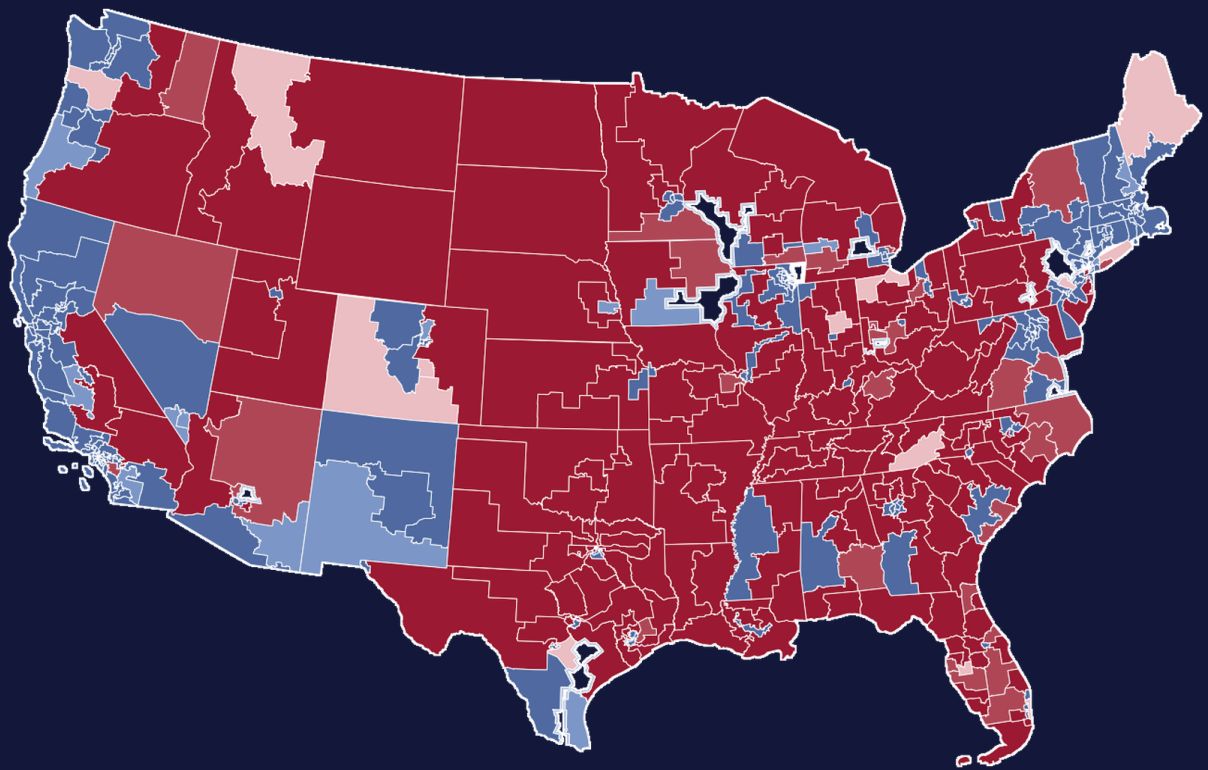
This document is a translation of the original French text. It may contain errors; the French version is the reference text.

SENATE 2026: RACE BY RACE

Le Millénaire in-depth note on the Senate elections of November 3, 2026

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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.*

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KEY TAKEAWAYS

On the poll average alone, Democrats and their allied independents (Bernie Sanders and Angus King included) would hold 53 Senate seats on November 3; the Le Millénaire forecast, drawn from 200,000 simulations as of October 31, 2026, gives them 50.1, with a 42.4% chance of control, and this note reviews the races already settled, then the fifteen competitive ones, up to the 51st seat.

THE SENATE IN EIGHT POINTS

- Democrats and their allied independents have a **42.4% chance** of controlling the Senate. They need 51 seats: at 50-50, Republican Vice President J.D. Vance breaks ties.
- We expect **50.1 seats** for this side, between 46 and 54 in 90% of the simulations. The most frequent outcome is 50 seats (16.6% of simulations), followed by 49 seats (15.5%), that is, a Senate split down the middle that stays Republican.
- Democrats and their allies hold 34 seats not up. With the races ranked from most Democratic to most Republican, the 17th race on the list provides the 51st seat: it is **Louisiana**, where Julia Letlow (R) keeps a projected 2.4-point lead over Jamie Davis (D).
- If each race went to the candidate leading our poll average, without correction, Democrats and their allies would have **53 seats**. Our forecast gives them fewer because it corrects for the polling error observed in the midterm elections from 2006 to 2022 (2.33 points subtracted from the Democratic lead in every race pitting a Democrat against a Republican) and gives weight to each state's electoral history and to the incumbency advantage.
- Two races are toss-ups: **Texas** (Talarico 50.9%) and **Maine** (Jackson 45.2%). In both, the polls put the Democrat ahead and our forecast separates the two candidates by a point at most.
- Democrats must defend **Michigan** (El-Sayed 65.4%), the only Democratic seat genuinely at risk, and hold on in North Carolina (Cooper 85.9%), New Hampshire (Pappas 77.6%) and Minnesota (Flanagan 80.4%).
- Every race weighs on the others. With a Sherrod Brown win in Ohio, Democratic Senate chances rise to 81.6%; with a Mike Rogers win in Michigan, they fall to 13.5%. Even a close result matters: if Jon Ossoff, expected to lead by 12 points in Georgia, wins only **narrowly** (5 points or less), they fall to 26.2%.
- Independents Dan Osborn (Nebraska) and Seth Bodnar (Montana) refuse to commit to caucusing with the Democrats. If they are assigned to neither side, Democrats alone control the Senate in 32.5% of the simulations, Republicans in 57.6%, and the majority depends on an independent in 9.9%.

Why the Senate leans Republican while the polls lean Democratic

Table 1 shows that in eleven of the fifteen competitive races, our poll average puts the Democratic or independent candidate ahead, whereas our forecast keeps only six, with Maine, Ohio, Kansas, South Carolina and Louisiana moving from a narrow Democratic lead in the polls to a Republican lead in the forecast.

Table 1. Senate: poll average, forecast and chances in the fifteen competitive races

State	Candidates	Polls	Forecast	D or I chance
Georgia	Ossoff (D, incumbent) vs. Collins (R)	Ossoff +11.8	Ossoff +11.7	94.6%
North Carolina	Cooper (D) vs. Whatley (R)	Cooper +10.9	Cooper +7.8	85.9%
Minnesota	Flanagan (D) vs. Tafoya (R)	Flanagan +6.9	Flanagan +6.2	80.4%
New Hampshire	Pappas (D) vs. Sununu (R)	Pappas +7.9	Pappas +5.5	77.6%
Michigan	El-Sayed (D) vs. Rogers (R)	El-Sayed +5.3	El-Sayed +2.9	65.4%
Texas	Talarico (D) vs. Paxton (R)	Talarico +4.0	Talarico +0.2	50.9%
Maine	Jackson (D) vs. Collins (R, incumbent)	Jackson +1.9	Collins +0.9	45.2%
Louisiana	Davis (D) vs. Letlow (R)	Davis +2.6	Letlow +2.4	37.0%
Iowa	Turek (D) vs. Hinson (R)	Hinson +0.3	Hinson +4.0	29.3%
Nebraska	Osborn (I) vs. Ricketts (R, incumbent)	Ricketts +3.5	Ricketts +8.7	23.6%
Kansas	Hamilton (D) vs. Marshall (R, incumbent)	Hamilton +3.0	Marshall +5.5	22.4%
Ohio (special)	Brown (D) vs. Husted (R, appointed)	Brown +0.7	Husted +5.8	21.4%
Montana	Bodnar (I) vs. Alme (R)	Alme +10.3	Alme +10.6	19.0%
Alaska	Peltola (D) vs. Sullivan (R, incumbent)	Sullivan +0.4	Sullivan +6.5	18.5%
South Carolina	Andrews (D) vs. D. Graham (R, appointed)	Andrews +1.3	Graham +7.0	16.7%

Source: the Le Millénaire forecast, October 31, 2026 update. Poll average: each pollster's latest wave, weighted by its quality and the age of the fieldwork. Races ranked by the chances of the Democratic or independent candidate.

Minus 2.33 points: that is what the model subtracts from the Democratic lead in every head-to-head against a Republican. It is the average overestimation by the polls in past Senate elections, at the same distance from Election Day. Nebraska, Montana, Idaho, South Dakota: there, an independent faces a Republican. There is no track record, and therefore no correction. The center of the forecast rests first on the polls, then on the state's electoral history, incumbency advantage included, and, to a lesser extent, on structure.

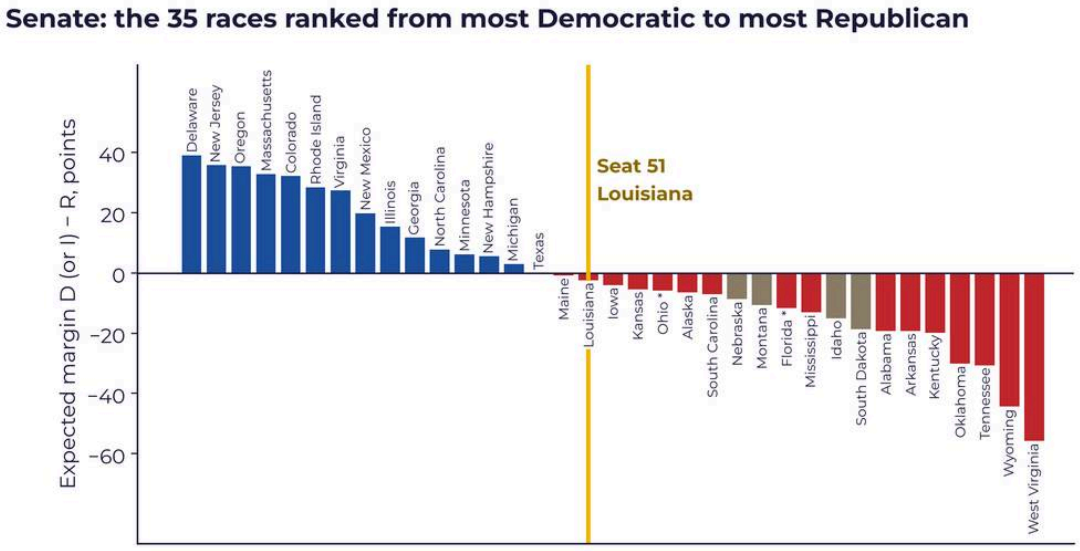
In Texas, James Talarico leads by 4.0 points in the polls. The state's history (minus 12.2 points, which the national environment only partly offsets with plus 7.2) and the error correction (minus 2.3) reduce his lead to almost nothing: James Talarico ends up ahead by only 0.2 point.

Across 148 Senate elections, from 2014 to 2022 and 17 days before the vote, the historical block lowered the average error from 4.92 to 4.46 points. Correctly called winners rose from 87.8% to 89.2%. But if the 2026 polls are right, it is the model that underestimates the Democrats. Ranked by the poll average alone, they have 53 seats.

The map: 34 seats in hand, 17 races to line up

The 2026 map is, moreover, unfavorable to Democrats. According to 270toWin's consensus map, 35 seats are up, including two special elections (Florida and Ohio[1]), with Republicans defending 22 and Democrats 13[2]. Yet the outgoing Senate has 53 Republicans and 47 members of the Democratic caucus, independents included, so Democrats need a net gain of 4 seats[3]. The 13 Democratic seats up include 4 contested states (Georgia, Michigan, Minnesota, New Hampshire), whereas most of the 22 Republican seats are in states Donald Trump won by more than 10 points in 2024: Iowa (13.2 points), Ohio (11.2), Alaska (13), Texas (13.7), Kansas (16.1), Nebraska (20.5) and South Carolina (17.9)[4]. Maine is the only Republican seat up in a state won by Kamala Harris (6.9).

[1] JD Vance and Marco Rubio had to give up their Senate seats to take on their roles as Vice President and Secretary of State in the White House administration.
[2] 270toWin, 2026 Senate consensus map, accessed October 27, 2026, https://www.270towin.com/2026-senate-election/.
[3] KTVU/FOX Local, October 21, 2026, https://www.ktvu.com/news/iowa-2026-senate-josh-turek-ashley-hinson; Newsweek, October 17, 2026, https://newsweek.com/pete-ricketts-nebraska-state-trump-won-12567170.
[4] Wikipedia, “2024 United States presidential election in” pages (one page per state) for Iowa, Ohio, Alaska, Texas, Kansas and Nebraska, for example https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Iowa; for South Carolina: official county results compiled by T. McGovern, https://github.com/tonmcg, Le Millénaire calculations.



Source: Le Millénaire forecast, update of 31 October 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 1. *Senate: the 35 races ranked from most Democratic to most Republican by projected margin as of October 31, 2026 (in gray, contests between an independent and a Republican). With 34 seats not up, Democrats and their allies reach 51 seats if they win the first 17 races on the list: the 17th is Louisiana.*

The figure reads from left to right. The first nine races (Delaware, New Jersey, Oregon, Massachusetts, Colorado, Rhode Island, Virginia, New Mexico, Illinois) are in hand for the Democrats, followed by five races where the Democrat is favored (Georgia, North Carolina, Minnesota, New Hampshire, Michigan), for a total of 14 races and 48 seats. The waterline falls just after, with Texas (Talarico ahead by 0.2 point) and Maine (Collins ahead by 0.9 point) providing the 49th and 50th seats and Louisiana (Letlow ahead by 2.4 points) the 51st. The slope of the curve shows the scale of the Democratic problem: between Michigan, the 14th race, and Louisiana, the 17th, the projected margin goes from a 2.9-point Democratic lead to a 2.4-point deficit; Democrats therefore need to hold one race where they are barely ahead, then win two where they are behind, without losing anything ahead of them.

Iowa (Hinson ahead by 4.0 points), Kansas (5.5), Ohio (5.8), Alaska (6.5), South Carolina (7.0) and Nebraska (8.7) could also supply a 51st seat in place of Louisiana. In the simulations, a moderate polling error shared by these states flips two or three of them at once, hence a 42.4% Democratic chance for a central forecast of 50.1 seats.

What has moved since August

Table 2 tracks the chances of the Democratic or independent candidate in eleven races, on five dates between August 1 and October 31.

Table 2. Change in the chances of the Democratic or independent candidate since August 1

Race	Aug. 1	Sept. 1	Oct. 1	Oct. 15	Oct. 31
Texas	32.3%	32.3%	35.7%	39.5%	50.9%
Maine	46.6%	55.7%	46.8%	48.9%	45.2%
Michigan	46.2%	59.0%	64.4%	61.9%	65.4%
Nebraska	16.9%	14.6%	19.6%	24.8%	23.6%
Iowa	19.1%	18.1%	25.7%	27.7%	29.3%
Ohio	20.4%	25.5%	24.9%	30.1%	21.4%
Alaska	8.0%	9.7%	13.9%	15.4%	18.5%
South Carolina	4.4%	1.8%	9.6%	12.4%	16.7%
Kansas	2.2%	4.2%	10.7%	14.7%	22.4%
New Hampshire	66.3%	59.6%	74.3%	75.6%	77.6%
Minnesota	77.0%	79.4%	67.7%	69.6%	80.4%

Source: the Le Millénaire forecast, recalculated daily with the polls completed by each date.

In Texas, Talarico went from 32% to 51%. Kansas rose from 2% to 22%, South Carolina from 4% to 17% and Alaska from 8% to 19%, three states Trump had won by 13 to 17.9 points in 2024. In Maine, Troy Jackson topped 55% on September 1 and then fell back to 45%, and in Ohio Sherrod Brown, at 30% in mid-October, slipped back to 21%. Outside Maine and Texas, no Republican seat has gone above 50% for the Democrat since August 1.

THE SETTLED RACES

Twenty of the 35 races leave little doubt, nine for the Democrats and eleven for the Republicans. With their 34 seats not up, Democrats and their allies thus start from 43 near-certain seats, and Republicans from 42, including 31 not up. The fifteen competitive races decide the remaining fifteen seats.

Democratic seats safe or very likely

Table 3. Senate: races safe or very likely for the Democrats

State	Candidates (D vs. R)	D chance	Projected margin	2024 presidential
Delaware	Coons vs. Katz	> 99%	Coons +39.0 (structure only)	Harris +14.7
New Jersey	Booker vs. Murphy	> 99%	Booker +35.7 (structure only)	Harris +5.9
Oregon	Merkley vs. Smith	> 99%	Merkley +35.4 (structure only)	Harris +14.4
Massachusetts	Markey vs. Deaton	> 99%	Markey +32.8	Harris +25.3
Colorado	Hickenlooper vs. Baisley	> 99%	Hickenlooper +32.2 (structure only)	Harris +11.0
Rhode Island	Reed vs. McKay	> 99%	Reed +28.4	Harris +13.9
Virginia	Warner vs. Mizusawa	> 99%	Warner +27.3 (structure only)	Harris +5.8
New Mexico	Luján vs. Marker	99.7%	Luján +19.8	Harris +6.0
Illinois	Stratton vs. Tracy	96.2%	Stratton +15.3	Harris +11.0

Source: the Le Millénaire forecast as of October 31, 2026 (candidates as recorded by the model); 2024 presidential: official county results compiled by T. McGovern (github.com/tonmcg), Le Millénaire calculations. "Structure only": no recent poll, the projected margin rests on the state's structure.

Booker has a projected lead of 35.7 points, Warner 27.3. Their margin will probably shrink. Harris had won New Jersey and Virginia by only 5.9 and 5.8 points. Their reelection is not in play for all that. The gap comes from structure and the national environment.

In New Mexico, Ben Ray Luján leads by 15 to 18 points in the three surveys used. Illinois offers less material: Juliana Stratton has a 96.2% chance on the strength of two polls, one of them from Public Policy Polling, a Democratic pollster, and of Harris's 11-point win in 2024. Two polls is not much, in our view.

Ossoff, at 94.6%, would belong here, but Georgia is among the decisive races. According to the simulator, a win by 5 points or less there brings Democratic Senate chances down to 26.2%.

Republican seats safe or very likely

Table 4. Senate: races safe or very likely for the Republicans

State	Candidates (D or I vs. R)	D or I chance	Projected margin	2024 presidential
West Virginia	Fetty Anderson vs. Capito	< 0.1%	Capito +55.7 (structure only)	Trump +41.9
Wyoming	Byrd vs. Hageman	< 0.1%	Hageman +44.4 (structure only)	Trump +46.2
Tennessee	Bradshaw vs. Hagerty	< 0.1%	Hagerty +30.6	Trump +29.7
Oklahoma	Thomas vs. Hern	< 0.1%	Hern +30.0	Trump +34.3
Alabama	Wess vs. Moore	0.4%	Moore +19.2	Trump +30.6
Kentucky	Booker vs. Barr	0.3%	Barr +19.8	Trump +30.6
Arkansas	Shoffner vs. Cotton	0.4%	Cotton +19.3	Trump +30.6
South Dakota	Bengs (I) vs. Rounds	6.1%	Rounds +18.6	Trump +29.2
Mississippi	Colom vs. Hyde-Smith	3.6%	Hyde-Smith +13.1	Trump +22.9
Florida (special)	Nixon vs. Moody	5.4%	Moody +11.7	Trump +13.1
Idaho	Achilles (I) vs. Risch	10.7%	Risch +15.0	Trump +36.5

Source: the Le Millénaire forecast as of October 31, 2026 (candidates as recorded by the model); 2024 presidential: official county results compiled by T. McGovern (github.com/tonmcg), Le Millénaire calculations.

In Alabama, Kentucky and Arkansas, Trump had won by 30.6 points in 2024. The projected margin drops to 19.2 to 19.8 points. There are no polls in Wyoming or West Virginia. Only their structure is therefore used to project them.

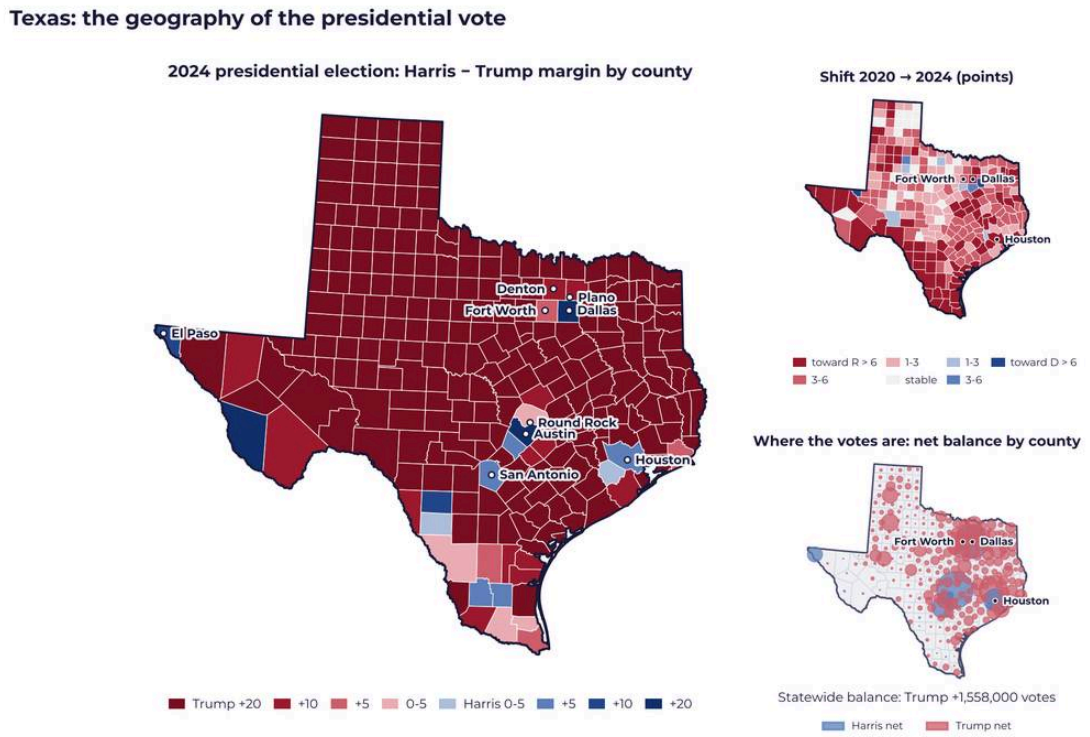
THE DECISIVE RACES

Fifteen profiles run from Texas (50.9%) to Georgia (94.6%). All follow the same outline: geography, candidates, polls, analysis. A win “across all margins” weights narrow wins and wide wins by their frequency. When the margin matters, as for Ossoff, the note separates them.

TEXAS: JAMES TALARICO VS. KEN PAXTON

Democrat James Talarico leads Republican Ken Paxton by 4.0 points in the polls. The forecast first removes their error, minus 2.3 points, then Texas's Republican history, minus 12.2, which the national environment only partly offsets, plus 7.2. Result: Talarico has a 50.9% chance of winning on November 3.

Geography



Source: official county results compiled by T. McGovern (github.com/tonmcg), 2020 and 2024 presidential elections; calculations and mapping by Le Millénaire. Circles proportional to the vote margin between Harris and Trump. Gray: unmatched county.

Figure 2. *Texas: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Texas in numbers

Indicator	Value
2020 presidential	Trump ahead by about 5.6 points
2024 presidential	Trump 56.14%, Harris 42.46%, a 13.7-point margin[5]
Key Democratic counties	12 counties for Harris, the lowest Democratic total since 1972; Travis 68.64%, Harris (Houston) 51.93%
Swing counties	Maverick, a 27.95-point shift; Webb, 25.43; Cameron, Hidalgo, Duval, Willacy and Culberson flip sides
Dallas suburbs	Collin and Denton, 8.4% of the vote, Trump plus 11 and plus 13; Dallas Democratic by 22.2 points, Harris by 5.5[6]
Republican primary	March 3: Cornyn 42.0%, Paxton 40.5%, Hunt 13.5%; May 26 runoff: Paxton 63.8%, 888,196 votes (62.6% according to Roll Call)[7]
Democratic primary	March 3: Talarico 53%, Crockett 46% with 91% of the vote counted (52.4% according to Wikipedia)[8]
Money, third quarter	Talarico $64 million raised, $14.6 million cash on hand at the end of September; Paxton $18 million raised
Outside spending	more than $200 million for Paxton since September; MAGA Inc. $33.7 million according to AdImpact[9]
Polls since September 1	31 surveys; Paxton ahead in only one, InsiderAdvantage on October 16 (49-48)[10]
Average and forecast	polls: Talarico plus 4.0; forecast: Talarico ahead by 0.2 point
Chances as of October 31	Talarico 50.9%, Paxton 49.1%
Breakdown	national environment plus 7.2; state voting history minus 12.2; incumbency and candidates plus 0.2; state polling plus 6.9; other data used plus 0.4; poll bias correction minus 2.3; 90% range from Paxton plus 11.8 to Talarico plus 12.1
Trend	Talarico 32.3% on September 1, 50.9% on October 31, including 11 points since October 15
Early voting, October 19	Travis: about 41,000 voters, 4.3% of registered voters, versus 2.8% in 2022 and 4.14% in 2018[11]; Dallas 76,079, versus 56,431 in 2024 and 32,605 in 2022; Tarrant 50,409, Denton 34,739, Collin 34,522[12]
Simulator cross-effects	Democratic Senate: 42.4%, 56.3% if Talarico wins, 60.9% if he wins by more than 5 points, 28.1% if Paxton wins; Ohio 21.7%, then 23.1% after a narrow Talarico win; Talarico at 73.2% if Abbott wins by 5 points or less

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

[5] Wikipedia, "2024 United States presidential election in Texas," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Texas; ABC News/538 (G. Skelley), "America's swing in 2024 was wide and deep," December 10, 2024, https://abcnews.com/538/americas-swing-2024-wide-deep/story?id=116639076.
[6] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[7] Wikipedia, "2026 United States Senate election in Texas," page as of May 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Texas; Roll Call, "Paxton defeat of Cornyn highlights Texas runoff night," May 26, 2026, https://rollcall.com/2026/05/26/paxton-defeat-of-cornyn-highlights-texas-runoff-night/.
[8] Wikipedia, "2026 United States Senate election in Texas," page as of May 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Texas; Newser, March 4, 2026, https://www.newser.com/story/384773/talarico-wins-in-texas-but-crockett-isnt-conceding.html.
[9] Texas Tribune, "James Talarico raises $64 million," October 15, 2026, https://www.texastribune.org/2026/10/15/james-talarico-64-million-fundraising-texas-senate/; Texas Tribune, October 5, 2026, https://www.texastribune.org/2026/10/05/ken-paxton-third-quarter-fundraising-texas-senate-race-2026/.
[10] 270toWin, Texas Senate polls, accessed October 27, 2026, https://www.270towin.com/2026-senate-polls/texas.
[11] KUT, October 20, 2026, https://www.kut.org/austin/2026-10-20/travis-county-austin-tx-first-day-early-voting-turnout-midterm-election.
[12] NBC DFW, "Record turnout on first day of 2026 early voting in North Texas," October 20, 2026, https://www.nbcdfw.com/elections/record-turnout-on-first-day-of-2026-early-voting-in-north-texas/4093325/.

The 2024 shift was among the strongest in the country, and it hit hardest along the Rio Grande. Starr County, 97.7% Hispanic, voted Republican for the first time since 1892. In the exit polls, Trump took 55% of the Latino vote and 65% among men, while Hispanic women stayed with Harris[13]. For Brookings, this vote swung Texas "*nearly as hard*" as Florida[14].

Talarico wants to win back this ground. Fox News gives him 64% among Hispanics, better than Harris in 2024, while Paxton holds rural voters and white evangelicals[15]. Around Dallas and Austin, about 20% of John Cornyn's Republican primary voters are crossing over to the Democrat[16].

Candidates and campaign

Ken Paxton, the state's attorney general, ousted Senator John Cornyn in the Republican primary runoff, after receiving Donald Trump's endorsement on May 19. Cornyn had argued that Paxton would be a weak general election candidate. He has said he would vote for him, without campaigning. Paxton's record is indeed heavy: in 2023 he faced impeachment in his role as *Attorney General* following allegations of professional misconduct, including corruption and abuse of power. The Texas Senate acquitted him, but in 2025 he then faced a divorce filing from his wife "on biblical grounds"[17] over accusations of adultery.

James Talarico serves in the Texas House. He defeated Jasmine Crockett in March. He was accused of having called Colin Allred a "mediocre Black man," which he disputes. Crockett supports him, without actively campaigning with him. Paxton's ambition is to win a Senate seat that no Democrat has won since 1988.

