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The Defense Ledger: War, Bills and Budgets from the Lame Duck to 2027

Stopgap money, a routinely stalled authorization bill and an unpaid war bill meet a short lame duck

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Stopgap money, a routinely stalled authorization bill and an unpaid war bill meet a short lame duck

Congress is likely to leave defense on another stopgap into the new year, pass the authorization act in December on a negotiated text as it has in each recent year, and pay at most part of the war's munitions bill before the year ends, because the lame duck has too little floor time for every deadline at once.

The most likely end to the year is another stopgap for defense, not a lapse and not a full-year bill. The authorization act is more likely than not to become law before the year ends on a text negotiated between the chambers, as in each of the last five years, and the Senate stall on its own bill is the usual pattern rather than a warning sign. Reconciliation money for defense is likely to be far smaller than requested and to arrive in the new year, if at all. The war supplemental will not pass on its own, so munitions replacement is at best partly funded by year end, on the stopgap, an omnibus or a small reconciliation bill. For program offices and suppliers, the stopgap's bar on new starts and rate increases is the rule to plan on.

HEADLINE INDICATORS

72 days STOPGAP FUNDING PERIOD ENDING 11 DECEMBER 2026	**50-46** FAILED SENATE CLOTURE VOTE ON THE SENATE AUTHORIZATION BILL, 14 JULY 2026	**22 of 27** AUTHORIZATION ACTS FOR FY2000 TO FY2026 SIGNED BY 31 DECEMBER
22 days SENATE SESSION DAYS LEFT IN THE YEAR AS OF 28 OCTOBER 2026	**47.1 USD-billion** PENTAGON ESTIMATE OF THE WAR'S COST AS OF 16 OCTOBER 2026	**144 vessels** REDIRECTED UNDER THE BLOCKADE OF IRANIAN PORTS AS OF 31 OCTOBER 2026

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CENTRAL JUDGMENT

Congress will end the year with defense on another stopgap, an authorization act passed in December on a negotiated text, and the war's bill at best partly paid. The lame duck has too little floor time for the funding cliff, the authorization bill and a reconciliation bill together, and the midterm result changes each party's incentive to settle now or wait for the new Congress, which shapes how long the next stopgap runs. For contractors and program offices, the practical result is that the stopgap's bar on new starts and on faster production runs into the new year, and most of the munitions rebuild waits on money that has not been appropriated.

KEY JUDGMENTS

KJ-1	Congress is likely to pass another stopgap rather than let defense funding lapse or settle full-year defense appropriations before the December deadline, though the risk of a lapse rises if the stopgap becomes the vehicle for the war money discussed in KJ-4. Both chambers passed the current stopgap by wide bipartisan margins, and neither has passed a defense appropriations bill.	MODERATE
KJ-2	The authorization act is more likely than not to be law by the end of the year, most likely on a text negotiated by the Armed Services leaders and moved as an amendment between the chambers, which bypasses a Senate floor vote on the stalled committee bill. December enactment has held in each of the last five years, several times without the Senate passing its own bill, but this year the final votes must share a short session with the funding deadline.	MODERATE
KJ-3	Defense reconciliation, if it passes at all, will be far smaller than requested and is unlikely to be enacted before the year ends. Both budget resolutions carry a small fraction of the request, the Senate has not adopted its own, and the Pentagon still held USD 75 billion of its earlier reconciliation money in July 2026, which weakens the urgency.[5]	MODERATE
KJ-4	The war supplemental will not pass as a standalone bill this year, and if any war money is enacted before the year ends it is most likely munitions replacement riding on the December stopgap, an omnibus or a small reconciliation bill, so munitions replacement is at best partly funded by year end. CSIS judges a standalone package unlikely in the short lame duck, and a recent year-end stopgap carried emergency money in its own division, but no source read shows leaders planning to attach war money this time.	LOW
KJ-5	The midterm result will shape the length and terms of the next stopgap more than whether one passes: a Republican hold on both chambers points to a long stopgap or a full-year bill, while a Democratic gain of either chamber points to a short stopgap that ends early in the new Congress. A party that expects to gain power has reason to defer full-year bills to the new Congress, while a majority that keeps both chambers loses little by settling in the lame duck.	LOW

