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ADVISORY

THE SPLIT IN WASHINGTON

Impacts in the Near Term



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Introduction

This advisory brings together a range of perspectives, analyses and commentaries from leading Pakistani and international sources on the implications of the 2026 US midterm elections. Drawing on reporting, policy assessments, expert opinion and institutional analysis from publications and think tanks in both Pakistan and abroad, it examines the emerging political balance in Washington and its implications for US domestic and foreign policy. Particular attention is given to the Iran conflict, regional security, global economic uncertainty and the evolving US relationship with China. It also assesses the opportunities, risks and strategic choices confronting Pakistan as it navigates a changing American political landscape.

Executive Summary

The Split in Washington: Impacts in the Near Term

The 2026 US midterm elections have delivered a significant political setback to President Donald Trump, with Democrats gaining control of both chambers of Congress. The results reflect growing public dissatisfaction with the administration's handling of the Iran war, rising living costs, inflation and tariffs. The election is therefore not simply a domestic political rebuke; it carries important implications for American foreign policy, international stability and the global economy.

Although Trump's political authority has been diminished, he retains substantial executive powers until the new Congress assumes office on 3 January 2027. The remaining weeks offer an important window for advancing his domestic and foreign policy priorities, including judicial appointments, trade investigations, tariff measures and potentially further military action against Iran.

There are two possible trajectories for Trump's Iran policy: escalation before the new Congress takes office, or a negotiated settlement driven by the economic and political costs of a prolonged conflict. Rising fuel prices, inflation and the financial burden of war are increasing pressure for an eventual diplomatic resolution.

Democratic control of Congress will significantly increase scrutiny of the administration through congressional investigations, budgetary oversight, confirmation hearings and control over appropriations. Defence spending, foreign assistance, military commitments and presidential appointments will become important areas of contestation.

However, congressional control does not automatically translate into control over foreign policy. Presidential veto powers, the Senate filibuster and the requirement for supermajorities to override vetoes will constrain Democratic efforts to reverse Trump's decisions.

The greatest leverage will lie in controlling funding, scrutinising executive decisions and attaching conditions to essential legislation.

Iran will remain the most immediate foreign policy challenge. Congressional pressure could strengthen diplomatic efforts, although the possibility of further military escalation remains.

On Israel and Palestine, Democratic opinion is shifting towards greater scrutiny of Israeli military actions and US military assistance. This creates potential opportunities for stronger international accountability and renewed engagement on Palestinian rights, although divisions within the Democratic Party remain.

On Ukraine and European security, Congress may constrain some of Trump's choices but is unlikely to determine the terms of a settlement. Meanwhile, bipartisan competition with China will remain a

defining feature of American foreign policy. Tariffs, export controls and restrictions on strategic investments are likely to continue.

The election creates a divided power structure in Washington, with a Republican White House controlling diplomacy and executive action while Democrats exercise greater influence over legislation, funding and oversight.

International governments will have to navigate both centres of power. American foreign policy initiatives based largely on presidential authority may become less durable and more vulnerable to reversal by future administrations.

Nevertheless, the political setback should not be confused with American strategic decline. The US retains considerable economic, technological and financial advantages.

For Pakistan, the outcome presents both risks and opportunities.

The recent improvement in Pakistan-US relations has been closely associated with Trump's personal engagement with Pakistan's civilian and military leadership, alongside American interest in Pakistan's minerals and cryptocurrency sectors. A Democratic Congress is likely to scrutinise arrangements perceived as dependent on personal relationships rather than institutional interests.

There are two possible outcomes: a recalibration of bilateral relations as Democratic scrutiny increases, or broad continuity because Pakistan remains relevant to enduring American interests in regional security, counterterrorism, Afghanistan, nuclear stability and competition with China.

Pakistan should therefore avoid over-reliance on presidential relationships and develop sustainable institutional engagement across both political parties, congressional committees, the State Department, Pentagon, business community and Washington think tanks.

Relations with China will require particularly careful management. Washington's bipartisan strategic competition with Beijing means that CPEC, Chinese investments and defence cooperation will remain under scrutiny. Pakistan must demonstrate that its economic engagement with China need not exclude American commercial interests.

The most significant opportunity lies in the changing dynamics of the Gulf and the Iran conflict. Pakistan maintains working relationships with Washington, Tehran, Riyadh, Ankara and Beijing. This diplomatic access gives Islamabad a potentially valuable role in promoting regional de-escalation and negotiations.

