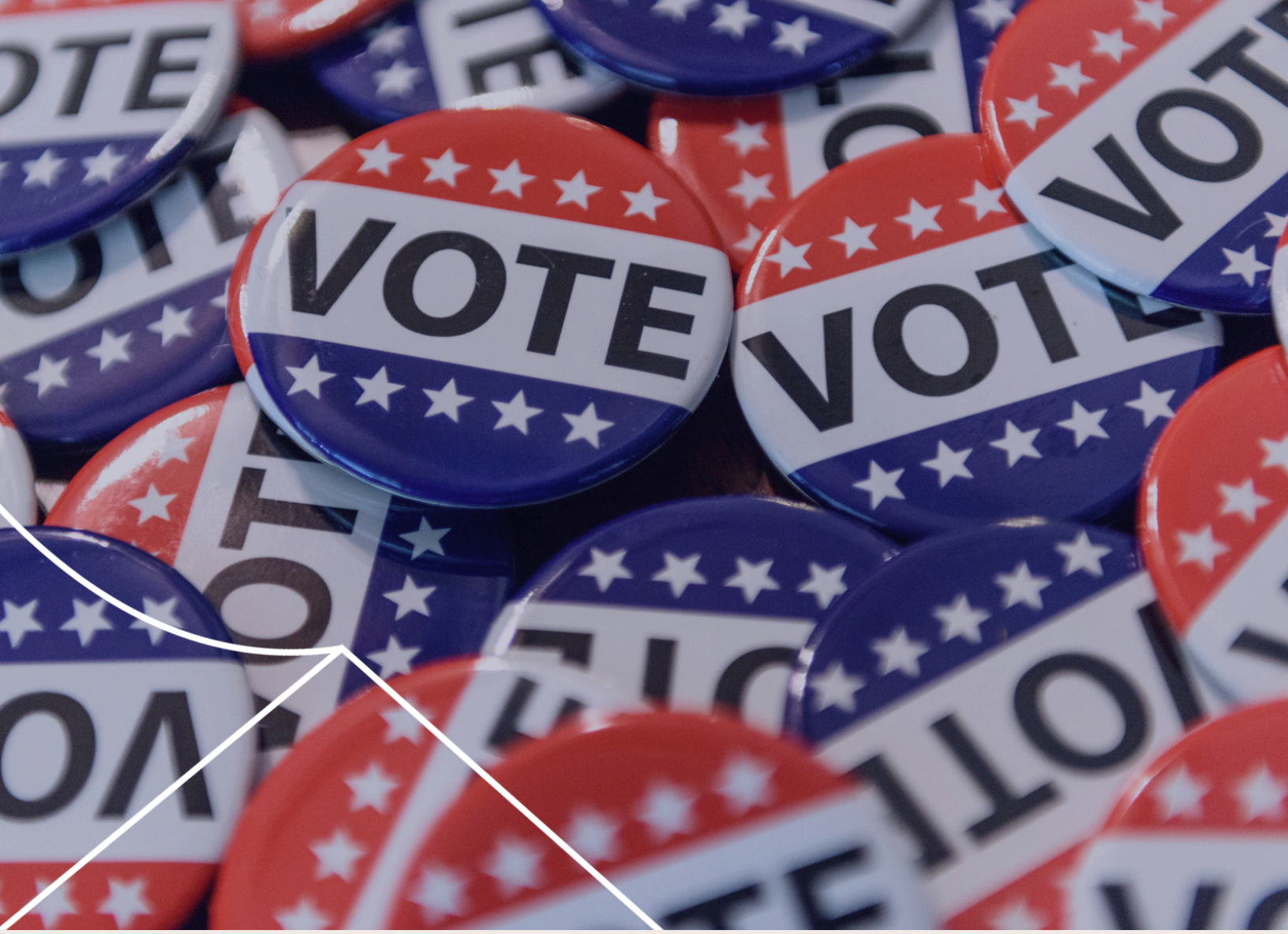

The 2026 US Midterms

A COMPENDIUM OF RAPID RESPONSE ANALYSIS BY COLUMBIA SIPA FACULTY

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Robert Y. Shapiro on Affective Partisanship

The last times one party trounced the other, taking control of both the House (by a very wide margin) and the Senate, were in 1994 and 2006. What happens now is anybody's guess. Will the Democrat-controlled Congress investigate corruption? Will it thwart anything other than bipartisan legislation? Make it more difficult to fund the Iran war? Or prevent Trump from making conservative judicial appointments?

