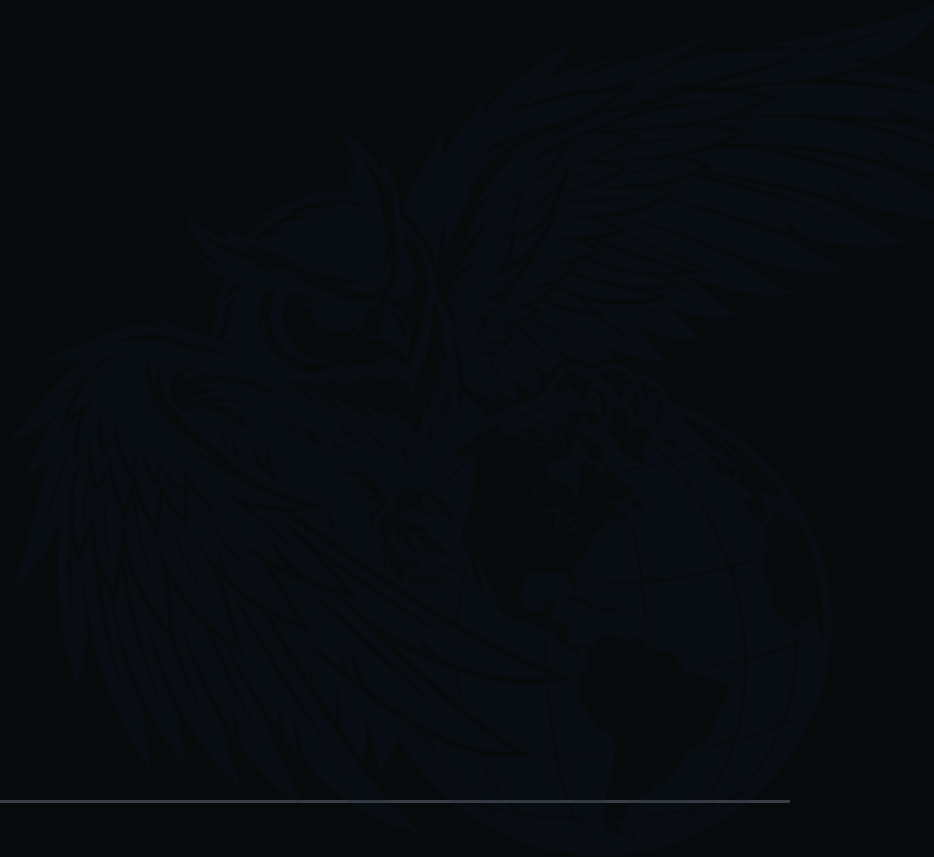

PUBLISHED MARKET RESEARCH

The Stalled NDAA: Does Congress Pass a Defense Bill This Year?

A Senate blockade over the Iran war meets a lame-duck calendar and a long enactment streak

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A Senate blockade over the Iran war meets a lame-duck calendar and a long enactment streak

Congress is more likely than not to enact this year's defense authorization bill before the current Congress ends, but late, through a negotiated text rather than the stalled Senate bill, and only if Senate Democrats get an answer they can accept on the Iran war.

Congress is more likely than not to enact the annual defense authorization bill before the current Congress ends, but not before the lame-duck session and not through the Senate bill now stalled on the floor. The House has passed its bill and the Senate Armed Services Committee reported a bipartisan one, so the obstacle is floor procedure, not policy content. Senate Democrats blocked the motion to proceed over the unauthorized Iran campaign, and the Senate has not moved the bill since. The likeliest route is the one used last year: committee leaders negotiate a compromise text and move it as an amendment to an unrelated vehicle, with a single Senate vote at the end. The main risks are a widening of the Iran war, a crowded December agenda as the stopgap expires, and a post-election incentive to wait for the new Congress.