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[13] Wikipedia, "2024 United States presidential election in Texas," exit poll reproduced on the page, same URL.
[14] Brookings (E.J. Dionne), "What the nation told us in 2024, state by state," January 2, 2025, https://www.brookings.edu/articles/what-the-nation-told-us-in-2024-state-by-state/.
[15] Fox News, "Fox News Poll: It's a Lone Star Senate showdown between Talarico, Paxton," fieldwork September 24-28, 2026, https://www.foxnews.com/politics/fox-news-poll-its-lone-star-senate-showdown-between-talarico-paxton.print.
[16] FOX 7 Austin, October 2, 2026, https://www.fox7austin.com/election/talarico-paxton-texas-senate-poll-october.
[17] Wikipedia, "2026 United States Senate election in Texas," page as of May 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Texas.

Campaign money is going decisively to Talarico, who set a Democratic record in the third quarter. In addition, the Democrat has received symbolic support, including from Barbara Bush, daughter of former President George W. Bush, who reportedly donated to Talarico's campaign, as well as her uncle, Neil Bush, who says he supports the Democratic candidate[18]. Paxton is counting on outside money, "nearly all of it bankrolled by Elon Musk" according to the Texas Tribune, and the New York Times puts Musk's donations to the Republican candidate's campaign at $158 million[19]. Trump came to hold three rallies in Texas during October to support Paxton's campaign and to portray James Talarico, or "Talafreako" as he nicknames him, as a vegan socialist (which he is not) who would ruin the Texas economy[20].

Polls and model

Texas is the most polled state on the map, and Talarico leads or is tied there almost everywhere.

Table 5. Texas: the latest polls

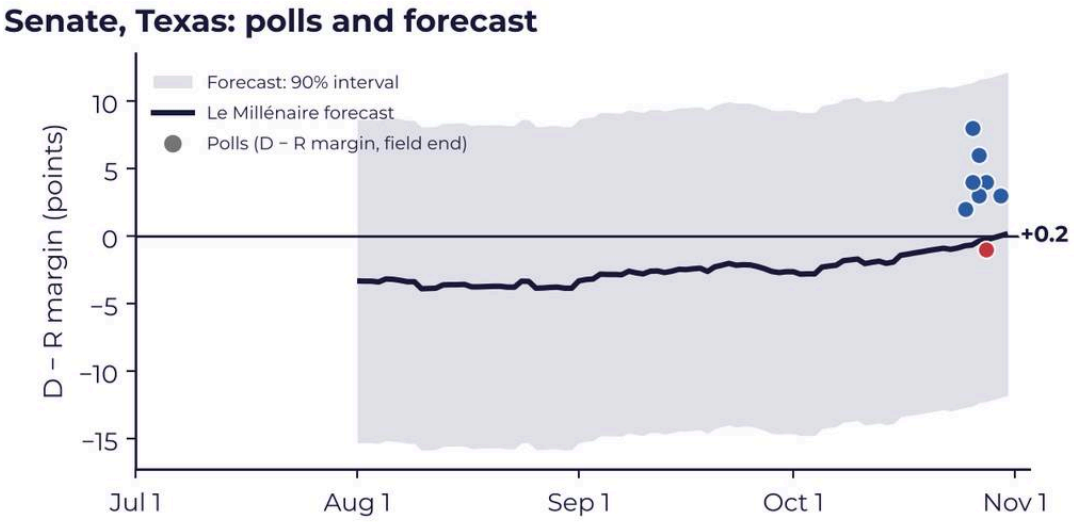
Pollster	Date	Sample	Talarico	Paxton	Margin
Verasight	Oct. 23	601 LV	48	45	Talarico +3
Texas Public Opinion Research	Oct. 23	969 LV	51	47	Talarico +4
Emerson College	Oct. 22	1,000 LV	49	48	Talarico +1
New River / GSG	Oct. 21	934 LV	49	44	Talarico +5
Fox News (Beacon / Shaw)	Oct. 21	1,398 LV	49	49	Tie
YouGov	Oct. 18	1,458 LV	51	49	Talarico +2
InsiderAdvantage	Oct. 16	1,200 LV	48	49	Paxton +1
Hobby School (Univ. of Houston)	Oct. 10-14	2,000 LV	48	46	Talarico +2

Source: 270toWin, Fox News, FOX 26 Houston; end date of fieldwork or publication date. LV: likely voters.

The large samples are tightening. Fox News went from 51-49 in late September to 49-49 on October 21, and its September survey gave Talarico 7 points among registered voters, only 2 among likely voters. Texas Public Opinion Research, which gives him some of his best numbers, is listed as a Democratic pollster in our files. On the other side, the surveys favorable to Paxton since late August

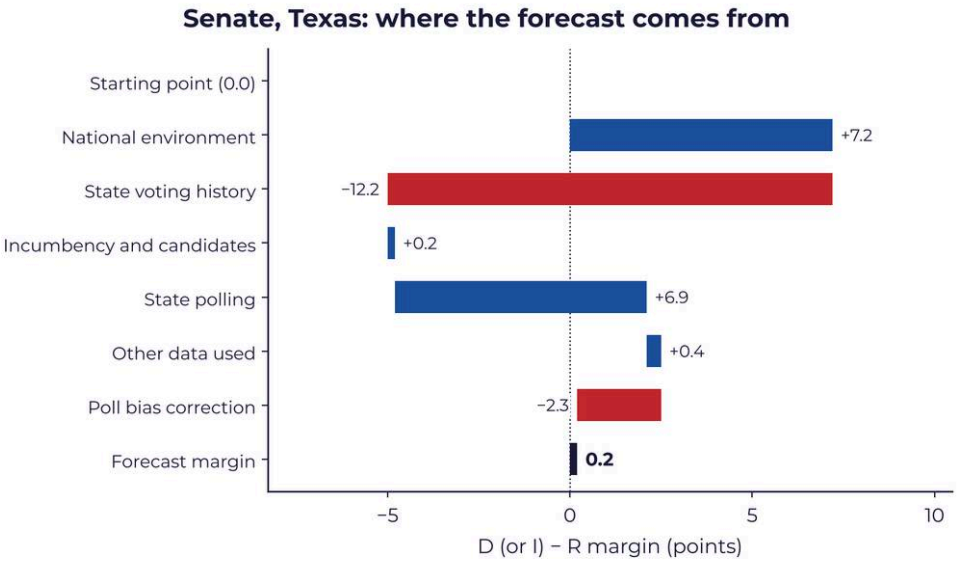
[18] Matza, M. (2026). Bush family members back Democrat James Talarico in Texas Senate race. BBC. https://www.bbc.com/news/articles/cwx29lk15nxxo
[19] Schleifer, T. (2026). Most of Ken Paxton's Money Can Be Traced to One Man: Elon Musk. The New York Times. https://www.nytimes.com/2026/10/16/us/politics/elon-musk-ken-paxton-texas-senate-race.html
[20] McCaughy. (2026). Election Dispatches:Trump Rallies in Texas for 3rd Time This Month as G.O.P. Anxieties Mount. The New York Times. https://www.nytimes.com/live/2026/10/27/us/midterms-elections-trump

come mainly from his own camp or from conservative organizations. Only UMass Lowell/YouGov (45-45, September 28) is nonpartisan.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 27 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 3. *Texas: polls (margin between Talarico and Paxton, at the end date of fieldwork) and the Le Millénaire forecast with its 90% range.*



Source: Millénaire forecast, October 31, 2026 update. D (or I) − R margin in points; each bar is the effect of one element of the model on the expected margin (breakdown published on the website). The total is the forecast margin.

Figure 4. *Texas: breakdown of the October 31 forecast. Each bar is the effect of one component of the model on the expected margin, in points.*

What nearly erases the lead given by the polls, in the model, is first the state's history, then the correction for their past error. Fundraising gives Talarico almost nothing back.

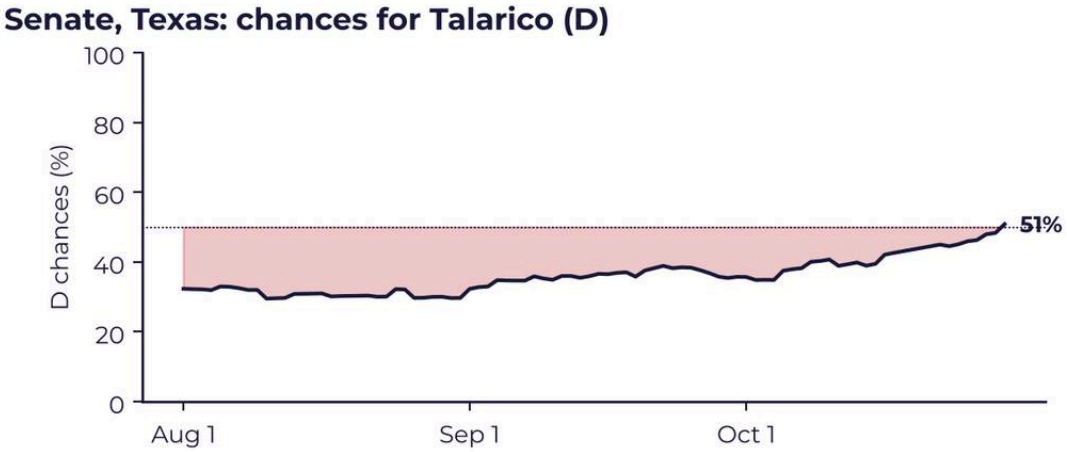


Figure 5. *Texas: James Talarico's chances according to our model, from August 1 to October 31, 2026.*

His recent rise stems from the series of surveys completed between October 18 and 30. Early voting says nothing about parties, since Texas does not record voters' party affiliation. The volumes, however, speak: Travis and Dallas exceed their benchmarks, while Tarrant, Denton and Collin, which are more Republican, remain below their first day of 2024.

Our analysis

Texas is the race where the model takes the most risk. It puts Talarico ahead by only 0.2 point. The polls give him a lead of four points. He must win back Hispanic votes in Hidalgo, Cameron, Webb and Starr, where the 2024 shift was strongest. He must also push Paxton back in Collin, Denton and Williamson, where Cornyn's electorate carries the most weight. Otherwise, strong rural and evangelical turnout on Election Day would be enough for Paxton to win the Senate seat.

MAINE: TROY JACKSON VS. SUSAN COLLINS

Troy Jackson leads by 1.9 points in the poll average. The model nonetheless puts Susan Collins ahead: a 54.8% chance, a 0.9-point projected lead. Her incumbency advantage, based on her historical overperformance, almost exactly offsets the state's Democratic lean and the national environment.

Geography

The only Republican seat up in a state Harris won in 2024, Maine splits into two opposing districts: the coast and Portland (ME-1) on one side, the north and the interior (ME-2) on the other.

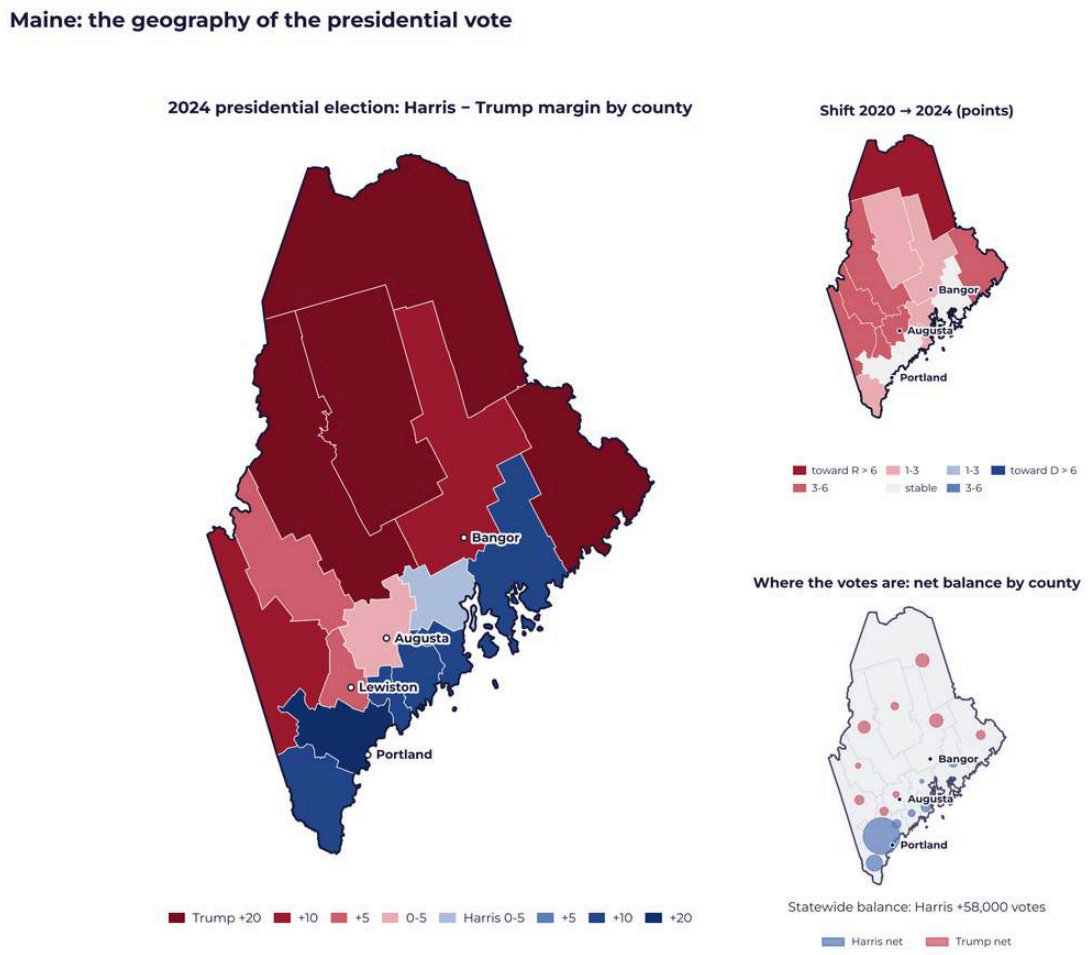


Figure 6. *Maine: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Maine in numbers

Indicator	Value
2020 presidential	Biden ahead by 9 points
2024 presidential	Harris 52.40%, Trump 45.46%; Democratic decline of about 2 points[21]
Districts in 2024	ME-1: Harris 59.69%; ME-2: Trump 53.50%
Counties	seven counties for Harris; Trump from Piscataquis (63.57%) to Kennebec (50.20%); share of the vote: Cumberland 24%, York 16%, Penobscot 10.5%[22]
Previous election (2020)	Collins 51.0%, Sara Gideon 42.4%, an 8.6-point lead[23]
Democratic nomination	June 9 primary: Graham Platner 72.1%; withdrawal on July 8; Bangor convention on July 25: Jackson 566 votes, 99.1%[24]
Money, third quarter	Jackson $20.4 million raised, $16.5 million spent, about $4 million cash on hand and $1 million in debt; Collins $5.2 million raised, $5.4 million available[25]
Polls since September 1	18 surveys; Collins ahead in three: Siena 49-46, co/efficient 48-46, Quantus 47-46; Trafalgar 47-47 (October 25), Fox News 49-49 (October 22, 1,514 likely voters), Suffolk 49-47 for Jackson[26]
Marist, early October	Jackson plus 4 among registered voters; 57% of respondents think Collins will win[27]
Other candidates	2.1% on average in the polls
Average and forecast	polls: Jackson plus 1.9; forecast: Collins plus 0.9
Chances as of October 31	Collins 54.8%, Jackson 45.2%
Breakdown	national environment plus 7.2; state voting history plus 8.4; incumbency and candidates minus 16.5; state polling plus 2.2; other data used plus 0.2; poll bias correction minus 2.3; 90% range from Collins plus 12.9 to Jackson plus 11.1
Trend	Jackson 55.7% on September 1, 46.8% on October 1, 45.2% on October 31
Simulator cross-effects	Democratic Senate: 23.7% with Collins, 65.0% with Jackson; Chris Pappas (New Hampshire) from 77.6% to 85.5% if Jackson wins narrowly

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Trump carried the interior as far as Kennebec, Augusta's county, Republican for the first time since the elder Bush. Only Cumberland, Sagadahoc and Lincoln did not shift right.

[21] Wikipedia, “2024 United States presidential election in Maine,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Maine.
[22] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[23] Wikipedia, “2020 United States Senate elections,” https://en.wikipedia.org/wiki/2020_United_States_Senate_elections.
[24] Wikipedia, “2026 United States Senate election in Maine,” https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Maine; KSHB/Scripps, “Troy Jackson wins Democratic nomination in critical Maine Senate race,” July 25, 2026, https://www.kshb.com/politics/america-votes/troy-jackson-wins-democratic-nomination-in-critical-maine-senate-race.
[25] Bangor Daily News, October 15, 2026, https://www.bangordailynews.com/2026/10/15/politics/troy-jackson-fundraising-disclosure/.
[26] 270toWin, Maine Senate polls, accessed October 27, 2026, https://www.270towin.com/2026-senate-polls/maine.
[27] Marist Poll, “Midterm elections in Maine,” October 6, 2026, https://maristpoll.marist.edu/polls/midterm-elections-in-maine-october-2026/.

In 2020, Collins had run nearly 18 points ahead of the presidential margin. This time she must limit her deficit on the coast. Jackson, for his part, is targeting rural ME-2.

Candidates and campaign

Democrat Graham Platner had won the primary on a populist platform, then withdrew after the revelation, on July 6, of a sexual assault allegation that he denies. The convention then nominated Troy Jackson almost unanimously. A former president of the state Senate, he supports Medicare for All and abolishing ICE. Like Graham Platner, he is targeting Maine's working-class and blue-collar voters. Collins calls him a “Bernie Bro.” Governor Janet Mills is withholding her endorsement.

At the last debate, on October 15 in Bangor, Jackson called Collins's votes against Trump “managed votes”[28]. Indeed, Collins has to distance herself from the war in Iran and from Trump's trade wars, which are blamed for the rising cost of living and above all for heating oil prices. She faces another difficulty: she is accused of being responsible for the overturning of Roe v. Wade. In 2018, Collins cast one of the decisive votes to confirm a Supreme Court justice, Brett M. Kavanaugh, who took part in the 2022 Supreme Court decision abolishing the federal right to abortion. Collins, who nonetheless supports abortion rights, stood by her vote for Kavanaugh.

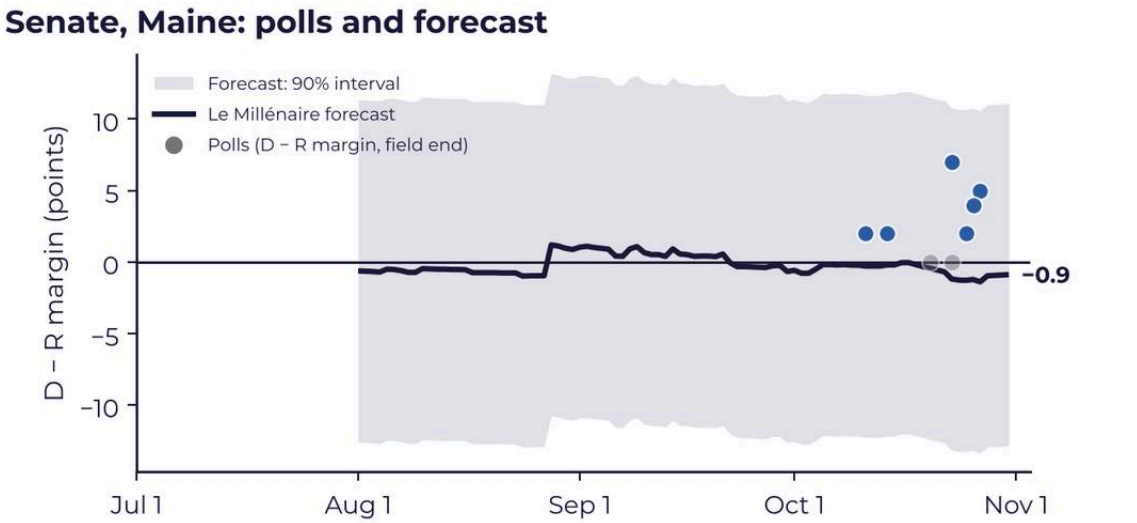
Former Senator Joe Manchin, who left the Democratic Party to become an independent before retiring from the Senate (as senator from West Virginia), has, however, endorsed Susan Collins in Maine. Collins is seeking her sixth consecutive term in the United States Senate (first elected in 1996), and she can therefore highlight her legitimacy and credibility in the role.

Maine uses ranked-choice voting, which would come into play only if no candidate wins a majority in the first count.

[28] Action News Jax / Cox (AP), October 15, 2026, https://www.actionnewsjax.com/news/politics/troy-jackson-tells/IKT2RCK5CUZV5HQXMXQMIYSB7U/.

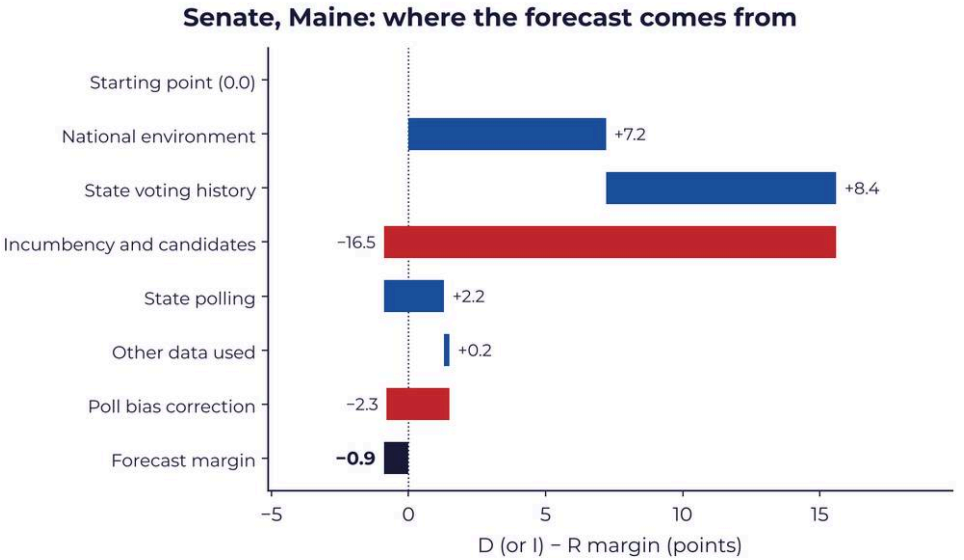
Polls and model

Collins has not led a poll since September. The most recent ones are tied or nearly so. In the Marist poll, however, a majority of respondents expected her to win. This recalls 2020: the polls showed her losing, and she had won by nearly 9 points.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 12 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 7. *Maine: polls (margin between Jackson and Collins, at the end date of fieldwork) and the Le Millénaire forecast with its 90% range.*



Source: Millénaire forecast, October 31, 2026 update. D (or I) − R margin in points; each bar is the effect of one element of the model on the expected margin (breakdown published on the website). The total is the forecast margin.

Figure 8. *Maine: breakdown of the October 31 forecast.*

In the model, the incumbency advantage (minus 16.5 points) almost exactly cancels out what the state's history and the national environment give Jackson (plus 8.4 and plus 7.2). The correction for polling error (minus 2.3) tips the rest toward Collins.

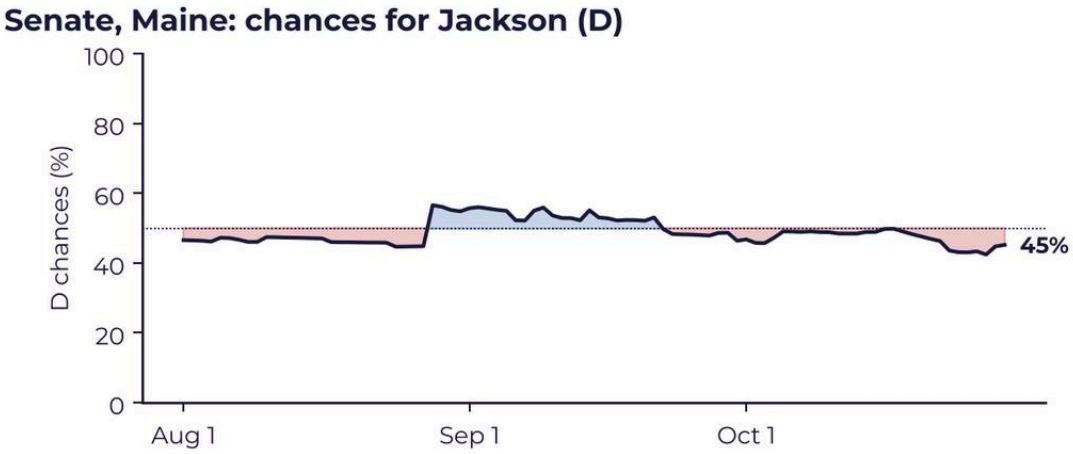


Figure 9. *Maine: Troy Jackson's chances according to our model, from August 1 to October 31, 2026.*

No competitive race has fallen further on the Democratic side. Jackson started from a high point, just after his nomination. The latest decline stems, in our reading, from the return to a tie in the Fox News and Trafalgar polls.

Our analysis

On election night, watch Kennebec and Androscoggin, won by Trump by 2.7 and 6.1 points. If Jackson leads there, Collins will have lost her personal advantage, in Le Millénaire's reading.

MICHIGAN: ABDUL EL-SAYED VS. MIKE ROGERS

Michigan is the only Democratic seat genuinely at risk, in Le Millénaire's reading: Mike Rogers nearly won in 2024. The model gives Abdul El-Sayed a 65.4% chance.

Geography

In 2024, Michigan shifted further right than the other two Rust Belt states. Harris held only Detroit, Ann Arbor, Lansing and a handful of counties, sometimes narrowly.

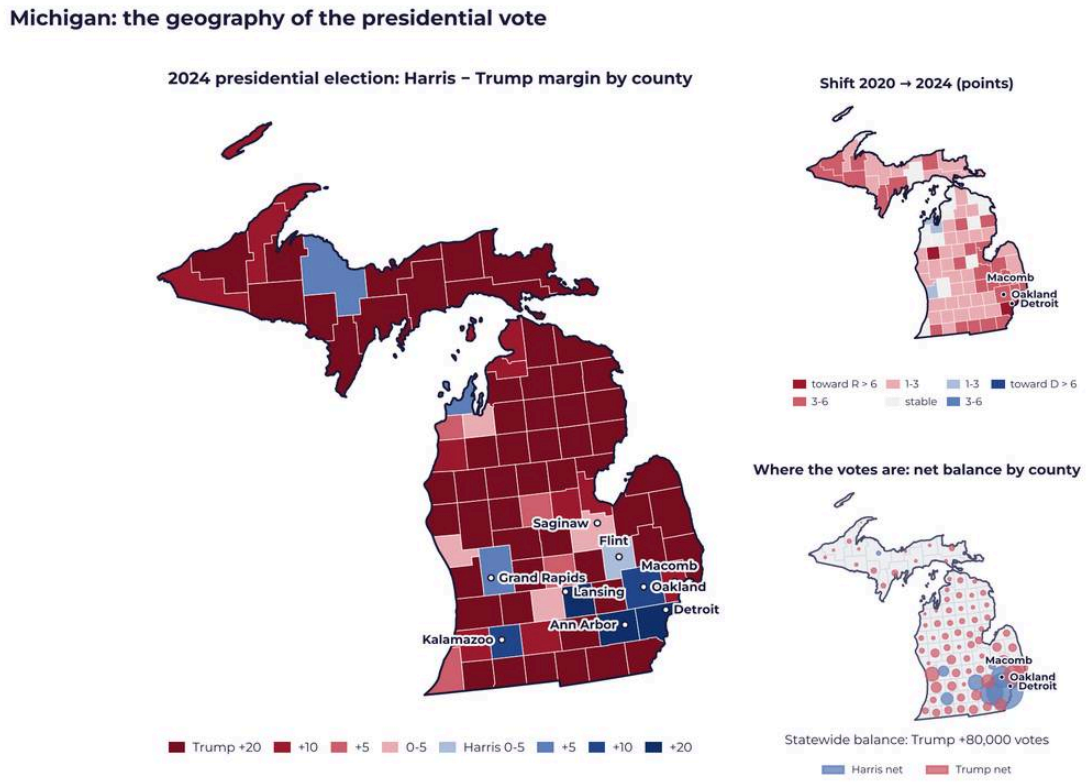


Figure 10. *Michigan: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Michigan in numbers

Indicator	Value
2024 presidential	Trump 49.73%, Harris 48.31%; shift to the right of about 4.2 points since 2020[29]
Key Democratic counties	9 of 83 for Harris; Washtenaw 70.94%, Ingham 63.84%, Wayne 62.69%, Oakland 54.33%, Kent 51.80%, Genesee 51.36%
Wayne (Detroit)	15.1% of the state's vote; Democratic margin down 9.1 points from Biden[30]
Swing counties	Macomb: Trump 55.91%; Saginaw and Muskegon flip right
Exit poll (CNN)	Harris 67% in cities; Trump 53% in the suburbs, 58% in rural areas; Harris only 57% among union households
Previous election (2024)	Rogers 48.3%[31]
August 4 Democratic primary	El-Sayed 48.45%, Haley Stevens 47.55%; about $62 million in outside spending for Stevens, nearly $30 million of it from AIPAC[32]
Money	as of July 15: El-Sayed $14.51 million raised, Rogers $10.90 million; third quarter: El-Sayed “more than $20 million more than” Rogers according to NBC Palm Springs[33]
Polls since September 1	23 surveys; Rogers ahead in only one (Glengariff, 46-44, September 8); Michigan State University 48-46 (October 26); InsiderAdvantage 47-46 (October 23); Marist 50-48 among likely voters, 7 points among registered voters (October 15-18)[34]
Forecast	El-Sayed plus 2.9
Chances as of October 31	El-Sayed 65.4%
Breakdown	national environment plus 7.2; state voting history plus 0.1; incumbency and candidates minus 1.3; state polling minus 0.5; other data used minus 0.2; poll bias correction minus 2.3; 90% range from Rogers plus 9.1 to El-Sayed plus 14.9
Trend	46.2% on August 1, more than 59% on September 1, 64.4% on October 1, around 61% thereafter, 65.4% on October 31
Simulator cross-effects	Democratic Senate: 13.5% if Rogers wins, 57.9% if El-Sayed wins (from 44.1% to 67.7% depending on the margin); narrow John James win in the governor's race: El-Sayed 17.5%, Democratic Senate 8.0%

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

The Democratic defeat played out first in Wayne County. Dearborn, a city with a large Arab American population, put Trump ahead, a first for a Republican since 2000. One explanation is the impact of the war in Gaza. Macomb, a working-class suburb north of Detroit, stayed with Trump.