It's remarkable how the Democrats recaptured voters they lost in 2024 and made striking inroads in ruby-red Southern states. But they should be mindful that all of this is still up for grabs.

My further take is that such midterm drubbings have occurred for reasons baked into our bipartisan system and political cycles. Since the mid-1970s, and more visibly by the 1990s, the parties diverged ideologically across nearly all domestic issues and, surprisingly, across several major foreign policy and national security issues, leading to our current state of intense ideological conflict and partisan polarization. The result is that the parties — in increasingly close elections, owing to the Democrats' loss of support in the South over civil rights — are simultaneously competitive for control of the presidency and both houses of Congress. As a result, we've had presidents since the 1990s entering office with unified party control of government — but then swinging back and forth from Democratic control to Republican control of the presidency and Congress as a new president is elected. That unified government led to major policy changes: while President Bill Clinton's health care reform effort faltered, look at what Presidents George W. Bush, Barack Obama, Donald Trump (first term), Joe Biden, and Trump (second term) were able to accomplish in their first two years. Elections now clearly have consequences, and in their next midterm elections, these presidents immediately lost their unified government (with the exception of Bush, who benefited from broad and bipartisan public support after the 9/11 terrorist attacks), because they were seen as performing poorly, evidently due to perceptions, if not the reality, of their overreach.

> ***"There is nothing exceptional in this story about Trump and the current midterm election until we acknowledge that, along with ideological polarization, the parties and their supporters have not only disagreed on issues but also come to dislike each other intensely and personally – what has been dubbed 'affective partisanship.'"***

And Trump and reactions to him have taken this anger and hate to a new level, as was quite visible in the current election.

All of this remains as we head to the next election for president in 2028. If Trump were a first-term president like Clinton and Obama, we would be asking: *Could he bounce back?* But since he is a

second-term president (non-consecutive), the better comparison is Bush's similar midterm debacle in 2006, owing to the Republicans being held responsible for the Iraq War, going into the 2008 election.

Will the Iran war, if it continues on unsuccessfully, be enough to elect a Democratic president and Democratic Congress? In an election, in contrast to 2008 (with the financial crisis and a charismatic leader in Barack Obama), will it skew more closely to 2016, 2020, and 2024? These elections have been part of the current trajectory of American politics, in which partisan polarization, "affective partisanship," and two closely matched parties remain. But there are divisions within each of the two parties — especially among Republicans, as they see Trump responsible for the beating they took — and the presidential candidates in both parties who come forth will obviously be the focus of enormous attention.

Robert Y. Shapiro
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Julian Gewirtz on the K-Shaped Relationship with China

President Trump is likely to try to preserve the K-shaped US-China relationship: stability and tactical deals with Xi Jinping at the top, even as strategic competition intensifies underneath. But that balancing act will become much harder for him with a Democratic Congress prepared to scrutinize concessions on technology and Taiwan. As Trump and Xi prepare to meet again at the Asia-Pacific Economic Cooperation (APEC) forum in Shenzhen in just two weeks, Beijing will see both opportunity and danger in this result.

> ***"Chinese leaders are likely to see Trump as significantly weakened, which creates new opportunities to press for concessions but also gives them reason to worry that congressional pressure will make those concessions harder to deliver. Beijing will keep trying to cement its preferred framework of "constructive strategic stability" for the remaining two years of Trump's presidency."***

JULIAN GEWIRTZ
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Erica Lonergan and Tamar Mitts on AI Data Centers

The US midterm elections were mostly about "kitchen table" issues, like the cost of groceries or the price of gasoline. But debates over AI — specifically, the build-out of data centers across the country — also appeared on local ballots. In Ohio and several other states, voters supported measures that restrict data-center development, amid growing concerns about electricity costs, water use, and these facilities' impact on local communities. These results offer an early indication of how AI development is entering electoral politics.

> ***"AI's growing geopolitical importance highlights how domestic policy decisions can have far-reaching implications for international security. At the systemic level, the United States and China are competing for control of and access to the inputs to the AI "tech stack" — the critical minerals, chips, energy, and infrastructure needed to sustain frontier innovation. At the crux of this competition is the need for computing power."***

Sustaining innovation at the AI frontier depends on constructing extensive (and expensive) data centers. The midterm results suggest the "winner" of the US-China AI race will depend partly on how the debate over AI plays out at home and how coalitions form around AI regulation after the midterms.