HEADLINE INDICATORS

50-46

FAILED SENATE CLOTURE VOTE
ON THE MOTION TO PROCEED TO
S. 4784

216-212

HOUSE PASSAGE VOTE ON
H.R. 8800

72 days

LENGTH OF THE STOPGAP
FUNDING THE GOVERNMENT TO
11 DECEMBER 2026

78 days

LAG FROM FISCAL YEAR START
TO ENACTMENT OF LAST YEAR'S
ACT

65 years

CONSECUTIVE FISCAL YEARS
WITH AN ENACTED DEFENSE
AUTHORIZATION ACT

DOCUMENT CONTROL

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CENTRAL JUDGMENT

The defense authorization bill is stalled for political, not substantive, reasons, and political blockades of must-pass defense bills have usually been resolved by a negotiated text late in the calendar year. The Senate Democratic objection is about leverage over the Iran war, which can be met with report language, a war-powers vote or a reporting requirement without rewriting the bill. The firm therefore expects enactment in the lame duck as the base case, while treating a slip into the next Congress as a real minority outcome.

KEY JUDGMENTS

KJ-1	Congress is more likely than not to enact this year's defense authorization act before the current Congress ends. The bill has passed the House, both committees reported it with bipartisan votes, and last year's act was enacted through a negotiated text late in December.	MODERATE
KJ-2	Enactment, if it comes, will run through a compromise text negotiated by the Armed Services leaders and moved on an unrelated vehicle, not through Senate floor passage of S. 4784. That path needs only one Senate vote on a finished text and is the route used for last year's act.	MODERATE
KJ-3	Senate Democrats will lift their blockade only in return for a concession on the Iran war, such as a reporting requirement, a limit on funds or a separate war-powers vote. Their stated objection is to the unauthorized campaign rather than to the bill's content, but the reporting on their terms is thin and comes from sources off the firm's list.	LOW
KJ-4	The defense authorization bill will compete for lame-duck floor time with the stopgap expiry and the regular appropriations bills, which makes a slip past mid-December more likely than in a normal year. The stopgap expires in December and appropriations are far from complete.	MODERATE
KJ-5	A change of control of either chamber at the midterm election would raise the odds that the bill slips into the next Congress. A party expecting more power in January has a reason to wait, though the enactment streak and member priorities push the other way.	LOW

KEY STATISTICS

50-46 votes Failed Senate cloture tally on the motion to proceed to S. 4784, 2026-07-14¹	216-212 votes House passage tally for H.R. 8800, 2026-07-22¹	18-9 votes Senate Armed Services Committee vote to report an original bill, 2026-06-10¹	44-12 votes House Armed Services Committee vote to report H.R. 8800, 2026-06-04¹
1.14 trillion USD Discretionary request within Armed Services jurisdiction, matched by both committee bills, 2026-07-24²	250 billion USD Increase over amounts authorized for FY2026 in both committee bills, about 28 percent, 2026-07-24²	350 billion USD Mandatory defense funding the request assumed would come through separate reconciliation, 2026-07-24²	72 days Duration of the FY2027 stopgap, running through 2026-12-11, 2026-09-17³
45 days Average lag from fiscal year start to authorization act enactment since FY1977, 2026-09-01¹	78 days Lag from fiscal year start to enactment of the FY2026 act, 2025-12-18⁴		

Scope and method

METHOD

This report reads the Congressional Research Service status and funding products on the current and prior defense authorization bills, the Congressional Research Service overview of the stopgap appropriations act now in force, and two press reports on the Senate impasse, all read at the time of drafting. Press reports from outside the firm's Source List are labelled unverified and carry no high-confidence judgment. Probabilities are the author's own judgment: no reference-class base rate in the firm's record matched this question. No client-attributable material is used.

SECTION 01 • ASSESSMENT

Where the bill stands

The House Armed Services Committee voted 44-12 on 2026-06-04 to report H.R. 8800, and the House passed it 216-212 on 2026-07-22 after a first rule failed 198-224 on 2026-06-30.¹

The Senate Armed Services Committee voted 18-9 on 2026-06-10 to report an original bill, reported as S. 4784 on 2026-06-15; cloture on the motion to proceed failed 50-46 on 2026-07-14, the majority leader entered a motion to reconsider, and as of 2026-09-01 the Senate had taken no further procedural step.¹

UNKNOWN: whether any Senate floor action on S. 4784 has occurred since the latest Congressional Research Service update; no source read for this report shows one.