KEY STATISTICS

72 days
Length of the stopgap period from 1 October to 11 December 2026, 2026-09-17[1]

2.85 USD-billion
Ceiling in Procurement Defense-Wide for National Security Systems under section 127 of the stopgap, 2026-09-17[1]

216-212 votes
House passage tally for H.R. 8800, 2026-07-22[2]

50-46 votes
Failed Senate cloture tally on the motion to proceed to S. 4784, 2026-07-14[2]

22 acts
Authorization acts for FY2000 to FY2026, out of 27, signed on or before 31 December of the year their fiscal year began, 2025-12-18[7]

78 days
Lag from the start of FY2026 to enactment of its authorization act, 2025-12-18[10]

1.15 USD-trillion
Base discretionary national defense request for FY2027, 2026-10-28[3]

60 USD-billion
Defense reconciliation funds in the House and Senate budget resolutions, 2026-10-28[3]

67.1 USD-billion
Defense share of the supplemental request sent to Congress, 2026-06-24[4]

47.1 USD-billion
Pentagon estimate of the war's cost to the department as of 16 October 2026, 2026-10-28[9]

Scope and method

METHOD

This paper reads the Congressional Research Service analyses of the stopgap law and of the authorization bill's legislative status this year and in each of the five previous years, the Congressional Research Service table of past authorization enactment dates, the text of the December 2024 stopgap law, a CSIS analysis of post-midterm defense funding outcomes, and defense trade and news reporting on the war supplemental, the war's cost and the blockade of Iranian ports. Every source was read on the day before the midterm elections, so the election result and any lame-duck action are outside it. The department is named the Department of Defense in the laws read for this paper and now also uses the Department of War name; this paper uses the statutory name. Probabilities are the author's own judgment unless a base rate is named. No client-attributable material is used.

SECTION 01 · ASSESSMENT

The December funding cliff

The stopgap law, H.R. 6500, enacted as P.L. 119-103 and signed on 2 September 2026, funds the government from 1 October through 11 December 2026, a 72-day period, after a 90-6 Senate vote on 8 August and a 370-48 House vote on 1 September.[1]

Section 102 of the stopgap bars the Department of Defense from funding new starts, new production of items not funded in FY2026, accelerated production rates and certain multiyear procurements, while section 127 allows up to USD 2.85 billion in Procurement Defense-Wide for National Security Systems.[1]

The Congressional Research Service notes that a funding gap could begin on 12 December 2026 unless full-year or further continuing appropriations are enacted first.[1]

As of 28 October 2026 the House had passed its military construction bill, H.R. 8469, while its defense bill, H.R. 9495, with a topline of about USD 1.072 trillion, had been reported but not passed, and the Senate Appropriations Committee had passed neither bill.[3]

CSIS notes that in the midterm years 2014, 2018 and 2022, full-year defense appropriations for FY2015, FY2019 and FY2023 were enacted before the end of the calendar year, the first and last in lame-duck sessions, and that a party winning a chamber this year may prefer a stopgap into the new year to gain leverage.[3]

UNKNOWN: whether congressional leaders have agreed the length of the next stopgap, its defense anomalies or any war money attached to it; no source read for this paper shows a draft text.

ASSESSMENT · MODERATE CONFIDENCE

Another stopgap, not a lapse and not a full-year bill, is the most likely result at the December deadline, and it would carry the bar on new starts and rate increases into the new year. The risk of a lapse rises if leaders make the stopgap the vehicle for war or munitions money, because that would reopen the fight over the war on a must-pass bill. Both chambers passed the current stopgap by wide margins, no defense appropriations bill has passed either chamber, and the midterm-year record points to full-year bills arriving late in the year rather than by the stopgap's own deadline.

