TAL SHIAR DEFENSE INTELLIGENCE REPORT

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Democratic Foreign Policy and Defense Priorities in the 120th Congress

Produced by the Tal Shiar Directorate of Intelligence | @Tal_Shiar_DI | November 5, 2026

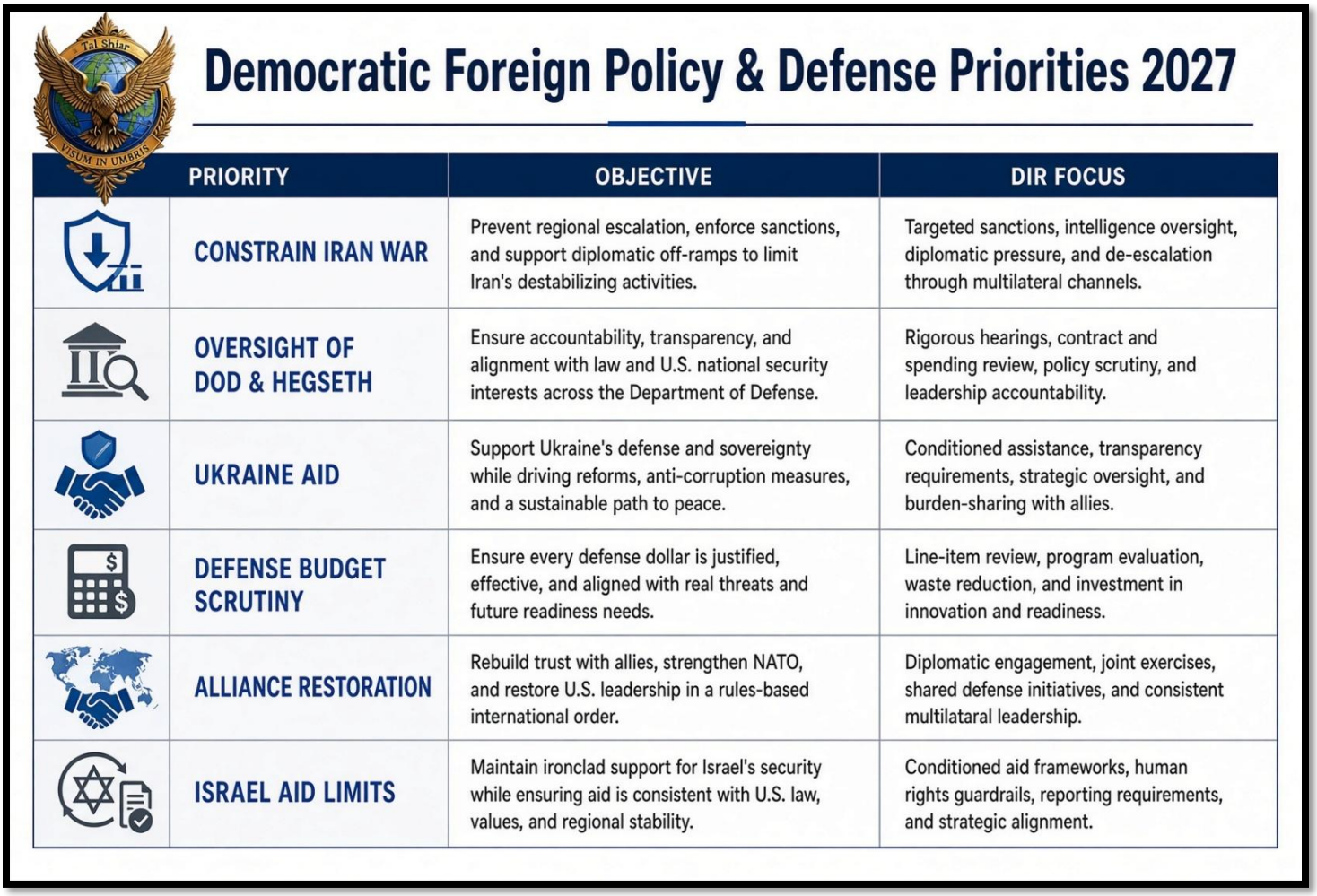
We assess that the incoming Democratic majorities will use control of the House and Senate to constrain the Iran war, impose rigorous oversight on defense operations, spending, and advance targeted support for Ukraine while restoring congressional authority over war powers. This shift responds to voter rejection of the conflict's economic costs and current administration's policies. Democrats lack a veto-proof majority, limiting full reversals of executive actions. Committee chairs will drive hearings and appropriations holds starting January 2027. The focus centers on affordability, accountability, and avoiding open-ended Middle East commitments.