ASSESSMENT • MODERATE CONFIDENCE

The bill is stuck at the Senate's first procedural step and needs either a new cloture vote or a negotiated alternative to move. The status rests on one authoritative tracker of the Senate's recorded actions, and no other source read shows floor action since.

SECTION 02 • ASSESSMENT

Why the Senate stalled

Senate Democrats unanimously opposed the motion to proceed on 2026-07-14, arguing that Congress should not advance the bill while operations against Iran continue without congressional authorization; a dispute over Section 219, a U.S.-Israel defense technology cooperation initiative, drew further opposition.⁵

As of 2026-10-05, Senate Democrats were reported as saying they would not approve the bill until the White House confirms that Congress has a role in the war with Iran.⁶

UNKNOWN: what concrete text or commitment would satisfy Senate Democrats; no source read sets out their terms.

ASSESSMENT • LOW CONFIDENCE

The blockade is a bid for leverage over war powers and can be resolved with a procedural or reporting concession rather than a rewrite of the bill. Both accounts of the Democratic position come from sources off the firm's list, so the judgment cannot rise above low.

SECTION 03 • ASSESSMENT

The money at stake

Both committee bills would authorize the discretionary level the President requested, about USD 250 billion (28 percent) more than amounts authorized for FY2026; of about USD 1.15 trillion requested for national defense discretionary activities, USD 1.14 trillion falls within the Armed Services Committees' jurisdiction, and these figures exclude USD 350 billion in mandatory defense funding the request assumed would be enacted in a separate reconciliation act, as of 2026-07-24.²

The stopgap in force, in its section 102, bars the Department of Defense from funding new starts, production-rate increases and certain multiyear procurements unless specifically appropriated later, as described on 2026-09-17.³

ASSESSMENT • MODERATE CONFIDENCE

The size of the increase raises the cost of delay for the department and its suppliers, which strengthens the hand of those pushing for a lame-duck deal. An authorization act alone does not lift the stopgap's bar on new starts, so pressure from industry falls on the authorization and the appropriations bills together.

SECTION 04 • ASSESSMENT

The calendar

The Continuing Appropriations Act, 2027, signed on 2026-09-02 as Division A of P.L. 119-103, funds the government from 2026-10-01 through 2026-12-11, a 72-day period; the Senate passed it 90-6 on 2026-08-08 and the House concurred 370-48 on 2026-09-01.³

As of 2026-10-05 Congress was in recess ahead of the midterm elections, with the defense authorization bill, the regular appropriations bills, a permitting agreement and renewal of FISA Section 702 all unfinished.⁶

UNKNOWN: the exact Senate return date and the lame-duck floor schedule; no source on the firm's list read for this report states them.

ASSESSMENT • MODERATE CONFIDENCE

The bill's realistic window is the lame duck, and the December funding deadline is both a competitor for floor time and a possible vehicle for a package deal. Last year's act cleared in December alongside year-end funding work, and nothing in this year's calendar closes that window.

SECTION 05 • ASSESSMENT

What history says

Since FY1977, defense authorization acts have been enacted on average about 45 days after the fiscal year began, and the acts for FY1979, FY1989, FY1996, FY2008, FY2016 and FY2021 were enacted over a presidential veto, as of 2026-09-01.¹

Last year's act was enacted 78 days into the fiscal year as a House amendment to S. 1071, an unrelated bill: the House agreed 312-112 on 2025-12-10, the Senate agreed 77-20 on 2025-12-17 and the President signed it on 2025-12-18 as P.L. 119-60.⁴

Press reporting in September and October 2026 puts the enactment streak at 65 consecutive fiscal years.^{5,6}

ASSESSMENT • MODERATE CONFIDENCE

The long streak and the vehicle-swap precedent make enactment by the end of the Congress the base case, but this year's blockade is partisan and tied to a live war, which history covers poorly. Past late acts were delayed by veto threats and scheduling rather than by a minority refusing to proceed over war powers.