As an energy-importing country, Pakistan is particularly vulnerable to disruptions in the Gulf, rising oil prices and instability around strategic maritime chokepoints. A prolonged conflict would increase inflationary pressures, threaten external accounts and undermine economic stability. Conversely, successful diplomacy could enhance Pakistan's regional standing.

The growing Democratic emphasis on Palestinian accountability also provides an opportunity for Pakistan to strengthen parliamentary and think-tank engagement on Palestine.

The central message is that Pakistan must prepare for a weaker Trump presidency at home but potentially more unpredictable foreign policy abroad. Washington's divided political structure will require a more sophisticated diplomatic approach.

Over the next two years, Pakistan should protect the gains made in bilateral relations, cultivate bipartisan congressional support, strengthen institutional engagement, manage its relationship with China carefully and position itself as a constructive regional stabiliser.

Pakistan must also anticipate the emergence of a new American policy environment in 2029. Its case should be built on its own strategic merits: regional stability, economic opportunity, energy security and its capacity to facilitate dialogue across competing regional interests.

The opportunity is real, but converting diplomatic access into lasting political influence will require consistency, institutional engagement and strategic foresight.

THE SPLIT IN WASHINGTON: IMPACTS IN THE NEAR TERM

The Mid-term Message: The midterms delivered a verdict on Trump's wars and prices, with the Iran war at the centre of it.[1] Vice President JD Vance has himself named the war as the main reason Republicans lost, adding that Trump acknowledged the same, and he listed the demands of Trump's 2024 voters as an end to the war, attention to inflation, a stronger America First line and a change in relations with Israel.[2,3] The polling backs the admission: 65 per cent of Americans disapproved of Trump's handling of the Iran conflict, 86 per cent said the war had raised the cost of living, 75 per cent said tariffs would shape their vote, and his approval stood near 37 per cent before election day, with only 29 per cent approving of his handling of foreign affairs.[1,4] The war has reached every part of the administration, spiking fuel prices and pushing districts that Trump carried comfortably in 2024 away from Republicans.[5] Tech, AI, data centres were also central to many races. While there was no opposition to using technology, votes split on who pays for the infrastructure, water and energy enough to reshape some outcomes.

Who Wields Power: None of this removes his powers in the short term. Until the new Congress is sworn in on 3 January 2027, which leaves roughly two months for the outgoing Republican Congress, no new constraint applies and Trump holds the full authority of the presidency.[2,6] He has accepted the result and said he is willing to work with Democrats, yet he has also said he intends to be "Mr Veto," so the conciliatory tone should be read with that in mind.[3,6,7] At home, the window favours the executive. Trump can push through as many judicial and executive appointments as the outgoing Senate will confirm, finalise open trade investigations, and attempt a party-line reconciliation bill, potentially carrying a debt ceiling increase, to insulate himself from the power of the purse before Democratic chairs take over.[6] The administration has already opened a further round of Section 301 probes covering the EU and 15 other economies, kept Section 232 action open on semiconductors, critical minerals and aircraft, and sought comment on the EU's carbon border mechanism. Analysts expect a renewed tariff push on Japan, Vietnam and China now that inflation is no longer an election-season embarrassment.[7–9]

Lame Duck Pushback or December Bargains? : Democrats hold some cards even before January. The continuing resolution funding the government expires on 11 December, and Senate Democrats may use that deadline to extract concessions on Iran.[10] The National Defense Authorization Act, which has passed for sixty-five consecutive years, was blocked by Senate Democrats in July over Iran, and the threat of blocking it again can be used to attach riders limiting presidential authority and funding.[10] The "lame duck" label fits poorly in any case: Trump has issued 292 executive orders, 90 memoranda and 192 proclamations this term, and much of his remaining agenda on AI, immigration, deregulation and energy will run through his own office.[11]

Iran Options: On Iran, there are two views of what Trump does with this window. The first holds that he escalates. Nearly nine months into an operation intended to last weeks, there are growing indicators that the US and Israel may renew military action, and analysts argue that if Trump plans to strike hard again it will happen before Democrats take their seats, since the outgoing Republican Congress is less likely to restrain war funding and the absence of an electoral constraint lowers the domestic cost of escalation.[11–13] History offers a warning here: after the 2006 midterms, Bush answered voter anger over Iraq with the 2007 surge. Despite the VP's stance, Republicans today lack an off-ramp from this war.[1,14] The second view holds that the math of war will force restraint. Brent crude fell as much as 9 per cent after the result to trade below $100 for the first time in a month on hopes of a diplomatic breakthrough, yet at about $94 it remains well above its prewar level of roughly $70, while US headline inflation has risen to 3.7 per cent, and

diesel hit a record high in August.[3] On this reading Trump orders a final round of bombing and then strikes a deal to reopen the Strait of Hormuz by 2027, since Congress is unlikely to fund another expensive campaign.[3,14] Either path sits alongside a push for legacy: a Ukraine ceasefire, a resolution in Iran and Nobel recognition, with trilateral talks planned in Abu Dhabi.[11] Presidents constrained at home have often turned to diplomacy abroad, as Bush did with START II and Obama with the Iran nuclear agreement, though agreements resting mainly on presidential authority are easier for successors to dismantle.[15]