[29] Wikipedia, “2024 United States presidential election in Michigan,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Michigan.
[30] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[31] Wikipedia, “2024 United States Senate elections,” https://en.wikipedia.org/wiki/2024_United_States_Senate_elections.
[32] Wikipedia, “2026 United States Senate election in Michigan,” page as of September 20, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Michigan; FOX 2 Detroit, August 5, 2026, https://www.fox2detroit.com/news/abdul-el-sayed-projected-defeat-haley-stevens-democratic-senate-primary-race.
[33] NBC Palm Springs, October 19, 2026, https://www.nbcpalmsprings.com/ca-us-and-world/2026/10/19/democrats-outraise-gop-in-10-competitive-senate-races.
[34] 270toWin, Michigan Senate polls, accessed October 27, 2026, https://270towin.com/2026-senate-polls/michigan; Marist Poll, “Midterm elections in Michigan,” October 21, 2026, https://maristpoll.marist.edu/polls/midterm-elections-in-michigan-october-2026/.

In Macomb and Oakland, Republicans are targeting El-Sayed's progressive profile. The first Muslim candidate at this level in the state, he could also bring part of the Arab American vote back in Detroit.

Candidates and campaign

El-Sayed beat Haley Stevens by less than a point, despite the outside money massed behind her. Republican Mike Rogers had no Republican opponent.

The October 8 debate was the most hostile its moderator had seen in thirty years. Rogers distanced himself from Trump on Iran and ICE. El-Sayed had to explain himself over Hasan Piker, with Whitmer at his side for the first time[35]. Obama came to Detroit on October 24. The next day, Trump called El-Sayed a "jihadist"[36] over his alleged ties to the Muslim Brotherhood. In addition, El-Sayed received the backing of the Democratic Party's left wing, with Alexandria Ocasio-Cortez donating $1 million to his campaign. For the Democratic Party's left wing, an El-Sayed victory is crucial to legitimize Alexandria Ocasio-Cortez's potential 2028 presidential bid. The obstacle to an Ocasio-Cortez candidacy among Democrats is the idea that the DSA's socialist line is too extreme to win over moderate voters. Nevertheless, if El-Sayed wins in Michigan, a *swing state*, he will prove the opposite, that a socialist line can rally a coalition of voters around it, and this would legitimize the democratic socialists' line to prevail within the Democratic Party in 2028.

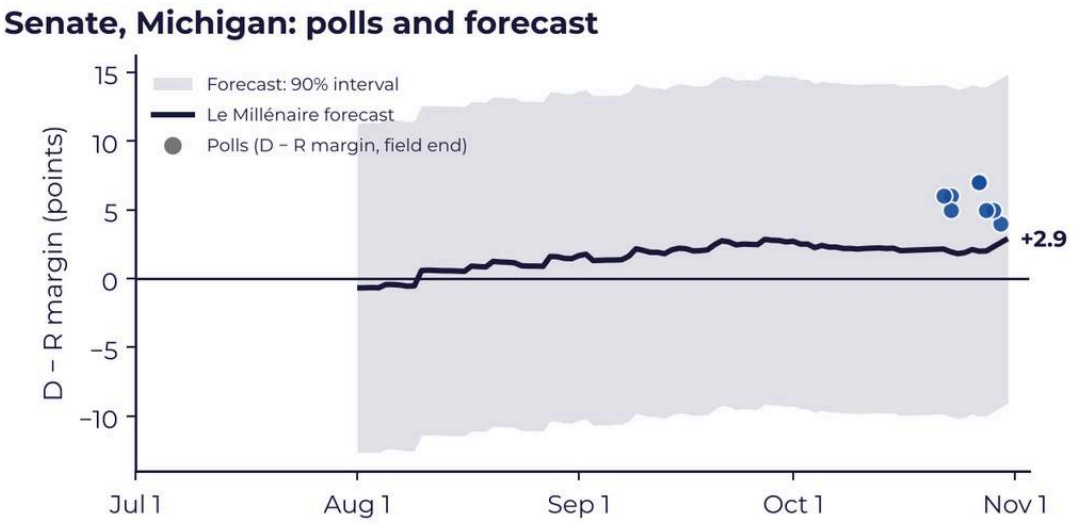
On money, our latest FEC figures date from July. For the third quarter, NBC Palm Springs puts him far ahead of Rogers.

Polls and model

Rogers has led only once since September. The only other surveys favorable to him were commissioned by Republican committees (Torchlight for Common Sense for America, Tyson Group for Alliance for a Better Future). As in Texas, we

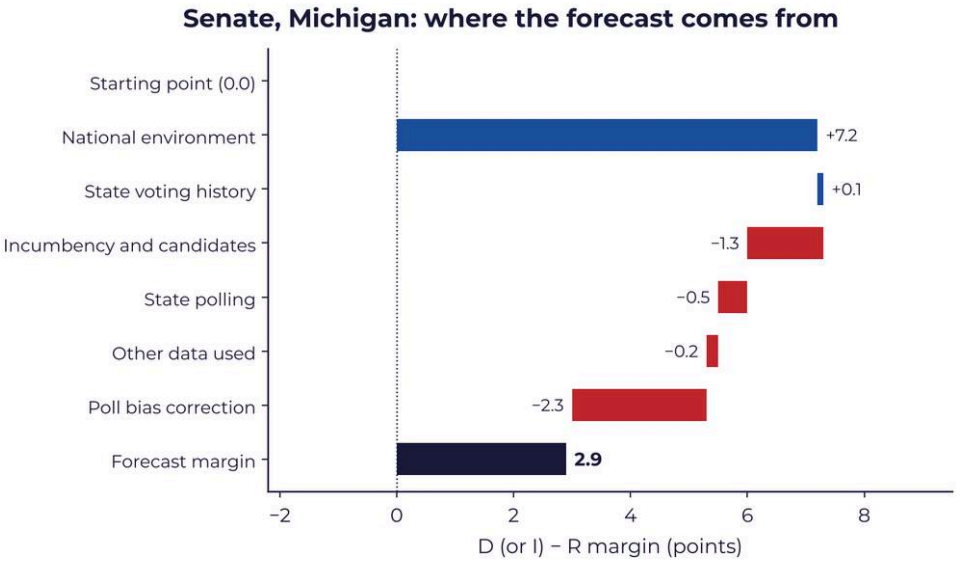
[35] AJC/AP, "Rogers and El-Sayed attack each other forcefully as first Michigan Senate debate grows hostile," October 9, 2026, https://www.ajc.com/news/2026/10/rogers-and-el-sayed-attack-each-other-forcefully-as-first-michigan-senate-debate-grows-hostile/.
[36] Fox News, live blog of October 25, 2026, https://www.foxnews.com/live-news/midterm-elections-2026-trump-obama-michigan-alaska-october-25.

believe the gap between registered voters and likely voters signals a Democratic base less certain to turn out.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 24 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 11. *Michigan: polls (margin between El-Sayed and Rogers, at the end date of fieldwork) and the Le Millénaire forecast with its 90% range.*



Source: Millénaire forecast, October 31, 2026 update. D (or I) − R margin in points; each bar is the effect of one element of the model on the expected margin (breakdown published on the website). The total is the forecast margin.

Figure 12. *Michigan: breakdown of the October 31 forecast.*

The breakdown is simple here: the national environment does most of the work, and the correction for polling error takes back a good share of it. The remaining lead is close enough to a tie to leave Rogers a one-in-three chance.

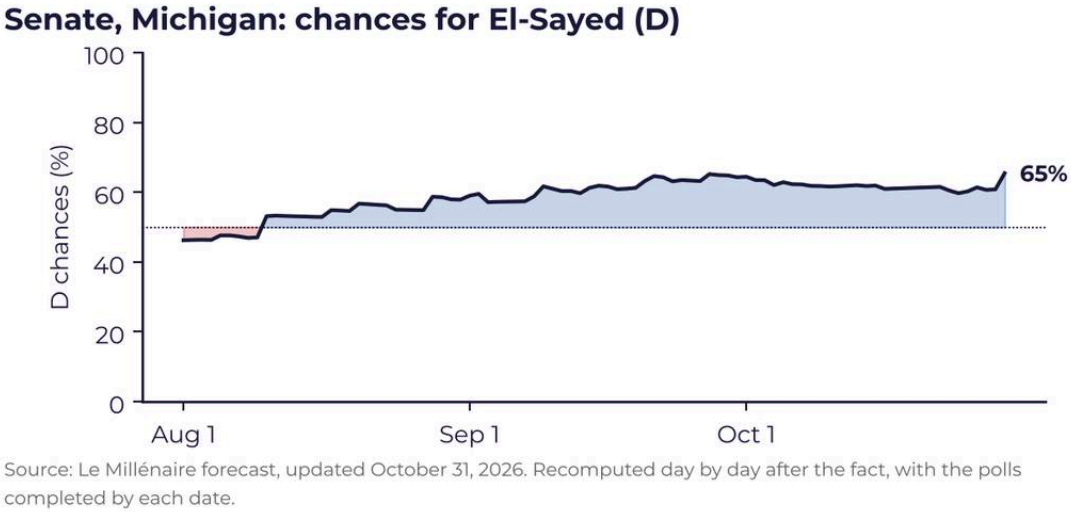


Figure 13. *Michigan: Abdul El-Sayed's chances according to our model, from August 1 to October 31, 2026.*

Written off before the primary, El-Sayed moved ahead as early as September. He peaked in early October before stabilizing, then rose again on October 31. The simulator ties his fate closely to that of the governor's race.

Our analysis

Since September 1, El-Sayed has been ahead in almost every poll, by one to two points in the most recent ones. Rogers would need low turnout in Detroit. He would need an Arab American vote that does not return in Dearborn, and an effective campaign in Macomb and Oakland. On election night, the trend will come from two suburban counties: Macomb (Trump plus 13.7 in 2024) and Oakland (Harris plus 10.6). Does El-Sayed narrow the gap in the first and top 10 points in the second? Then he wins.

NEBRASKA: DAN OSBORN VS. PETE RICKETTS

Trump won Nebraska by 20 points, and Pete Ricketts is running there again as the incumbent. The polls put him slightly ahead of Dan Osborn. The model, for its part, sees him clearly ahead, and the independent keeps a little less than a one-in-four chance.

Geography

Nebraska barely moved in 2024. Omaha is the exception. Its district, NE-2, voted for Harris, and even Sarpy, the suburb that stayed Republican, gave Democrats their best showing since 1964.

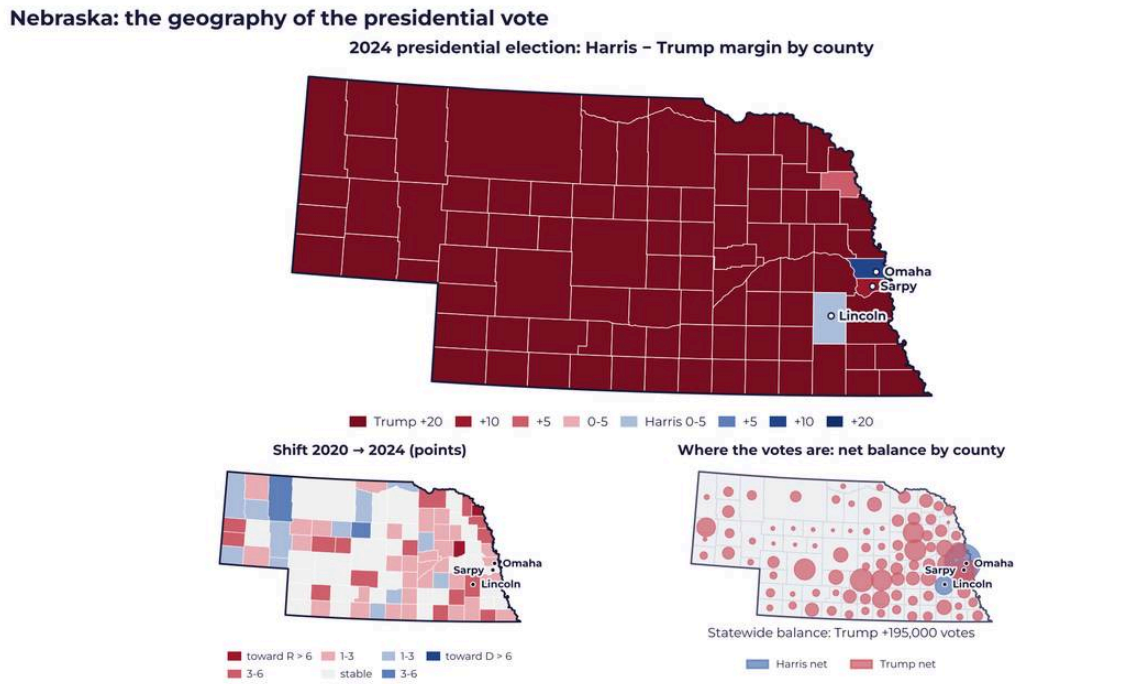


Figure 14. *Nebraska: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Nebraska in numbers

Indicator	Value
2024 presidential	Trump 59.32%, Harris 38.86%; a shift of only 1.3 points[37]
2024 presidential by district	NE-2 (Omaha): Harris 51.32%, Trump 46.73%; NE-3 (rural): Trump 76.03%
Key Democratic counties	Douglas (Omaha) 54.06% for Harris, Lancaster (Lincoln) 51.04%
Swing county	Sarpy: Trump 54.85%, i.e., Trump plus 11.7
Share of Douglas, Lancaster and Sarpy	56% of the vote[38]

[37] Wikipedia, "2024 United States presidential election in Nebraska," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Nebraska.
[38] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.

Indicator	Value
Senate 2024	Osborn 46.47% against Deb Fischer, about 7.6 points more than Harris[39]
Money raised as of October 14	Ricketts $14.55 million (including $5.2 million in personal funds), Osborn $9.81 million
Cash on hand as of October 14	Osborn $2.21 million, Ricketts $1.22 million
Reported outside spending	$12.58 million for Osborn, $8.11 million for Ricketts[40]
Senate Leadership Fund	$8 million more on October 13, $15 million in total, not counting amounts reported to the FEC[41]
Poll average and forecast	Ricketts +3.5 in the polls, +8.7 projected
90% range	From Ricketts +28.5 to Osborn +11.2
Breakdown	National environment +7.2; state voting history −19.0; incumbency and candidates −18.2; state polling +21.9; other data used −0.5
Chances	Ricketts 76.4%; Osborn 16.9% on August 1, 14.6% in early September, 23.6% on October 31
Cross-effects (Democratic Senate)	68.0% if Osborn wins, 34.5% if Ricketts wins, 45.1% if Ricketts wins narrowly
Depending on how independents are counted	32.5% without any independent, 36.4% counting Osborn alone

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Osborn had already done much better than Harris against Deb Fischer. In our reading, this time he must win Douglas and Lancaster by wide margins, carry Sarpy and substantially reduce his rural deficit.

Candidates and campaign

Democrats have chosen not to field a candidate in Nebraska. Cindy Burbank, nominated on May 12, withdrew in July. A voter filed a lawsuit to force the party to field someone, and an initial ruling found it unlikely to succeed[42]. The party has backed Osborn since August 2025. Five names appear on the ballot, including that of Mike Marvin, who reportedly withdrew in favor of Osborn according to KETV. The report has not been verified[43].

[39] Wikipedia, "2024 United States Senate elections," https://en.wikipedia.org/wiki/2024_United_States_Senate_elections.
[40] Ballotpedia, same URL; Nebraska Examiner, https://nebraskaexaminer.com/?p=43009.
[41] Bloomberg Government, "Senate Republicans pouring $8 million more into Nebraska race," October 13, 2026, https://news.bgov.com/antitrust/senate-republicans-pouring-8-million-more-into-nebraska-race.
[42] Wikipedia, "2026 United States Senate election in Nebraska," page as of August 31, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Nebraska.
[43] Ballotpedia, "United States Senate election in Nebraska, 2026," updated as of October 20, 2026, https://ballotpedia.org/United_States_Senate_election_in_Nebraska,_2026.

Osborn, a union leader, attacked across-the-board tariffs at the State Fair debate in September. Ricketts calls him “Democrat Dan”[44]. Trump came to Grand Island on October 5 to back Ricketts. The incumbent had been elected in 2024 with 62.64%[45].

Money does not lean to one side only. Ricketts has raised far more, partly from his own funds. Osborn has more cash on hand and benefits from more reported outside spending, but the Senate Leadership Fund put millions back into the race on October 13, outside FEC reporting.

Polls and model

The eight polls published since September 1 contradict one another. The four mid-October surveys range from Osborn +7 to Ricketts +3.

Table 6. Nebraska: the September and October polls

Pollster (sponsor)	Fieldwork	Sample	Osborn	Ricketts	Margin
GBAO (Working Class Majority PAC, pro-Osborn)	Oct. 18-22	800 LV	46	45	Osborn +1
Impact Research (Osborn campaign)	Oct. 14-20	600 LV	47	49	Ricketts +2
Concord Public Opinion Partners	Oct. 15-18	500 LV	48	41	Osborn +7
National Public Affairs	Oct. 15-18	598 LV	43	46	Ricketts +3
YouGov	Sept. 24-Oct. 3	1,809 LV	48	47	Osborn +1
co/efficient	Sept. 28-30	1,113 LV	40	45	Ricketts +5
SurveyUSA	Sept. 8-13	503 LV	46	42	Osborn +4

Source: Ballotpedia, 270toWin, Newsweek; sponsors according to Ballotpedia. LV: likely voters.

The most telling comes from Impact Research. Commissioned by Osborn's own campaign, it puts him two points behind. For co/efficient, Newsweek and Ballotpedia publish different levels but the same margin.

[44] Nebraska Examiner, https://nebraskaexaminer.com/?p=43931.
[45] Newsweek, October 17, 2026, https://newsweek.com/pete-ricketts-nebraska-state-trump-won-12567170.

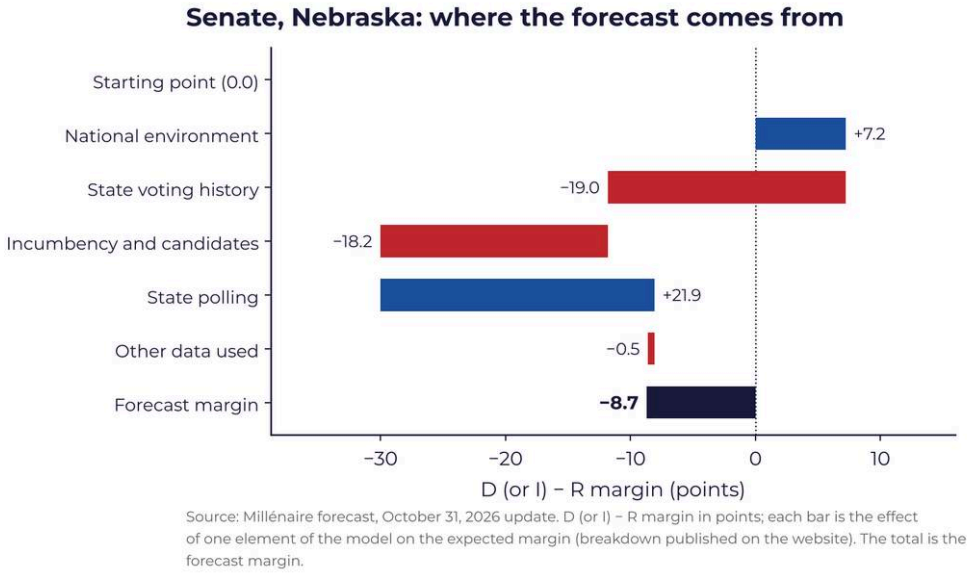


Figure 15. *Nebraska: breakdown of the October 31 forecast. No polling error correction or structural block for a contest between an independent and a Republican.*

Lacking a track record for a contest between an independent and a Republican, the model applies neither a polling error correction nor a structural block. The gap with the polls stems mainly from the state's Republican history and the incumbency advantage. The range is one of the two widest among the competitive races. The model thus acknowledges that it knows this type of race poorly.

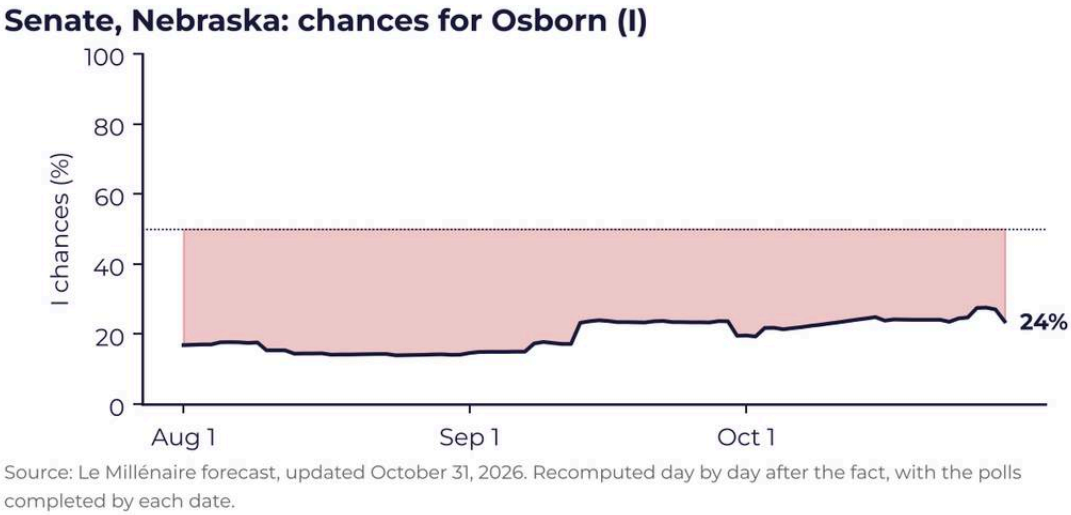


Figure 16. *Nebraska: Dan Osborn's chances according to our model, from August 1 to October 31, 2026.*

Osborn's October rise follows the YouGov poll, then the Concord and GBAO surveys.

Cross-effects. The simulator counts Osborn with the Democrats. A narrow Ricketts win would hardly move their chances. We see this as a sign that Nebraska is weakly correlated with the other races: the Osborn vote rests partly on Republicans who do not vote Democratic elsewhere. Yet Osborn has not committed to caucusing with the Democrats (see part four).

Our analysis

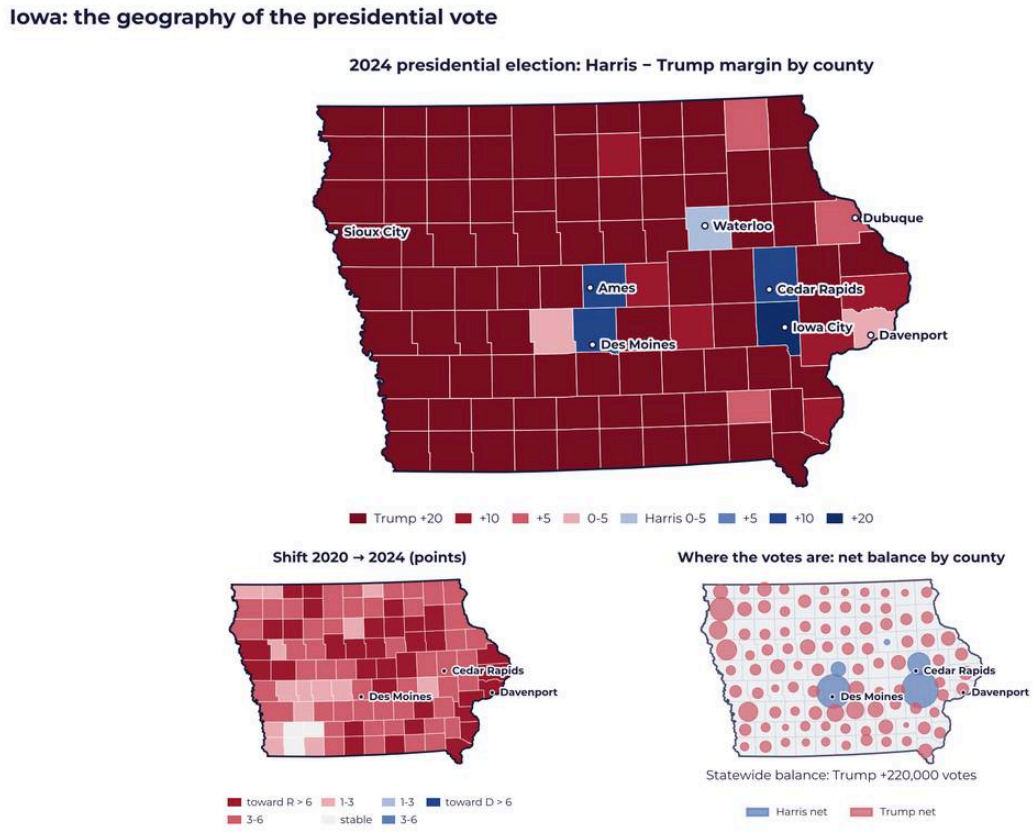
In 2024, Osborn outran the Democratic score by 7 to 8 points. He needs to do even better, against a better-funded incumbent, in a state where the rural vote has barely moved. We estimate that he would need more than 60% in Douglas and a win in Sarpy. That county will be the bellwether on election night. If Osborn comes out ahead there, he will very likely be elected.

IOWA: JOSH TUREK VS. ASHLEY HINSON

Iowa comes right after the tipping-point race, Louisiana, which gives the Democrats their 51st seat. It is also the state whose most famous poll missed by 16 points in 2024. Republican Ashley Hinson is the favorite there according to our model, which puts her well above the polls.

Geography

Trump gained ground almost everywhere in 2024. Harris won only five counties, those of the college towns and Des Moines, and Black Hawk held on only narrowly.



Source: official county results compiled by T. McGovern (github.com/tonmcg), 2020 and 2024 presidential elections; calculations and mapping by Le Millénaire. Circles proportional to the vote margin between Harris and Trump. Gray: unmatched county.

Figure 17. *Iowa: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Iowa by the numbers

Indicator	Value
Presidential elections	2024: Trump 55.73%, Harris 42.52%, a 13.2-point gap; 2020: 8.2 points; Trump gained ground in 98 of 99 counties[46]
Key Democratic counties (Harris 2024)	Johnson (Iowa City) 67.92%, Polk (Des Moines) 54.54%, Story (Ames) 54.04%, Linn 53.97%
Swing counties	Black Hawk 49.76% for Harris, a 7.9-point shift; Scott, Trump plus 3.9, a 7.4-point shift[47]
Republican strongholds	Sioux 84.49% for Trump, Lyon 84.25%, Clinton 58.48%
Center of the state	Polk, 15.4% of the vote; Dallas, a shift of only 2.8 points
June 2 primaries	Hinson 74.2%[48], Turek 62.7%[49]
Cash on hand as of June 30	Hinson $6.75 million, Turek 2.36
Polls since September 1	19: Hinson ahead in 10, Turek in 8, a 43-43 tie in Cygnal (conservative foundation)[50]
Polling average and projection	Hinson +0.3 in the polls, +4.0 projected, a 3.7-point difference; 90% interval from Hinson +15.9 to Turek +8.0
Decomposition (effect on Turek)	National environment +7.2; state voting history −11.7; incumbency and candidates −0.7; state polling +3.9; other data used −0.2; poll bias correction −2.3
Chances	Hinson 70.7%; Turek 19.1% on August 1, 28.8% in mid-September, between 25 and 30% since
Cross-race effects (Democratic Senate)	77.3% if Turek wins, 27.9% if Hinson wins; 72.4% if Turek wins narrowly, 40.9% if Hinson wins narrowly
A narrow Turek win, elsewhere	Maine 57.3%, Texas 56.7%, Michigan 77.3%, Ohio 31.9%
Link with the governor's race	Rob Sand favored at 65.8%; Turek's chances 23.9% if Sand wins narrowly, 4.9% if Zach Lahn wins narrowly
Early voting as of October 23	Absentee ballots about 24% above 2022; Democratic lead down from 23.8 to 18.9 points[51]

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Along the Mississippi, Scott, Davenport's county, voted Republican for the first time since 1984. In the center, Polk and its neighbor Dallas held up better. Yet the Selzer poll, the most respected in the state, had Harris ahead by 3 points. To win, Turek must carry Polk and Linn by more than 10 points and take back Scott and Black Hawk.

