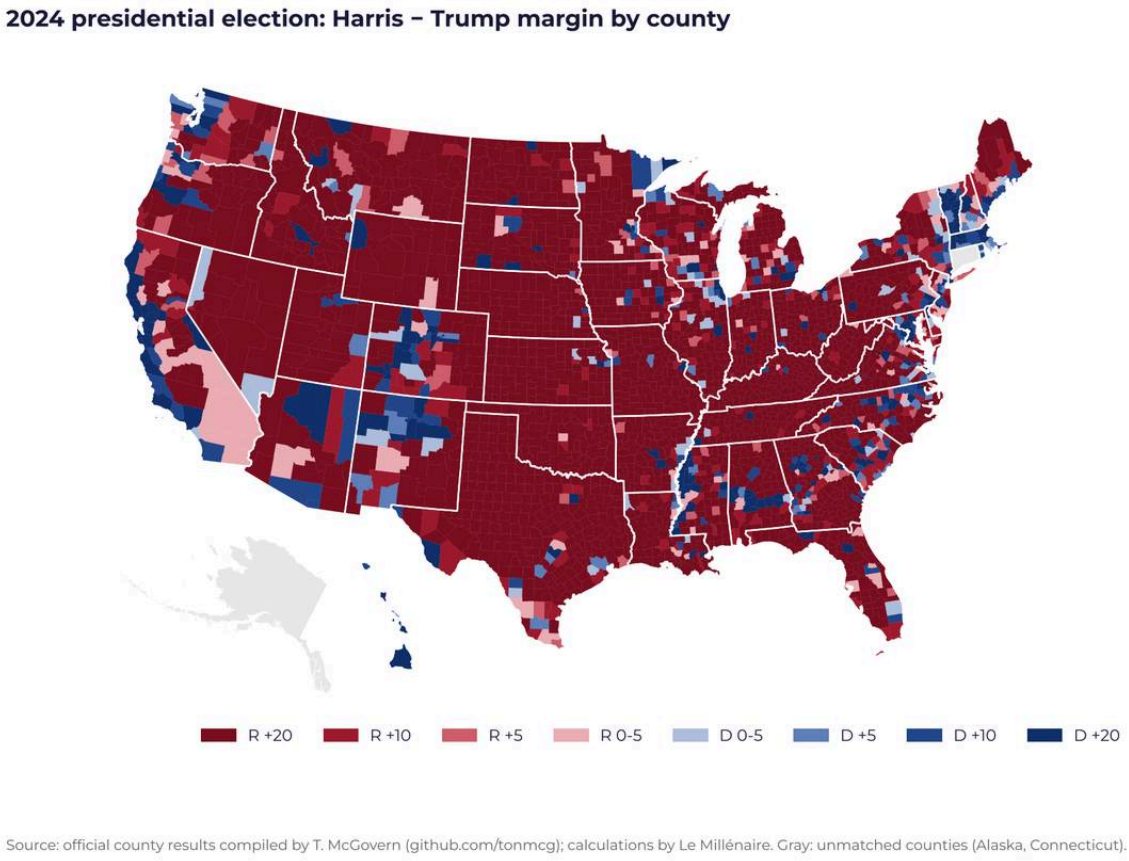
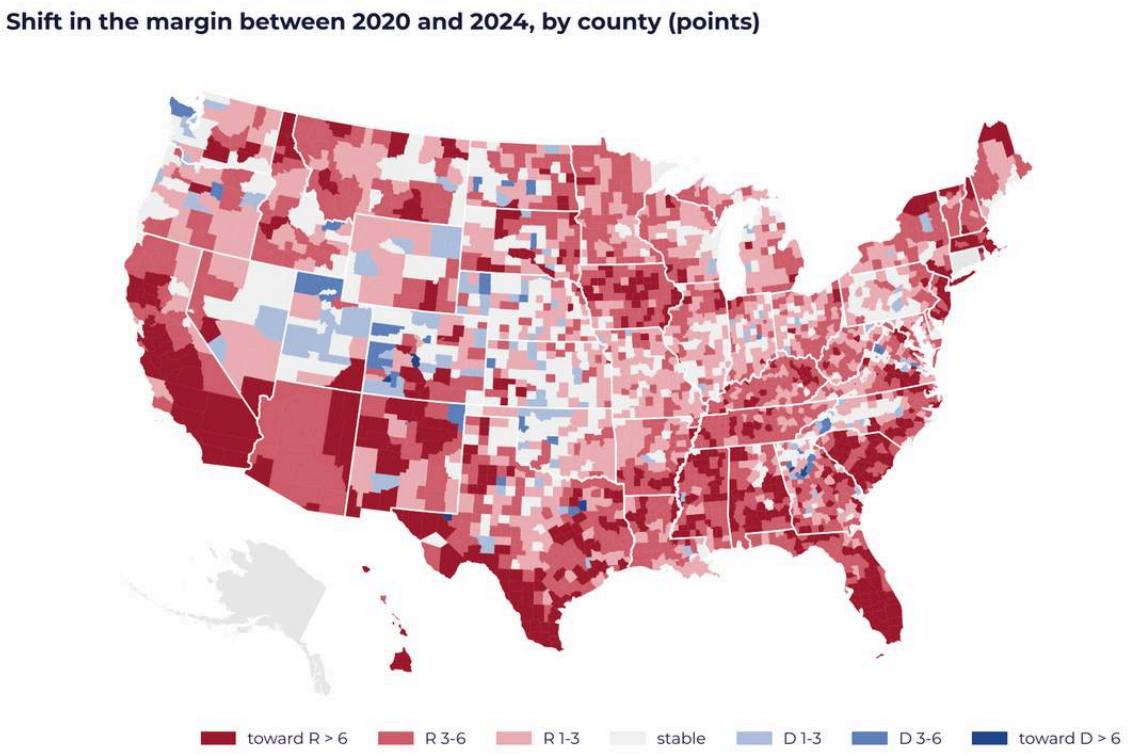


Figure 3. *2024 presidential election: margin between Kamala Harris and Donald Trump by county.*



Source: official county results compiled by T. McGovern (github.com/tonmcg); calculations by Le Millénaire. Gray: unmatched counties (Alaska, Connecticut).

Figure 4. *Shift in the margin between the 2020 and 2024 presidential elections, by county.*

The shift toward Donald Trump between 2020 and 2024 was not uniform. Ranked by number of voters, the largest 10% of counties shifted by 5.7 points of margin on a weighted average, against 2.4 to 4.0 points for the others. The steepest Democratic declines were in large cities with large immigrant populations and in Hispanic counties, with 22.5 points of margin lost in the Bronx, 21 in Queens, 18.9 in Miami-Dade County (which Kamala Harris lost by 11.5 points after Joe Biden won it by 7.4 points), 11.1 in Los Angeles County, 7.8 in Houston's county (Harris County), and 20 to 26 points in the Rio Grande Valley counties (Hidalgo, Webb, Starr), which flipped to Republicans. Affluent, college-educated suburbs, by contrast, barely moved, and Cobb County, north of Atlanta, even moved 0.5 points toward Democrats, Fayette County 3.7 points and Jefferson County, west of Denver, 0.9 points, while Wake County (Raleigh) slipped by only one point[16].

[16] County results compiled by T. McGovern (github.com/tonmcg), 2020 and 2024 presidential elections; Le Millénaire calculations.

In the suburbs that held, a modest rebound is enough for Democrats to flip a district Donald Trump won by two points. Elsewhere, in Miami or the Rio Grande Valley, it is a different story: everything depends on how long the shift lasts.

TWO MAPS, TWO ELECTIONS

The House and the Senate are not fought on the same ground. In the House, the district that delivers the majority (the 218th when the 435 districts are ranked from most Democratic to most Republican) is Arizona's 1st district, won by Donald Trump by 3.1 points in 2024; in the Senate, the race that gives Democrats and their allies the 51st seat is Iowa, won by Donald Trump by 13.2 points.