Change After January 3

Blue Houses: Once the new Congress is seated, control of both chambers gives Democrats leverage, and the arithmetic of the veto shows why it stops short of command. Overriding a veto takes 67 senators and 290 House members, and breaking a Senate filibuster takes 60 votes, so any serious restriction on Trump needs Republican support.[9] The 2019 precedent is sobering. After Democrats took the House in 2018, binding resolutions to end support for the war in Yemen and halt hostilities with Iran passed both chambers and were vetoed, and the NATO Support Act stalled in the Senate.[10] What did become law rode on must-pass legislation, such as NDAA provisions on troop levels in South Korea. Congress has already used the same route to require a baseline of 76,000 US troops in Europe.[10,16] Republicans can no longer protect the president by controlling the agenda, but the filibuster remains.[10] The executive also arrives better armed than in 2019: the Supreme Court's June decision in Trump v. Slaughter upheld a stronger conception of the presidency and weakened the independence of most regulatory agencies, and Trump has purged the executive branch of ideological opponents and elevated his own followers.[5]

Money, Oversight, Confirmations: The real instruments are the purse, oversight and confirmations. The administration has spent two years hollowing out the power of the purse through impoundment, rescissions and tariff revenue that bypasses Congress, while in foreign aid box it dissolved USAID, withheld billions in appropriated funds until they expired and moved Food for Peace to the Department of Agriculture.[10,16] No reversal is expected under this president, but Democrats will chair the appropriations committees and shape the annual defence and foreign aid bills, which gives them real bargaining power, including over whether damaged US bases in the Gulf are rebuilt or moved.[2] Oversight will run through committees led by figures such as incoming House Oversight chair Robert Garcia, who has pledged to investigate the Trump family and told them to "lawyer up."[2] More than 200 companies have been flagged for scrutiny over ties to the White House, and Trump is expected to invoke executive privilege, setting up court battles.[6] In the Senate, Democrats can slow judicial nominations, scrutinise agency appointments and delay national security nominees as leverage, and Republicans will lack the votes to confirm new Federal Reserve governors.[2,3,6] Some analysts expect Trump to replace Defense Secretary Pete Hegseth, as Bush replaced Rumsfeld after 2006.[14] Impeachment will run high in the headlines, with Hegseth the most discussed target.[2,11] The House can impeach by simple majority, but conviction needs 67 votes, and the Senate acquitted Trump 52-48, 53-47 and 57-43 in 2019 and 2021.[17] A quarter of Americans polled believe renewed efforts would embolden him.[11]

Congressional Options On Iran: Congress's tools are weakest where the pressure is highest. The Senate has voted fourteen times on the war and, with the House, approved only one nonbinding measure last June, which the White House ignored.[10] War powers resolutions have been vetoed or ignored by presidents of both parties, including Trump in 2019 and 2020, and courts have declined to enforce the War Powers Act, so a joint resolution would raise political pressure and little more.[8] Funding is the lever with teeth. The Pentagon's request for extra war money has already been blocked once by Democrats and a few Republicans, and the model analysts point to is the 1973 near-shutdown that helped end the bombing of Cambodia, a funding prohibition attached to must-pass legislation.[2,8] Congress has historically threatened such cuts without following through, yet even the threat can bite, since it is unlikely to approve the $1.5 trillion defence budget, a 44 per cent increase, that Trump requested before the war.[8] Sentiment for ending the war is broad, and it leaves the terms of an ending open.[15] The US and Israel remain united in wanting to punish

Iran, and one assessment warns of a long, low-intensity conflict in which the US eventually leaves, Gulf states make their own accommodations, and Israel manages Iran's missile and nuclear capabilities with far less US support.[12,18]