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Jennifer Klein on the Cost of Child Care

The election results reflect what voters have demanded all year: that their elected representatives address the affordability crisis.

> ***"Throughout this election cycle, candidates and pundits rightly pointed to skyrocketing gas and grocery prices. Some, however, missed another significant part of the financial squeeze that families are experiencing: child care."***

Nationally, 82 percent of voters say child care costs are part of the affordability crisis. In Ohio, voters elected the first-ever woman governor, Amy Acton, who made child care costs a centerpiece of her campaign. Seventy-six percent of Ohio voters say finding affordable, quality child care is a crisis or major problem, and 74 percent say that increasing access to high-quality child care would strengthen Ohio's workforce and economy. At least nine senators-elect made child care part of their case to voters, including those in Texas, Maine, and South Carolina.

Parents, particularly moms, have made their voices heard. Families have also expressed a preference for a range of child care options, rather than a binary choice between paid care and care they take on themselves. According to a recent survey by New America, parents want access to high-quality, affordable child care, and also see time with their children as a top priority, particularly in the early years — which points to the need for a range of options, including care by a parent or relative, for different stages of a child's life, as well as a federal law guaranteeing paid family and medical leave.

To get ourselves out of the child care affordability and accessibility crisis — what former Treasury Secretary Janet Yellen described as "a textbook example of a broken market" — we need to invest in child care as a public good, just as we do for other infrastructure. Voters consider care an economic priority, and last night's midterm election results may cement it as a core part of the economic agenda.

JENNIFER KLEIN
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Thomas Christensen on the Asia Pacific Region

Despite the dramatic results of the US midterm elections, the impact on the Asia Pacific region may prove limited. The executive branch still enjoys broad authority over most foreign policy decisions, and President Trump still has over two years in office. Even if Congress opposes the president on tariff policy, the administration still has many ways to maintain high tariffs on goods exported to the United States from the Asia Pacific region, including US allies and partners, and they appear dedicated to this approach.

> ***"US allies in the region will hope that the midterm elections promise an eventual return to normalcy in their US diplomatic treatment, but perhaps only after President Trump leaves office in January 2029. Countries like Japan, Australia, and the Philippines are also likely concerned about a Democrat-controlled Congress, since Trump administration efforts to strengthen and distribute US military presence in the face of a rising China may have been appreciated in regional capitals. Those efforts will likely receive less funding now than they would have under a Republican-controlled Congress."***

More welcome in the Asia Pacific region would be congressional efforts to limit the administration's ability to sustain or escalate the US war with Iran. That war is unpopular not only in the United States, but also in the Asia Pacific. States there have suffered from higher energy prices and worry that the United States is depleting its stockpile of high-end ordnance in the Middle East, with negative implications for balancing efforts against China in East Asia.

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Rachel Vogelstein on Women's Leadership

Although votes are still being tallied, preliminary results show that the 2026 US midterm election was historic for women's political representation.

> ***"Women made record gains in statewide office. In 2027, women will govern a third of America's states, with an all-time high of 17 women governors, surpassing the previous record of 14. Four states — Georgia, Minnesota, Ohio, and Tennessee — elected a woman governor for the first time. Women will hold at least 101 statewide elective executive positions, reaching a record 32.6 percent, exceeding a previous high set in 2024."***

The election also produced historic firsts for women of color. Keisha Lance Bottoms became the first Black woman elected governor, Deb Haaland the first Native American woman governor, and Peggy Flanagan the first Native American woman elected to the Senate. A record three Black women will serve simultaneously in the Senate.

These breakthroughs followed an unprecedented number of women candidates competing in this election cycle. A record 590 women ran for the US House, up 26 percent from 2024 and topping the previous record of 583 set in 2020. And 84 women ran for governor, up 22 percent from the previous record of 69 set in 2022.

America remains far from gender parity in politics, but the 2026 election produced a meaningful step forward.

RACHEL VOGELSTEIN
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Ester Fuchs on Aligning Rural and Urban Interests

This extraordinary victory for the Democratic Party in the 2026 midterm elections is nothing but good news for America's cities. This election puts Republicans on notice that cities can no longer be isolated and their low-income, immigrant and minority communities cannot be demonized if they want to win national elections. Cities now have political allies in rural and suburban parts of America that share their policy concerns.