SECTION 02 · ASSESSMENT

The authorization bill stalled in the Senate

The House Armed Services Committee voted 44-12 on 4 June 2026 to report H.R. 8800, and the House passed it 216-212 on 22 July 2026 after a first rule failed 198-224 on 30 June.[2]

The Senate Armed Services Committee voted 18-9 on 10 June 2026 to report an original bill, S. 4784; cloture on the motion to proceed failed 50-46 on 14 July and a motion to reconsider was entered, with no further Senate step recorded as of the 1 September 2026 update.[2]

Of the 22 authorization acts for FY2000 to FY2021, 17 were signed on or before 31 December of the year in which their fiscal year began, and five, for FY2006, FY2008, FY2011, FY2013 and FY2021, were signed in January.[7]

The acts for FY2022 to FY2026 were signed on 27 December 2021, 23 December 2022, 22 December 2023, 23 December 2024 and 18 December 2025, which lifts the count to 22 of 27 acts signed by 31 December.[10,11,12,13,14]

The Congressional Research Service puts the average lag from the start of the fiscal year to enactment at about 45 days since FY1977, but the last five acts were signed 78 to 87 days after their fiscal years began, so the long-run average understates how late recent acts land.[10,11,12,13,14]

In four of those five years the final text moved as an amendment between the chambers on another bill rather than on the Senate committee bill: S. 1605 for FY2022, H.R. 7776 for FY2023, H.R. 5009 for FY2025 and S. 1071 for FY2026.[10,11,13,14]

The Senate did not vote on final passage of its FY2022 committee bill after cloture on a substitute failed 45-51, did not consider its FY2023 committee bill, and shows no floor vote on its FY2025 committee bill in the Congressional Research Service record, yet each act became law in December.[11,13,14]

In those five years the Senate cast its final vote on the act on 15 December 2021, 15 December 2022, 13 December 2023, 18 December 2024 and 17 December 2025.[10,11,12,13,14]

The Senate is scheduled to return the week of 9 November 2026, and the authorization bill competes for floor time with the funding deadline of 11 December 2026.[8]

CSIS counted 22 scheduled Senate session days and 20 House session days left in the year as of 28 October 2026.[3]

UNKNOWN: whether the Armed Services leaders of the two chambers have settled a compromise text; no source read for this paper shows one released.

ASSESSMENT · MODERATE CONFIDENCE

The authorization act is more likely than not to become law by the end of the year, most likely on a negotiated text moved as an amendment between the chambers that bypasses a Senate floor vote on the stalled committee bill, and the summer stall is the usual pattern rather than a sign of failure. The December record is strong and recent, but this year the final votes must share a short session with the funding deadline and a possible reconciliation bill, which keeps the estimate somewhat below the record.

SECTION 03 · ASSESSMENT

Toplines: the request and what Congress will fund

The FY2027 request for national defense totals USD 1.5 trillion, made up of USD 1.15 trillion in base discretionary appropriations and USD 350 billion in reconciliation funding.[3]

The House passed its FY2027 budget resolution, H. Con. Res. 113, in July 2026; the Senate has not voted on its version, and both resolutions provide USD 60 billion in defense reconciliation funds.[3]

The One Big Beautiful Bill Act took 85 days from adoption of the budget resolution on 10 April 2025 to enactment on 4 July 2025, and the Secure America Act took 42 days.[3]

The Pentagon had USD 75 billion left of the USD 156 billion in reconciliation funding it received under the One Big Beautiful Bill Act, as reported on 21 July 2026.[5]

UNKNOWN: whether the Senate will take up a budget resolution in the lame duck at all; no source read for this paper shows a scheduled vote.

ASSESSMENT · MODERATE CONFIDENCE

Defense will receive far less reconciliation money than it asked for, and any that passes is more likely to be enacted in the new year than in the lame duck. The Senate has not adopted a budget resolution, even the fastest recent reconciliation law took weeks from that step to enactment, and the large unspent balance of the earlier reconciliation money weakens the case for rushing a second bill.