Candidates and campaign

With Joni Ernst stepping down, the June 2 primaries chose Ashley Hinson, backed by Trump, and Josh Turek for the Democrats. He is also a two-time

[46] Wikipedia, "2024 United States presidential election in Iowa," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Iowa.
[47] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[48] Iowa Capital Dispatch, June 2, 2026, https://iowacapitaldispatch.com/2026/06/02/u-s-rep-ashley-hinson-wins-gop-nomination-for-u-s-senate-seat-ap-projects/.
[49] Wikipedia, "2026 United States Senate election in Iowa," page as of September 3, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Iowa.
[50] 270toWin, Iowa Senate polls, accessed October 27, 2026, https://www.270towin.com/2026-senate-polls/iowa.
[51] Iowa Secretary of State, absentee ballots received as of October 23, 2026, compiled by Le Millénaire.

Paralympic gold medalist. Hinson has the money advantage. The October 13 debate, on WHO 13, centered on tariffs and fuel[52]. According to Bloomberg Government, the war in Iran is driving up the cost of fuel and fertilizer, and that is what makes farm-state seats like Iowa's more competitive[53]. Yet no Democrat has been elected senator there since 2008.

Polls and model

The series has been split since September, with no clear favorite.

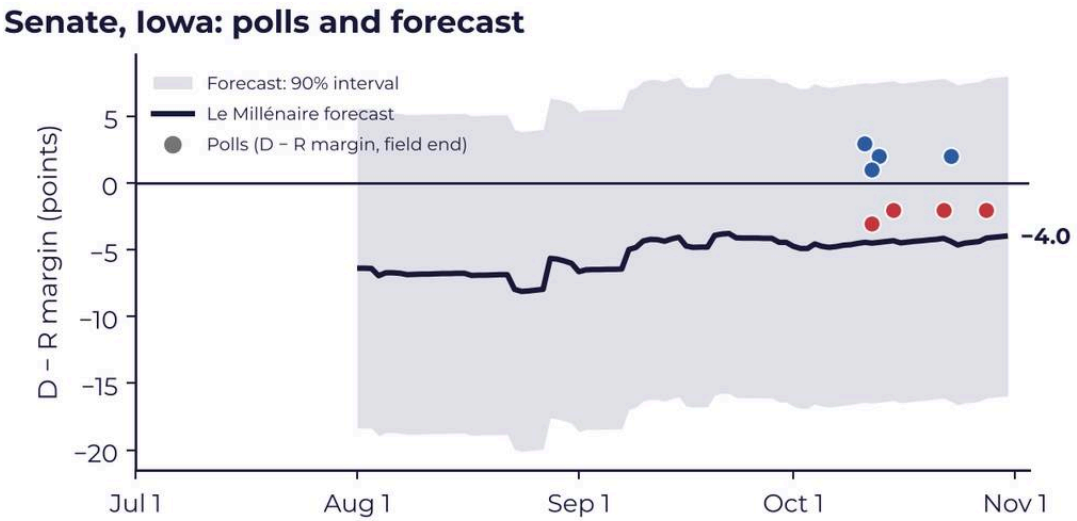
Table 7. Iowa: the October polls

Pollster	Date	Sample	Turek	Hinson	Margin
InsiderAdvantage	Oct. 23	1,200 LV	45	47	Hinson +2
New River / GSG	Oct. 21	602 LV	46	44	Turek +2
National Public Affairs	Oct. 20	678 LV	44	47	Hinson +3
co/efficient	Oct. 19	863 LV	45	48	Hinson +3
Trafalgar Group	Oct. 17	1,094 LV	44	46	Hinson +2
Marist	Oct. 15	1,100 LV	48	45	Turek +3
YouGov	Oct. 6-12	2,245 LV	47	46	Turek +1
Emerson College	Oct. 5-6	650 LV	45	47	Hinson +2
CNN / SSRS	Sept. 29-Oct. 5	801 LV	43	45	Hinson +2
Suffolk University	Oct. 1-4	500 LV	48	44	Turek +4
Siena College	Oct. 3	606 LV	47	48	Hinson +1

Source: 270toWin, Newsweek. LV: likely voters.

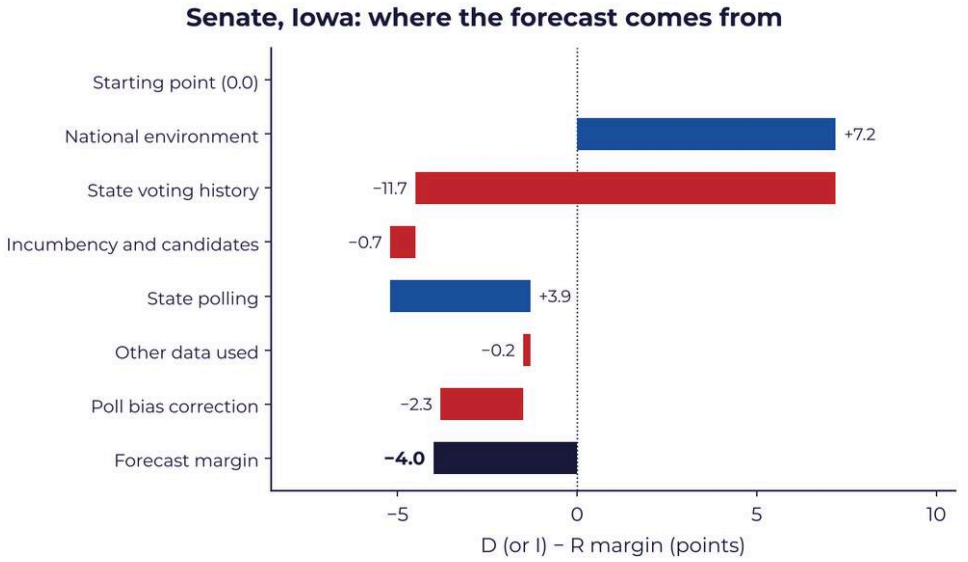
The average is close to zero. Yet four of the last five surveys put Hinson ahead, New River / GSG being the only exception, and CNN, Emerson, and Siena already had her in the lead in early October.

[52] Newsweek, October 14, 2026, https://www.newsweek.com/josh-turek-ashley-hinson-iowa-polls-trump-voters-12569851.
[53] Bloomberg Government, October 13, 2026, cited in Newsweek, same URL.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 10 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 18. *Iowa: polls (margin between Turek and Hinson, by end date of fieldwork) and Le Millénaire's projection with its 90% interval.*



Source: Millénaire forecast, October 31, 2026 update. D (or I) − R margin in points; each bar is the effect of one element of the model on the expected margin (breakdown published on the website). The total is the forecast margin.

Figure 19. *Iowa: decomposition of the October 31 projection.*

The polls, nearly even, add 3.9 points for Turek in the decomposition, and the national environment 7.2. Everything else works against him: above all the voting history of a state Trump won by 13 points (minus 11.7), then the poll error correction (minus 2.3) and, more marginally, the weight of incumbency and candidates (minus 0.7).

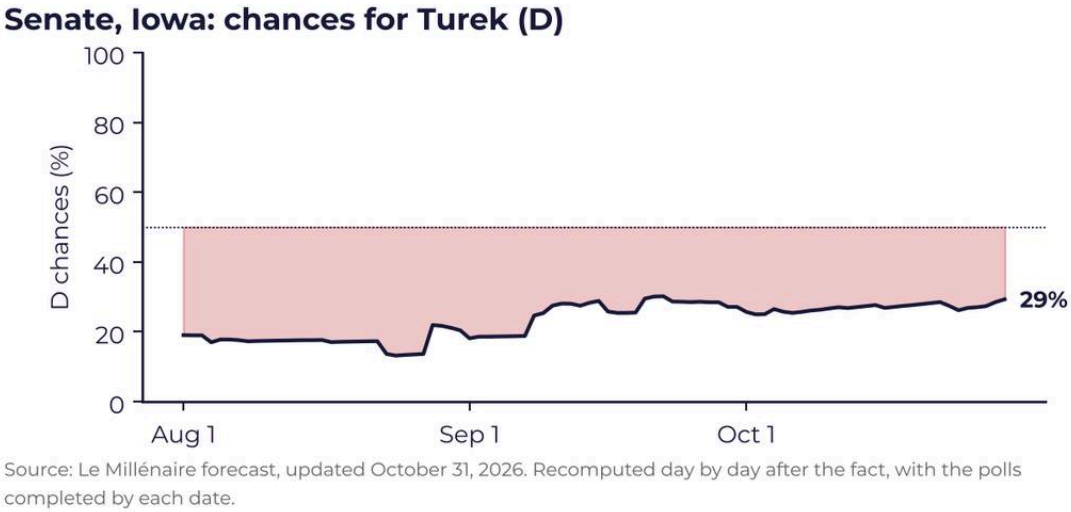


Figure 20. *Iowa: Josh Turek's chances according to our model, August 1 to October 31, 2026.*

Turek gained ground in August and early September. The October polls did not move the race.

Cross-race effects. Iowa carries great weight in the simulator. A narrow Turek win would lift the Senate and other races. A narrow Hinson win would leave the Senate almost at its current level. The link with the governor's race is strong: if Rob Sand wins only narrowly, Turek's chances fall, and if Zach Lahn wins narrowly, they collapse.

Early voting. Absentee ballots are more numerous than in 2022, but the Democratic lead in the mail vote has narrowed. And in 2022, a wider lead did not prevent Grassley from winning by 12 points.

Our analysis

Without a clear Rob Sand win in the governor's race, Turek will not win Iowa. The county to watch on election night will be Scott, which Trump won by 3.9 points in 2024. Without Scott, Turek will not win the state.

MINNESOTA: PEGGY FLANAGAN VS. MICHELE TAFOYA

Peggy Flanagan leads in the polls and keeps that lead in the projection. Minnesota's Democratic history offsets the error correction. Undecided voters

nonetheless leave an opening for Michele Tafoya.

Geography

Harris won Minnesota while losing ground. Minneapolis and Saint Paul dominate. The outer ring votes Republican.

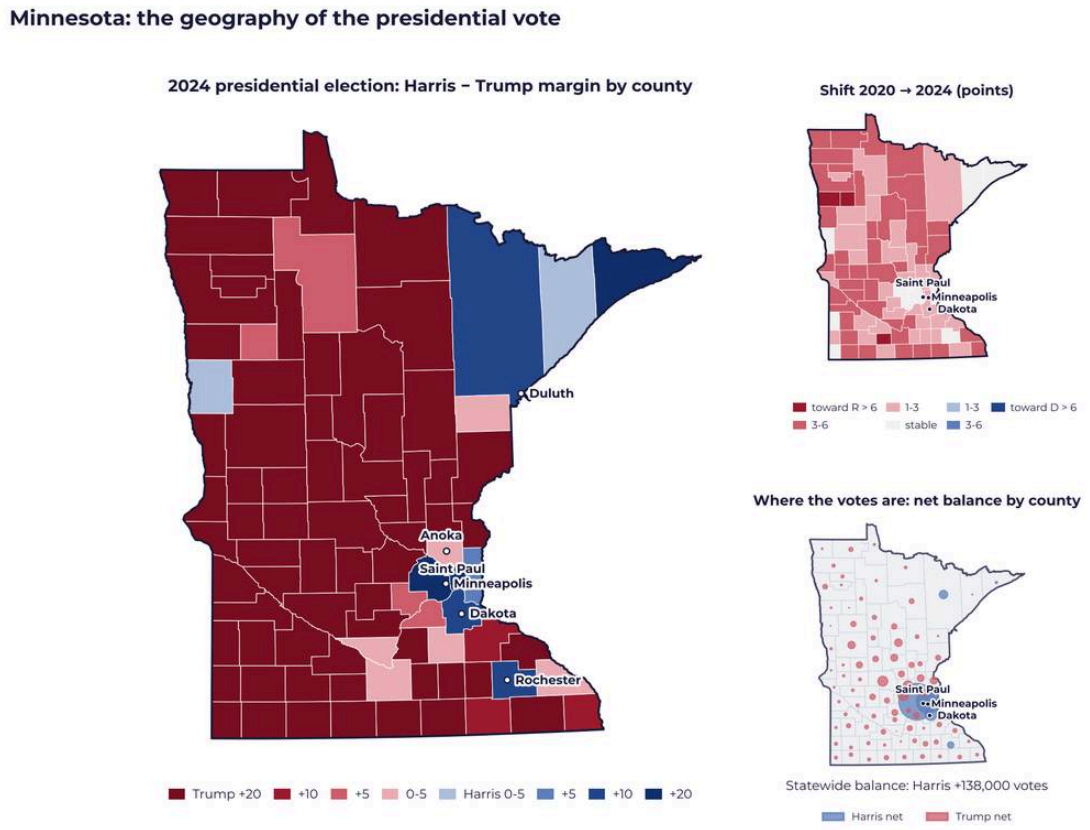


Figure 21. *Minnesota: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Minnesota by the numbers

Indicator	Value
2024 presidential election	Harris 50.92%, Trump 46.68%, a 4.2-point gap; Democratic decline of about 3 points[54]
Key Democratic counties (Harris 2024)	Hennepin 69.80%, Ramsey 70.20%, together 30% of the state's vote[55]; Dakota 55.14%, Washington 53.28%
Outer ring	Anoka, Carver, Scott, and Sherburne: 66.41% for Trump
Bellwether county	Anoka, Trump plus 4.4 in 2024
August 11 Democratic primary	Flanagan 59.0%, Angie Craig 39.4%[56]
Republican primary	Tafoya 52.1%, Adam Schwarze 24.0%
Money raised as of October 14	Tafoya $12.50 million, Flanagan 11.56
Outside spending	8.16 million, of which 7.43 against Flanagan[57]
Ratings	Cook: “Lean D” since October 20[58]
Polls since September 1	Ten, Flanagan ahead or tied in all of them
Mason-Dixon	Flanagan 47%, Tafoya 43%, 9% undecided
GQR (Senate Majority PAC)	Flanagan 50, Tafoya 42
Polling average and projection	Flanagan +6.9 in the polls, +6.2 projected
Flanagan's chances	79.4% on September 1, 67.7% on October 1, 80.4% on October 31
Cross-race effects (Democratic Senate)	9.2% if Tafoya wins, 50.4% if Flanagan wins, 32.2% if she wins narrowly

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Carlton voted Republican in 2024, a first since 1928. Blue Earth, Nicollet, and Winona also flipped to Trump. Tafoya, for her part, is courting moderates in Dakota, Washington, and Anoka, closer to Minneapolis.

Candidates and campaign

Peggy Flanagan clearly defeated Angie Craig in the Democratic primary for the seat Tina Smith is leaving. She wants to dismantle ICE. Facing her, Michele Tafoya, a former sportscaster, won the Republican primary by a wide margin. She is targeting welfare fraud from the Walz era while describing herself as independent[59]. Indeed, the federal funds fraud scandals, estimated at $9 billion, involving Minnesota's Somali community are fueling Republican anti-

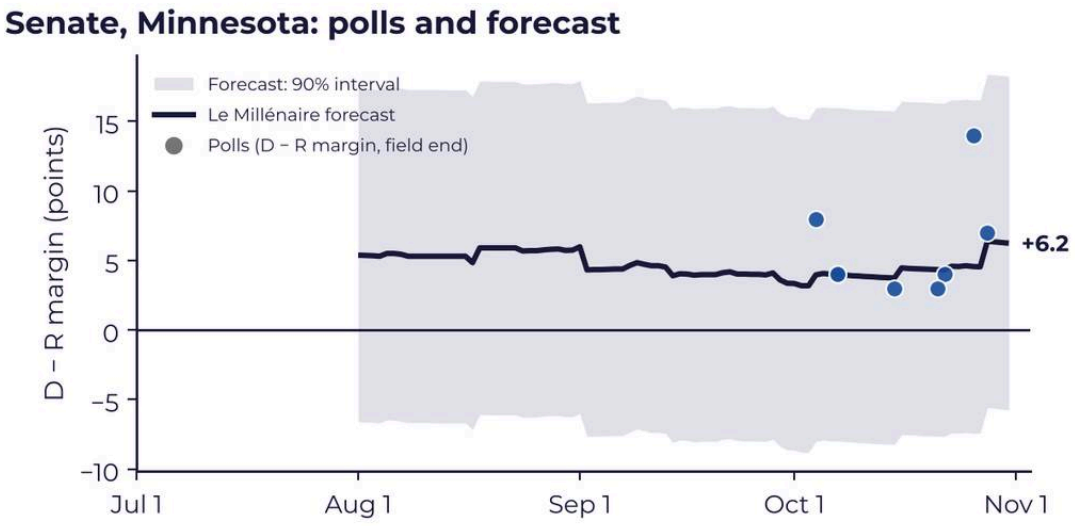
[54] Wikipedia, “2024 United States presidential election in Minnesota,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Minnesota.
[55] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[56] Wikipedia, “2026 United States Senate election in Minnesota,” page as of September 11, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Minnesota; FOX 9, August 11, 2026, https://fox9.com/news/minnesota-senate-primary-election-results-dfl-2026.
[57] Ballotpedia, “United States Senate election in Minnesota, 2026,” https://ballotpedia.org/United_States_Senate_election_in_Minnesota,_2026.
[58] Political.org, October 20, 2026, https://political.org/2026/10/20/cook-political-report-shifts-minnesota-senate-race-toward-gop-south-carolina-toward-democrats/.
[59] MPR News, October 12, 2026, https://www.mprnews.org/2026/10/12/peggy-flanagan-michele-tafoya-senate-race-stays-quiet-in-minnesota.

immigration rhetoric. No Republican has won a Senate election in Minnesota since 2002.

Tafoya has raised slightly more, and nearly all outside spending targets Flanagan.

Polls and model

Flanagan has not trailed in any poll since September. Her best result comes from a GQR survey commissioned by the Democratic committee Senate Majority PAC.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 7 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 22. *Minnesota: polls (margin between Flanagan and Tafoya) and Le Millénaire's projection with its 90% interval.*

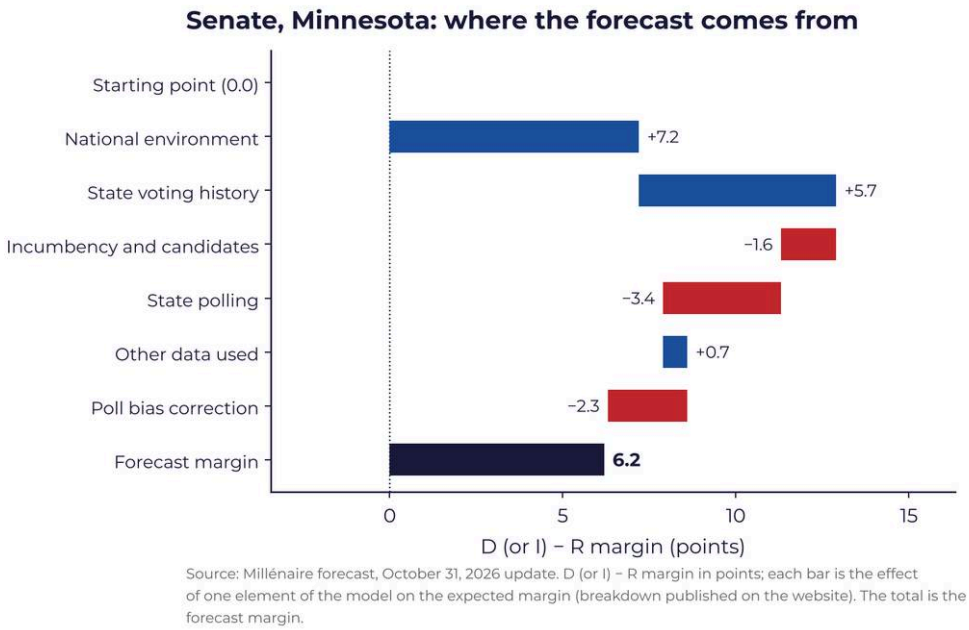


Figure 23. *Minnesota: decomposition of the October 31 projection.*

Her chances dropped in September, when SurveyUSA had her tied, then rebounded. In the simulator, her defeat would all but close off the Senate to the Democrats.

Our analysis

Bellwether county in Le Millénaire's reading: it will be Anoka, which Trump won by 4.4 points in 2024. If Tafoya does markedly better there, the race is open.

OHIO (SPECIAL ELECTION): SHERROD BROWN VS. JON HUSTED

Jon Husted has a 78.6% chance in the model. Yet it is Sherrod Brown who leads by 0.7 points in the polls. It is one of the largest gaps on the map, along with South Carolina and Kansas.

Geography

In 2024, Ohio gave Trump his widest margin since Reagan. Harris held only the two big cities, one college county, and Montgomery, won narrowly.

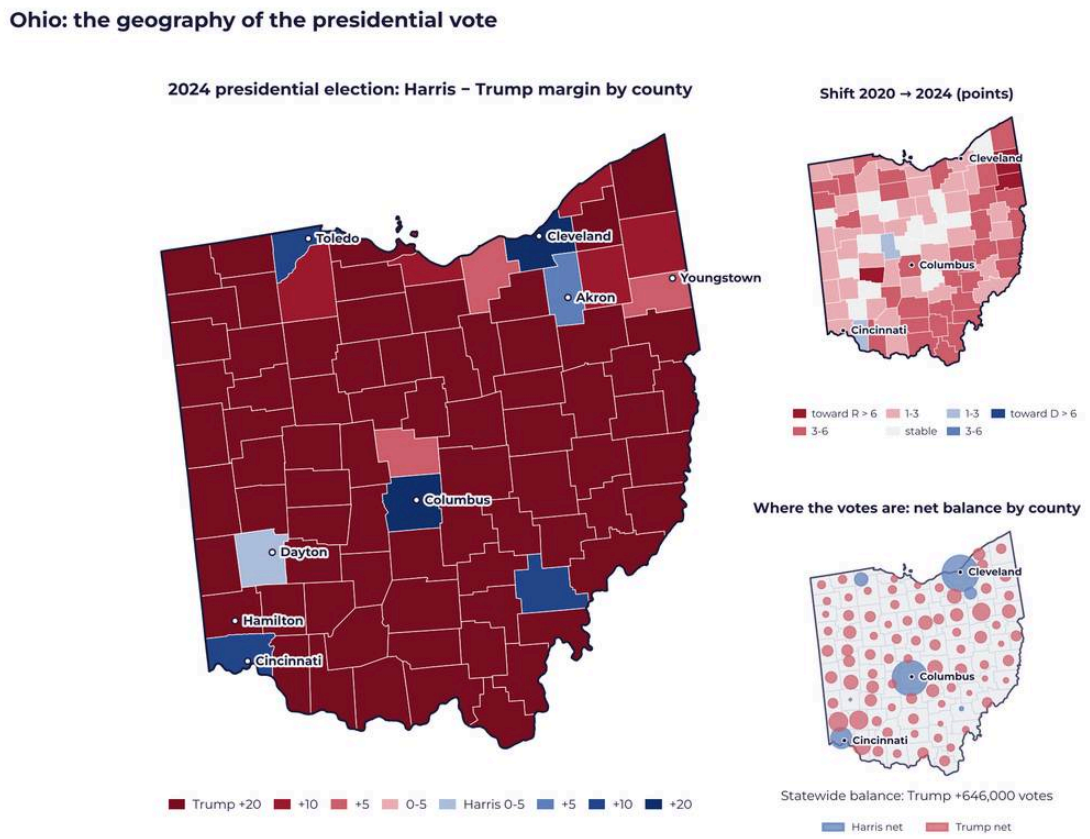


Figure 24. *Ohio: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Ohio by the numbers

Indicator	Value
2024 presidential election	Trump 55.14%, Harris 43.93%, or 11.2 points, the widest margin since 1984[60]
Key Democratic counties	7 of 88 for Harris: Cuyahoga (Cleveland) 65.08%, Franklin (Columbus) 62.98%, Athens, Montgomery by 0.47 points
Shifting counties	Mahoning 54.09% for Trump, down about 7 points; Belmont 73.30%; Gallia 79.13%; Delaware 46.04% for Harris, a shift to the left
2024 exit poll	Trump wins rural voters 72-26, the suburbs 57-42, voters without a college degree 70-29
2024 Senate	Moreno 50.09%, Brown 46.5%; Brown ran about 7.6 points ahead of the Democratic score[61]

[60] Wikipedia, "2024 United States presidential election in Ohio," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Ohio.
[61] Wikipedia, "2024 United States Senate elections," https://en.wikipedia.org/wiki/2024_United_States_Senate_elections.

Indicator	Value
May 5 primary	Brown 89.4%; Husted the only Republican[62]
Money, third quarter	Brown $23.1 million raised, Husted 4.8
Outside spending	about 350 million according to AdImpact, a 105 million Republican edge[63]
Marist	Brown 48%, Husted 44% among likely voters; a 9-point lead among registered voters[64]
Polls since September 1	Brown ahead in 17 of 20; best result from Fox News, 52-47
Projection and chances	Husted ahead by 5.8 points, 78.6% chance; Brown 21.4%
90% interval	from 17.7 points for Husted to 6.2 points for Brown
Decomposition	national environment plus 7.2; state voting history minus 9.7; incumbency and candidates minus 13.4; state polling plus 13.1; other data used minus 0.5; poll bias correction minus 2.3
Brown's chances over time	20.4% on August 1, 30.1% on October 15, 21.4% on October 31; projection moved from 3.8 to 5.8 points for Husted
Cross-race effects, Senate	Brown wins: 81.6% for the Democrats; Husted wins: 31.6%
Cross-race effects, other races	Brown wins narrowly: Michigan 80.8%, Maine 57.1%, Texas 57.6%, Iowa 45.4%, Senate 77.4%; Amy Acton narrowly beats Vivek Ramaswamy: Brown 47.2%

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

No county changed sides in 2024, but nearly all of them shifted right. Mahoning, around Youngstown, had voted Democratic from 1976 to 2016. The Appalachian southeast keeps moving right.

As in Nebraska, the model starts from Brown's 2024 score against Bernie Moreno, far better than Harris's. He needs about four more points. They are to be found in the Mahoning Valley, where he usually overperformed, and in the college-educated suburbs of Columbus and Cincinnati, Delaware and Hamilton, the only ones to have resisted the shift.

Candidates and campaign

Mike DeWine appointed Husted to replace J.D. Vance. The winner will serve out the term, which ends in January 2029[65]. Brown served in the Senate until 2025.