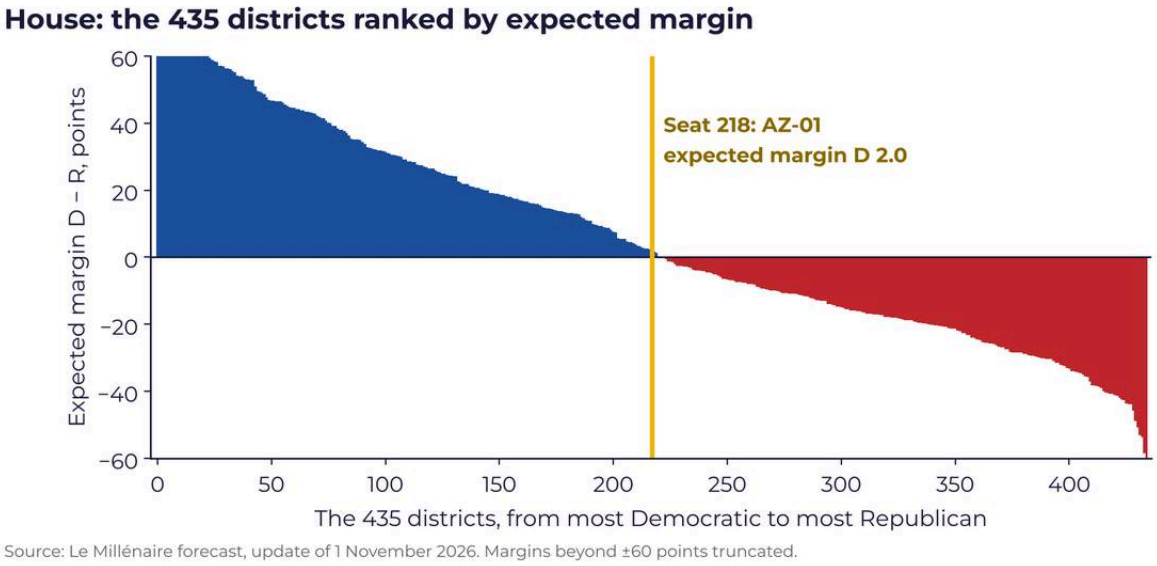
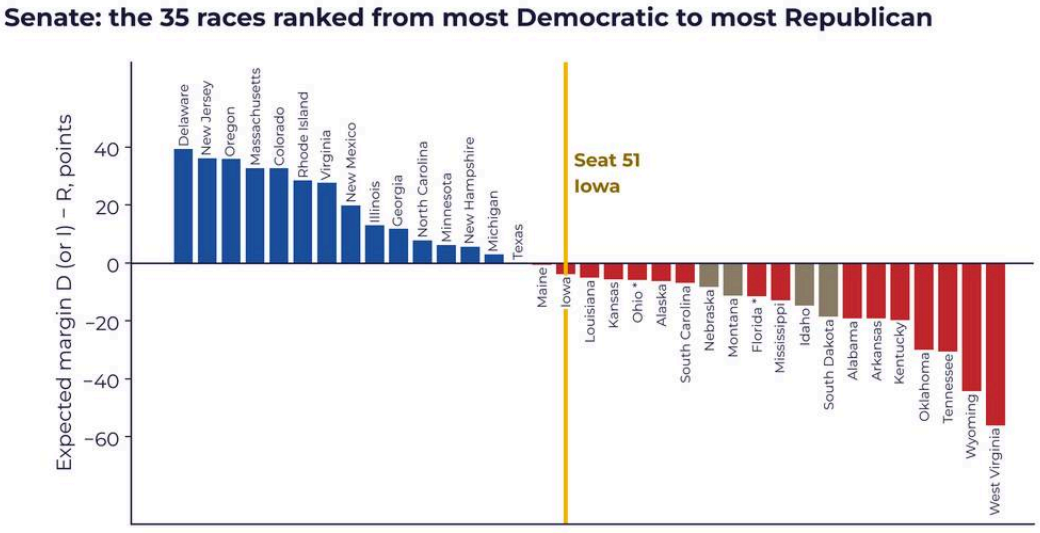


Figure 5. *House: the 435 districts ranked by projected margin, as of November 1, 2026.*



Source: Le Millénaire forecast, update of 1 November 2026. Democrats and allied independents hold 34 seats not up for election: race number 17 on the list would give them seat 51. * special election.

Figure 6. *Senate: the 35 races ranked from most Democratic to most Republican, as of November 1, 2026.*

Thus a national climate of about 6 points of margin in Democrats' favor, the one our model uses after correcting the polls, is enough to flip the House but not the Senate, where Democrats would need either a much more favorable climate or candidates able to run well ahead of their party in Republican states. That is precisely the bet they are making in Texas (James Talarico), Ohio (Sherrod Brown), Alaska (Mary Peltola) and, through independent Dan Osborn, Nebraska.

HOW OUR MODEL READS THE ELECTION

THREE SOURCES OF INFORMATION

For each race, the model combines the state or district **polls**, averaged by giving more weight to the pollsters whose past results were the most accurate and to the most recent fieldwork, with the state's **history** (its vote in previous elections and the incumbency advantage) and the **fundamentals**, that is, the 2024 presidential vote and the national climate. Their weight varies by chamber. In the Senate, two days before the vote, polls carry 79% of the weight, history 16% and fundamentals 5%, and for governors polls carry 88%, whereas in the House, where district polls are rare, fundamentals dominate and only polls completed within the last 21 days (adjusted when they are sponsored by one side) move a district's projection.

CORRECTING FOR POLLING ERROR

The model then subtracts from Democrats a correction learned from polling error in the 2006 to 2022 midterm elections, at the same distance from election day, amounting to 2.3 points of margin two days before the vote. It applies to the generic ballot and to every Senate race pitting a Democrat against a Republican, but it spares contests between an independent and a Republican. We regard it as the main methodological choice in our forecast, and it is mainly what makes us more cautious than prediction markets and several American models.

Table 3. Senate: polling average and Le Millénaire projection, competitive races

Race	Candidates	Polls	Projection	D/I chances
Georgia	Ossoff vs. Collins	+11.8	+11.7	94.7%
North Carolina	Cooper vs. Whatley	+10.9	+7.8	86.0%
New Hampshire	Pappas vs. Sununu	+7.8	+5.6	77.8%
Minnesota	Flanagan vs. Tafoya	+6.8	+6.2	80.2%
Michigan	El-Sayed vs. Rogers	+5.3	+2.9	65.7%
Texas	Talarico vs. Paxton	+4.0	+0.2	51.3%
Maine	Jackson vs. Collins	+2.2	−0.7	46.1%
Nebraska	Osborn vs. Ricketts	−3.2	−8.3	24.5%
Iowa	Turek vs. Hinson	−0.3	−3.9	29.7%
Ohio (special)	Brown vs. Husted	+0.5	−6.0	20.5%
Alaska	Peltola vs. Sullivan	−0.4	−6.4	18.8%
South Carolina	Andrews vs. Graham	+1.3	−7.0	17.0%
Kansas	Hamilton vs. Marshall	+2.5	−5.8	21.1%
Montana	Bodnar vs. Alme	−11.2	−11.3	17.3%
Louisiana	Davis vs. Letlow	−0.9	−5.1	24.3%

Source: the Le Millénaire forecast, November 1, 2026 update. Margins in points (Democrat or independent minus Republican). Polling average: latest wave from each pollster, weighted.

In sixteen of the twenty-one races we follow closely, our projection leans toward the Republican Party by at least 2 points more than the polling average, as a result of two mechanisms. The first, the polling-error correction, is common to all races pitting a Democrat against a Republican; the second stems from the weight of history, which includes the incumbency advantage enjoyed in Ohio by Jon Husted, appointed to the Senate in 2025, while in Kansas, South Carolina or Alaska it is the state's Republican history that pulls in the same direction. In Texas, where Ken Paxton enjoys no incumbency advantage, the polling correction is essentially enough to cut Talarico's 4.0-point lead in the polls to 0.2 point in our projection.

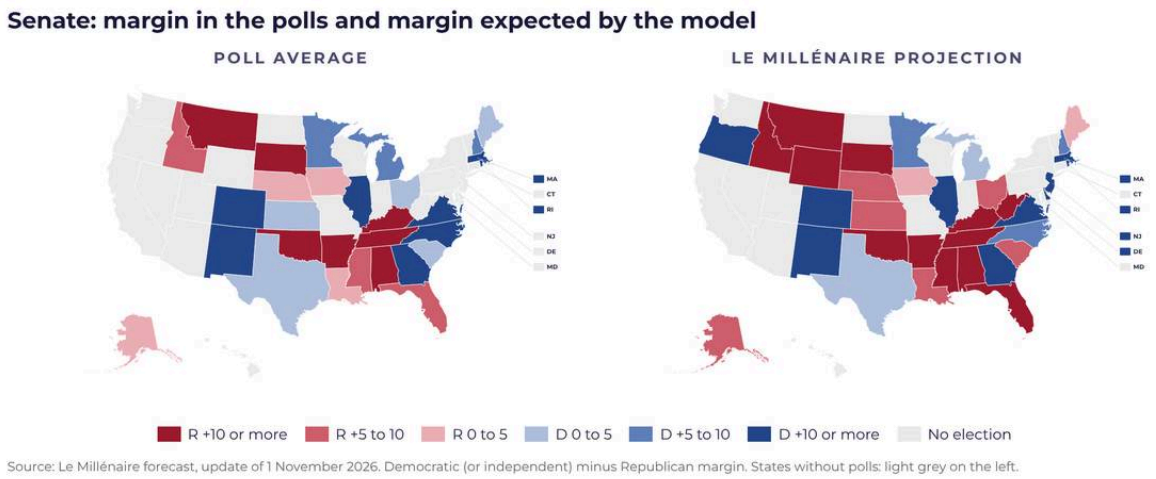


Figure 7. *Senate: average polling margin (left) and margin projected by our model (right), as of November 1, 2026.*

If we remove all corrections and award each race to the candidate leading in the polls, Democrats get 53 Senate seats, 244 House seats and 25 governors. The gap between this scenario and our forecast essentially measures what is really at stake: whether or not the polls once again underestimate Republicans. It also includes the weight the model gives to each state's history and to the incumbency advantage.