Tarriff Authority: Tarriffs are the area where Congress can do least. Trade authority was delegated to the president years ago, so a change in congressional control does little to alter it. Repealing those authorities over a veto needs two-thirds majorities that have not panned out.[9,16] Democrats will use hearings to probe tariff exemptions and the toll on small businesses. They also want to rescind archaic laws such as Section 338, used for duties on Canada, which is also the most plausible exception, since there may be enough bipartisan support to override some Canadian tariffs.[9,12] Public anger has not produced agreement on removal: 41 per cent say tariffs mainly raise prices, yet fewer than 30 per cent want all tariffs removed, and support for presidential tariff authority rises by roughly 10 points when the president shares the respondent's party.[19] Biden kept Trump's China tariffs and added 100 per cent duties on electric vehicles, so China is the main area of continuity, with bipartisan backing for export controls, investment restrictions and stalled Taiwan arms sales, even as the understanding reached at the May US-China summit may fray as Trump's authority weakens.[7,9,13]

Broad Foreign Policy Impacts: Democratic politics on Israel has moved faster than on any other file. On 29 September, 46 of 47 Senate Democrats backed a resolution seeking information on the killing of US citizens by settlers or Israeli forces in the West Bank, compared with 18 who backed Bernie Sanders' arms-sale block in November 2024, and in April 40 of 47 voted against a sale of bulldozers.[20] Trump has himself announced an intent to end $4 billion in annual military aid. Analysts expect most aid to end in its current form, though joint weapons production may continue.[12] The movement has limits. AIPAC's super PAC spent over $108 million in 2025-26, almost all in Democratic primaries, and Democrats remain split on Israel and on China, although the moderate-led wave means leaders can assemble majorities without the most progressive members.[4,6] On Ukraine and Europe, Congress can hold a floor but cannot set terms. Mandated sanctions on Russia or new Ukraine aid would face the filibuster and veto, while many of the most vocal Republican defenders of Ukraine are exiting, so Europeans fear that NATO and European security could become part of a deal with Moscow.[6,16]

The wider world is already adjusting to a split power base in Washington. Trump's ambassadors no longer speak for an administration with a fresh mandate, some leaders may prefer to wait for 2029 before engaging, and close allies in Britain, France, Germany and Italy offered no official reaction.[7,21] Adversaries read the result as a weakening, with celebrations in Iran and China and a Kremlin hoping the peacemaking continues, while Asian capitals exhibit a small sigh of relief that Republicans may feel freer to defy Trump on trade, alongside fear that an emboldened Trump could act even more freely.[7,16] Two cautions apply. Policies pursued mainly through executive action are less durable, since courts can challenge them and successors can reverse them. The lasting legacy of this Congress may well be the policy baseline it sets for a 2029 administration on Israel and Palestine, aid and war powers.[13,20] The turbulence also should not be mistaken for American decline: the US economy stands near $33 trillion, and its technological leadership and deep capital markets still give it strategic advantages over its peers.[15]

Implications for Pakistan

More Complexity, More Windows: Pakistan's history with the two parties explains why the result is read with caution in Islamabad. Republican administrations have historically offered closer defence cooperation, from Nixon's support during the 1971 crisis with India to Reagan's military aid during the Afghan war and Bush's after 9/11. Democratic administrations have more often stressed human rights, democracy and nuclear non-proliferation, with sanctions under Carter over the nuclear programme and under Clinton after the nuclear tests, which made the 1990s a hard decade for ties.[22] Democrats have also cooperated when interests aligned, and the Obama administration kept up economic

support despite caution on defence, but relations under Biden ranged from lukewarm to ambivalent.[22,23] Matters changed when Trump returned in January 2025, with frequent public praise for Pakistan's civil and military leadership, praise returned in kind, including a Nobel Peace Prize nomination, and a Washington interest in Pakistan's crypto and minerals sectors that is widely seen as a by-product of personal rapport.[23] That is the kind of individual-centric policy that a Democratic Congress is likely to examine. As the White House's internal and external dealings come under scrutiny from January, Pakistan should expect attitudes to shift, and not necessarily for the better, with America's hesitation over Pakistan's request for a $10 billion Exchange Stabilisation Support Facility as a possible early signal.[23]

There are two views of what follows. The first expects recalibration. A weakened Trump could stall the recent reset in bilateral ties; Democrats have traditionally held a negative disposition towards Pakistan, and with Trump can no longer able take congressional support for granted, scrutiny of war spending and deals built on personal ties will rise.[18] The second view expects continuity, on the argument that American foreign policy rests on institutions, namely the State Department, the Pentagon, intelligence agencies and congressional committees, and on structural interests that survive elections: regional security, counterterrorism, Afghanistan, nuclear stability, economic engagement and competition with China. On this view the presidency still directs diplomacy for two more years, and Pakistan's weight, resting on its location between South Asia, Central Asia, China and West Asia, its nuclear deterrent, its ties with China and new regional initiatives such as the Makkah and Badar alliances. Most likely, Pakistan will not be ignored because the composition of Congress has changed.[24]