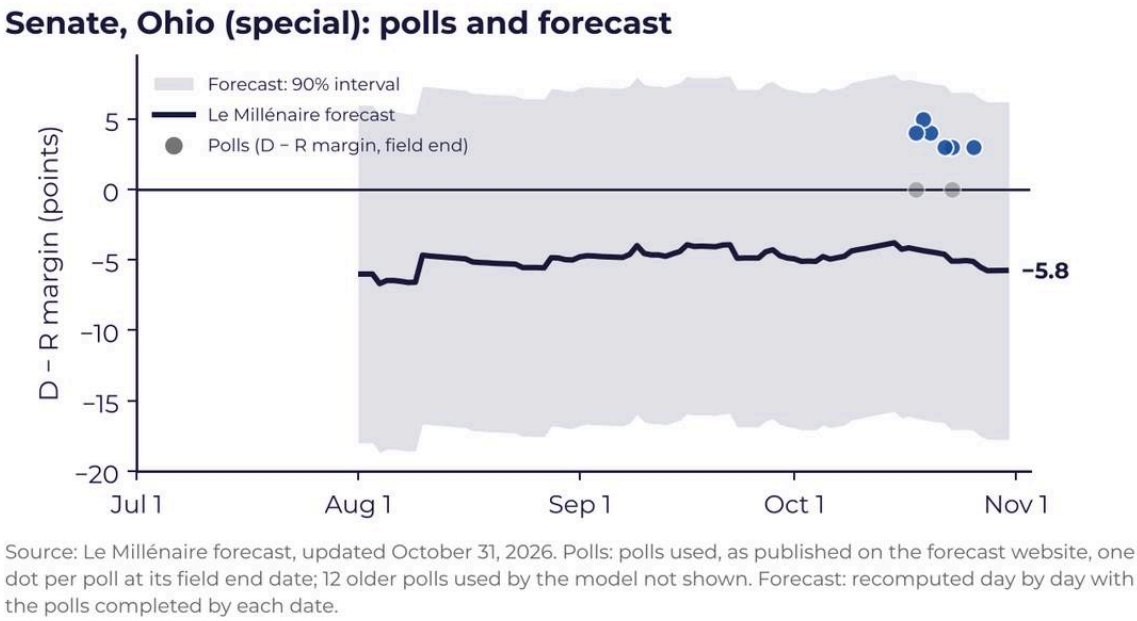
[62] Wikipedia, "2026 United States Senate special election in Ohio," page as of October 8, https://en.wikipedia.org/wiki/2026_United_States_Senate_special_election_in_Ohio.
[63] Spectrum News, October 15, 2026, https://spectrumlocalnews.com/columbus/news/2026/10/15/ohio-senate-q3-brown-husted.
[64] Marist Poll, "Midterm elections in Ohio," October 20, 2026, https://maristpoll.marist.edu/polls/midterm-elections-in-ohio-october-2026/.
[65] NBC4 (WCMH), October 1, 2026, https://www.nbc4i.com/news/your-local-election-hq/two-ohio-polls-show-sherrod-brown-leading-jon-husted-in-u-s-senate-race/amp/.

Brown is campaigning on data centers: 71% of residents support a moratorium, according to a cited Bowling Green State University poll. He also blames Husted for rising energy prices. Husted responds with Obamacare, immigration, and Brown's 32 years in office[66].

The candidates' money leans toward Brown. Outside groups' money leans right.

Polls and model

Brown leads almost everywhere, rarely above 50%.



Source: Le Millénaire forecast, updated October 31, 2026. Polls: polls used, as published on the forecast website, one dot per poll at its field end date; 12 older polls used by the model not shown. Forecast: recomputed day by day with the polls completed by each date.

Figure 25. *Ohio: polls (margin between Brown and Husted, by end date of fieldwork) and Le Millénaire's projection with its 90% interval. All polls but one, and two ties, are above the tie line; the projection has been below it since August 1.*

[66] Fox News, August 4, 2026, https://www.foxnews.com/politics/gop-senator-unloads-creature-washington-challenger-critical-senate-showdown.print.

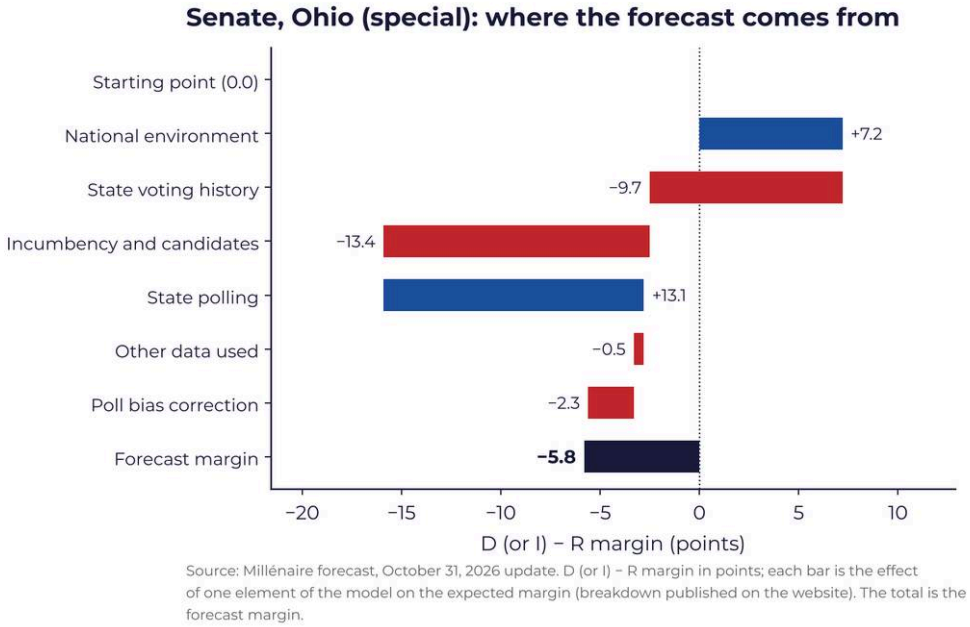


Figure 26. *Ohio: decomposition of the October 31 projection.*

The model reverses the picture, mainly through the state's voting history and the incumbency bonus granted to Husted. Yet Husted has never been elected to the Senate. According to the Bowling Green poll, 25% of likely voters even wrongly believe that Brown is the incumbent. Without this bonus, Husted's projected lead would melt away, and Brown would have markedly higher chances. This is our reading of the decomposition; it is not simulated.

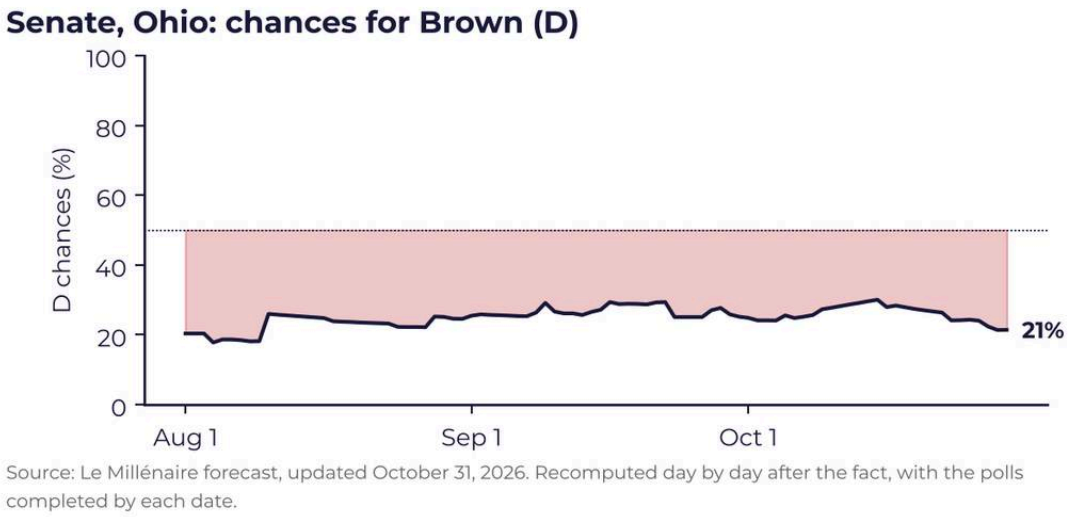


Figure 27. *Ohio: Sherrod Brown's chances according to our model, August 1 to October 31, 2026.*

Brown slipped after mid-October even though the polls of the last week remained favorable to him. The projection, for its part, moved only about two

points.

Cross-race effects. In the simulator, a Brown win, even a narrow one, would carry Michigan, Maine, Texas, and Iowa along with it.

Our analysis

Ohio's polls have Brown winning by about one point, and with them the Democrats would have a better than three-in-four chance of taking the Senate; the projection, however, sees Husted winning by about six points. On election night, the bellwether county will be Montgomery (Dayton), won by Harris by 0.5 points in 2024, and a Brown leading by more than 5 points in Dayton would win Ohio.

NEW HAMPSHIRE: CHRIS PAPPAS VS. JOHN E. SUNUNU

Chris Pappas leads in every poll but one, even though New Hampshire shifted right in 2024, and our model gives him a 77.6% chance, with a projected lead of 5.5 points against 7.9 points in the polls.

Geography

In 2024, the Democratic decline hit every county. Brookings notes that Biden's margin “may have been exceptional, not a new norm.” Three counties changed sides.

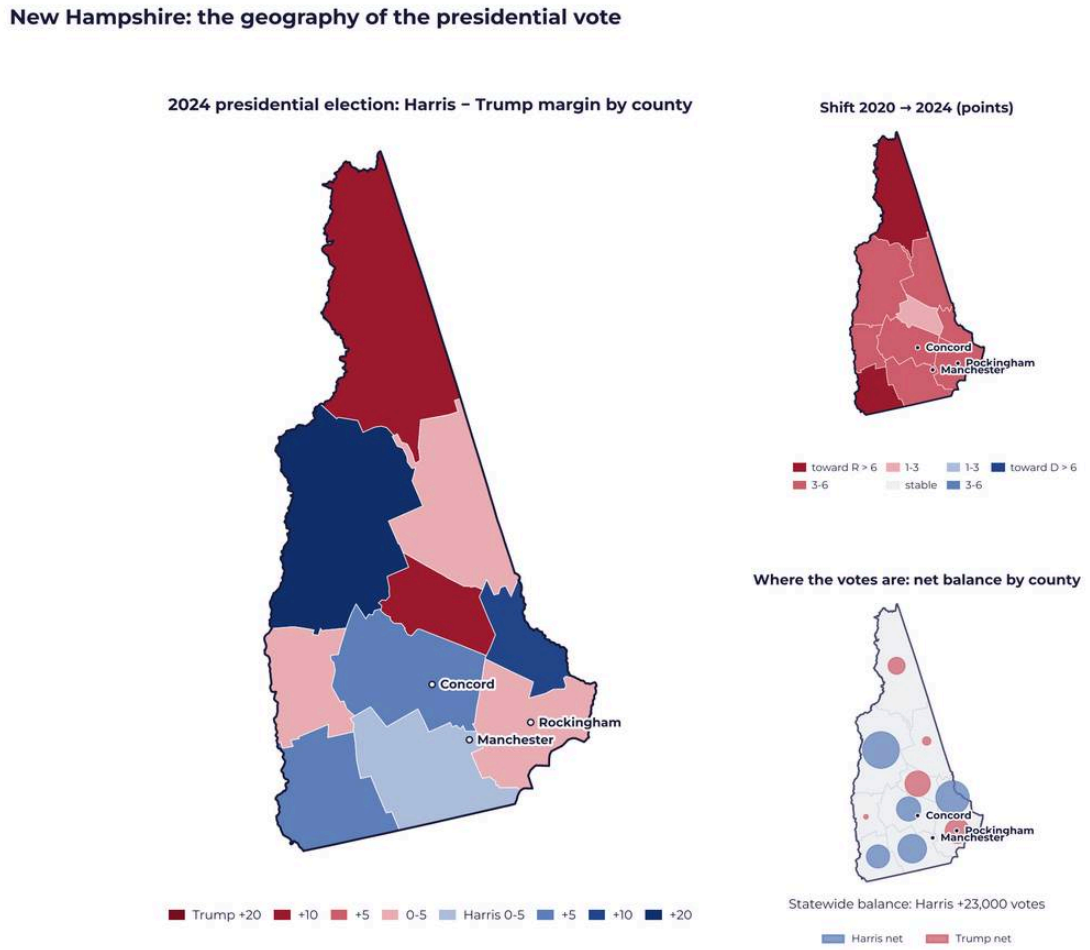


Figure 28. *New Hampshire: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

New Hampshire by the numbers

Indicator	Value
2024 presidential election	Harris 50.65%, Trump 47.87%, or 2.8 points
2020 presidential election	Biden lead of about 7.4 points; a 4.6-point shift in 2024[67]
Key Democratic counties	Grafton (Hanover, Lebanon) 59.03%, Strafford 55.25%, Cheshire 54.15%, Merrimack (Concord) 51.82%, Hillsborough 50.66%
Republican counties	Coos 56.19%, Rockingham 50.53%, Belknap, Carroll, Sullivan; Carroll, Rockingham, and Sullivan flipped

[67] Wikipedia, "2024 United States presidential election in New Hampshire," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_New_Hampshire; Brookings, January 2, 2025, https://www.brookings.edu/articles/what-the-nation-told-us-in-2024-state-by-state/.

Indicator	Value
Swing counties	Hillsborough 28.4% of the vote, Harris plus 2.9; Rockingham 24.6%, Harris minus 2.4; declines of nearly 5 points in both[68]
Seat	open, Jeanne Shaheen is retiring
September 8 primaries	Pappas 65.0%, Karishma Manzur 32.7%; Sununu 68.4%, Scott Brown 26.6%[69]
Money as of October 14	raised: Pappas $23.7 million, Sununu 5.68; cash on hand: 1.98 million versus 1.71[70]
Outside spending	national Republican advantage of about $20 million, according to Cook
Polls since September 1	Pappas ahead in 10 of 11; a 46-46 tie in co/efficient (September 9-11); Trafalgar in late September 46-42 and 47-41, possibly the same survey
Latest polls	Saint Anselm College (October 19-20, 1,672 likely voters) 50-43; National Public Affairs (October 8-12) 50-43[71]
Average and projection	Pappas plus 7.9 in the polls, plus 5.5 projected
Pappas's chances	77.6%; low of 59.6% on September 1, then an almost continuous rise
Decomposition	national environment plus 7.2; state voting history plus 4.3; incumbency and candidates minus 2.5; state polling minus 0.8; other data used minus 0.2; poll bias correction minus 2.3; 90% interval from 6.4 points for Sununu to 17.5 for Pappas
Ratings	Cook: Lean D, after a stint at Toss-up in mid-October; as of October 20, Inside Elections Tilt D, Sabato and DDHQ Likely D
Cross-race effects	Sununu wins: Democratic Senate at 11.5%; Pappas wins: 51.1%, 35.5% if he wins narrowly

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Hillsborough, around Manchester and Nashua, and Rockingham, on the Massachusetts border, account for more than half of the electorate. They are the ones that decide the election.

Candidates and campaign

Jeanne Shaheen is retiring. Representative Chris Pappas and John E. Sununu won their primaries easily. At the first debate, on October 13 in North Conway, Sununu recalled that he had opposed Trump in 2016 and in 2024. Trump nonetheless backs him today. He described Pappas as “part of the problem,” and Pappas distanced himself from Biden on the border[72]. He also received the endorsement of Don Bolduc, a former Republican Senate candidate.

[68] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[69] Wikipedia, “2026 United States Senate election in New Hampshire,” page as of September 27, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_New_Hampshire.
[70] Ballotpedia, “United States Senate election in New Hampshire, 2026,” https://ballotpedia.org/United_States_Senate_election_in_New_Hampshire,_2026.
[71] Ballotpedia, “United States Senate election in New Hampshire, 2026,” https://ballotpedia.org/United_States_Senate_election_in_New_Hampshire,_2026.
[72] Political.org, October 13, 2026, https://political.org/2026/10/13/sununu-keeps-trump-at-arms-length-in-first-new-hampshire-senate-debate-ties-chris-pappas-to-biden/.

Pappas has raised four times as much as Sununu, but he has spent nearly all of it. According to the Cook Political Report, however, national Republicans started out with the advantage in the state.

Polls and model

The most recent polls give Pappas a 7-point lead.

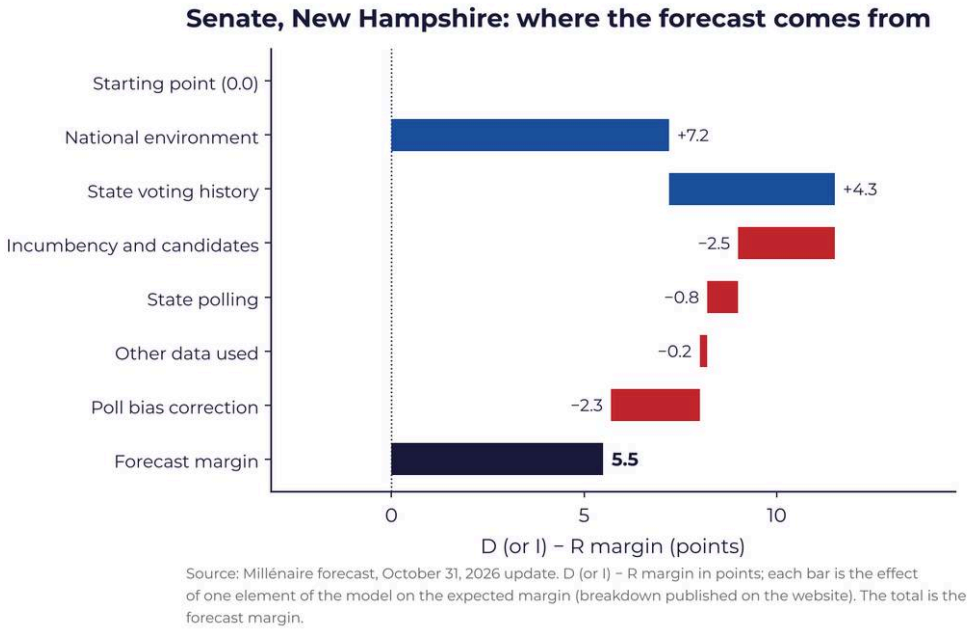


Figure 29. *New Hampshire: decomposition of the October 31 projection.*

The model trims this lead, mainly through the weight of incumbency and candidates and through the poll error correction. Pappas's chances have been rising since the primary.

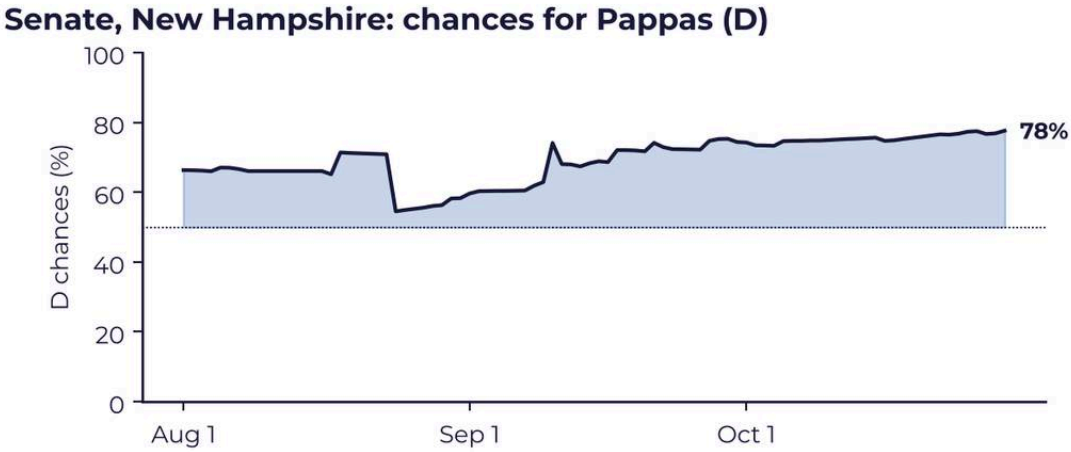


Figure 30. *New Hampshire: Chris Pappas's chances according to our model, August 1 to October 31, 2026.*

Cross-race effects. In the simulator, losing this seat would almost certainly cost the Democrats the Senate. A narrow Pappas win would not be enough for them either. It is the same pattern as in Minnesota, another Democratic seat in the North.

Our analysis

Pappas leads widely and steadily. Sununu has not pulled ahead by setting himself apart from Trump. For the race to flip, in our reading, it would take a polling error like 2024's, when the state shifted by nearly 5 points. It would also take a protest vote in Rockingham, which Trump won by 2.4 points.

ALASKA: MARY PELTOLA VS. DAN SULLIVAN

In Alaska, a state Trump won by 13 points, Mary Peltola leads in most polls. Yet the model makes incumbent Dan Sullivan the favorite: an 81.5% chance and a projected lead of 6.5 points.

Alaska by the numbers

Indicator	Value
2024 presidential election	Trump 54.54%, Harris 41.41%, or 13 points

Indicator	Value
2020 presidential election	Trump lead of about 10 points[73]
Key Democratic areas	Anchorage 48.74% to 47.35%; Juneau 60.70%; Bethel 51.09%; Nome 50.98%
Republican areas	Fairbanks 56.9% for Trump; Matanuska-Susitna 72.5%
2022 Senate	Lisa Murkowski reelected by ranked-choice voting, 53.7% to 46.3%
Incumbent	Dan Sullivan, backed by Trump and Lisa Murkowski
August 18 open primary	Peltola 49.5%, Sullivan 41.4%, his namesake 2.5%, David Leslie[74]
Money and outside spending	Peltola $17 million raised in the third quarter, according to her campaign; Senate Leadership Fund $17 million in ads for Sullivan[75]
Polls since September 1	12: Peltola ahead in 8, Sullivan in 2 (Trafalgar, co/efficient), 2 ties
Main polls	NYT/Siena (September 24 to October 1) 50-43; Alaska Survey Research (October 1 to 3) 47-45, then 51-49 after transfers; Data for Progress 47-44; PPP 48-47[76]
Le Millénaire average	Sullivan plus 0.4 points; namesake at 3.5% on average
Projection and chances	Sullivan ahead by 6.5 points, 81.5% chance
Decomposition	national environment plus 7.2; state voting history minus 11.7; incumbency and candidates minus 15.1; state polling plus 15.0; other data used plus 0.4; poll bias correction minus 2.3
90% interval	from 18.5 points for Sullivan to 5.5 points for Peltola
Peltola's chances	8.0% on August 1, 13.9% on October 1, 18.5% on October 31
Cross-race effects	Peltola wins: Democratic Senate at 80.8%; Sullivan wins: 33.7%

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Geography

Our data do not match precincts between 2020 and 2024, so we do not publish a map. Harris narrowly held Anchorage, as well as Juneau and part of the Native west.

Peltola, herself Yup'ik, is counting on the Native vote in the west, where Trump nonetheless gained ground in 2024. She will also need a clearer lead in Anchorage than Harris had.

Candidates and campaign

The election takes place in two stages: an open primary from which four candidates advance, then a ranked-choice vote.

[73] Wikipedia, "2024 United States presidential election in Alaska," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Alaska.
[74] Anchorage Daily News, August 28, 2026, https://www.adn.com/politics/2026/08/28/alaska-election-officials-count-more-ballots-growing-peltolas-lead-in-closely-watched-us-senate-race/.
[75] Congress.net, October 13, 2026, https://congress.net/?p=9621.
[76] Newsweek, October 20, 2026, https://www.newsweek.com/mary-peltola-is-pulling-ahead-in-the-final-stretch-against-dan-sullivan-12592675; 270toWin, https://www.270towin.com/2026-senate-polls/alaska.

Sullivan's namesake has become the story of the campaign. The Alaska Supreme Court upheld his presence on the ballot on July 2, without a party label. Sullivan sees it as a manipulation by the Peltola camp. KTUU found only small donations from the namesake to Peltola, $100 in 2022 and $30 in 2024, and Peltola, the state Democratic Party, and the Democratic Senatorial Campaign Committee deny it[77]. According to Scripps News, the Department of Justice is seeking to block certification of the result on the grounds of this name confusion[78]. No ruling is known yet.

At the October 15 debate, Peltola accused Sullivan of having voted 14 times in favor of the war in Iran, which she links to prices in Alaska. Sullivan highlighted energy production and declared “Sometimes I oppose the Trump administration”[79]. Peltola turned down Kamala Harris's endorsement, according to the New York Times. The same newspaper revealed on October 28 that the candidacy of the second Dan Sullivan was a deliberate strategy on Peltola's part, with the approval of the Democratic leadership, to mislead Republican voters who would want to vote for the real incumbent senator Dan Sullivan[80].

Polls and model

Our average, which incorporates the namesake and the ranked-choice count, nonetheless puts Sullivan ahead. In our reading, this is mainly because it assigns him the votes of the Republican namesake in the final round.

[77] Wikipedia, “2026 United States Senate election in Alaska,” https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Alaska.
[78] Scripps News (Joe St. George), October 26, 2026, https://www.scrippsnews.com/politics/america-votes/trump-heads-to-mississippi-as-more-red-states-enter-the-midterm-conversation-with-8-days-to-go.
[79] Newsweek, October 15-16, 2026, https://www.newsweek.com/dan-sullivan-mary-peltola-alaska-pols-debate-12574508.
[80] Browning, K. (2026). Inside Democrats’ Secret Effort to Stack Alaska’s Ballot. The New York Times. https://www.nytimes.com/2026/10/28/us/politics/alaska-dan-sullivan-conspiracy-peltola.html

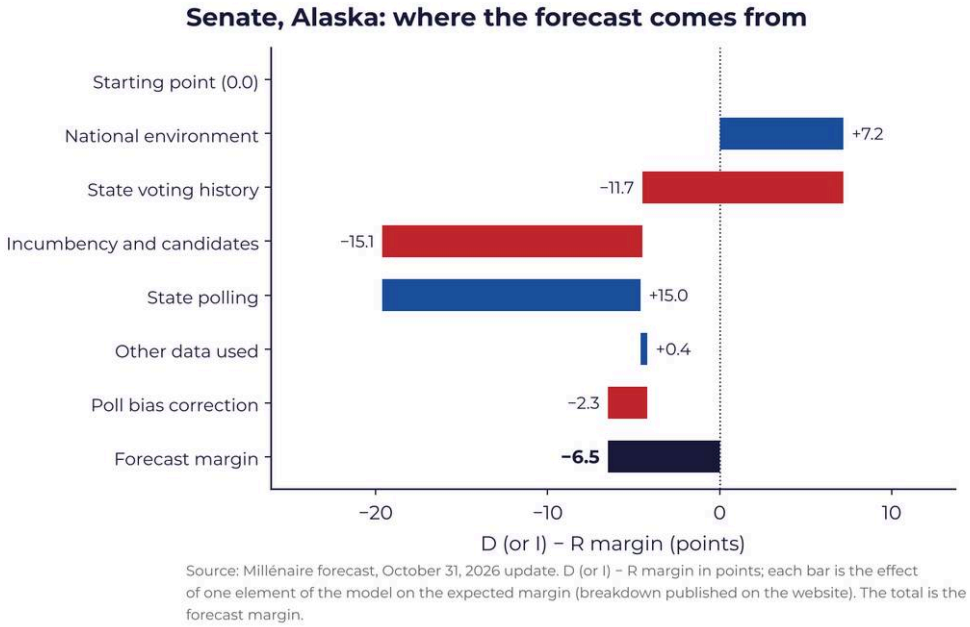


Figure 31. *Alaska: decomposition of the October 31 projection.*

The rest of the gap comes from voting history, the incumbency bonus, and the poll error correction, all of which work against Peltola. Her chances have nonetheless risen markedly since August.

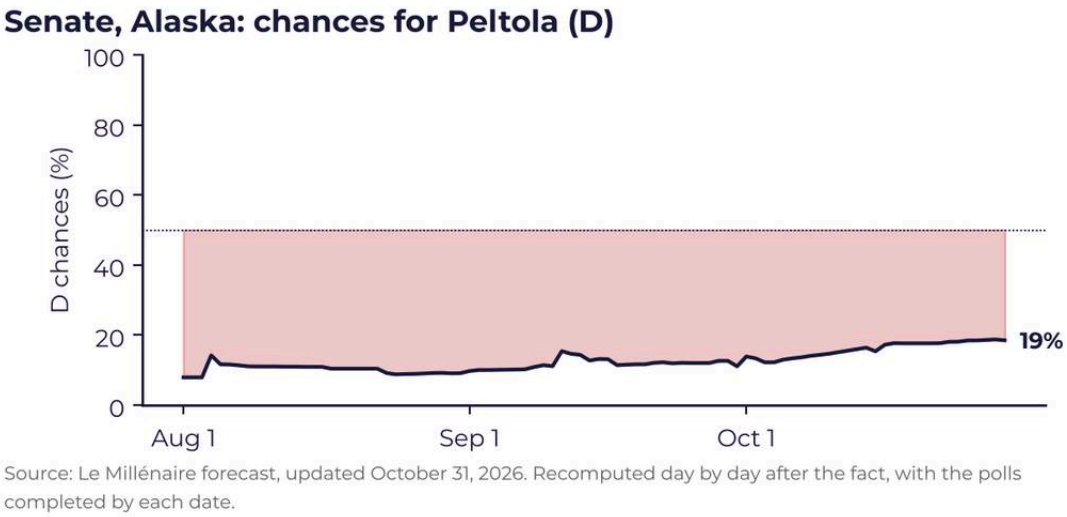


Figure 32. *Alaska: Mary Peltola's chances according to our model, August 1 to October 31, 2026.*

Cross-race effects. The verdict will come late: the final result may not be known until about two weeks after the vote, once mail ballots have arrived and the ranked-choice count has been carried out.

Our analysis

For the state of Alaska, the polls and the projection diverge by 6.1 points, almost as much as in Ohio. Peltola won the August 18 primary by 8 points. She leads in 8 of the 12 polls. Sullivan has the incumbency bonus on his side, and a state where polls have often overestimated Democrats. Peltola would need a Native vote in the west (Bethel, Kusilvak, Nome) back at its 2022 level, and a clear lead in Anchorage. The evening of November 3 will settle nothing. Then will come the mail ballots, then the ranked-choice count, and perhaps a court ruling as well.