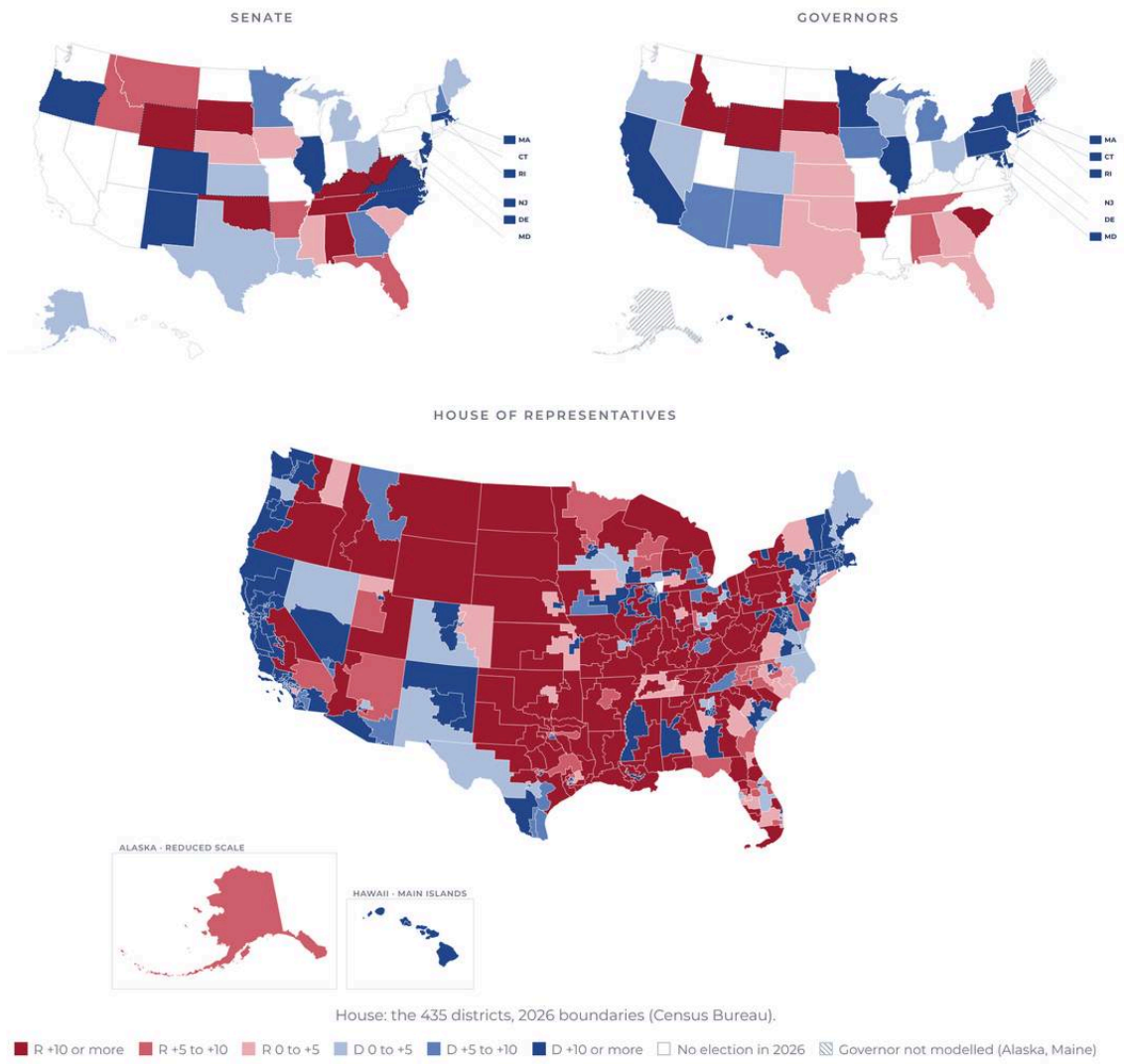


Figure 8. *If each race went to the candidate leading the polling average, without correction: margin by race in the Senate, governor and House races (screenshot of Le Millénaire's "Polling errors" tool).*

WHY EACH RACE TIPS

For each decisive race, Table 4 gives the factor that weighs most heavily in the projection. There are six, each discussed in its own section.

Table 4. The decisive races and their main factor

Race	Our model's favorite	D chances	Main factor
Senate, Texas	Talarico (D), +0.2	51.3%	Polling correction: Talarico leads by 4.0 points
Senate, Maine	Collins (R), +0.7	46.1%	Incumbency advantage in a Democratic state
Senate, Michigan	El-Sayed (D), +2.9	65.7%	State that swung toward Trump in 2024
Senate, Iowa	Hinson (R), +3.9	29.7%	51st seat; 16-point error in the 2024 Selzer poll
Senate, Ohio	Husted (R), +6.0	20.5%	Large gap between polls and projection
Senate, Nebraska	Ricketts (R), +8.3	24.5%	An independent in a Trump +20 state
Senate, Alaska	Sullivan (R), +6.4	18.8%	Incumbency, Republican history and correction combined
Senate, North Carolina	Cooper (D), +7.8	86.0%	Former governor, ahead in every poll
Governor, Wisconsin	Crowley (D), +1.3	59.4%	Most evenly balanced state in the country
Governor, Ohio	Ramaswamy (R), +2.6	31.5%	Our reading differs from Cook and Sabato
Governor, Iowa	Sand (D), +2.3	66.6%	Democratic candidate ahead in every poll
Governor, Oregon	Kotek (D), +1.8	63.1%	Unpopular incumbent in a Democratic state
House, Arizona 1	Democrat, +2.0	59%	218th seat: the national climate
House, Pennsylvania 1	Fitzpatrick (R), +2.0	41%	Incumbent who outruns his party
House, Ohio 9	Merrin (R), +1.5	43%	Redistricting against an incumbent
House, Texas 34	Democrat, +4.1	68%	Redistricting and the Hispanic vote

Source: the Le Millénaire forecast, November 1, 2026 update; Le Millénaire analysis for the last column. Chances of the Democratic candidate (or the independent in Nebraska).

FIRST MECHANISM: THE NATIONAL CLIMATE DECIDES THE HOUSE

Through the national climate, the model adds about 3 points of Democratic vote share to each House district, or 6 points of margin. With this block alone, the districts Donald Trump won by less than 5 points in 2024 move to the Democratic side. This is the case of Juan Ciscomani's Arizona 6 (Trump +0.8), Gabe Evans's Colorado 8 (+1.9) and David Valadao's California 22 (+1.9), as well as Tom Barrett's Michigan 7 (+1.3), Tom Kean Jr.'s New Jersey 7 (+1.2), Ryan Mackenzie's Pennsylvania 7 (+3.2) and Zach Nunn's Iowa 3 (+4.5).

Few district polls have been published there, and most were sponsored by one of the two sides. These districts therefore tip together with the national vote. A polling error comparable to those of 2020 or 2024 would thus drive Democratic chances of winning back the House to below 18% in Le Millénaire's "Polling errors" tool.

In Pennsylvania, the New York Times and Siena College (October 16 to 22) have Bob Brooks ahead of Ryan Mackenzie by 5 points in the 7th district and Paige Cognetti ahead of Rob Bresnahan by 5 points in the 8th, while Janelle Stelson and Scott Perry are dead even in the 10th[17], and the same pollster puts Bob Harvie ahead of Brian Fitzpatrick, 48% to 46%, in the 1st district[18]. Completed on October 22, these polls made it into the November 1 update. Together with the other polls of these districts, they leave Brian Fitzpatrick ahead in the 1st district, bring the 10th back toward a tie and narrow the Democratic lead in the 7th and above all in the 8th.