SECTION 06 • DECISION

Decision

Decision	Owner	Trigger	Pre-authorized action
Plan for authorization provisions slipping into the next Congress	Government affairs lead at a defense supplier	No compromise text released before the stopgap expires	Brief program teams on authorities that wait on the act and reset the outreach plan for the new Congress
Hold work that depends on new starts	Program finance lead	Stopgap extended past its December expiry without full-year bills	Keep new-start and rate-increase work on hold and re-baseline cash plans
Revisit the firm's enactment view	Defense desk analyst	Senate leaders announce a negotiated text with Democratic support on the Iran question	Raise the enactment claim and re-issue the outlook

SECTION 07 • OUTLOOK

Outlook

Baseline. Armed Services leaders negotiate a compromise text after the election, attach Iran reporting or war-powers language that lets enough Senate Democrats vote yes, and Congress clears it on an unrelated vehicle late in December, keeping the enactment streak alive.

Deterioration. The Iran war widens or a post-election shift in control gives one side a reason to wait, the December funding fight consumes the floor, and the bill dies with the Congress, forcing the new Congress to start over.

Stabilization. An early deal on Iran oversight lets the Senate invoke cloture soon after it returns, pass its own bill and reach a final text well before the December funding deadline.

Claim C-1. The National Defense Authorization Act for Fiscal Year 2027 is enacted into law on or before 3 January 2027. Probability 0.65. Resolves on 2027-01-07 from Congress.gov: YES if Congress.gov shows a public law enacted on or before 2027-01-03 whose short title is the National Defense Authorization Act for Fiscal Year 2027, whatever its bill number or vehicle and including enactment over a veto; otherwise NO. Horizon 90 days. The enactment streak and last year's vehicle-swap precedent favour enactment, and the dispute is about leverage rather than content. The Democratic blockade tied to a live war, a crowded December and possible post-election incentives to wait keep a slip into the next Congress a real risk.

Claim C-2. The Senate agrees to a full text of the National Defense Authorization Act for Fiscal Year 2027, whether S. 4784, H.R. 8800 as amended or a negotiated text moved on any vehicle, on or

before 7 December 2026. Probability 0.25. Resolves on 2026-12-08 from Congress.gov: YES if the Congress.gov actions for any such measure record Senate passage of, or Senate agreement to, the full defense authorization text by recorded or voice vote dated on or before 2026-12-07, a cloture vote alone not counting; otherwise NO. Horizon 60 days. The Senate is out until after the election and last year's final Senate vote came in mid-December. A quick deal is possible, but the lame duck must also handle the funding deadline, so an early Senate vote is the less likely path.

Indicators.

- A new cloture filing or a unanimous consent agreement on S. 4784 when the Senate returns
- Release of a compromise text or joint explanatory statement by the Armed Services leaders
- A Senate vote on an Iran war powers resolution, or an administration commitment on consulting Congress about the war
- The midterm result for control of each chamber
- Whether the December stopgap expiry produces a full-year package or another stopgap

SECTION 08 • SCORECARD

Scorecard

No earlier firm claim is resolved or advanced by this draft.

SOURCE REGISTRY

1. Every CRS Report, FY2027 NDAA: Status of Legislative Activity (CRS Insight IN12704), updated 2026-09-01, everycrsreport.com/reports/IN12704.html, read 2026-10-09.
2. Every CRS Report, FY2027 NDAA: Summary of Funding Authorizations (CRS Insight IN12703), updated 2026-07-24, everycrsreport.com/reports/IN12703.html, read 2026-10-09.
3. Every CRS Report, Overview of Continuing Appropriations for FY2027 (Division A of P.L. 119-103) (CRS Report R49353), 2026-09-17, everycrsreport.com/reports/R49353.html, read 2026-10-09.
4. Every CRS Report, FY2026 NDAA: Status of Legislative Activity (CRS Insight IN12653), updated 2026-02-10, everycrsreport.com/reports/IN12653.html, read 2026-10-09.
5. Legis1, Senate NDAA Stalls Amid Iran War and U.S.-Israel Defense Fight, 2026-09-02, legis1.com/news/fy2027-ndaa-stalled-defense-bill-past-deadline, read 2026-10-09 [UNVERIFIED].
6. Federal News Network, Congress may be in recess but the unfinished business is piling up, 2026-10-05, federalnewsnetwork.com/congress/2026/10/congress-may-be-in-recess-but-the-unfinished-business-is-piling-up/, read 2026-10-09 [UNVERIFIED].



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