- Likely Senate Foreign Relations Chair Chris Coons and House Foreign Affairs Chair Gregory Meeks plan Ukraine aid pushes, blocks on Russian energy deals, and Israel arms scrutiny, according to The Hill reporting. Meeks has introduced bipartisan measures against Russian diesel imports.



- The Iran war, launched without congressional authorization and costing tens of billions, was a major driver of Democratic gains amid rising energy prices and public opposition. House and Senate NDAA debates already saw Democrats block progress over Iran authorization and Israel military cooperation provisions; the new majority will intensify this in 2027 appropriations.

- Senate Appropriations Subcommittee Chair Brian Schatz will focus on reversing USAID cuts, boosting global health and democracy funding, and supporting Taiwan while criticizing Iran war impacts on Indo-Pacific readiness, according to The Hill.



Democratic Restoration of Ukraine and Foreign Assistance Funding

We assess that the incoming Democratic majorities will restore several billion dollars annually in Ukraine security and related foreign assistance that the Trump administration sharply reduced or halted, but will stop well short of Biden-era levels and will face veto threats, fiscal constraints, and competing domestic priorities. New direct U.S. aid to Ukraine fell to roughly $540 million since January 2025 after more than $127 billion in prior commitments. Democrats will use appropriations, the NDAA, and committee oversight to raise US aid and related accounts into the low-to-mid billions per year while restoring portions of the broader foreign assistance baseline that saw disbursements drop as much as 75 percent.

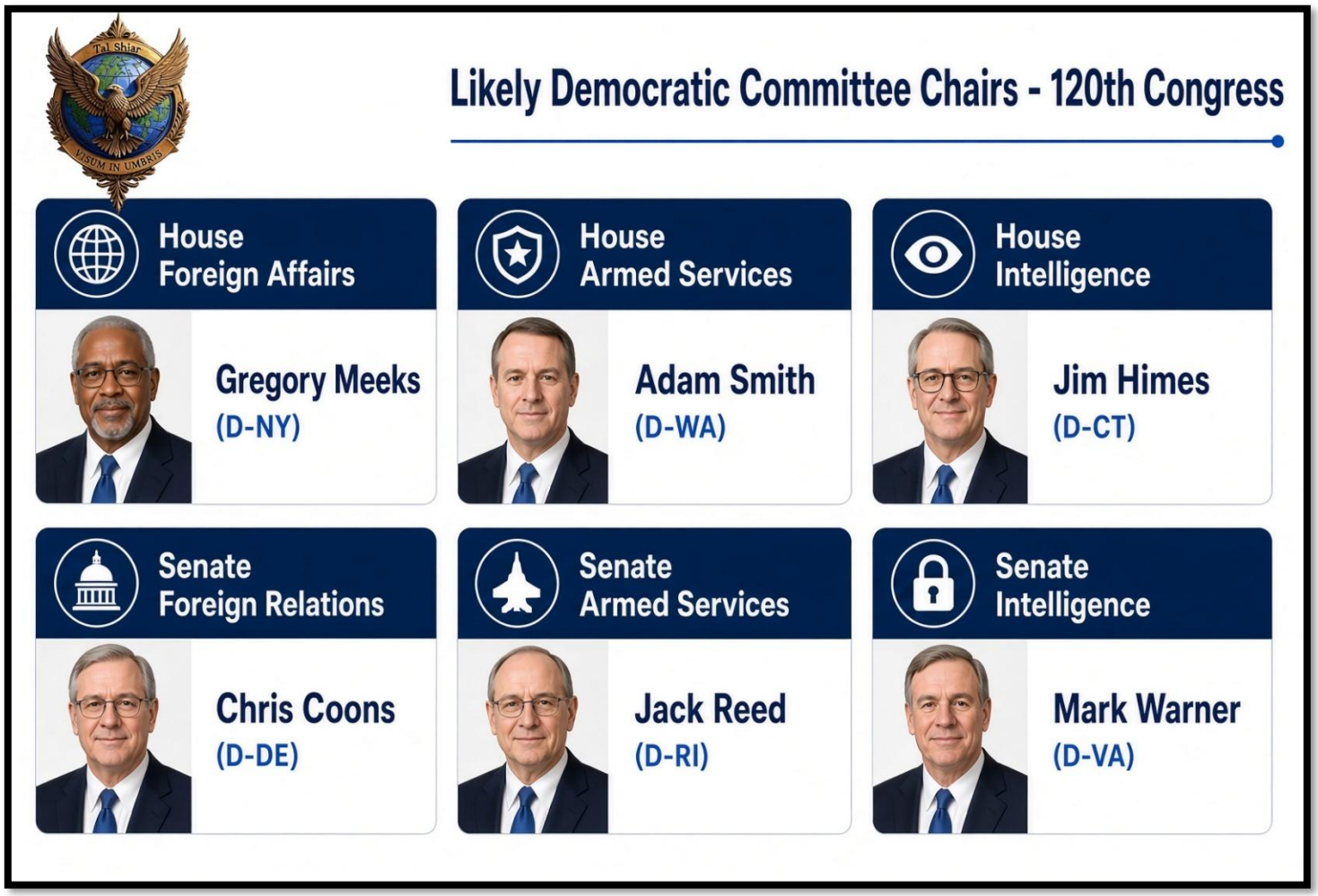
- Congress has already authorized modest baseline Ukraine funding despite Trump resistance. The FY2026–27 NDAA set U.S. aid at $400 million per year; the Senate Armed Services Committee's FY2027 draft raised that to $750 million through FY2029, with intelligence-sharing directives and prohibitions on recognizing Russian territorial gains.