SECTION 04 · ASSESSMENT

The war bill

The White House sent Congress a USD 87.6 billion supplemental request on 24 June 2026, of which USD 67.1 billion is for defense, including USD 21 billion to recoup munitions and USD 17.3 billion for operations.[4]

Secretary Hegseth told the Senate Appropriations Committee on 21 July 2026 that the war, which began on 28 February 2026, had cost the department USD 37.5 billion, and that about USD 32.7 billion of the request would fund the operation directly.[5]

The Pentagon told lawmakers the war had cost USD 47.1 billion as of 16 October 2026, with about USD 29 billion for replacing munitions and about USD 11.9 billion for operations, and the estimate leaves out damage to US bases.[9]

CSIS judged on 28 October 2026 that Congress is unlikely to take up the defense request as a standalone package, noted that some Republicans suggest using the USD 60 billion reconciliation package to address it, and noted that the House budget resolution includes USD 21 billion to accelerate munitions acquisition and expand production lines.[3]

The year-end stopgap enacted on 21 December 2024 as P.L. 118-158 carried a Disaster Relief Supplemental Appropriations Act as its own division beside continuing appropriations to 14 March 2025.[15]

UNKNOWN: whether leaders will attach war or munitions money to the next stopgap or an omnibus; no source read for this paper shows a draft.

UNKNOWN: how much of the munitions replacement cost is still unfunded; no listed source read for this paper gives an unfunded figure.

UNKNOWN: the full cost of the war including damage to US bases and equipment, which the Pentagon is still assessing.

> **ASSESSMENT · LOW CONFIDENCE**
>
> The war supplemental will not pass as a standalone bill this year. If any war money is enacted before the year ends, munitions replacement is the most likely part to move, on the December stopgap, an omnibus or a small reconciliation bill, so replacement is at best partly funded by year end and the larger bill passes to the new Congress. CSIS judges a standalone package unlikely and names reconciliation as one vehicle, and a recent year-end stopgap carried emergency money, but no source read shows leaders planning to attach war money this time.

SECTION 05 · ASSESSMENT

The blockade at sea

Middle East Eye reported CENTCOM's statement that as of 31 October 2026 its forces had redirected 144 commercial vessels under the blockade of Iranian ports, up from 135 reported earlier in October.[6]

The Senate passed a resolution to halt the war 50-48 in June 2026, and at least 14 merchant mariners had died in attacks in the Strait of Hormuz by late July 2026.[5]

UNKNOWN: the text of CENTCOM's own release on the count, which could not be opened for this paper; the figure is read through a listed press report of CENTCOM's statement.

UNKNOWN: the state of talks on reopening the Strait of Hormuz; no listed source read for this paper reports their terms.

> **ASSESSMENT · LOW CONFIDENCE**
>
> The blockade is likely to keep running through the lame duck, which keeps operating costs rising while Congress argues over who pays for them. The redirection count rose steadily through October, but this paper reads it only through a press report of CENTCOM's statement, and a deal could end the blockade at short notice.

SECTION 06 · DECISION

Decision

Decision	Owner	Trigger	Pre-authorised action
Plan contract and production schedules on a stopgap running into the new year	Program finance lead	Congress passes a further stopgap without a full-year defense bill	Hold new-start and rate-increase actions and sequence awards onto existing lines
Set the planning horizon to the next stopgap's end date	Program finance lead	The next stopgap is introduced with its end date	Re-time awards to the stated end date and flag those that need full-year money
Prepare for authorization provisions taking effect	Compliance lead	The Armed Services leaders release a compromise text	Map the compromise text's sourcing and lobbying provisions against current contracts
Time munitions replacement orders	Supply chain lead	The December stopgap, an omnibus or a reconciliation bill carries munitions money	Release long-lead orders already priced and approved
Ready for a funding lapse	Operations lead	No stopgap has passed either chamber in the final week before the deadline	Activate lapse plans for excepted and non-excepted work

SECTION 07 · OUTLOOK

Outlook

Baseline. Congress passes another stopgap at or just before the December deadline, carrying defense into the new year under the same bar on new starts. The Armed Services leaders agree a compromise authorization text that passes both chambers in mid to late December, as in recent years, and reconciliation and most of the war supplemental slip into the new Congress.