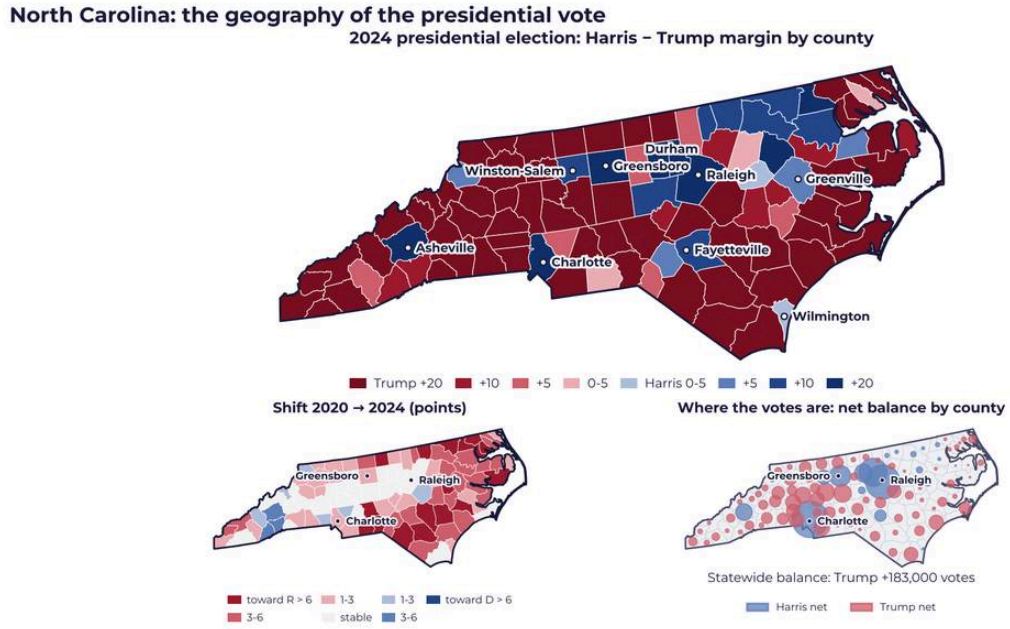
NORTH CAROLINA: ROY COOPER VS. MICHAEL WHATLEY

Former Governor Roy Cooper leads in every poll, and the Senate Leadership Fund has pulled its ads for Whatley. It is the best Democratic pickup opportunity on the entire map.

Geography

The 2024 shift to the right there was one of the smallest among the battleground states. Brookings attributes this to the organization of the state Democratic Party[81]. The Democratic vote is concentrated in the Piedmont metro areas and in the northeastern “Black Belt.”

[81] Wikipedia, “2024 United States presidential election in North Carolina,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_North_Carolina.



Source: official county results compiled by T. McGovern (github.com/tonmcg), 2020 and 2024 presidential elections; calculations and mapping by Le Millénaire. Circles proportional to the vote margin between Harris and Trump. Gray: unmatched county.

Figure 33. *North Carolina: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

North Carolina by the numbers

Indicator	Value
2024 presidential election	Trump 50.86%, Harris 47.65%, or 3.2 points; a 1.9-point shift to the right since 2020
Key Democratic counties	Durham 79.85%, Mecklenburg 65.19%, Wake 61.66%, Guilford 60.03%, Forsyth 55.76%, Hertford 62.90%, Edgecombe 60.95%; Wake and Mecklenburg make up 21.6% of the vote[82]
Swing counties	Anson to Trump, a first since 1972; Pasquotank too, a first since 1988; New Hanover to Harris by 0.6 points; Buncombe plus 3.7 points for Harris
Latinos (exit poll)	50-49 for Trump
Seat	Open: Thom Tillis is leaving the Senate
March 3 primaries	Cooper 92.0%; Whatley 64.6%, Don Brown 15.6%[83]
Money as of June 30	Cooper $34.98 million raised, 20.72 on hand; Whatley 11.27 and 3.46
Polls since September 1	19, all with Cooper ahead, by 5 to 15 points
SurveyUSA for WSOC and WRAL (October 7-11)	Cooper 54%, Whatley 40%; Trump approval at 37%
Quantus (October 26); Harper Polling, Republican	Cooper 52%, Whatley 43%; Cooper 49%, Whatley 39%
Projection and chances	Cooper 85.9%; projected lead of 7.8 points, versus 10.9 in the polls
Decomposition	National environment plus 7.2; state voting history minus 1.7; incumbency and candidates plus 3.4; state polling plus 1.6; other data used minus 0.3; poll bias correction minus 2.3; 90% interval from Whatley plus 4.1 to Cooper plus 19.8
Change since August	Cooper's chances between 83.8% and 88.0%
Cross-race effects	Whatley win: Democratic Senate chances at 8.0%, the lowest of all races; Cooper win: 48.0%, 29.5% if he wins by less than 5 points
Early voting as of October 23	1,453,516 ballots (1,063,702 in 2022); Democrats 41.5%, Republicans 24.0%, unaffiliated 34.3%; in 2022: 39.1% and 31.3%; in 2024: Republicans 34.5%, Democrats 33.2%; Democratic lead of 17.5 points, versus 7.8 in 2022[84]

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

In the west, ten counties hit by Hurricane Helene voted more strongly for Harris than for Biden: Ashe, Avery, Buncombe, Haywood, Henderson, Macon, Madison, Mitchell, Polk, and Transylvania. At the same time, Trump took two counties that had not voted Republican in decades.

Candidates and campaign

Thom Tillis is leaving. To succeed him, the Democrats chose former Governor Roy Cooper, and the Republicans Michael Whatley, former chair of the Republican National Committee, backed by Trump. The money has leaned

[82] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[83] Wikipedia, "2026 United States Senate election in North Carolina," page as of September 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_North_Carolina.
[84] North Carolina State Board of Elections, ballots accepted as of October 23, 2026, compiled by Le Millénaire; for 2024: NCSBE, Daily Absentee Stats Report, October 26, 2024, https://s3.amazonaws.com/dl.ncsbe.gov/Press/2024%20General/NC%20Absentee%20Stats%20for%202024%20General/2024-10-26%20Daily%20Absentee%20Stats%20Report%20-%202024%20General.pdf.

toward Cooper throughout the campaign, three to one in funds raised as of June 30. As in-person early voting approached, the Senate Leadership Fund pulled its ads for Whatley, which Cooper attributed to the polls[85]. According to AP, Republicans redirected to Kansas funds planned for North Carolina[86].

Polls and model

No survey published since September shows Whatley ahead, not even one from a Republican pollster.

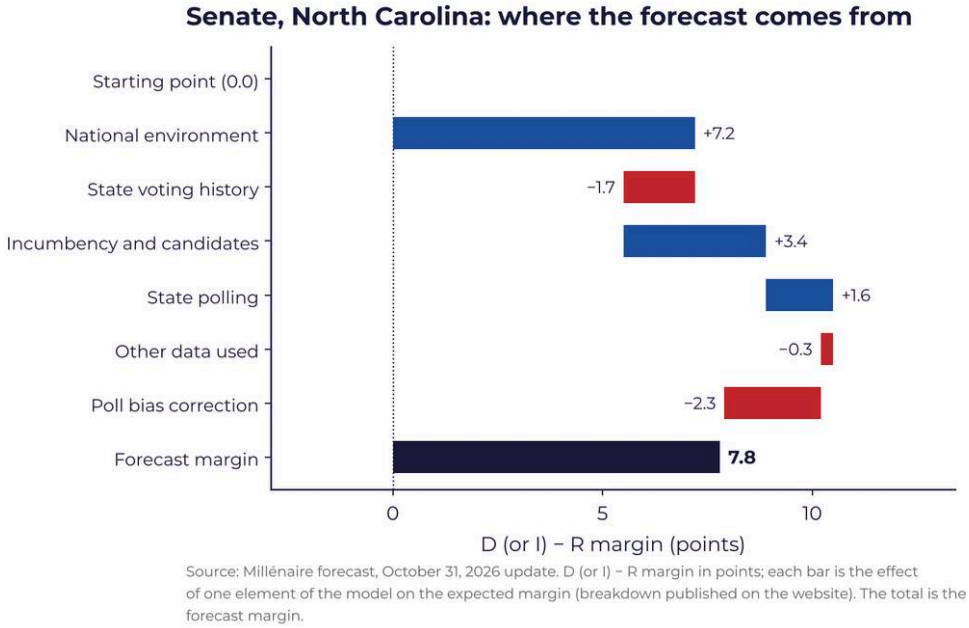


Figure 34. *North Carolina: decomposition of the October 31 projection.*

The model brings Cooper's lead below the level of the polls. The national environment, the weight of incumbency and candidates and, more modestly, the state polls help him. The state's voting history and above all the poll error correction weigh in the other direction.

Cross-race effects. A Cooper defeat would be the worst scenario on the entire map for the Democrats. A narrow win would raise their Senate chances only modestly.

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[85] WSOC-TV, October 13, 2026, https://www.wsoctv.com/news/local/roy-cooper-leads-michael-whatley-wsocwral-poll/2X632IFVOFC3XCC2KKQSVURQGE/.
[86] AP (J. Hanna and J. Cappelletti), October 22, 2026, https://www.click2houston.com/news/politics/2026/10/22/the-gop-is-on-a-rescue-mission-in-kansas-where-dems-havent-won-a-senate-race-in-nearly-a-century/.

Early voting. North Carolina and Iowa are the two contested Senate states for which partisan early voting data are available. Here, registered Democrats have built a much wider lead than in 2022, whereas in 2024 Republicans were ahead at the same point before the election. Iowa shows nothing comparable. Caution is warranted, however. Some Republicans now vote on Election Day, and a ballot from a registered Democrat is not necessarily a vote for Cooper.

Our analysis

Wake and Mecklenburg: Harris won 61.7% and 65.2% there in 2024. If Cooper stays below 60% in Wake and 65% in Mecklenburg in the early returns on November 3, the race will be closer than expected. For him to lose, it would take a large-scale polling error, or a rural and Latino vote far more mobilized on Election Day than the polls show.

SOUTH CAROLINA: ANNIE ANDREWS VS. DARLINE GRAHAM

Annie Andrews leads in our polling average. Yet it is Darline Graham (sister of the late Lindsey Graham), appointed senator in July, whom the model makes the favorite. The gap comes from what is added to the surveys: the state's Republican history, and an incumbency bonus granted as if she had been elected.

Geography

The 2024 shift to the right was clear. Harris won only two of the ten most populous counties. The Republican base holds the northwest and the coast, and extends into the suburbs of Charleston and Charlotte.

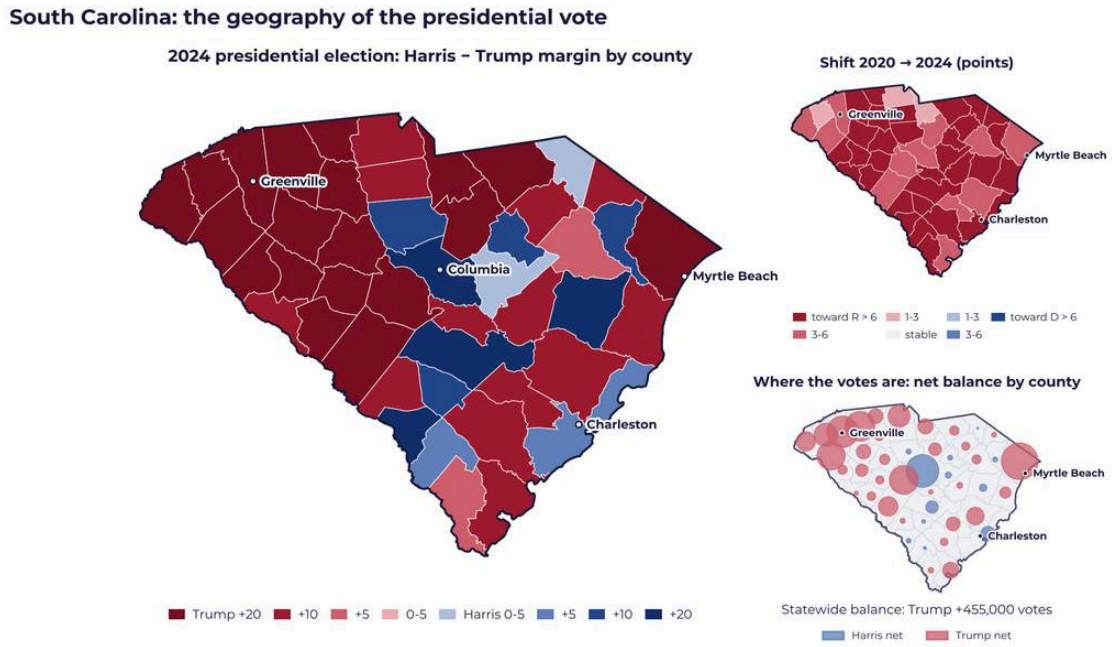


Figure 35. *South Carolina: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

South Carolina by the numbers

Indicator	Value
2020 presidential election	Trump plus 11.7 points
2024 presidential election	Trump 58.2%, Harris 40.4%, or 17.9 points; a 6.2-point shift[87]
Key Democratic counties	Richland (Columbia): Harris plus 34.6; Charleston: Harris plus 5.7, down 7.2
Republican strongholds	Greenville (10.3% of the vote): Trump plus 22.2; Spartanburg plus 33.6; Horry plus 38.5; Berkeley and York: 16 to 19 points
Previous election for the seat (2020)	Lindsey Graham 54.5%, Jaime Harrison 44.2%, or 10.3 points[88]
June 9 primaries	Lindsey Graham 56.8%; Andrews 61.5%, Brandon Brown 30.2%
Special Republican primary	August 11: Darline Graham 32.8%, Ralph Norman 24.6%, Russell Fry 19.7%, Mark Sanford 14.9%; August 25 runoff: Graham 52.4%, Norman 47.6%[89]
Money as of August 5	Andrews $10.80 million raised, 4.12 on hand; Graham 0.35 million raised
Polls since September 1	Five, all close
Impact Research for Fresh Start SC (October 15-21, 800 likely voters)	Andrews 45%, Graham 44%
Trafalgar (October 18); InsiderAdvantage (October 2)	Graham 49%, Andrews 46%; 46 to 45[90]
Average and projection	Andrews plus 1.3 in the average; Graham plus 7.0 projected; 90% interval from Graham plus 19.0 to Andrews plus 5.0
Chances	Graham 83.3%; Andrews 1.8% as of September 1, 16.7% on October 31
Decomposition	National environment plus 7.2; state voting history minus 16.4; incumbency and candidates minus 14.9; state polling plus 19.9; other data used minus 0.5; poll bias correction minus 2.3
Cross-race effects	Andrews win: Democratic Senate chances at 78.2%; Graham win: 35.2%, 49.8% if she wins by less than 5 points

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

To win, Andrews would need very strong turnout among Black voters in the Midlands and the “Low Country.” She would also need a Republican decline in Berkeley and York. Even in 2020, Lindsey Graham had not crushed Jaime Harrison.

Candidates and campaign

The race changed in nature on July 11. Lindsey Graham, winner of the June 9 primary, died suddenly of cardiac arrest. Governor Henry McMaster appointed

[87] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations. Our desk research did not cover this state's geography: the figures in this section come from this database alone.
[88] Wikipedia, “2020 United States Senate elections,” https://en.wikipedia.org/wiki/2020_United_States_Senate_elections.
[89] Wikipedia, “2026 United States Senate election in South Carolina,” page as of September 20, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_South_Carolina.
[90] Ballotpedia, “United States Senate election in South Carolina, 2026,” https://ballotpedia.org/United_States_Senate_election_in_South_Carolina,_2026; WCIV ABC News 4, September 28, 2026, https://abcnews4.com/news/local/story/candidates-experts-react-after-new-poll-shows-scs-us-senate-race-as-neck-and-neck-annie-andrews-darline-graham-ralph-norman.

his sister, Darline Graham, on July 13. She was sworn in the next day, the state's first woman senator. A special Republican primary then chose her in a runoff against Ralph Norman, who was backed by Nikki Haley, Nancy Mace, and Mark Meadows. She, for her part, has the support of Trump, Thune, Tim Scott, and McMaster.

In August, Annie Andrews had an overwhelming financial lead over a senator appointed only a few weeks earlier. October figures are missing. We found no trace of any general election debate. The Cook Political Report nonetheless moved the race from “Likely R” to “Lean R” on October 20[91]. Ballotpedia was still showing the old rating.

Polls and model

Another anomaly: the surveys showing a close race come mostly from Republican-leaning pollsters (Trafalgar, InsiderAdvantage, Rasmussen).

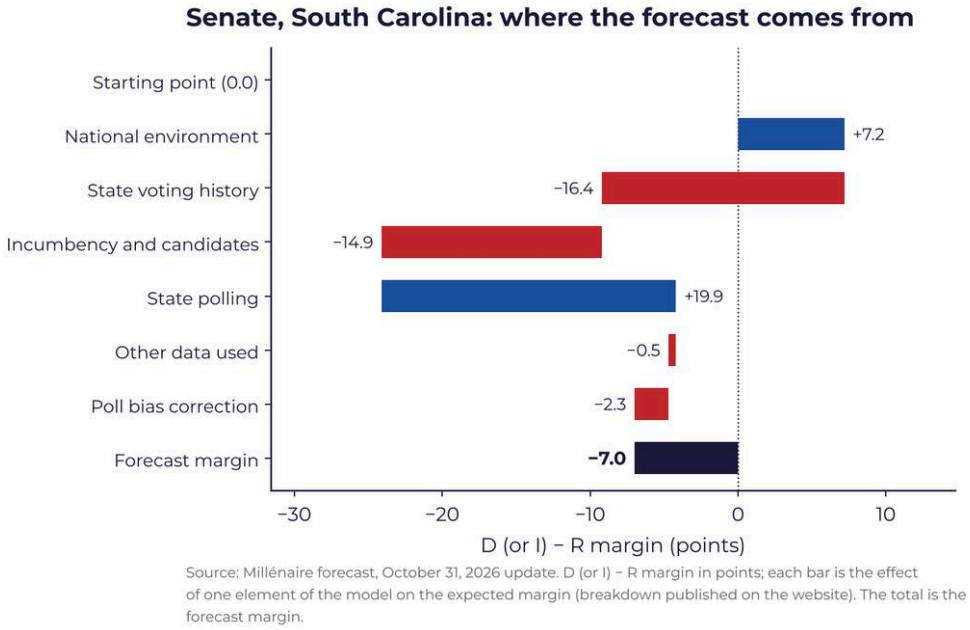


Figure 36. *South Carolina: decomposition of the October 31 projection.*

As in the other Republican states defended by an incumbent, the state polls pull toward Andrews in the decomposition (plus 19.9 points). Most of the gap

[91] Political.org, October 20, 2026, https://political.org/2026/10/20/cook-political-report-shifts-minnesota-senate-race-toward-gop-south-carolina-toward-democrats/.

comes from voting history (minus 16.4) and the weight of incumbency and candidates (minus 14.9). This bonus raises questions. It weighs heavily even though Darline Graham was only appointed in July, and without it the projected gap would narrow markedly (our reading of the decomposition). Andrews's chances have climbed since the Republican runoff.

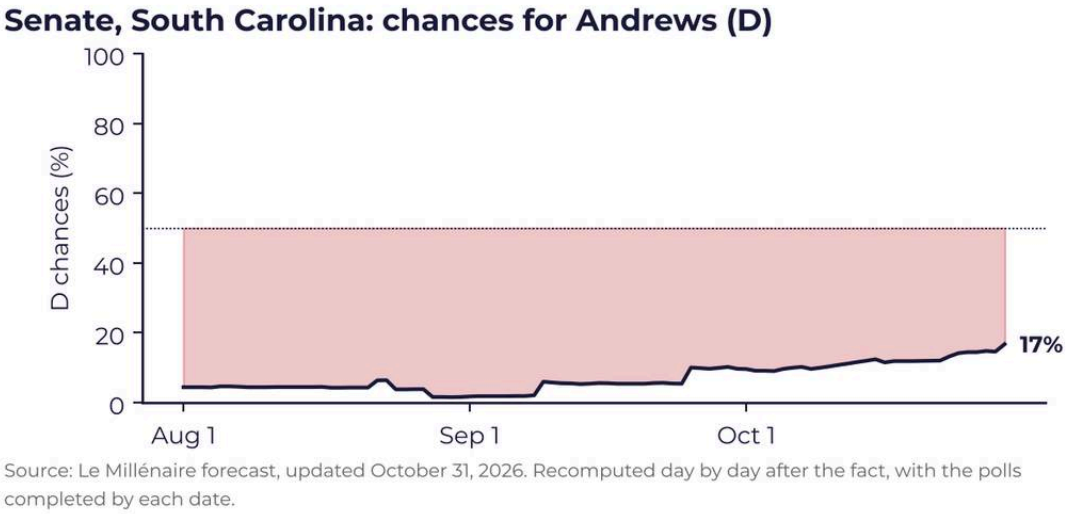


Figure 37. *South Carolina: Annie Andrews's chances according to our model, August 1 to October 31, 2026.*

Cross-race effects. In our simulator, few races weigh as heavily on control of the Senate. Even a narrow Graham win, in a state Trump won by 18 points, would noticeably raise Democratic chances.

Our analysis

To prevail, Democrat Andrews would need Black turnout higher than in 2024 and a protest vote by moderate Republicans against a senator appointed by Henry McMaster after her brother's death. On election night, we will look first at Charleston, which Harris won by 5.7 points, and Berkeley. An Andrews margin of more than 15 points in Charleston would be the first sign of an upset.

KANSAS: ADAM HAMILTON VS. ROGER MARSHALL

Kansas has not elected a Democratic senator since 1932. Yet the surveys show Adam Hamilton slightly ahead of Roger Marshall. Once this history is added to

the polls, the model makes Marshall a clear favorite.

Geography

Harris won only five counties. Johnson County, the large affluent suburb of Kansas City, is the only Biden-won county where she improved the Democratic margin. The rural west remains overwhelmingly Republican.

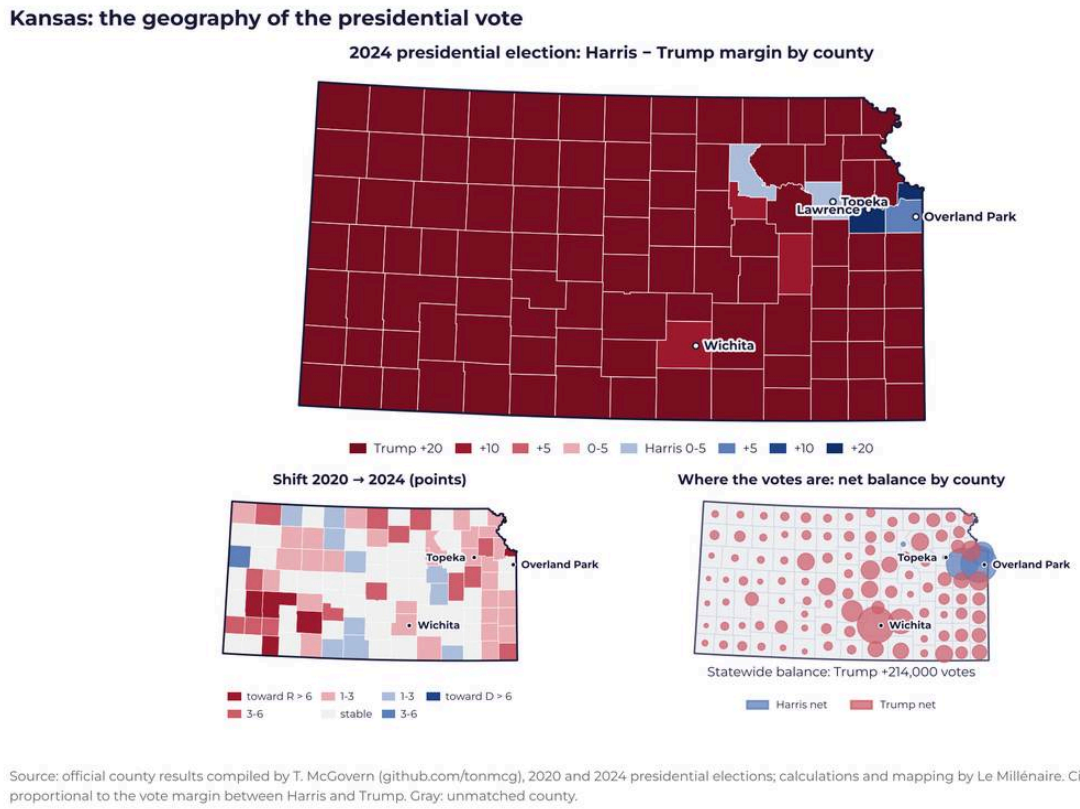


Figure 38. *Kansas: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote balance by county (proportional circles).*

Kansas by the numbers

Indicator	Value
Presidential elections	2024: Trump 57.16%, Harris 41.04%, or 16.1 points; 2020: about 14.6 points[92]
Key Democratic counties	Douglas (Lawrence) 68.20%, Wyandotte (Kansas City) 61.14%, Johnson 53.36% with a margin of 8.49 points and 25.9% of the state's vote; narrowly, Riley 49.62%, Shawnee 49.26%
Other counties	Sedgwick (Wichita, 16.1% of the vote): Trump 56.09%, plus 13.8 points; rural west: 88 to 92% Republican

[92] Wikipedia, "2024 United States presidential election in Kansas," accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Kansas.

Indicator	Value
Electorate (AP)	Some 2 million registered voters: under 26% Democrats, over 44% Republicans; Laura Kelly reelected in 2022 with 49.5% to 47.3%
Previous election for the seat (2020)	Marshall 53.5%, Democrat 41.8%
Money since the primary (AP)	Hamilton about $8 million, more than 10,000 donations from Kansans; Marshall $905,000, about 200 donations from Kansans
Ads (AdImpact)	About $71 million, a state record: more than 38 million on the Democratic side, more than 32 on the Republican side
Polls since September 1	Eight, none with a gap of more than 5 points
InsiderAdvantage	October 9 and 10: Hamilton 47.5%, Marshall 46.7%; October 16: Marshall 48%, Hamilton 47%[93]
YouGov (September 24-October 4); NYT/Siena (September 22-30)	Hamilton 48%, Marshall 45%; 45-45 with the Libertarian at 3% according to 270toWin, 47-46 for Marshall according to Ballotpedia
Average and projection	Hamilton plus 3.0 in the average; Marshall plus 5.5 projected; 90% interval from Marshall plus 17.5 to Hamilton plus 6.5
Chances	Marshall 77.6%; Hamilton 2.2% on August 1, 10.7% on October 1, about 14% thereafter, 22.4% on October 31
Decomposition	National environment plus 7.2; state voting history minus 14.6; incumbency and candidates minus 15.0; state polling plus 20.0; other data used minus 0.6; poll bias correction minus 2.3
Ratings as of October 20	Cook and Sabato: Toss-up
Early voting (AP)	More than doubled compared with the same point in the last midterm; partisan breakdown unknown
Cross-race effects	Hamilton win: Democratic Senate chances at 80.3%, among the highest in the simulator; Marshall win: 31.5%, 47.2% if he wins by less than 5 points

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Democrats are a small minority among registered voters. It was moderate Republicans and independents who reelected Democratic Governor Laura Kelly and protected abortion rights in the 2022 referendum[94]. Hamilton relies on the Kansas City suburbs, where his church, Church of the Resurrection, has about 25,000 members. History nonetheless works against him. No Democrat has come within 10 points in a Senate election since 1974. In 2014 as in 2020, races considered close in mid-October ended in clear wins, for Pat Roberts and then for Marshall.

Candidates and campaign

Adam Hamilton, founding pastor of a Methodist megachurch, won the August 4 Democratic primary. His fundraising dwarfs the incumbent's, and ad

[93] HPPR/Kansas Reflector, October 16, 2026, https://www.hppr.org/hppr-news/2026-10-16/election-analyst-candidate-quality-key-to-roger-marshalls-slide-adam-hamiltons-rise-in-kansas.
[94] AP (J. Hanna and J. Cappelletti), “The GOP is on a rescue mission in Kansas, where Dems haven't won a Senate race in nearly a century,” October 22, 2026, https://www.click2houston.com/news/politics/2026/10/22/the-gop-is-on-a-rescue-mission-in-kansas-where-dems-havent-won-a-senate-race-in-nearly-a-century/.

spending has broken the state record. Trump came to hold a rally in Park City on October 19.