SECOND MECHANISM: THE POLLING CORRECTION DECIDES THE SENATE

Of the fifteen competitive Senate races in Table 3, the polling average puts the Democrat or the independent ahead in ten, and our projection in only six: Georgia, North Carolina, New Hampshire, Minnesota, Michigan and Texas. Let us take some examples.

In Texas, James Talarico leads by 4.0 points in our polling average, but the 2.3-point correction learned from polling error in midterm elections, added to the Republican past of a state that has not elected a Democratic senator since 1988, cuts his lead to 0.2 point, and his chances to 51.3%. They have risen from 32% to 51% since September 1, with a series of surveys conducted between October 18 and 21, then through October 30. The state's attorney general, Ken

[17] RealClearPolling, polls of Pennsylvania's 7th, 8th and 10th districts, accessed October 27, 2026, https://www.realclearpolling.com/polls/house/general/2026/pennsylvania/district-7/brooks-vs-mackenzie; https://www.realclearpolling.com/polls/house/general/2026/pennsylvania/district-8/cognetti-vs-bresnahan; 270toWin, https://www.270towin.com/2026-house-polls/pennsylvania/district-10.

[18] RealClearPolling, poll of Pennsylvania's 1st district, accessed October 27, 2026, https://www.realclearpolling.com/polls/house/general/2026/pennsylvania/district-1/harvie-vs-fitzpatrick.

Paxton had eliminated incumbent John Cornyn in the Republican primary runoff.

In Ohio, Sherrod Brown leads in 20 of the 25 polls published since September, which does not stop our model from giving Jon Husted a 79.5% chance; along with South Carolina and Kansas, it is one of the races where the gap between the polls (Brown +0.5) and our projection (Husted +6.0) is largest. The polling correction is compounded there by the incumbency advantage of Husted, appointed to the Senate in 2025 to replace JD Vance when he became vice president, and by the history of a state that voted for Trump by 11.2 points in 2024. The benchmark that argues for Brown is his own 2024 performance: beaten by 3.6 points when Kamala Harris lost by 11.2, he had outrun his party by about 7.6 points.

In Iowa, the average is almost even (Ashley Hinson +0.3), while our projection gives the Republican a 3.9-point lead. This is the state where caution seems most justified to us, as the Selzer poll, the most highly regarded in the state, had Kamala Harris ahead by 3 points in 2024 when Donald Trump won by 13.2 points; it is also the Senate's tipping-point race, the one that would give Democrats the 51st seat.

In Alaska, South Carolina and Kansas, polls close to a tie become Republican leads of 5.8 to 7.0 points in our projection. Minnesota and Georgia largely escape this effect, the former because of its Democratic past, the latter because of Jon Ossoff's incumbency advantage.

THIRD MECHANISM: INCUMBENTS WHO OUTRUN THEIR PARTY

Now rare, ticket splitting still matters in races where an incumbent has built a personal brand.

Susan Collins, in Maine, who won by 8.6 points in 2020 when Joe Biden carried the state by 9, retains a 53.9% chance in our projection despite trailing Democrat Troy Jackson (since July the replacement for Graham Platner, the

primary winner) by two points in the polls, her incumbency advantage nearly canceling out the state's Democratic lean. Collins's strength in a strongly Democratic state can be explained by her longevity, as she has been Maine's senator since 1996, and by her profile as a non-MAGA Republican. Indeed, Collins was already well established in Maine before Donald Trump's presidency in 2016 and the MAGA movement's takeover of the Republican Party.

Phil Scott, in Vermont, is a Republican governor in a state Kamala Harris won by 31.5 points. The polls give him only a 5.2-point lead over Amanda Janoo, and he retains an 81.1% chance. In New Hampshire, **Kelly Ayotte** is at 97.9% for governor while Democrat Chris Pappas is also favored for the Senate, which implies that some of the same voters vote Republican for one and Democratic for the other. In Pennsylvania, **Brian Fitzpatrick** is the only Republican favored in a district won by Kamala Harris, thanks to a local gap of 4.5 points of vote share in his favor, and this despite the Siena poll conducted October 16 to 22, which has him at 46% to 48% for Bob Harvie.

38% favorable, 60% unfavorable: such is **Tina Kotek**'s rating in the DHM poll for OPB[19]. In an Oregon won by 14.3 points by Kamala Harris, the Democratic governor has only a 63.1% chance with polls tied.

FOURTH MECHANISM: UNCONVENTIONAL CANDIDATES

The model lacks precedent. It is cautious about the Democrats and independents running for the Senate (Nebraska, Alaska, Montana) or for governor (Iowa, Ohio).

In Nebraska, **Dan Osborn** has had no Democratic opponent since July. He trails incumbent Pete Ricketts by 3.2 points in the polls and by 8.3 points in the projection, a 24.5% chance, in a state Donald Trump won by 20 points, and he

[19] City & State Pennsylvania, “PA-10 debate night: Scott Perry and Janelle Stelson spar over economy, Iran war and elections,” October 2026, https://www.cityandstatepa.com/politics/2026/10/pa-10-debate-night-scott-perry-and-janelle-stelson-spar-over-economy-iran-war-and-elections/416604/.

does not commit to caucusing with Democrats[20]. **Mary Peltola** leads in Alaska in most polls against Dan Sullivan, a namesake of whom appears on the ranked-choice ballot. In Montana, independent **Seth Bodnar** splits the opposition vote with Democrat Alani Bankhead, which accounts for most of the Republican lead.

In Iowa, **Rob Sand** is the only Democrat projected to win on Republican ground (66.6%). In Ohio, **Amy Acton** leads in most polls, and both the Cook Political Report and Sabato's Crystal Ball rate the race “Lean D”, but the model gives Vivek Ramaswamy 68.5%. No other governor's race puts the model so far from American analysts.

FIFTH MECHANISM: REDISTRICTING AND THE HISPANIC VOTE

Texas, Florida, Ohio: redistricting there created Trump +9 to +12 districts, often Hispanic. They have become close.

Texas's 15th district is a special case. Trump had won it by 18.0 points, and the model now gives Democrats 60% there, since the Texas Southern University poll in which Bobby Pulido leads by 7 points was added.[21] In Texas's 28th, 34th and 35th districts, Democrats are between 37% and 91%.

According to Telemundo, about two in three Hispanics disapprove of ICE's conduct[22]. The model, which carries over the 2024 vote, does not see this. Even a partial return toward Democrats would put them above the projection, in Texas as in Florida.

[20] Nebraska Examiner, republished by News From The States, October 17, 2026, https://www.newsfromthestates.com/node/433383.
[21] Texas Standard, October 21, 2026, https://texasstandard.org/stories/new-poll-shows-tejano-star-bobby-pulido-is-poised-to-flip-tx-15-in-battle-for-border-voters/.
[22] Brookings Institution, “Please Discuss: US midterm elections voter issues”, October 20, 2026, https://www.brookings.edu/wp-content/uploads/2026/10/20261020-Please-Discuss-US-midterm-elections-voter-issues-1.pdf.

SIXTH MECHANISM: WHERE THE MODEL LACKS INFORMATION

Colorado has had no public poll since September. Phil Weiser's 64% reflects the state's fundamentals, nothing more.

In **New York's 21st district** (Trump +20.8), Blake Gendebien is no longer favored. The single Siena poll that carried him, completed on October 6, dropped out of the 21-day window on October 28. A PPP poll from October 12 and 13, which puts Anthony Constantino ahead, is now in our database. Despite a fundraising term of 4.8 points in Gendebien's favor, which remains to be verified, Constantino has a 74% chance.[23]

In **Alaska**, the database lists Eric Hafner, held in a federal prison, as the House candidate instead of independent Bill Hill, Nick Begich's real opponent[24].

Our analysis

The House follows the national climate. The Senate requires more: state polls that, this time, do not underestimate Republicans in Texas, Ohio or Maine, and a win by Dan Osborn or Mary Peltola. A Democratic House with a Republican Senate would be, in our reading, the map that speaks.

[23] Times Union, October 9, 2026, https://www.timesunion.com/state/article/constantino-gendebien-poll-data-22469290.php.
[24] Alaska Beacon, August 31, 2026, https://alaskabeacon.com/2026/08/31/in-alaskas-u-s-house-race-two-of-the-final-candidates-dont-live-in-alaska-and-one-is-in-prison/.

THREE LINKED ELECTIONS

WHAT THE SIMULATOR REVEALS

Le Millénaire's simulator sets the winner of a race and recalculates the rest of the map. It then becomes clear that polling errors often run in the same direction for the House, the Senate and the governors.