Deterioration. A clear swing in the House turns the next stopgap into a standoff: the outgoing majority refuses a long stopgap that hands leverage to the new one, the incoming side refuses a short one or a stopgap carrying war money, and a short lapse follows in December. The authorization act slips into January, and munitions replacement waits on a new Congress with different priorities.

Stabilization. Leaders pair a longer stopgap or an omnibus with the compromise authorization act in December, carrying part of the munitions money, and Republicans move a small defense reconciliation bill before the year ends.

Claim C-1. A further continuing resolution or a full-year appropriations act that funds the Department of Defense beyond 11 December 2026 is enacted on or before 11 December 2026. Probability 0.80. Resolves on 2026-12-12 from Congress.gov: YES if Congress.gov shows such a law enacted on or before 11 December 2026; NO if none is enacted by that date, even if one is enacted later. Horizon 60 days. Both chambers passed the current stopgap by wide margins, and neither chamber has a defense appropriations bill ready to replace it. The main risks are a post-election standoff over the length of the next stopgap and a fight over attaching war money to it. No base rate available: the firm has not read a count of on-time stopgap extensions from a listed source.

Claim C-2. Full-year FY2027 appropriations for the Department of Defense, by a regular defense appropriations act, an omnibus or a full-year continuing resolution, are enacted on or before 31 December 2026. Probability 0.25. Resolves on 2026-12-31 from Congress.gov: YES if Congress.gov shows enacted on or before 31 December 2026 a law that provides appropriations for the Department of Defense through 30 September 2027; a stopgap that ends earlier does not count. Horizon 60 days. The House has not passed its defense bill and the Senate Appropriations Committee has not reported one, and a party that expects to gain power after the midterms has reason to defer full-year bills. The midterm-year record, read for this revision, lifts the estimate from the earlier draft's 0.15. Base rate: 1.00, from Center for Strategic & International Studies, as of 2026-11-02. Why the probability differs: the base rate rests on only three midterm years, 2014, 2018 and 2022, and this year CSIS counts only 22 Senate session days left as of 28 October 2026 while reconciliation, the debt limit and the war request compete for them.

Claim C-3. The National Defense Authorization Act for Fiscal Year 2027 is enacted into law on or before 31 December 2026. Probability 0.65. Resolves on 2026-12-31 from Congress.gov: YES if Congress.gov shows a National Defense Authorization Act for Fiscal Year 2027, on any vehicle, signed into law or enacted over a veto on or before 31 December 2026; NO otherwise. Horizon 60 days. The act has been signed in December in each of the last five years, usually on a negotiated text moved as an amendment between the chambers without a Senate floor vote on the committee bill, so the Senate stall is routine. This year the final votes must share a short session with the funding deadline, so the probability sits below the record and matches the firm's locked estimate for enactment by 3 January 2027, since a signing between 1 and 3 January adds little. Base rate: 0.81, from Every CRS Report, as of 2026-11-02. Why the probability differs: in the last five years the Senate cast its final vote between 13 and 18 December, so this year's act needs the same late window just after the stopgap expires on 11 December 2026, from only 22 Senate session days left as of 28 October 2026.

