

The 2026 Midterms

Forecast and Final-Month Response Scenarios

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236 Democratic House seats. 51 Democratic-caucus Senate seats.

That is the central forecast for November. Democrats are substantial favorites to take the House, with an estimated 92% probability of control. The Senate is much closer: its estimated Democratic control probability is 61%. The same national movement could leave the House forecast broadly intact while changing the Senate favorite.

Part I. The electoral outlook and the President's allegations

Chamber	Central forecast	Central 80% range
House	236 D / 199 R	219-255 D seats
Senate	51 D caucus / 49 R	48-54 D-caucus seats

The House estimate implies a Democratic gain of 21 seats. It combines a model of all 435 districts with a historical model, weighted 75% and 25%. The Senate estimate uses 35 race inputs and accounts for correlated national error. Dan Osborn is assigned to the Democratic caucus if elected, an explicit modeling assumption rather than a claim about a commitment by the candidate.

The most consequential finding is the difference between the chambers. In the model, a uniform one-point movement toward Republicans raises their Senate control probability from approximately 39% to 53%. A two-point movement raises it to 67%. Those same changes leave Republican House control at approximately 13% and 21%. A narrow Senate forecast and a strong House forecast can therefore coexist.

Why the July 16 address receives separate treatment

A nationally televised presidential address alleging serious election and intelligence misconduct warrants more than a passing reference in an election forecast. The paper examines the allegations element by element: foreign acquisition of voter information, intelligence handling, registration failures and technical vulnerabilities. It distinguishes what the released evidence establishes from the additional steps needed to demonstrate altered votes or a changed winner.

The analysis also examines follow-up and reception. Public follow-up occurred, although its adequacy and completion remain separate questions. Polarization and media treatment may have limited the address's impact, but the paper does not establish their independent causal effect. It makes no additional numerical adjustment for the speech beyond what subsequent polling may already reflect.

What the numbers mean

These are conditional model estimates, not calibrated guarantees. The weights and uncertainty assumptions involve judgment, and out-of-sample calibration has not been completed. Forecast inputs are dated October 4; documentary and legal review runs through October 5. The full paper discloses the historical approval audit, all 35 Senate inputs and all 435 House districts.

Part II. Conventional and extraordinary responses

The second part examines how the environment could change during the final month and how institutional responses to the President's allegations should be assessed. It separates three questions that are often conflated: can an action be implemented, will it affect public behavior or election administration, and how would an observed change translate into seats?

Conventional developments: five channels to examine

Household costs, policy delivery, candidate-specific information, lawful participation and public oversight are the principal channels. Fuel prices receive particular attention because frequent, visible purchases can shape assessments of governing competence. Economic relief matters differently when it is announced, delivered and recognized by households. Candidate developments and administrative changes likewise require evidence at the level where they occur.

The scenario table shows the size of the national change needed to alter the chamber outlook. It does not estimate what any particular message, expenditure, policy or appearance would produce.

Uniform shift toward R	Expected House D / R	R House control	R Senate control
None	236 / 199	8%	39%
1 point	232 / 203	13%	53%
2 points	229 / 206	21%	67%
4 points	222 / 213	42%	87%
5 points	219 / 216	53%	93%

Expected seats are rounded. Control probabilities come from the full distributions, rather than the rounded seat totals. Senate probabilities are approximate. A shift limited to selected races differs from a uniform national shift.

Extraordinary responses: test the threat, authority and consequences

The paper then grants progressively stronger versions of the allegations, including a current operational compromise, and asks what follows. It evaluates forensic review, evidence preservation, civilian monitoring, eligibility verification, cyber protection and emergency procedures against the specific threat each could address.

National Guard involvement requires separate analysis of mission, command status and location. Remote cyber support and armed polling-site presence raise very different questions. Even when allegations are assumed true, legal authority, practical effectiveness and effects on lawful voting must still be established. Litigation, disruption, intimidation and public backlash belong in the assessment alongside potential security benefits.

The paper identifies conditions that would justify changing the forecast. It does not attach unsupported seat gains to dramatic interventions. A verified new finding, a measurable shift in preferences or a documented local effect can warrant an update; the magnitude and direction must come from evidence.

About the author

Rodney Malpert holds Cornell degrees in law and government and completed all doctoral requirements except the dissertation in American government. A former SMU and ASU law adjunct, he has been active in Republican state and national campaigns, attended political meetings at Mar-a-Lago, and represented Fortune 500 and leading technology companies in public-policy meetings on Capitol Hill. He welcomes interviews on the forecast and its methodology.

A Centaur Paper developed with ChatGPT and Claude. Detailed sources, human and AI attributions, methods and three complete data appendices accompany the full paper.