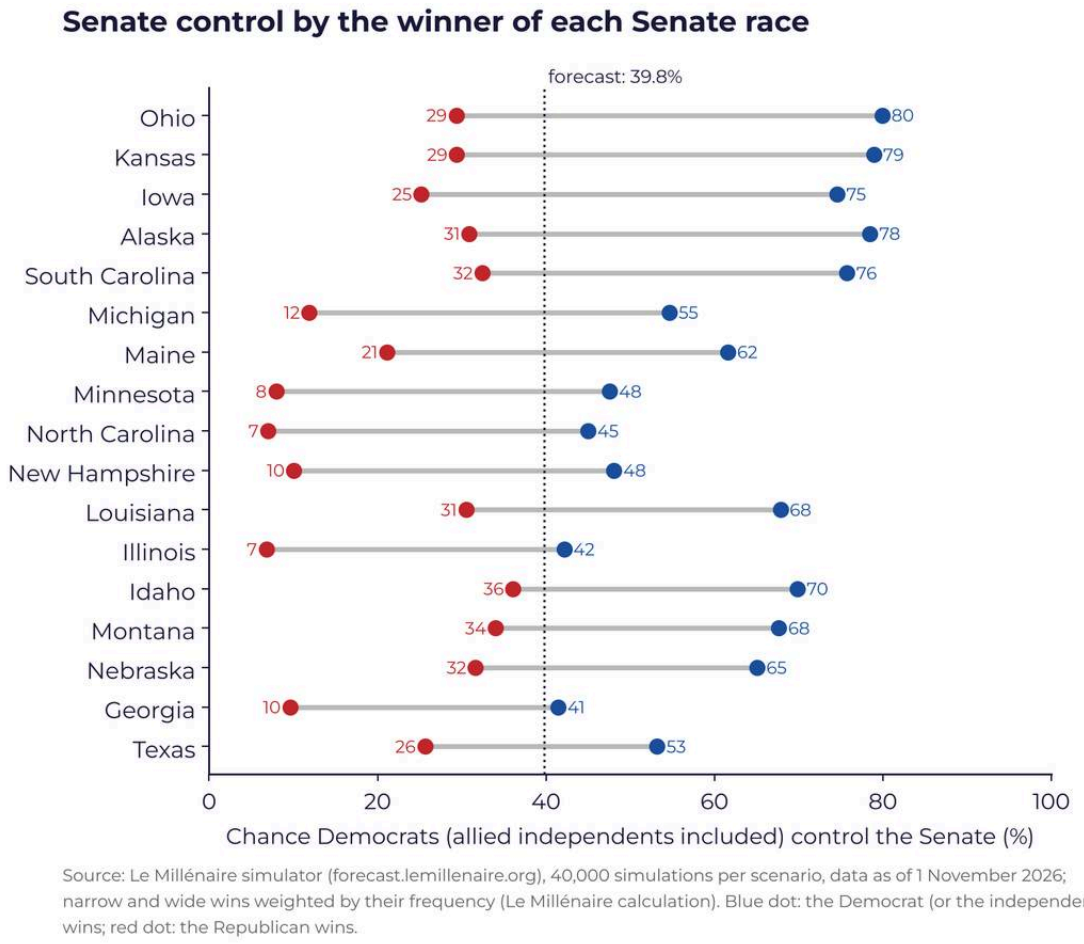


Figure 9. *Democratic chances (allied independents included) of controlling the Senate depending on the winner of each Senate race, all margins combined.*

In Kansas, Ohio, Alaska or South Carolina, a Democratic win would push Democratic Senate chances above 75%. Such a win only happens in simulations where the national climate is very favorable to Democrats. Conversely, a loss in North Carolina, Georgia, Minnesota or New Hampshire

leaves them with less than a 10% chance. These four seats must be won before Democrats can even count on Republican states.

The simulator also distinguishes wins of 5 points or less from wide wins. If Roger Marshall wins Kansas only narrowly, in a state Donald Trump took by 16 points, Democratic Senate chances rise to 45.0%. A narrow win by Jon Ossoff in Georgia, where the model expects him to lead comfortably, drops them to 23.8%.

Table 5. What each decisive Senate race changes

Race	D or I win: Senate	R win: Senate	D or I win: House	R win: House
Georgia	41.4%	9.7%	79.8%	47.1%
North Carolina	45.0%	7.6%	82.4%	51.2%
New Hampshire	48.3%	9.9%	84.0%	57.2%
Minnesota	47.6%	7.8%	83.8%	54.6%
Michigan	54.6%	11.5%	86.9%	61.2%
Texas	53.1%	25.6%	88.3%	67.2%
Maine	61.6%	21.1%	88.8%	68.9%
Nebraska	65.3%	31.6%	83.1%	76.5%
Iowa	74.4%	25.4%	92.4%	72.1%
Ohio	80.7%	29.3%	94.8%	73.8%
Alaska	78.3%	30.9%	94.3%	74.3%
South Carolina	75.9%	32.5%	94.0%	74.9%
Kansas	79.5%	29.3%	94.4%	73.8%
Montana	68.9%	33.8%	83.1%	77.0%
Louisiana	67.9%	30.8%	91.4%	73.8%

Source: Le Millénaire simulator, 40,000 simulations per scenario, data as of November 1, 2026; "all margins": average of narrow and wide wins weighted by their frequency (Le Millénaire calculation). Democratic chances (allied independents included).

The link with the House is just as clear, since Democratic Senate chances go from 39.8% to 49.0% if Democrats win the House and fall to 6.9% if they lose it; Republicans therefore have almost no chance of losing the Senate without losing the House. In the other direction, a Republican win in North Carolina or Georgia would bring Democratic House chances down to around 50%, because it would signal a polling error favoring Republicans across the country.

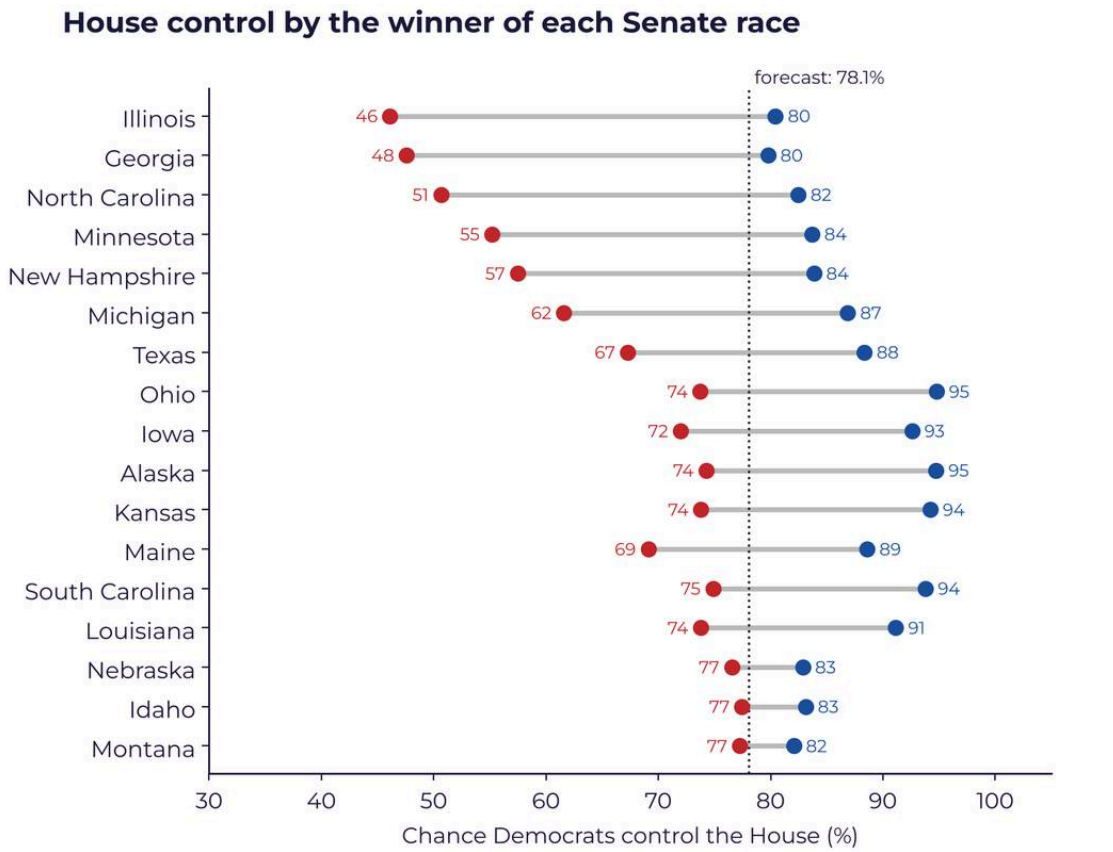
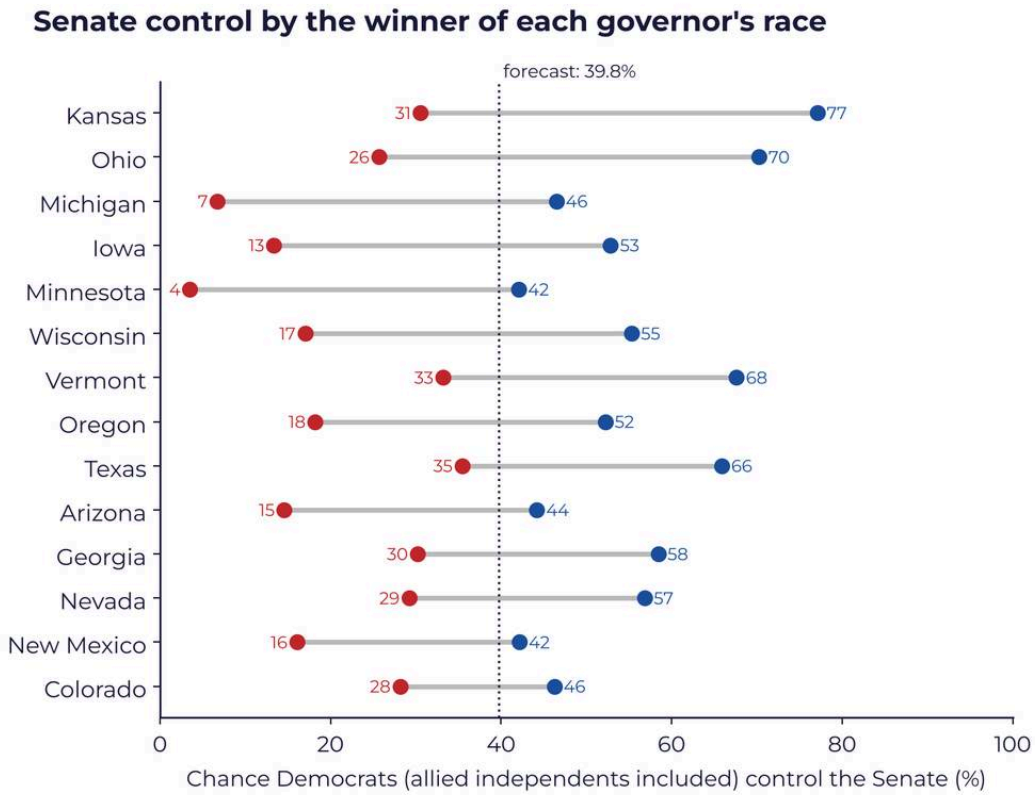