Claim C-4. The cumulative number of commercial vessels redirected under the US blockade of Iranian ports, in the latest figure US Central Command publishes on or before 2026-12-01. Point and interval: lo 145, central 155, hi 168, unit vessels, level 80. Resolves on 2026-12-02 from

CENTCOM operational press releases: the latest cumulative count of commercial vessels redirected under the blockade, in vessels, that CENTCOM publishes on or before 1 December 2026, as first published, whatever the method. Horizon 30 days. The count rose from 135 to 144 over October, a pace of about two to three vessels a week, as read through a press report of CENTCOM's statement. The interval allows for a slower pace if traffic thins and for a pause if a deal suspends the blockade. No base rate available: a running count of a single operation has no record of past outcomes to compare with.

Claim C-5. Congress enacts a reconciliation measure providing at least USD 50 billion in new budget authority for the Department of Defense on or before 31 December 2026. Probability 0.08. Resolves on 2026-12-31 from Congress.gov: YES if Congress.gov shows such a reconciliation law enacted on or before 31 December 2026 and its text or the Congressional Budget Office estimate shows at least USD 50 billion in new budget authority for the Department of Defense; NO otherwise. Horizon 60 days. The Senate has not adopted a budget resolution, and the two recent reconciliation laws took six to twelve weeks from that step to enactment. The Senate majority leader has called passage after the midterms difficult, and the Pentagon still held USD 75 billion of its earlier reconciliation money in July 2026. No base rate available: the firm has not read a listed count of reconciliation bills enacted in a lame duck.

Claim C-6. On 31 December 2026, laws enacted on or before that day appropriate funds for the Department of Defense through a date later than 31 January 2027. Probability 0.45. Resolves on 2027-01-01 from Congress.gov: YES if Congress.gov shows that continuing or full-year appropriations enacted on or before 31 December 2026 fund the Department of Defense through a date later than 31 January 2027; NO if the latest such date in enacted law on 31 December 2026 is 31 January 2027 or earlier, or if no appropriations for the department are in force on that day. Horizon 60 days. A Republican hold on both chambers points to a long stopgap or a full-year bill and a YES, while a Democratic gain of either chamber points to a short stopgap ending early in the new Congress and a NO. The claim makes the judgment that the midterm result shapes the stopgap's length scoreable. Base rate: 1.00, from Center for Strategic & International Studies, as of 2026-11-02. Why the probability differs: the base rate counts only three midterm years, 2014, 2018 and 2022, in which full-year defense bills passed by year end, and CSIS notes that a party winning a chamber in 2026 may prefer a stopgap into the new year.

Indicators.

- The midterm result in each chamber and the first statements by each chamber's leaders on the lame duck
- A new cloture filing or a unanimous consent agreement on the Senate authorization bill when the Senate returns
- Release of a compromise authorization text or joint explanatory statement by the Armed Services leaders

- Introduction of a further stopgap, the end date it names and any war or munitions money attached to it
- A Senate vote on a budget resolution carrying defense reconciliation instructions
- A new Pentagon estimate of the war's cost or a revised supplemental request
- CENTCOM releases on the blockade's redirection count, or any agreement that suspends the blockade

SECTION 08 · SCORECARD

Scorecard

- CLM-2026-346: Advanced by Claim C-3, which asks the same question to an earlier date and now matches the locked estimate, since the extended record of December enactment offsets the short floor calendar.
- CLM-2026-347: Advanced by Section 02, which finds no Senate floor step since the failed cloture vote, no released compromise text, and final Senate votes between 13 and 18 December in each of the last five years, consistent with the locked low estimate for Senate agreement by 7 December.
- CLM-2026-256: Advanced by Claim C-5, which restates it with a lower estimate because the Senate has not adopted a budget resolution.
- CLM-2026-373: Advanced by Claim C-4, which gives an interval for the same count from the latest published figure.

SECTION 09 · WHAT IS NOT KNOWN

Unknowns

- UNKNOWN: the outcome of the midterm elections and how each chamber's leaders read it for the lame duck.
- UNKNOWN: whether any Senate floor action on the authorization bill has occurred since the latest Congressional Research Service update.
- UNKNOWN: the Senate's return date is read only from an unverified source; no listed source read for this paper states it.

SOURCE REGISTRY

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