- House Democrats, led by likely Foreign Affairs Chair Gregory Meeks, passed the bipartisan Ukraine Support Act authorizing more than $1 billion in security/reconstruction aid plus up to $8 billion in military loans and new Russia sanctions. The measure cleared the House 226-195 in June 2026 after a discharge petition overcame Republican leadership opposition.

- Broader foreign assistance faces larger restoration pressure. The Trump administration proposed cutting State/Foreign Operations by nearly half (to ~$28–31 billion) and dismantled most USAID programming, producing sharp declines in health, humanitarian, and economic development disbursements (ForeignAssistance.gov and KFF tracking). Democratic appropriators are expected to restore several billion dollars toward pre-2025 baselines in the FY2027 cycle while conditioning funds on oversight and anti-corruption requirements.

Conclusion

Democratic control of the House and Senate will produce incremental but meaningful increases in Ukraine security assistance (likely in the $1–5 billion annual range via USAI, loans, and related accounts) and partial restoration of foreign aid programs cut under Trump. These steps will be driven by committee chairs such as Meeks, Coons, and Reed, embedded in must-pass bills, and limited by presidential veto authority, budget pressures, and higher-priority issues such as the Iran conflict and domestic spending. The net effect is a partial reversal of the post-2024 funding collapse rather than a return to peak Biden-era levels.





Tal Shiar was founded by Nadeem Iqbal, a national security expert who served over 16 years as an intelligence officer for the Department of Defense from 2006-2022. His career began as a counter-insurgency analyst on the Afghanistan-Pakistan Task Force (2006–2013), followed by 9 years as a military analyst in the Syria Branch (2013–2022). He deployed five times in support of combat operations (3× Afghanistan, 2× Iraq), including two rotations with Special Operations Forces focused on counter-terrorism missions in the CENTCOM theater. Additional roles included rotations to CIA Headquarters as the military analyst for the DNI Middle East Task Force and served as the Syria Country Director for Office of Secretary of Defense Policy (OSDP). He was recognized with Joint Civilian Commendation/Achievement Medals, the NATO Medal(x3), the Secretary of Defense GWOT Medal, DoD Expeditionary Award and the OSD Excellence Award.