Figure 10. *Democratic chances of controlling the House depending on the winner of each Senate race, all margins combined.*

Governor's races follow the same logic, except that voters there vote more on personalities and local records. A Democratic win in the governor's race in Kansas, Texas, Nevada or Vermont, where Republicans are favored, would push Democratic Senate chances above 56%, and a Republican win in Michigan, Minnesota or Arizona would drop them below 14%.



Source: Le Millénaire simulator (forecast.lemillenaire.org), 40,000 simulations per scenario, data as of 1 November 2026; narrow and wide wins weighted by their frequency (Le Millénaire calculation). Blue dot: the Democrat (or the independent) wins; red dot: the Republican wins.

Figure 11. *Democratic chances (allied independents included) of controlling the Senate depending on the winner of each governor's race, all margins combined.*

Table 6. The four possible outcomes for Congress

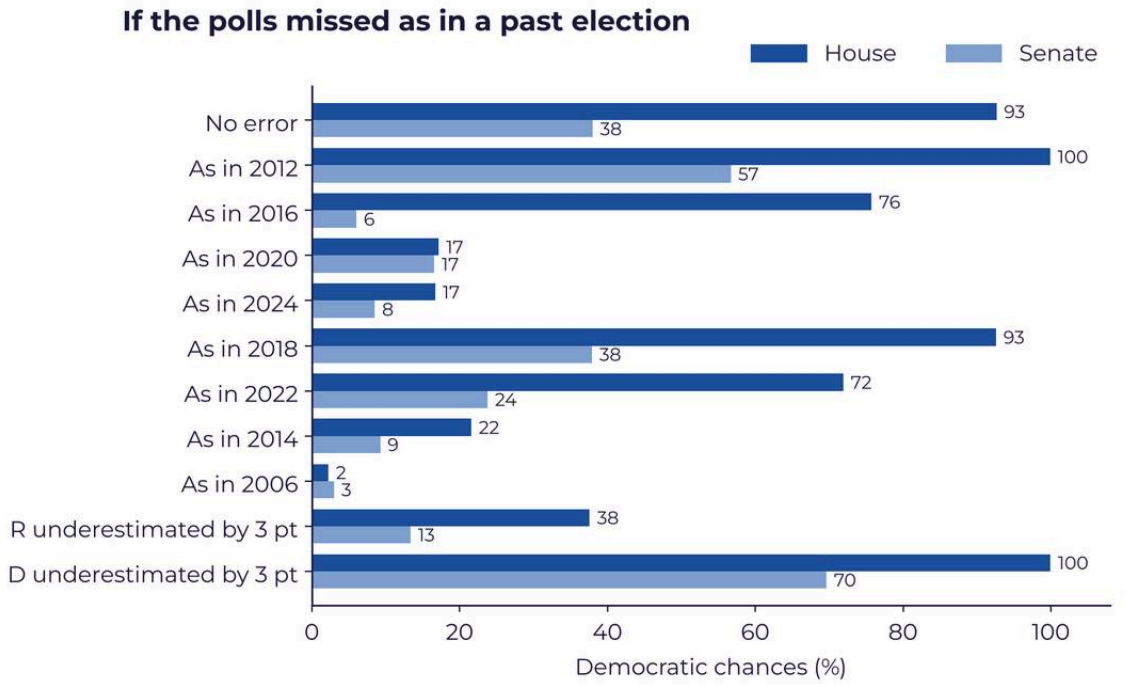
Outcome	Probability
Democratic House, Republican Senate	40.0%
Democrats control both chambers	38.1%
Republicans control both chambers	20.3%
Republican House, Democratic Senate	1.7%

Source: the Le Millénaire forecast, November 1, 2026 update. House and Senate simulated together, with a shared national error; allied independents counted with the Democrats.

WHAT IF THE POLLS ARE WRONG?

WHAT AN ERROR COMPARABLE TO PAST ELECTIONS WOULD MEAN

Our polling-errors tool applies to the 2026 polls the error observed in a past election (state by state for presidential elections, at the national level for midterm elections), and these scenarios are added to our projection, which is already corrected for the usual polling bias.



Source: Le Millénaire "Polling errors" tool, data as of 1 November 2026; state-by-state errors (presidential years) or national error (midterms), 12,000 simulations.

Figure 12. *Democratic chances in the House and the Senate if the 2026 polls were wrong as in a past election.*

Table 7. Democratic chances by polling error

Scenario	Error applied by the tool	House	Senate
No error	0	92.6%	38.1%
As in 2012	D+1.6	99.9%	57.0%
As in 2016	R+4.0	75.9%	6.0%
As in 2018	0	92.6%	38.0%
As in 2020	R+4.7	16.9%	16.8%
As in 2022	R+1.5	72.1%	24.4%
As in 2024	R+3.1	16.7%	8.4%

Source: Le Millénaire's "Polling errors" tool, https://forecast.lemillenaire.org/etats-unis/midterms/2026/erreurs-sondages/, 12,000 simulations per scenario. Error applied: average gap between the result and end-of-campaign polls, as used by the tool, in favor of the party shown; for midterm elections, it differs from the gap measured 45 days before the vote (Table 2).

With no additional error, Democrats win the House in 92.6% of simulations (78.1% in the published forecast, which keeps the uncertainty of a national error) and the Senate in 38.1%, whereas an error comparable to 2020 or 2024 would take the House away from them more than eight times out of ten; that of 2016, of similar size, would leave it to them in 76% of cases, because, in our reading, of its distribution, stronger in the Midwest and the South than on the coast, where decisive districts are in play. In the Senate, only the 2012 scenario exceeds even odds (57.0%).

WHICH VOTERS ARE THE POLLS MISSING?

The tool also makes it possible to concentrate the error on certain electorates, whether white voters without a college degree, whom the polls missed in 2016 and 2020, or Hispanic and Asian voters, whose vote had swung toward Donald Trump in 2024.

