US Midterm Elections: Cautious Optimism for India, But No Strategic Reset

November 23, 2026



The US midterm elections on 3 November delivered a landslide victory for the Democrats in both the House and the Senate, a major setback for President Donald Trump. Political analysts, exit polls, and even party leaders have attributed the results to voters' rebuke of Trump's foreign and domestic policy, with the Iran war and cost-of-living concerns as decisive factors shaping voter discontent.

India's first official response to the midterms was measured. MEA Spokesperson Randhir Jaiswal emphasized the bipartisan nature of the US-India relationship during a press briefing on November 10. He refrained from commenting on the political outcome, describing the elections as an "internal matter of the United States" and reiterating India's commitment to strengthening the comprehensive global strategic partnership with the US.

Notwithstanding the official remarks, the results have generated a degree of optimism within the Indian strategic community, albeit one that remains cautious. The relief comes against the backdrop of a turbulent year for India-US relations, marked by punitive tariffs, changes in skilled-worker visa regulations, contentious public remarks, and a credit grab for the ceasefire with Pakistan following Operation Sindoor.

Foreign policy implications

While it is unlikely that the midterm results will bring about any structural change in the bilateral relationship, they offer India more room to maneuver geopolitically. The election results matter less for India-US bilateral relations, and more for their impact on India's "operating environment" in the world, as *The Hindu*'s diplomatic affairs editor Suhasini Haider argues. A Democratic Congress is set to challenge Trump's foreign policy decisions, reducing the volatility that has characterized his second term.

The Iran war presents a pressing example. The US-Israel strikes on Iran have killed at least 24 Indians and have raised alarms for the Indian diaspora in the Gulf region. Moreover, the blockade of the Strait of Hormuz has adversely affected India's energy and fertilizer imports and goods trade. A cessation of hostilities, as well as any developments that lead to more predictability in US foreign policy, would therefore be welcome for India. However, former Indian Ambassador to the US and Israel Navtej Sarna said it was still too early to see which "specific aspects" of foreign policy would be affected by the election results. C. Raja Mohan argues that, while there is considerable sentiment across the political spectrum for an immediate end to the Iran war, Congress can only restrict funding and authorizations. A two-thirds consensus, which is required to overcome a presidential veto, appears unlikely, as Democrats are still well short of such a supermajority.

On Russia, the results could potentially have a mixed, or even negative, effect on India's ties with the country. The Lindsey O. Graham Sanctioning Russia and Iran Act of 2026 had widespread bipartisan support, so even after Trump's decision to temporarily waive tariffs on countries importing Russian oil, the election results provide no guarantee that the tariffs will remain waived. The possibility of renewed pressure on India therefore cannot be ruled out. Meekashi Doshi and Azman Usmani argue in *Bloomberg* that for India, the uncertainty will likely persist over trade as well as crude prices.

Similarly, on China, the results only create ambivalence. KS Tomar argues in the *Hindustan Times* that Beijing might calculate that a weakened Trump may give way to diplomatic success. However, this is unlikely to happen as Congressional concern over AI, semiconductors, supply chains and Taiwan cuts across party lines. With the Quad leaders' summit in Manila and the upcoming APEC summit in Shenzhen, New Delhi will closely monitor US-China ties, especially how the Republican electoral defeat shapes Washington's Indo-Pacific strategy and its stance towards the conflict in Ukraine.

Another neighbor whose relations with the US interest India is Pakistan. Islamabad's gains under Trump ran largely through one channel, Field Marshal Asim Munir, and its value to Washington as an intermediary with Iran. However, India should not read Democratic victory as a straightforward gain, since Trump's executive diplomacy is likely to continue, and remains outside Congressional jurisdiction. Moreover, Pakistan's usefulness vis-a-vis Iran lasts as long as the war does.

Furthermore, in the Western Hemisphere, the US-Venezuela oil agreement could also come under greater scrutiny. An October investigation by ProPublica raised questions about the agreement's transparency, its structure, and the choice of North American Blue Energy Partners (NABEP) as a partner, whose chief executive has surfaced in money-laundering

investigations. Democratic lawmakers have already demanded greater transparency from the administration, including access to the agreement and details of its financial arrangements. With Democrats controlling Congress starting in January, the deal could become a subject of hearings and investigations. Washington has pressured India to reduce its reliance on Russian crude, pushing Venezuela as the primary alternative. Ahead of the November 2026 midterm elections, U.S. Secretary of State Marco Rubio visited India's Reliance Industries refinery in Jamnagar to push for increased processing of heavy Venezuelan crude oil. Within this context, the investigations add to India's uncertainty. Any political or legal backlash against the deal could hurt the supply chain and potentially create legal and reputational risks for Indian buyers.

Implications for the diaspora and domestic politics

For the Indian diaspora in the US, the rise in Democratic governors and Congress members belonging to immigrant families sparks optimism about a reduction in anti-immigrant rhetoric. Yet it is unlikely that the tough stance on illegal immigration, curbing visas, and restricting the naturalization of professionals will change. On the other hand, the surge in Indian-American wins in the midterms may test the MEA, as these Democratic leaders, often termed the 'Samosa Caucus,' have been vocal about civil rights and have condemned Hindu nationalism in India. BJP MP Meenakshi Lekhi wrote for *ThePrint* that a Democratic-controlled Congress is likely to follow "Rahul's (LOP Rahul Gandhi) allegations and his political toolkit" – referring to their emphasis on human rights and civil liberties.

Indeed, within Indian domestic politics, leaders from the NDA and INDIA blocs have clashed over the political parallels and the implications of the US midterm results. The Opposition has framed the Republican losses as a general pushback against right-wing governments worldwide. Congress MP Pawan Khera drew parallels between Trump and PM Modi,

stating that a similar electoral defeat could happen to Modi as well. BJP leaders have dismissed these parallels with their own slogan– that the POTUS may come and go, but the "lotus" will remain, referring to the party symbol of the BJP.

Takeaways and future steps

For New Delhi, the immediate priority is to sustain engagement with the Trump administration and work to close the bilateral trade deal. However, deep structural hurdles make a quick breakthrough in the trade deal unlikely. Among these, US demands for regulatory changes and greater access to India's agriculture and dairy sectors remain unresolved. Neither does India have a firm assurance that tariffs will not simply be reimposed through alternative legal avenues.

The overall mood within India's strategic community is therefore one of cautious optimism, and a wait-and-watch approach is warranted. Although some commentators have noted that flipping of the Congress following midterm polls is a long-standing pattern in US politics, the main takeaway is a reduction in Trump's unilateral power to pass legislation that affects India's interests. Nevertheless, presidential executive orders remain a tool in Trump's hands that will likely be heavily invoked at his whim. So, while greater congressional scrutiny is likely, a fundamental shift in US policy towards India is unlikely. As C. Raja Mohan argues, India cannot afford to rely exclusively on personal chemistry between political leaders. Engagement with Congress, businesses, think tanks, and the Indian-American community will be equally important. For Indian interests, what matters most are issues with bipartisan support in Congress.