A New York Times investigation, cited by AP, has damaged Marshall. His gynecology practice reportedly initiated at least 700 debt collection proceedings between 1996 and 2016. In 81 cases, patients were reportedly arrested for failing to appear in court. Marshall calls this a “gross mischaracterization.” His campaign portrays Hamilton as “woke” using excerpts from his sermons. He has also distanced himself from Trump's position on the trade war with Canada because it directly affects Kansas, where the Canadian aircraft manufacturer Bombardier employs 1,200 people. Two Republican figures have nonetheless rallied to the pastor, including Leroy Towns, former chief of staff to Senator Pat Roberts. At the October 21 debate on WDAF-TV, Marshall himself summed up the stakes: “control of the Senate goes through Kansas”[95].

Polls and model

For the NYT/Siena survey, the two aggregators do not report the same result. They probably reflect two different questions.

[95] AP, October 22, 2026, same article, also published at https://www.actionnewsjax.com/news/politics/gop-is-rescue/GSE7T57OVEZABHW44OBYTI4LUU/.

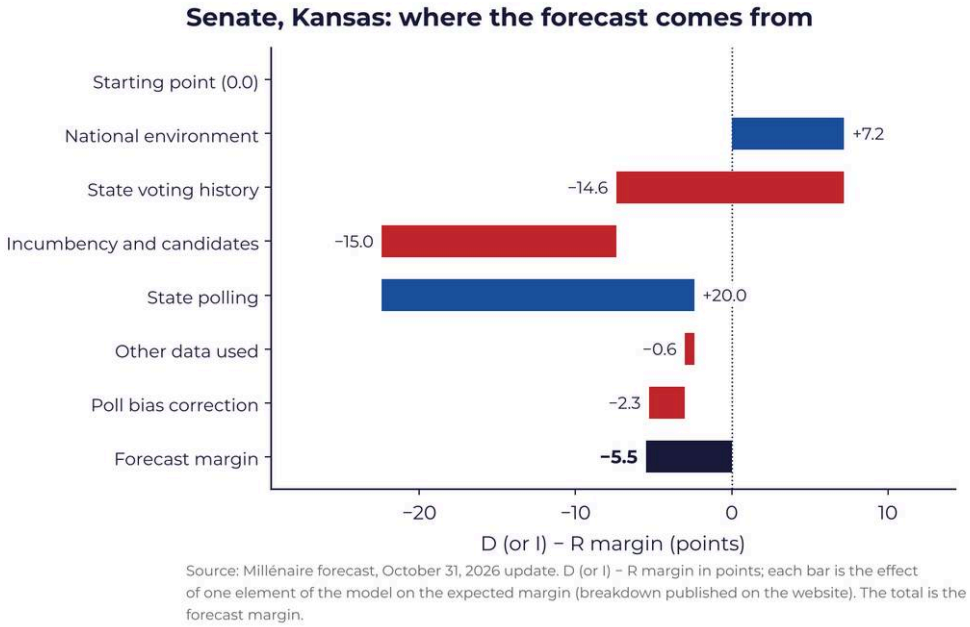


Figure 39. *Kansas: decomposition of the October 31 projection.*

The state polls pull toward Hamilton in the decomposition (plus 20.0 points). Voting history (minus 14.6) and the weight of incumbency and candidates (minus 15.0) account for most of the projected gap. His chances rose in August and September, leveled off in October, then climbed markedly at the end of the month.

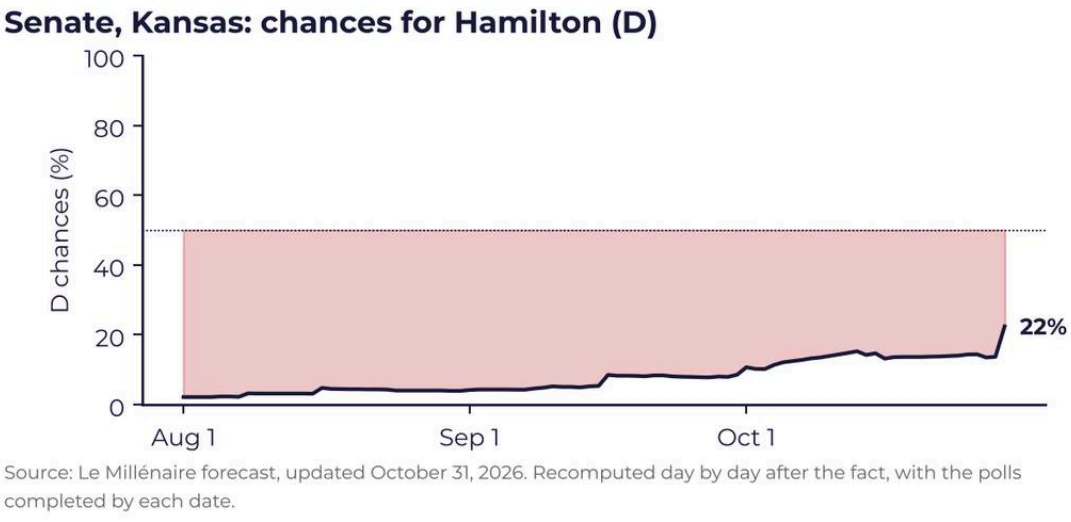


Figure 40. *Kansas: Adam Hamilton's chances according to our model, August 1 to October 31, 2026.*

Cross-race effects. Few races weigh as heavily in our simulator. Kansas, along with Ohio and Alaska, is where a Democratic win would raise the chances of a Senate majority the most.

Our analysis

In 2014 as in 2020, close October polls in Kansas preceded clear Republican wins. This time Hamilton has a clear financial advantage. To win, he would need a lead of more than 20 points in Johnson County and come close to even in Sedgwick, where Trump led by 13.8 points in 2024. These are the two counties we will be watching on November 3.

MONTANA: SETH BODNAR VS. KURT ALME

Kurt Alme has an 81.0% chance in the model and a projected 10.6-point lead over independent Seth Bodnar. Democrat Alani Bankhead is nonetheless still on the ballot. She is drawing part of the opposition vote.

Geography

Brookings notes that the Mountain West states shifted less than the national average. Here, the Democratic vote lives in the college towns and working-class towns. Billings and the northwest form the Republican base.

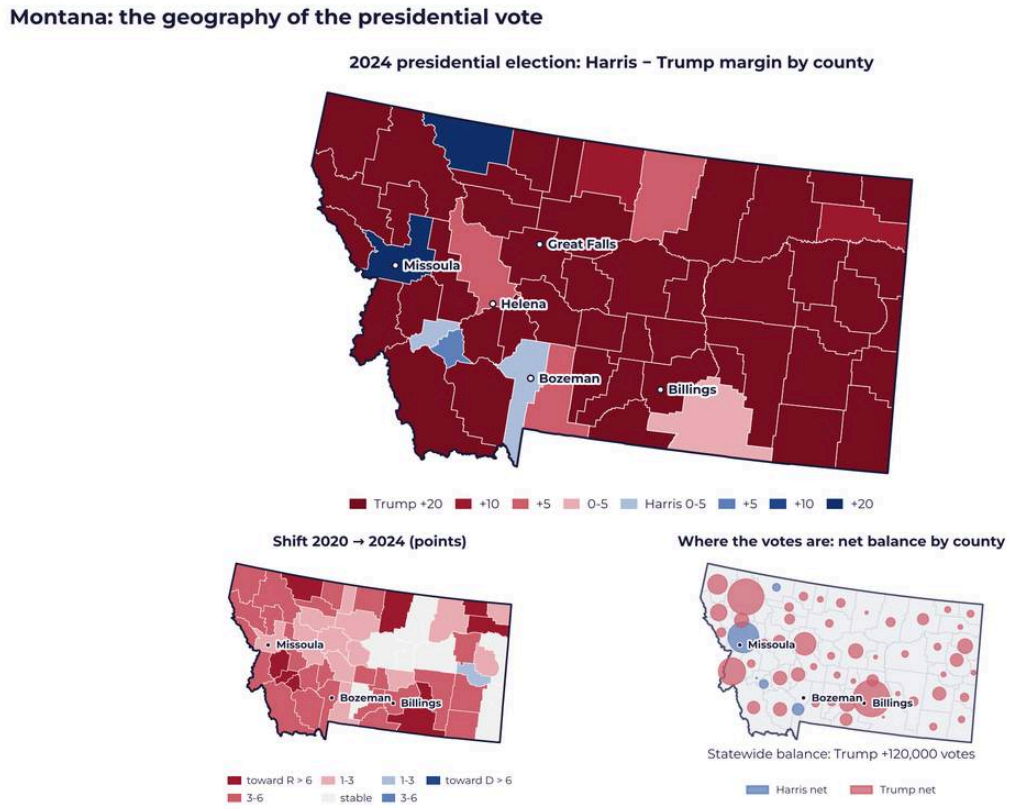


Figure 41. *Montana: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote margin by county (proportional circles).*

Montana by the numbers

Indicator	Value
2020 presidential	Trump +16.3 points
2024 presidential	Trump 58.4%, Harris 38.5%, a 19.9-point margin[96]
2024 Senate, other seat	Tim Sheehy 52.64%, Jon Tester 45.5%, a 7.1-point deficit
Key Democratic counties	Missoula, 12.1% of the vote, Harris +21.4; Gallatin (Bozeman), 11.6%, Harris +3.2; Silver Bow (Butte), Harris +7.0, down 7.1
Swing county	Lewis and Clark (Helena), Trump +5.7
Republican base	Yellowstone (Billings), 13.5% of the vote, Trump +27.1; Flathead (Kalispell) +33.8; Cascade (Great Falls) +22.3
Republican primary (June 2)	Alme 76.1%
Democratic primary	Bankhead 43.6%, Reilly Neill 33.0%
Money raised as of June 30	Bodnar $3.24 million, Alme $1.98 million, Bankhead $60,000

[96] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations. Our desk research did not cover this state's geography.

Indicator	Value
Outside spending	Montana Freedom PAC, supporting Bodnar: more than $1 million in ads[97]; Progressive Vet PAC: $592,000 in mailers
Polling average	Alme 40.4%, Bodnar 30.0%, Bankhead 16.1%; Alme +10.3 points
Projection	Alme +10.6 points; 90% interval from 30.4 points for Alme to 9.2 points for Bodnar
Chances	Alme 81.0%, Bodnar 19.0%
Trend	Bodnar 6.8% in early September, 15.7% in mid-October, 19.0% on October 31
Ratings	rated “Safe R” or “Likely R”
Knock-on effects	Democratic Senate chances: 69.6% if Bodnar wins, 36.1% if Alme wins

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

The real benchmark remains Jon Tester's defeat in 2024. He lost, but by a margin nearly three times smaller than Harris's in the same election.

Candidates and campaign

Senator Steve Daines withdrew on March 5, minutes before the filing deadline, then endorsed Kurt Alme. Alme won the primary in a landslide. Bankhead won hers, but Democratic leaders lined up behind Seth Bodnar, former president of the University of Montana, who is running as an independent. Jon Tester, Max Baucus, Joe Manchin and Adam Kinzinger back him, as do former Republican governor Marc Racicot and the state AFL-CIO. Bankhead refused to withdraw by the August 10 deadline, despite pressure from her party. One committee even paid for mailers on her behalf.

Alme, for his part, has Trump, Daines, Sheehy and Greg Gianforte. He debated once, on October 11, against Bodnar, Bankhead and Libertarian Kyle Austin. No other forum. Bodnar has raised more.

Polls and model

[97] Wikipedia, “2026 United States Senate election in Montana,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Montana.

Table 8. Montana: the three-candidate polls

Pollster (sponsor)	Date	Sample	Alme	Bodnar	Bankhead	Austin
Quantus Insights	Oct. 20	667 LV	46	29	21	n/a
Peak Insights (Alme campaign)	Oct. 7-12	500 LV	44	29	12	3
Concord Public Opinion Partners	Oct. 9	405 LV	35	37	13	1
American Pulse (NonStop Local)	Sept. 28	604 LV	45	26	19	n/a
Quantus Insights	Sept. 17	625 LV	44	24	23	n/a
Rutgers-Eagleton	Sept. 8-11	845 RV	38	30	16	5

Source: 270toWin, Ballotpedia. LV: likely voters; RV: registered voters; n/a: not available.

Combined, Bodnar and Bankhead match or exceed Alme everywhere, except in his own campaign's poll. Separately, they leave him in the lead. Only Concord, whose sponsor is unknown, puts Bodnar ahead.

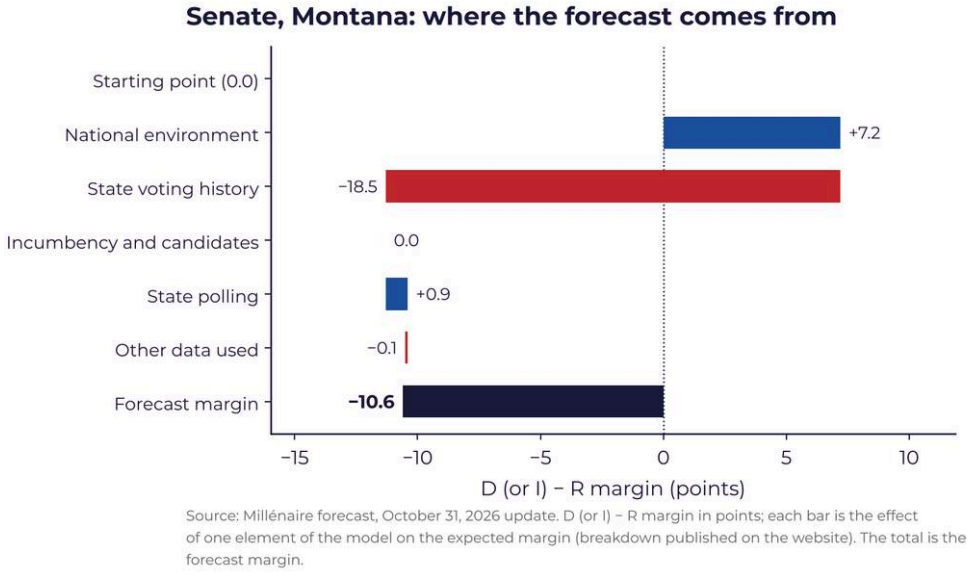


Figure 42. *Montana: breakdown of the October 31 projection (Bodnar vs. Alme race; no poll bias correction). Each bar is the effect of one model component on the expected margin, in points.*

As in Nebraska, the model treats this race between an independent and a Republican without correcting for polling error. The projection therefore sits almost exactly on the average. The Concord poll lifted Bodnar in mid-October, then the effect faded, before a new Concord poll, completed on October 23, revived it.

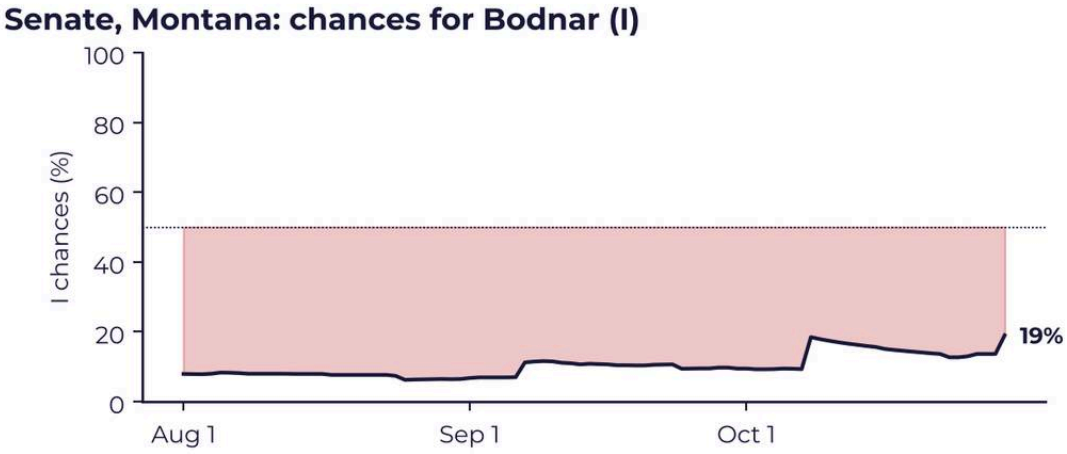


Figure 43. *Montana: Seth Bodnar's chances according to our model, August 1 to October 31, 2026.*

Knock-on effects. The simulator groups Bodnar with the Democrats. He refuses to "submit to a party leader," and his advisers say he would join neither caucus (see Part Four).

Our analysis

Alme never tops 46%, and the combined opposition catches up with him almost everywhere. To win, Bodnar needs Bankhead to fall below 10% in the final days, through tactical voting by Democratic voters. On election night, watch Bankhead's share in Missoula and Gallatin (Bozeman), which Harris won by 21.4 and 3.2 points. Above 15% in both counties, Alme's election would be all but certain.

LOUISIANA: JAMIE DAVIS VS. JULIA LETLOW

Louisiana has lost its incumbent senator, Bill Cassidy, eliminated in the Republican primary, and the latest poll, from Hart Research, completed on October 29, has each of the two candidates at 45%. Our model nonetheless gives Julia Letlow a 63.0% chance and a projected 2.4-point lead.

Geography

The Democratic vote is concentrated in three cities: New Orleans, Baton Rouge and Shreveport. The New Orleans suburbs and Acadiana deliver the Republican majority.

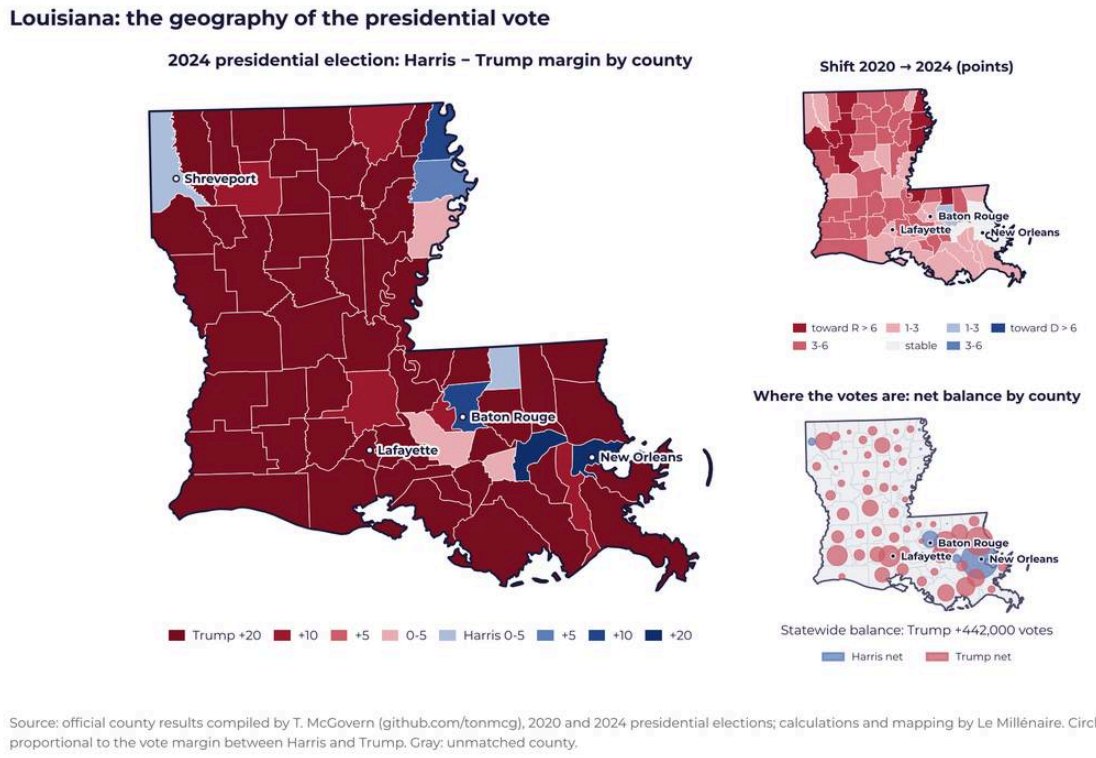


Figure 44. *Louisiana: margin between Kamala Harris and Donald Trump by parish in 2024 (large map), shift between 2020 and 2024, and net vote margin by parish (proportional circles).*

Louisiana by the numbers

Indicator	Value
2020 presidential	Trump +18.6 points
2024 presidential	Trump 60.2%, Harris 38.2%, a 22.0-point margin[98]
Key Democratic parishes	Orleans, Harris +67; East Baton Rouge +11.1; Caddo (Shreveport) +4.6
Republican base	Jefferson, Trump +13.0; St. Tammany +43.8; Lafayette +31.4; Calcasieu +39.6
Republican primary (May 16)	Letlow 44.8%, John Fleming 28.3%, Bill Cassidy 24.8%
Republican runoff (June 27)	Letlow 56.9% against Fleming[99]
Democratic primary	Davis 47.4% in the first round, 79.9% in the runoff against Gary Crockett
Money	Davis: $4.02 million raised, $0.94 million cash on hand as of September 30; Letlow: $7.06 million raised, $0.44 million cash on hand as of October 14
Outside spending	about $22.4 million, all centered on Letlow: $10.9 million against her, almost entirely from the Louisiana Freedom Fund; $11.5 million for her, including $9.5 million from the Accountability Project[100]
Polls since September 1	Hart Research for the Davis campaign (September 17-19, 500 likely voters): Letlow 48%, Davis 44%; Hart Research (completed October 29, 502 respondents): Letlow 45%, Davis 45%
Effect of state polling	+13.1 points for Davis in the October 31 breakdown
Projection and chances	Letlow +2.4 points; 63.0% chance
Breakdown (for Davis)	national environment +7.2; state voting history −20.5; incumbency and candidates −0.7; state polling +13.1; other data used +1.0; poll bias correction −2.3
Trend	Davis 4.1% on August 1, 7.0% on October 15, 37.0% on October 31
Knock-on effects	Democratic Senate chances: 64.9% if Davis wins, 28.9% if Letlow wins

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Candidates and campaign

Act HB 17 gave Louisiana back closed partisan primaries, the first since 2010. They cost Bill Cassidy his seat. Letlow finished ahead of him and of John Fleming, then beat Fleming in the runoff. On the Democratic side, Jamie Davis, a former “police juror” of Tensas Parish, prevailed over two rounds. Letlow also has Trump, Governor Jeff Landry and Steve Scalise on her side.

All outside spending is focused on Letlow, for or against her. In our reading, the hostile money dates mainly from the primary against Cassidy and Fleming, which ended in late June.

[98] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations. Our desk research did not cover this state's geography.
[99] Wikipedia, “2026 United States Senate election in Louisiana,” page as of September 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Louisiana.
[100] Ballotpedia, “United States Senate election in Louisiana, 2026,” https://ballotpedia.org/United_States_Senate_election_in_Louisiana,_2026.

Polls and model

Two polls since September, both from Hart Research; the first comes from the Democratic campaign. The second, completed on October 29 and showing a tie, carries heavy weight in the projection.

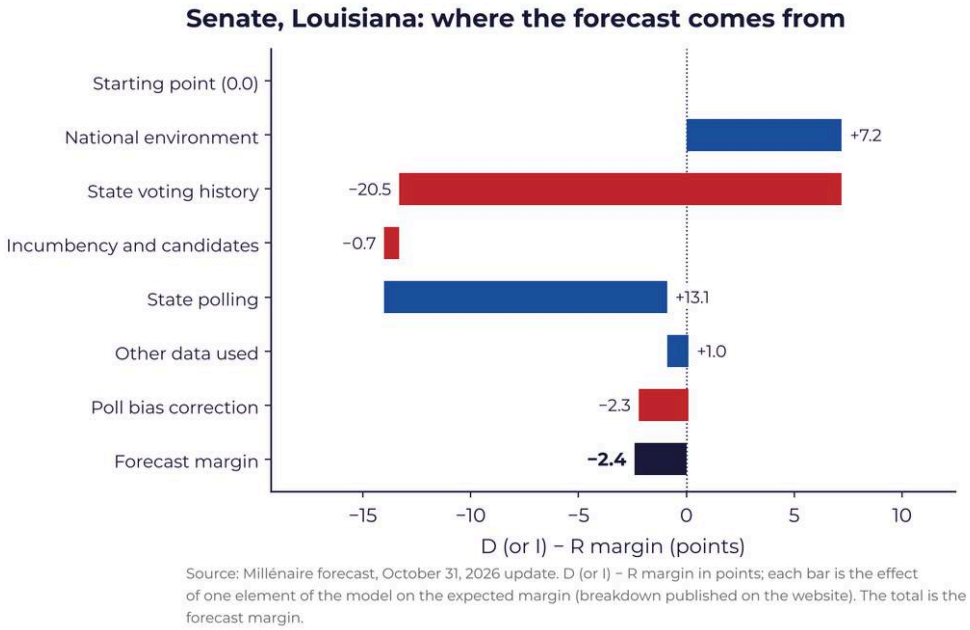


Figure 45. *Louisiana: breakdown of the October 31 projection. Each bar is the effect of one model component on the expected margin, in points.*

State voting history weighs heavily against Davis; the national environment and the polls offset it almost entirely. His chances have increased ninefold since August. The rise between October 15 and 28 came without any new poll and stemmed from the model's other components; the latest one, as of October 31, follows the Hart Research poll completed on October 29.

Our analysis

Jefferson Parish, in suburban New Orleans, Trump +13.0 in 2024: that is the margin to watch on election night. In our reading, Louisiana would flip only on a night when the Democrats had already won most of the other races. A Davis victory would then lift their Senate chances to 64.9%.

GEORGIA: JON OSSOFF VS. MIKE COLLINS

In Georgia, the Senate Leadership Fund has canceled $7.6 million in ad reservations. Jon Ossoff has a 94.6% chance in the model and a projected 11.7-point lead. That is nearly the same lead as in the polls. His incumbency advantage offsets the polling error correction.

Geography

The state is decided in the Atlanta metro area. The Democratic core and its suburbs face an outer ring of Republican exurbs: Forsyth, Cherokee, Coweta and Paulding. Harris gained the most in Henry (about 9 points), ahead of Rockdale and Douglas.

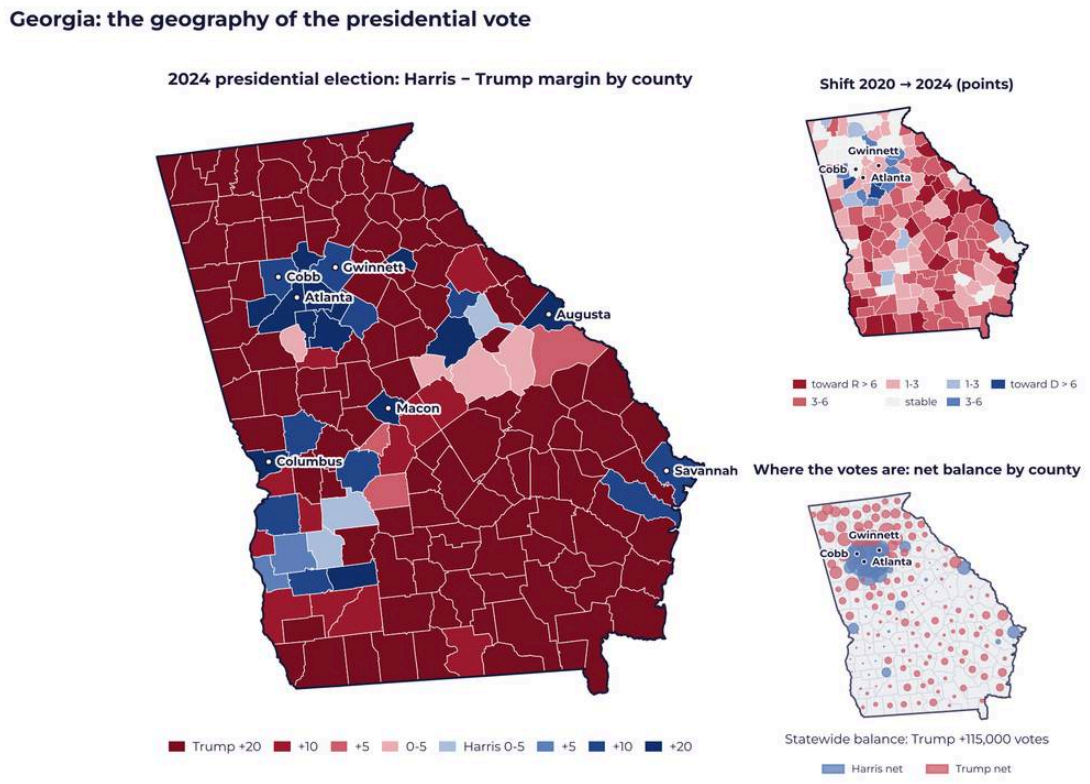


Figure 46. *Georgia: margin between Kamala Harris and Donald Trump by county in 2024 (large map), shift between 2020 and 2024, and net vote margin by county (proportional circles).*

Georgia by the numbers

Indicator	Value
2020 presidential	Biden +0.23 points
2024 presidential	Trump 50.73%, Harris 48.53%; a shift of about 2.4 points[101]
Previous election (2021 runoff)	Ossoff 50.6%, David Perdue 49.4%[102]
Democratic core	Clayton 84.31%, DeKalb 81.86%, Fulton 71.88%
Democratic suburbs	Henry 64.52%, Gwinnett 57.65%, Cobb 56.91%
Atlanta's weight	Fulton, Gwinnett, Cobb and DeKalb: 32.8% of the statewide vote[103]
Rural counties in the north and south	Trump 80 to 91%
Republican primary (May 19)	Collins 40.5%, Derek Dooley 30.2%, Buddy Carter 25.1%
Republican runoff (June 16)	Collins 55.5% against Dooley[104]
Money, third quarter	Ossoff: $33 million raised, $26 million cash on hand; Collins: $2.7 million raised, just over $1.1 million cash on hand[105]
Senate Leadership Fund	$7.6 million in reservations canceled, out of $44 million pledged
Polls since September 1	Ossoff ahead in all ten, by 4 to 11 points
UGA for the AJC (October 7-15, 1,000 likely voters)	Ossoff clearly ahead; AJC correction on October 22
Projection and chances	Ossoff +11.7 points, nearly as much as in the polls; 94.6% chance
90% interval	from a 0.3-point lead for Collins to a 23.7-point lead for Ossoff
Breakdown (for Ossoff)	national environment +7.2; state voting history −0.7; incumbency and candidates +14.9; state polling −7.5; other data used +0.2; poll bias correction −2.3
Knock-on effects, Senate	Democratic chances: 44.2% if Ossoff wins, 47.0% if he wins by more than 5 points, 26.2% if he wins by 5 points or less, 10.5% if he loses
Knock-on effect, governor	narrow Keisha Lance Bottoms win over Rick Jackson: Democratic Senate at 57.6%

Sources: the Le Millénaire forecast, October 31, 2026 update; results and FEC data cited in the profile.