Table 8. Democratic chances by the electorate mismeasured by the polls

Error of up to 3 points	House	Senate	D governors
No error	92.6%	38.1%	22.7
Whites without a degree underestimated (favoring Republicans)	74.1%	21.7%	21.3
Hispanics and Asians underestimated (favoring Republicans)	76.4%	32.0%	21.9
Both electorates underestimated (favoring Republicans)	46.7%	17.2%	20.5
Whites without a degree underestimated (favoring Democrats)	98.8%	57.1%	24.0
Hispanics and Asians underestimated (favoring Democrats)	98.5%	44.5%	23.5

Source: Le Millénaire's "Polling errors" tool, 12,000 simulations per scenario. Full error (3 points) in the state where the electorate concerned weighs most, zero in the state where it weighs least, proportional in between.

It follows that the Senate is much more sensitive to the vote of white voters without a degree than to that of Hispanics, a three-point error on the former cutting Democratic chances by nearly half while an error of the same size on the latter reduces them by only a sixth. Indeed, Iowa (58% of adults aged 25 and over), Maine (58%), New Hampshire (53%) and Ohio (53%) are among the states where this electorate weighs most, against 25% in Texas[25]. The House, for its part, only becomes uncertain if the two errors combine, with Democratic chances then falling to 46.7%.

[25] U.S. Census Bureau, American Community Survey 2023, share of non-Hispanic white adults without a college degree among those aged 25 and over, Le Millénaire calculations.

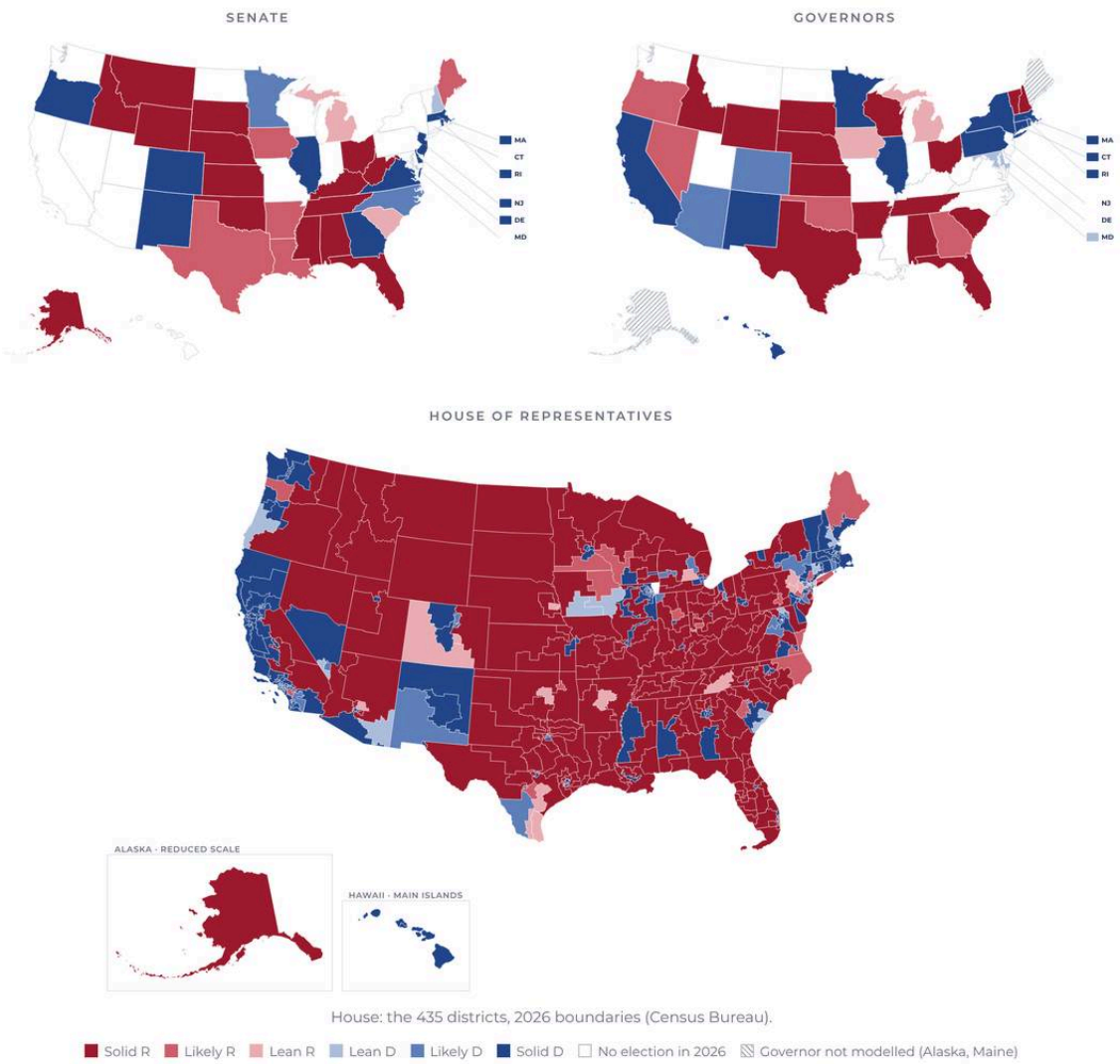


Figure 13. *If the polls were wrong as in 2020: chances of winning by race in the Senate, governor and House races (screenshot of the "Polling errors" tool).*

EARLY VOTING: FIRST SIGNALS

TURNOUT ON THE RISE

More than 28 million Americans had already voted by October 26, according to the University of Florida's Election Lab[26], and our tracking of election administrations, published daily on the early voting page of our election night coverage, shows turnout well above 2022 in most states that allow a comparison.

Table 9. Early voting: 2026 and the same stage in 2022

State	Data as of	2026	2022	Change
Texas	October 23	3,688,224	2,515,156	+47%
North Carolina	October 23	1,453,516	1,063,702	+37%
Tennessee	October 23	760,069	493,972	+54%
Washington	October 23	773,792	669,453	+16%
Colorado	October 22	730,614	442,889	+65%
Pennsylvania	October 21	724,599	730,100	−1%
South Carolina	October 22	363,566	173,107	+110%
Iowa	October 23	207,858	167,105	+24%
South Dakota	October 23	49,438	55,377	−11%

Source: state election administrations, Le Millénaire tracking, https://election.lemillenaire.org/etats-unis/vote-anticipe/2026/. Same number of days before the vote as in 2026.

WHAT PARTY REGISTRATION TELLS US

In states where voters register with a party, the administration publishes the party label of voters who have already cast a ballot. This is a registration and not a vote, since a registered Republican may vote Democratic and independents are not allocated; nonetheless, the comparison with 2022, at the same number of days before the vote, sheds light on each side's mobilization.

[26] Newsweek, “Map shows states with most early voters”, October 26, 2026, https://www.newsweek.com/map-states-early-voters-midterms-12619134.

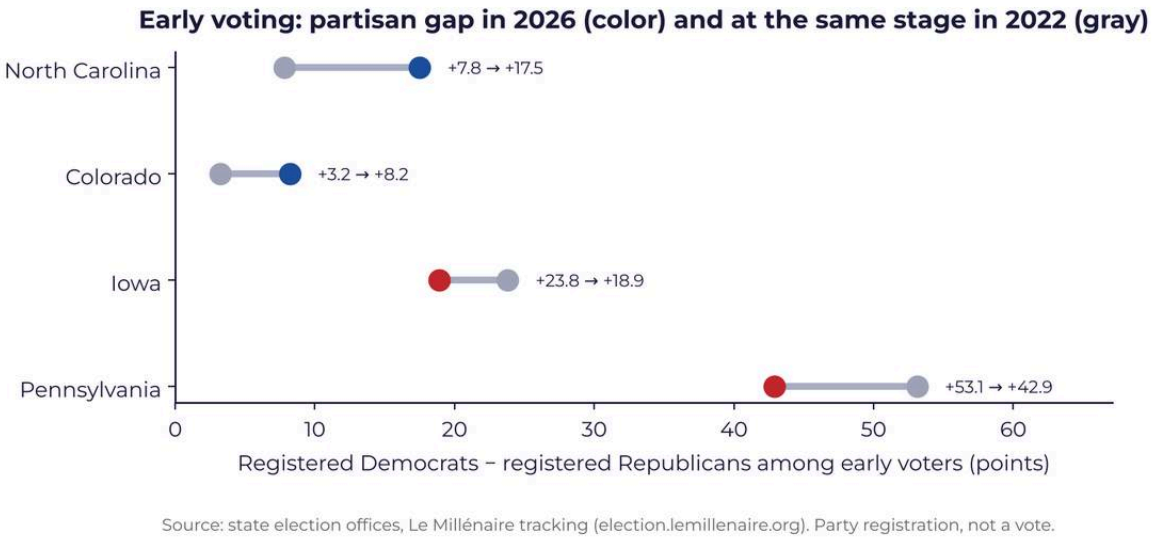


Figure 14. *Early voting: gap between registered Democrats and Republicans among voters, in 2026 and at the same stage in 2022.*

In North Carolina, registered Democrats lead Republicans by 17.5 points among early voters, compared with 7.8 points at the same stage in 2022, and in Colorado the gap grows from 3.2 to 8.2 points. In Pennsylvania, by contrast, it shrinks from 53.1 to 42.9 points, and in Iowa from 23.8 to 18.9 points, which signals better Republican mobilization than in 2022 in mail voting.