> ***"Many of the Trump administration's policies — from cutting health care and reducing SNAP (food assistance) benefits to driving up consumer prices through tariffs and the Iran war to relentless attacks on immigrants — have been devastating for cities, but rural and suburban voters have also felt their effects."***

According to the SSRS exit polls, 71 percent of urban voters, 58 percent of suburban voters, and 40 percent of rural voters supported Democratic candidates in the national elections. The *Washington Post*'s analysis suggests this represents a 15.5 percentage point shift away from Republican candidates in rural counties. Iowa and Kansas elected Democratic senators! Even while recognizing that President Trump can still veto any legislation and the Democrats do not have a supermajority to override a presidential veto, the opportunity to hold Republicans accountable and even to try and reverse some of these policies is now within political reach.

ESTER FUCHS
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Michael Nutter on Governing a Divided Nation

In the days, weeks, and months leading up to the election, I wondered what a majority of Americans were thinking about: the economy, gas prices, international wars, groceries, a frayed safety net for those in need, immigration and deportation, and the tone and tenor of our political discourse. I'm sure for every person, the issues were different.

I've been saying in my class and other places that I think America is and has been at a crossroads in our politics and our personal engagements. People seem worried about the direction of our country, worried about our standing in the international community, and worried that they seemingly have to worry about so many things on a daily basis. I think Americans decided on Tuesday that they're "tired of being tired," and that it is and was time for a change in the focus, direction, and leadership of this great country. Americans "showed up" in order to "speak up." The overall vote on Tuesday, I believe, was a fairly significant rejection of how things have been going for the last two years. Now the question must be asked:
"What's next?"

Campaigning is one thing; governing is something completely different, with much higher stakes and outcomes.

> ***"It is my sincere desire that Democrats, soon to be majorities in both the House and Senate, will develop an action plan, with hopefully meaningful support from Republicans. The plan should focus on the real issues that Americans care about, and that we keep in mind the promise of America, a nation of rights and laws, and that there are fundamental rights that all Americans want and deserve, summed up with a few words – the rights of "Life, Liberty and the pursuit of Happiness.""***

Election Day and its results are laid bare in front of us. It is time to heed President Lincoln's call in his second inaugural address to "bind up the nation's wounds" — it *is* time to start governing for "We the People."

MICHAEL NUTTER
David N. Dinkins Professor of Practice in Urban and Public Affairs; IGP Faculty Advisory Board Member, Columbia SIPA; Former Mayor, City of Philadelphia



Camille François on Holding Big Tech Accountable

For years, Silicon Valley has defined technological progress largely in terms of speed and scale: how fast we can innovate, how much we can build, how quickly we can transform the world.

> ***"The midterm results tell a clear story about growing public concern over the consequences of [AI] ambition. Debates over AI safety, data centers, and the influence of tech money in politics have brought these questions closer to home, affecting our children, our communities, and our democracy."***

That creates an opening for a much more ambitious conversation about progress. Who benefits? Who decides? What could we build together?

A new era of accountability could give people a greater measure of democratic control over the direction of technology, while sustaining the innovation that improves our lives and creates shared prosperity.

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Maria Ressa on the Fight for Global Democracy

> *"American midterms showed us what happens when citizens hold the line. Like we did in the Philippines, Americans stepped out of the virtual line of fire and mobilized in the real world, building communities of action to fight back and reclaim their rights."*

We saw this in Hungary: the end of 16 years in power for Viktor Orbán. Last month in Brazil, desperation pushed citizens to mobilize in numbers not seen in two decades to reelect Luiz Inácio Lula da Silva over Flávio Bolsonaro, son of the former president convicted of plotting a coup. And in Serbia, Gen Z students ousted Aleksandar Vucic from his 14-year grip on power. Different countries, different histories, but the same lesson: technology may connect us, but real human relationships give us the courage to act.

Courage is contagious, but you have to be close enough to catch it. These elections are turning points in the fight for global democracy. The two "dictators" — the strongmen and the tech CEOs — are counting on us to stay home, but it is up to us to fight back and hold power to account. The lessons from these elections should be leveraged as other democracies around the world head to the polls, including next spring in France and elsewhere.

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