Savannah, Augusta, Columbus, Macon and Albany vote Democratic. The rural areas, however, remain overwhelmingly for Trump, who even flipped three “Black Belt” counties: Baldwin, Washington and Jefferson.

Candidates and campaign

Mike Collins, a member of the House, dominated the first round of the primary ahead of Derek Dooley, Governor Brian Kemp's candidate, and Buddy Carter.

[101] Wikipedia, “2024 United States presidential election in Georgia,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2024_United_States_presidential_election_in_Georgia.
[102] Wikipedia, “2020 United States Senate elections,” https://en.wikipedia.org/wiki/2020_United_States_Senate_elections.
[103] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations.
[104] Wikipedia, “2026 United States Senate election in Georgia,” page as of September 26, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Georgia; Atlanta News First, June 17, 2026, https://www.atlantanewsfirst.com/2026/06/17/us-rep-mike-collins-defeats-derek-dooley-georgia-senate-gop-runoff/.
[105] Georgia Recorder via News From The States, October 15, 2026, https://www.newsfromthestates.com/article/ossoff-reports-raising-another-33-million-homestretch-us-senate-reelection-bid.

Trump endorsed him on June 14. Two days later, he beat Dooley in the runoff, and Kemp fell in line.

Nowhere on the map is the money gap as wide. According to the AJC, the Republican senatorial committee has reportedly dropped Georgia from its priorities, the Senate Leadership Fund has walked away from most of what it had pledged, and Collins has been weakened by controversies involving his staff[106]. Ossoff has been endorsed by Jeff Flake and by the Republican mayors of Toccoa, Valdosta and Tifton. Brad Raffensperger has not taken a position.

Polls and model

Ossoff's lead holds even among Republican-leaning pollsters, which supply most of the surveys used: Trafalgar, InsiderAdvantage, Rasmussen, Quantus, Big Data Poll. In the UGA survey, voters cite Trump, Iran and the price of diesel among their concerns.

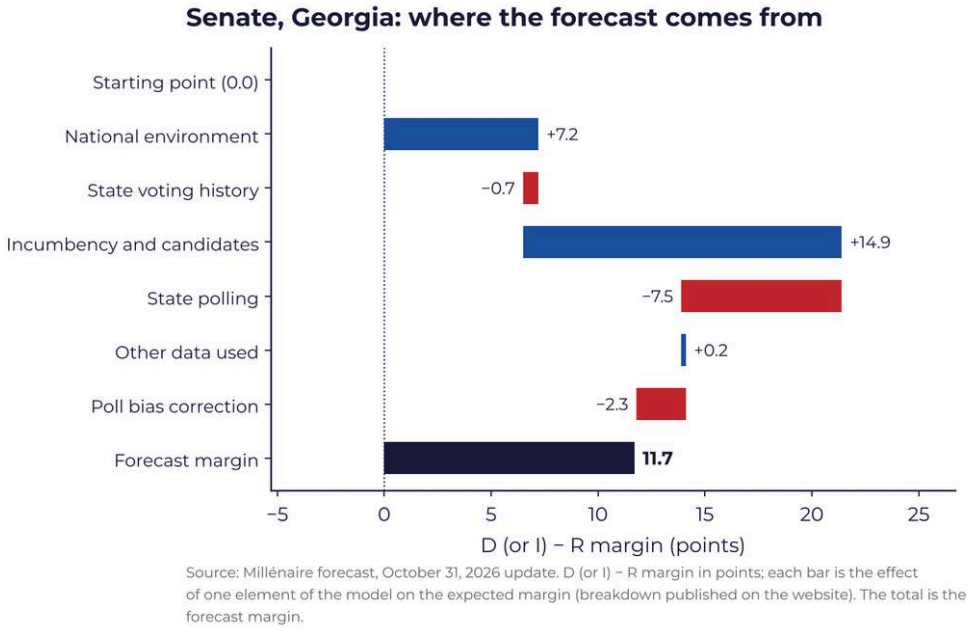


Figure 47. *Georgia: breakdown of the October 31 projection. Each bar is the effect of one model component on the expected margin, in points.*

Among the competitive races, none has a 90% interval entirely on the Democratic side; Georgia's comes closest, from a 0.3-point Republican lead to

[106] AJC, “AJC poll: Ossoff leads Collins in Georgia's US Senate race,” October 21, 2026, https://www.ajc.com/politics/2026/10/ajc-poll-ossoff-leads-collins-in-georgias-us-senate-race/.

a 23.7-point Democratic lead.

Knock-on effects. A narrow win would lower Democratic Senate chances instead of raising them. For a candidate expected to lead by 12 points, the simulator would read it as a nationwide overestimation of Democrats by the polls. In the governor's race, Republican Rick Jackson is favored, and a Democratic upset would weigh heavily on the Senate.

Our analysis

Georgia is far from a toss-up. Ossoff's margin will nonetheless serve as a benchmark for the rest of the night. At 12 points, it would confirm the polls. At 3 or 4 points, it would signal Democratic trouble in Texas, Maine and the Midwest. The counties to watch are Gwinnett and Cobb, which Harris won by 16.5 and 14.9 points in 2024. Ossoff running well above those levels there would confirm the projection.

THE OTHER RACES

In Florida, Idaho, South Dakota and Mississippi, polls have shown close margins, or even the challenger ahead. Yet each time the model gives the Republican better than a 89% chance.

Florida (special election): Angie Nixon vs. Ashley Moody

Ashley Moody has a 94.6% chance according to our model, and a projected 11.7-point lead, against 7.1 in the polls. Ron DeSantis appointed her in January 2025 to Marco Rubio's seat. Florida shifted about 10 points toward Trump between 2020 and 2024, with a 13.1-point lead for him in 2024 against 3.4 in 2020. Miami-Dade, 10% of the statewide vote, swung 18.8 points and voted for Trump by 11.4 points. Palm Beach moved to parity. Broward gave Harris a lead of only 17 points[107]. On August 18, Angie Nixon, a member of the Florida House, beat Alexander Vindman in the Democratic primary with 56.1% of the vote.

[107] Official county results compiled by T. McGovern, https://github.com/tonmcg; Le Millénaire calculations; ABC News/538, December 10, 2024, https://abcnews.com/538/americas-swing-2024-wide-deep/story?id=116639076.

Newsweek called it a major upset[108]. As of September 30, she even had more cash on hand than Moody: $4.11 million against $2.82 million. Moody nonetheless leads in 13 of the 15 polls released since September. The two ties, moreover, date from September (St. Pete Polls and Change Research, a Democratic pollster). The latest give her leads ranging from 4 points (University of North Florida, 49-45) to 8 points (co/efficient, 48-40). Her chances have stayed between 94 and 98% since August. The model gives her the incumbency advantage, even though she was appointed in January 2025 and has never been elected to the office.

Idaho: Todd Achilles vs. Jim Risch

Jim Risch has a 89.3% chance and a projected 15.0-point lead. Facing him, Todd Achilles, a former Democratic member of the Idaho House, is running as an independent with the backing of Democratic leaders. Democrat David Roth, who won 61.9% in the May 19 primary, withdrew on July 28 in favor of Achilles[109]. Trump won 66.9% in Idaho in 2024. The only counterweight is Boise: Ada County accounts for 29.5% of the statewide vote, Trump +10.3. Advanced Targeting Research, from September 13 to 16 among 700 registered voters, sponsor not disclosed, put Achilles ahead. It was 50% to 39%, or 46-39 with the minor candidates. Peak Insights, a Republican pollster, by contrast had Risch at 52% to 18% in August. We found no published October poll. Achilles's chances have risen from 0.3% in August to 10.7%. The model incorporates five waves of polling, one of them completed on October 22. We found no sourced statement on which caucus he would join.

South Dakota: Brian Bengs vs. Mike Rounds

Mike Rounds has a 93.9% chance and a projected 18.6-point lead. Julian Beaudion, the only Democratic candidate, withdrew on August 4. Democrats are therefore backing independent Brian Bengs. Against John Thune in 2022, as the Democratic nominee, he had won 26.2%. He says he wants to form an

[108] Newsweek, September 20, 2026, https://www.newsweek.com/ashley-moody-sounds-alarm-as-second-poll-shows-dead-heat-with-angie-nixon-12465288; Wikipedia, “2026 United States Senate special election in Florida,” as of October 18, https://en.wikipedia.org/wiki/2026_United_States_Senate_special_election_in_Florida.
[109] Wikipedia, “2026 United States Senate election in Idaho,” page frozen as of September 20, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Idaho.

"independent caucus"[110]. The polls contradict each other. Concord, for a Democratic organization, put Bengs ahead from October 6 to 8, 43% to 42%. Quantus, in mid-October, by contrast has Rounds at 57% to 36%. As of September 30, Rounds had raised $5.06 million, Bengs $1.68 million.

Mississippi: Scott Colom vs. Cindy Hyde-Smith

In Mississippi, which Trump won by 22.9 points in 2024, Cindy Hyde-Smith has a 96.4% chance and a projected 13.1-point lead. There is only one October poll, by Change Research for the Government that Works PAC committee, on October 21-22, among 842 likely voters. It has her at 43% against 40% for Scott Colom. Ty Pinkins draws 6%. The Democratic nominee in 2024, he left the party in July 2025 and is running as an independent[111]. Hinds, Jackson's county, is the only large Democratic stronghold, at Harris +46.1. It faces the Republican suburbs of Rankin, Madison and DeSoto. In 2020, Hyde-Smith had in fact beaten Mike Espy by only about 10 points, 54.1% to 44.1%. In October, Sabato and then Cook moved the race from "Safe" to "Likely Republican." Donald Trump was visiting the state late in the campaign[112]. In the Change Research poll, Colom and Pinkins combined lead Hyde-Smith, but each one trails her. As long as the opposition is split between them, an upset seems very unlikely to us.

[110] Semafor, October 21, 2026, https://www.semafor.com/article/10/21/2026/poll-shows-big-lead-for-south-dakota-republican-rounds; Wikipedia, "2026 United States Senate election in South Dakota," as of October 17, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_South_Dakota.
[111] Ballotpedia, "United States Senate election in Mississippi, 2026," https://ballotpedia.org/United_States_Senate_election_in_Mississippi,_2026; Wikipedia, "2026 United States Senate election in Mississippi," https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Mississippi.
[112] Scripps News (Joe St. George), "Trump heads to Mississippi as more red states enter the midterm conversation with 8 days to go," October 26, 2026, https://www.scrippsnews.com/politics/america-votes/trump-heads-to-mississippi-as-more-red-states-enter-the-midterm-conversation-with-8-days-to-go.

THE PATH TO A MAJORITY

What each race is worth

As for Texas, Arizona and New Mexico, a polling error favorable to the Democrats in Texas often goes hand in hand with an error in the same direction in the other two. A surprise in Ohio also carries over in part to Iowa and Michigan. Our simulator sets the winner of a race, then recalculates the chances everywhere else, including the model's correlations. Table 9 gives the result race by race.

Table 9. Democratic chances (allied independents included) of controlling the Senate depending on the winner of a race

Race	D or I chances	If D or I wins	If R wins	If D or I wins narrowly	If R wins narrowly
Ohio	21.4%	81.6%	31.6%	77.4%	47.7%
Alaska	18.5%	80.8%	33.7%	77.7%	49.4%
Kansas	22.4%	80.3%	31.5%	76.2%	47.2%
South Carolina	16.7%	78.2%	35.2%	75.5%	49.8%
Iowa	29.3%	77.3%	27.9%	72.4%	40.9%
Montana (Bodnar)	19.0%	69.6%	36.1%	65.7%	47.2%
Nebraska (Osborn)	23.6%	68.0%	34.5%	63.3%	45.1%
Maine	45.2%	65.0%	23.7%	58.1%	30.7%
Louisiana	37.0%	64.9%	28.9%	60.2%	36.1%
Michigan	65.4%	57.9%	13.5%	44.1%	17.3%
Texas	50.9%	56.3%	28.1%	51.9%	32.1%
New Hampshire	77.6%	51.1%	11.5%	35.5%	13.9%
Minnesota	80.4%	50.4%	9.2%	32.2%	11.6%
North Carolina	85.9%	48.0%	8.0%	29.5%	9.4%
Georgia	94.6%	44.2%	10.5%	26.2%	11.5%

Source: the Le Millénaire simulator, 40,000 simulations per scenario, data as of October 31, 2026; "all margins": average of narrow and wide wins weighted by their frequency (Le Millénaire calculation). Forecast with no picks: 42.4%.

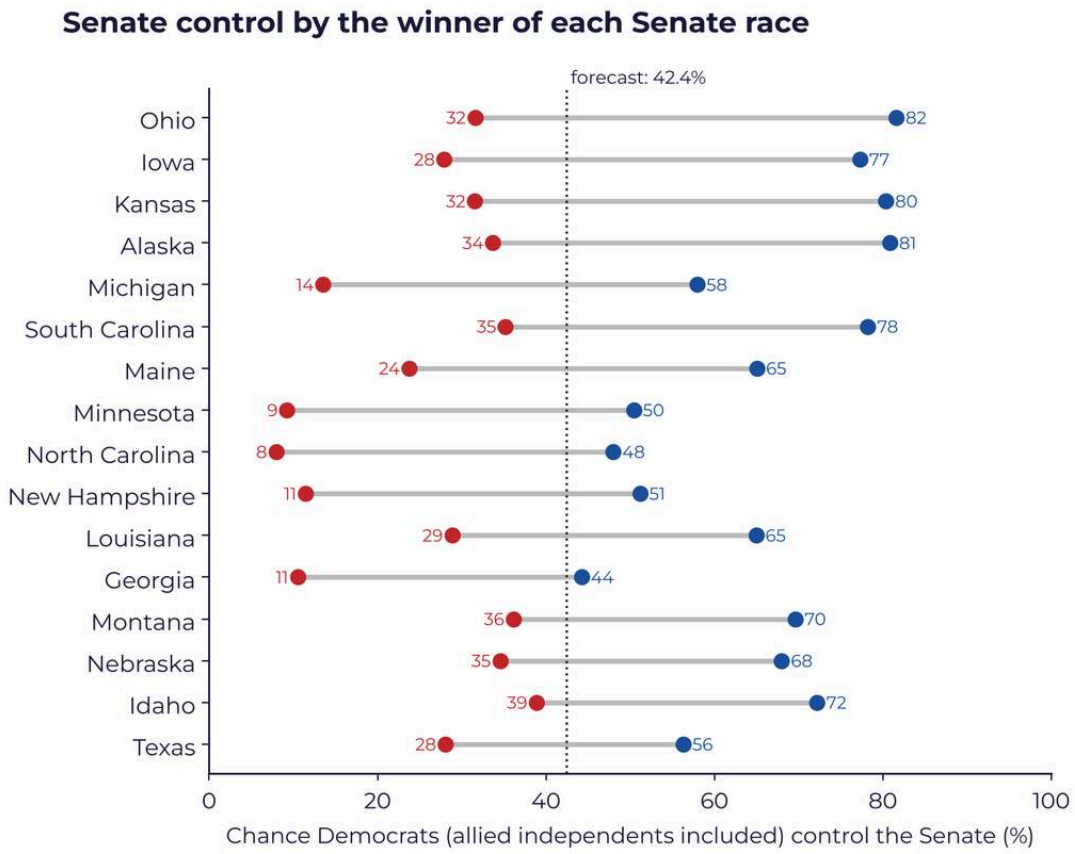


Figure 48. *Democratic chances (allied independents included) of controlling the Senate depending on the winner of each Senate race, all margins combined. Blue dot: the Democrat or independent wins; red dot: the Republican wins.*

In Georgia, North Carolina, New Hampshire, Minnesota and Michigan, where the Democrats are favored, a Democratic win leaves their Senate chances between 44.2% and 57.9%, while a loss drops them to between 8.0% and 13.5%. In Kansas, Alaska, Ohio, South Carolina, Iowa, Louisiana, Montana and Nebraska, where the Republicans are ahead, a Democratic loss leaves the chances between 27.9 and 36.1%, and a win lifts them to between 64.9 and 81.6%, with the maximum reached in Ohio.

In the last two columns, a narrow win by a favorite produces roughly the same effect as a loss for its side. Take some examples. A narrow win by Cooper in North Carolina (29.5%) or by Ossoff in Georgia (26.2%) would bring Democratic chances back below 30%, while a narrow win by Marshall in Kansas (47.2%) or by Graham in South Carolina (49.8%) would lift them above 45%. Trump won

those two states by 16 to 18 points, and a Republican winning there by only 5 points would signal a Democratic wave elsewhere.

The winning combinations

The Democrats have 34 safe seats and nine near-certain races, for 43 seats, and the five races in which they are favored bring them to 48. They need three more among Texas, where the Democrat edges ahead in our projection, and the nine races where the Republican is ahead. At the time of writing, the simulator had not produced scenarios setting two races at once, and the combinations that follow are read from Table 9 without being calculated probabilities.

Texas and Maine are the two toss-up races. A win in either one, on its own, already lifts Democratic chances to between 56.3 and 65.0%. A third win would still be needed, in **Louisiana**, now the tipping-point race in our model, or in the Midwest and the Plains, where **Iowa** would be the most obvious candidate. When Turek wins there narrowly, Democratic chances indeed rise to 57.3% in Maine and 56.7% in Texas.

The working-class Midwest: everything starts with Ohio. A Brown win, even a narrow one, lifts Michigan to 80.8%, Texas to 57.6%, Maine to 57.1% and Iowa to 45.4%. In our reading, the link runs through the white working-class electorate of Ohio, Iowa and Michigan. It shifted toward Trump in 2024. A polling error favorable to the Democrats would therefore be more “regional” there than elsewhere.

In Nebraska and Montana, a win by Osborn or Bodnar takes a seat away from the Republicans. It does not give one to the Democrats unless the winner agrees to vote with them on organizing the Senate. And neither has promised to do so.

Everything is connected. With the House, the Democrats have a 52.8% chance in the Senate; without it, 8.5%. The model gives them 76.7% in the House and 42.4% in the Senate. Multiplying 76.7% by 47.2% therefore gives about 36% of

simulations with a Democratic House and a Republican Senate. That leaves about 40% for an entirely Democratic Congress and 21% for an entirely Republican Congress.

The independents: whom would they caucus with?

Dan Osborn in Nebraska, Seth Bodnar in Montana, Brian Bengs in South Dakota, Todd Achilles in Idaho: four independents carry Democratic hopes where the party has no candidate or is standing aside. Yet none of them promises to caucus with the Democrats.

Nebraska candidate Dan Osborn keeps saying it: he will join neither caucus. At a joint press conference with Bodnar and Bengs, he declared: “I'd caucus with everybody... Independent means independent.” All three acknowledge that the stance complicates the allocation of chairmanships and committee seats. In a closely divided Senate, they say, their votes would carry more weight. The Republican senatorial committee talks of a “Fake Independent circus.” Republicans also cite a 2025 recording in which Osborn allegedly says he would caucus with the Democrats. Osborn replies: “Fake news.” For political scientist Geoff Lorenz, the approach is “atypical,” not “impossible”[113]. Seth Bodnar refuses to “submit to a party leader.” His advisers say he would join no caucus[114]. Brian Bengs says he wants to form an “independent caucus”[115]. On Todd Achilles, by contrast, we found no sourced position.

In the forecast's headline figures, elected independents count with the Democrats. They are assumed to vote with them on organizing the Senate. Table 10 compares this assumption with the others.

[113] Nebraska Examiner, republished by News From The States, October 17, 2026, https://www.newsfromthestates.com/node/433383.
[114] Wikipedia, “2026 United States Senate election in Montana,” accessed October 27, 2026, https://en.wikipedia.org/wiki/2026_United_States_Senate_election_in_Montana.
[115] Semafor, October 21, 2026, https://www.semafor.com/article/10/21/2026/poll-shows-big-lead-for-south-dakota-republican-rounds.

Table 10. Control of the Senate depending on the choice of elected independents

Assumption about elected independents (Nebraska, Montana, Idaho, South Dakota)	Democrats	Republicans	Undetermined
All counted with the Democrats (headline figure)	42.4%	57.6%	0.0%
None assigned	32.5%	57.6%	9.9%
Osborn with the Democrats, the others unassigned	36.4%	57.6%	6.0%
Osborn and Bodnar with the Democrats	39.6%	57.6%	2.8%
Osborn with the Republicans, the others unassigned	32.5%	61.6%	5.9%
All counted with the Republicans	32.5%	67.5%	0.0%

Source: the Le Millénaire forecast, 200,000 simulations, October 31, 2026 update. "Undetermined": the majority depends on the choice of at least one elected independent. These scenarios are not weighted by a probability.

Republican chances remain at 57.6% or higher under every assumption in Table 10, and they rise to 67.5% if all elected independents vote with them. In 9.9% of simulations, the majority depends on the choice of an independent, and the Senate would then be decided by the vote on the organizing resolution, which sets committee chairmanships, in a negotiation with one or two senators outside any caucus. Our model expects 0.59 newly elected independents, and at least one is elected in 47.9% of simulations.

And if the polls are wrong?

The forecast's scenario tool applies to the projection a polling error of the kind seen in past elections (Table 11). With no additional error, it gives 40.5% in the Senate and 91.3% in the House, against 42.4% in the Senate in the published forecast and 76.7% in the House in the simulator, because it runs on its own set of simulations.

Table 11. Democratic chances in the Senate and the House by type of polling error

Error scenario	Senate	House
No additional error	40.5%	91.3%
2012-type error	59.9%	99.9%
2016-type error	6.6%	73.7%
2018-type error	40.4%	91.2%
2020-type error	18.4%	15.4%
2022-type error	25.9%	69.2%
2024-type error	9.6%	14.5%
Uniform 3-point error in favor of Republicans	14.8%	34.5%
Uniform 3-point error in favor of Democrats	71.8%	100.0%

Source: "polling errors" tool of the Le Millénaire forecast, data as of October 31, 2026. Each scenario applies to every race an error of the kind seen in the year indicated.

With a uniform 3-point error in the Democrats' favor, their Senate chances would rise to 72%. With the same error in the other direction, they would fall to 14.8%. The 2012 error would make the Democrats favorites for the Senate, at 59.9%. The 2018 error would change almost nothing, at 40.4%. By contrast, those of 2016, 2020, 2022 and 2024 would all lower Democratic chances, down to 6.6% for 2016.

The central projection already includes an average correction of 2.33 points in the Republicans' favor. Without it, the polls taken at face value would give 53 seats to the Democrats and their allies.

Our analysis

The Democrats must hold Georgia, North Carolina, New Hampshire, Minnesota and Michigan. They then need to win three races among Texas, where the Democrat is just barely ahead, and those where the Republican is slightly ahead: in Maine, Louisiana, Iowa, Kansas, Ohio or Alaska. After the 2.33-point correction drawn from past errors, our model concludes that the Senate will be Republican with 50 or 51 seats. With a uniform 3-point error in the Democrats' favor, however, their chances would rise to 72%.

THE NIGHT OF NOVEMBER 3

Table 12 brings together the bellwether counties given in the race profiles. Our sources do not document in a verified way the poll closing times or the order of the count, which we therefore do not give. In Alaska, the final result could take up to fifteen days, given the time for mail ballots to arrive and for the ranked-choice tabulation[116], and in Maine a ranked-choice tabulation would begin only if no candidate won a majority in the first count.

Table 12. The night of November 3: the bellwether counties

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

State	Bellwether county	2024 presidential	What would signal a Democratic surprise
Georgia	Gwinnett, Cobb	Harris +16.5 and +14.9	Ossoff well above these margins; a close Ossoff result signals a bad night for Democrats
North Carolina	Wake, Mecklenburg	Harris +25.5 and +32.9	Cooper above 60% and 65%; below that, a closer race than expected
Texas	Tarrant; Harris (Houston)	Trump +5.1; Harris +5.5	Talarico ahead in Tarrant, a lead of more than 10 points in Houston
Texas	Hidalgo, Cameron, Webb	Trump +2.9, +5.8 and +2.2	Talarico ahead in all three (a Democratic comeback in the Rio Grande Valley)
Ohio	Montgomery (Dayton)	Harris +0.5	Brown ahead by more than 5 points
Ohio	Mahoning (Youngstown)	Trump +9.4	Brown close to even
Michigan	Macomb, Oakland	Trump +13.7; Harris +10.6	El-Sayed narrows the gap in Macomb and exceeds 10 points in Oakland
Maine	Kennebec, Androscoggin	Trump +2.7 and +6.1	Jackson ahead in both
New Hampshire	Rockingham	Trump +2.4	Pappas ahead
Minnesota	Anoka	Trump +4.4	Tafoya well above Trump (a Republican signal)
Iowa	Scott (Davenport)	Trump +3.9	Turek ahead
Nebraska	Sarpy	Trump +11.7	Osborn ahead
Kansas	Johnson; Sedgwick	Harris +8.5; Trump +13.8	Hamilton up by more than 20 points in Johnson and close to even in Sedgwick
South Carolina	Charleston	Harris +5.7	Andrews ahead by more than 15 points
Montana	Missoula, Gallatin	Harris +21.4 and +3.2	Bankhead below 10% (tactical voting for Bodnar)
Alaska	Anchorage	Harris +1.4	Final result expected within fifteen days

Source: 2024 presidential election, official county results compiled by T. McGovern (github.com/tonmcg), Le Millénaire calculations; thresholds: Le Millénaire analysis.

In Georgia and North Carolina, our projections show Democratic leads of 11.7 and 7.8 points. That is where the margin will measure the polling error. If it holds, Texas, Maine and Ohio become winnable. If it falls below 5 points, however, the simulator brings Democratic Senate chances back below 30%.

In Ohio and Iowa, the result will show whether the white working-class electorate, which delivered Trump's victory in 2024, has partly returned to the Democrats. A Brown win would lift Democratic Senate chances above 81%, a Husted win by more than 5 points would bring them down to 24.0%, and a Hinson win of the same size to 19.9%.

If the Democrats won **Texas and Maine** while holding all their seats, they would still be one seat short, which would be decided in Alaska, where the final

result can take fifteen days, or in a negotiation with an independent from Nebraska or Montana. The majority might then not be known on the night of November 3.

Brazil, October 25: the polls and our own model underestimated Lula by about 2.7 points in the runoff, with an almost identical error from one state to the next. The October 24 forecast gave the incumbent president only a 34% chance. He won nonetheless[117]. Nothing indicates that the American error will run in the same direction. The projection already takes 2.33 points away from the Democrats. In the U.S. Senate, they start from 42.4%. The answer will come on November 3, or in the days that follow.

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LE MILLÉNAIRE'S FOUR MIDTERMS 2026 NOTES

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

[117] Le Millénaire, “Comment Lula a transformé l'impossible en réalité ?”, note on Brazil's 2026 presidential election, https://lemillenaire.org/comment-lula-a-transforme-limpossible-en-realite.

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