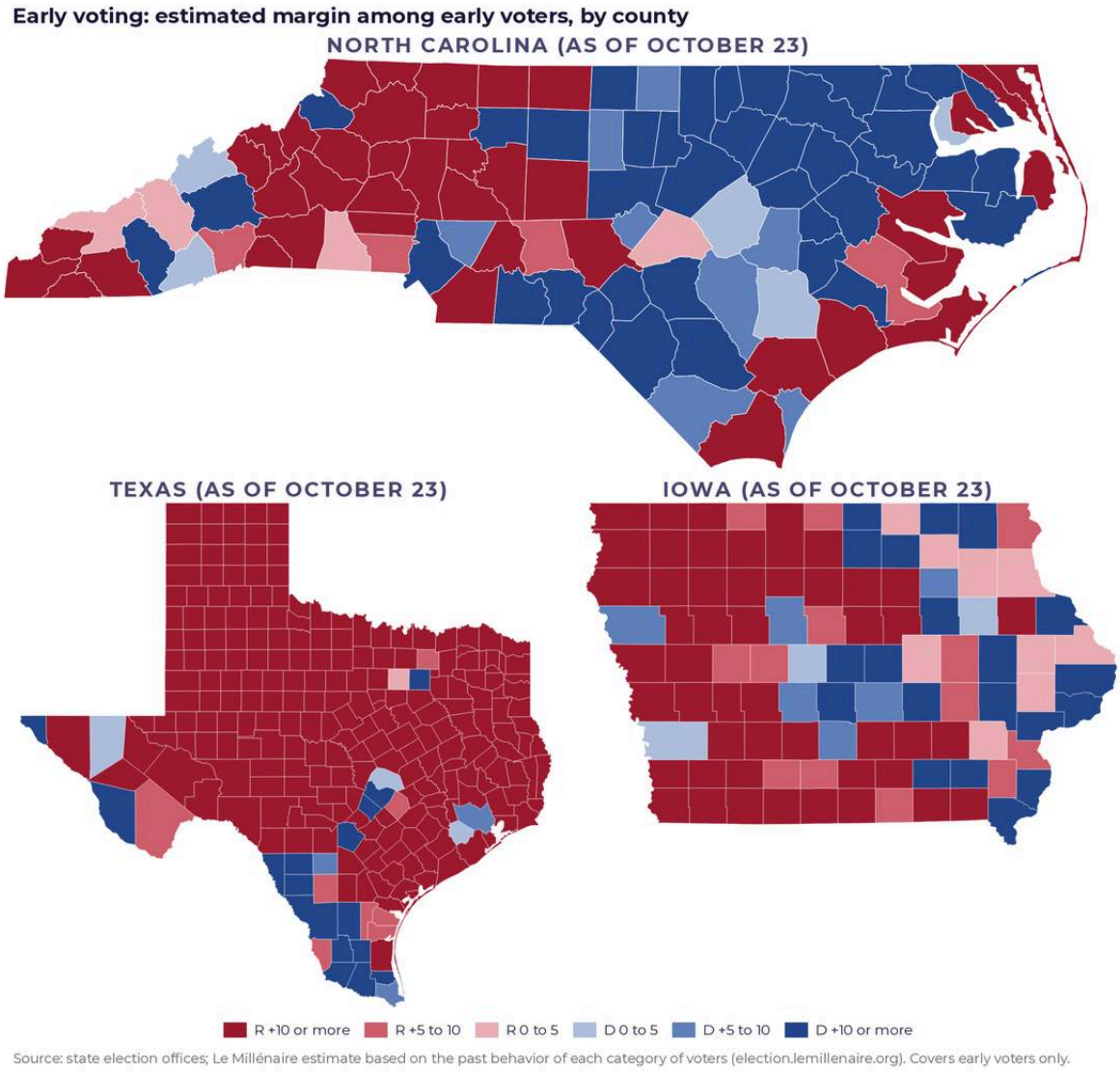


Figure 15. *Early voting: estimated margin between Democrats and Republicans among early voters, by county, in North Carolina, Texas and Iowa.*

For four states, we also estimate the vote of early voters by applying to each category of voters the behavior observed in previous elections. As of October 23, these estimates show a Democratic lead of 16.1 points in North Carolina and 15.3 points in Iowa, and a Republican lead of 7.8 points in Texas and 1.9 points in Florida; they cover only early voters, however, whereas in most states election day voters are markedly more Republican. The Iowa estimate is the most fragile, since it was off by 8.1 points in 2024.

Our analysis

In North Carolina and Colorado, the gap between registered Democrats and Republicans among early voters has widened since 2022, whereas it has narrowed in Pennsylvania and Iowa, where, in our reading, Republicans are voting by mail more than in 2022. These figures do not enter the model and will be used on election night to spot the first deviations from the forecast.

THE NIGHT OF NOVEMBER 3

THREE SUCCESSIVE BENCHMARKS

In **Georgia and North Carolina**, where we project Democratic Senate leads of 11.7 and 7.8 points, Gwinnett and Cobb counties, in suburban Atlanta, and Wake and Mecklenburg counties, around Raleigh and Charlotte, will be the first to watch. If Jon Ossoff or Roy Cooper wins by only 5 points or less, the simulator brings Democratic Senate chances down to around 25%, and House chances well below our forecast. Margins in line with the projection would, on the contrary, make Texas, Maine and Ohio winnable.

Next, **the Midwest and Pennsylvania**: in Ohio and Iowa, we will see whether white working-class voters who backed Trump in 2024 have returned to Democrats, the voters on whom a polling error weighs most in the Senate (Table 8). In Pennsylvania, the districts polled by the New York Times and Siena will test the generic ballot.

On the border, the test will be the Hispanic vote. From the Rio Grande to Miami-Dade, we will find out whether the 2024 swing toward Trump has held, and seven districts depend on it (Texas 15, 28, 34 and 35, Florida 14, 22 and 25).

It is also possible that the Senate majority will not be known on election night. At 50-50, everything could hinge on Dan Osborn, Nebraska's independent, who has not committed to either side. In Alaska, the final result can take up to two weeks[27].

[27] Newsweek, October 20, 2026, https://www.newsweek.com/mary-peltola-is-pulling-ahead-in-the-final-stretch-against-dan-sullivan-12592675.

CONCLUSION

Democratic House, Republican Senate: this is the most likely scenario two days before the vote. The House is being fought in suburbs narrowly won by Trump in 2024, the Senate in states he carried by more than ten points.

Polls and markets are more optimistic for Democrats. Some polls put them ahead in Texas, Ohio, Maine and Kansas, and prediction markets make them the favorites for the Senate[28]. Our model, for its part, takes into account that the polls underestimated Republicans in the last five midterm elections. If this error recurs, even in a milder form, the Senate will very likely be Republican; if it does not, Democrats can win both chambers.

After November 3, attention will turn to Texas, Florida and the suburbs of Pennsylvania and Michigan. There we will see whether the 2024 realignments last: that of Hispanics and big cities toward Trump, and that of college-educated suburbs toward Democrats. And, two years out from 2028, whether Trump's coalition belongs to the Republican Party or to him alone.

Note written by:

William Thay, President of Le Millénaire

Sean Scull, United States specialist at Le Millénaire

Augustin Bataille, analyst at Le Millénaire

[28] Covers, “2026 midterm prediction market odds tracker”, October 26, 2026, https://www.covers.com/politics/2026-midterm-prediction-market-odds-tracker; Newsweek, “Nate Silver revises Democrats' chances of winning Senate”, October 19, 2026, https://newsweek.com/nate-silver-revises-democrats-chances-winning-senate-12586949.

LE MILLÉNAIRE'S FOUR MIDTERMS 2026 NOTES

- **Midterms 2026: The Keys to the Vote** *(this note)*
- Senate 2026: Race by Race
- Governors 2026: State by State
- House of Representatives 2026: District by District

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Communication: communication@lemillenaire.org

Press: presse@lemillenaire.org

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