Both views point to the same remedy. Personal ties can open the door, but relations have been largely transactional for decades, from fighting communism to fighting terrorism, so Pakistan would be well advised work with every tier of the US government, build institutional channels that survive storms in Washington, engage both parties, and avoid trading away other vital relationships, China above all.[23] On balance, Washington is unlikely to turn more pro-Pakistan or more anti-Pakistan, but it will certainly become more complicated, because Pakistan will now deal with two power centres: a Republican White House that still controls diplomacy and negotiations, and a Democratic Congress that controls committees, spending and oversight.[25] The strategy therefore has to reach beyond the White House and Congress to the American business community and Washington's think tanks.[25]

The China Factor: Ties with China need careful handling, since bipartisan agreement that Beijing is America's principal long-term competitor keeps CPEC investments and defence cooperation with China under American scrutiny. To keep the hedge, Pakistan must demonstrate that economic cooperation with China need not come at the expense of American economic interests.[25] A Democratic Congress also offers an opening on Palestine. As party positions harden around accountability, and Congress has little exposure to Palestinian leaders, parliamentary and think-tank diplomacy with incoming committee chairs deserves priority for Pakistan as a long-standing advocate.[20]

Chokepoint Math: Peace in the Gulf is the clearest shared interest, and chokepoint economics make it urgent. Congressional pressure strengthens the case for diplomacy with Iran and could open the way to negotiations that improve Gulf stability and enhance Islamabad's role as a peace broker. The alternative is a long, low-intensity conflict on Pakistan's western flank.[12,18] Islamabad assets are that it holds working relationships with Washington, Tehran, Riyadh, Ankara and Beijing. Not many countries have direct access to all five capitals, so a US move towards a negotiated settlement with Iran would place Islamabad in an advantageous position, provided it can convert diplomatic access into diplomatic influence.[25] As an energy importer, Pakistan is exposed to every turn. The IMF expects global headline inflation of 4.7 per cent this year with energy importers hardest hit. Brent at around $94 remains far above its prewar level of roughly $70, and the recent fall in oil prices on hopes of lower escalation risk allowed the government to cut petrol by Rs5.45 and diesel by Rs3.68 per litre.[3,9] Markets have priced the same bet, with the KSE-100 adding nearly 4,000 points on expectations around the midterms and Iran talks and standing at 174,684 on 5 November, up 1.55 per cent, so a renewed strike in the lame-duck window would test it quickly.[9] Tighter global money adds to the strain. The Federal Reserve has raised rates for the first time since 2023, further increases are expected, and US fights over the budget and debt ceiling are likely to strain bond markets and lift borrowing costs for heavily indebted

economies.[3,12] The finance minister has told a Senate body that external accounts are comfortable, but the coming months will test that comfort.[9]

Bottom Line: The central lesson for Islamabad is to plan for a Trump presidency that is weaker at home and busier abroad, and a Congress that is louder than it is powerful. There is a strong view that Trump may pursue an even more adventurist foreign policy, including in the Middle East, as he faces real constraints on his domestic agenda.[16] At this point, Trump may move to align his interests until Congress and new Senators are sworn in on January 3. After that Trump can likely not pass any laws, although he holds the veto power, because Congress is expected to block all bills. He will not be able to secure new funding, as the legislature controls the budget, and may feel more cornered by his inability to appoint judges and officials, as the Senate has the power to block nominees. The risk of impeachment will also run high in the headlines, as investigations may be initiated.

There will clearly be a split power base in Washington that foreign governments must now navigate.[21] Pakistan's task over the next two years is to protect the gains of the recent reset, keep channels open on both sides of the aisle, and prepare for a 2029 administration whose policy floor is being shaped by this Congress. Direct lobbying with key Committee chairs will be critical, as well as management of diasporic expectations.

Shifts in the region are to be expected. Analysts expect India's stakes in the U.S. relationship to grow even amid American turbulence, with the H-1B visa question and trade friction as live issues.[15] Bipartisan convergence in Congress has centred on competing with China and reassuring allies in Europe and Asia, which is the lane India occupies in Washington's eyes.[10] Pakistan's case must therefore be made on its own terms, around regional stability and its Gulf and mediation role, because Congress will not make it for Islamabad.

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