



What's Ahead for Defense?

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November 14, 2024

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INTERNATIONAL STUDIES

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Today's Agenda

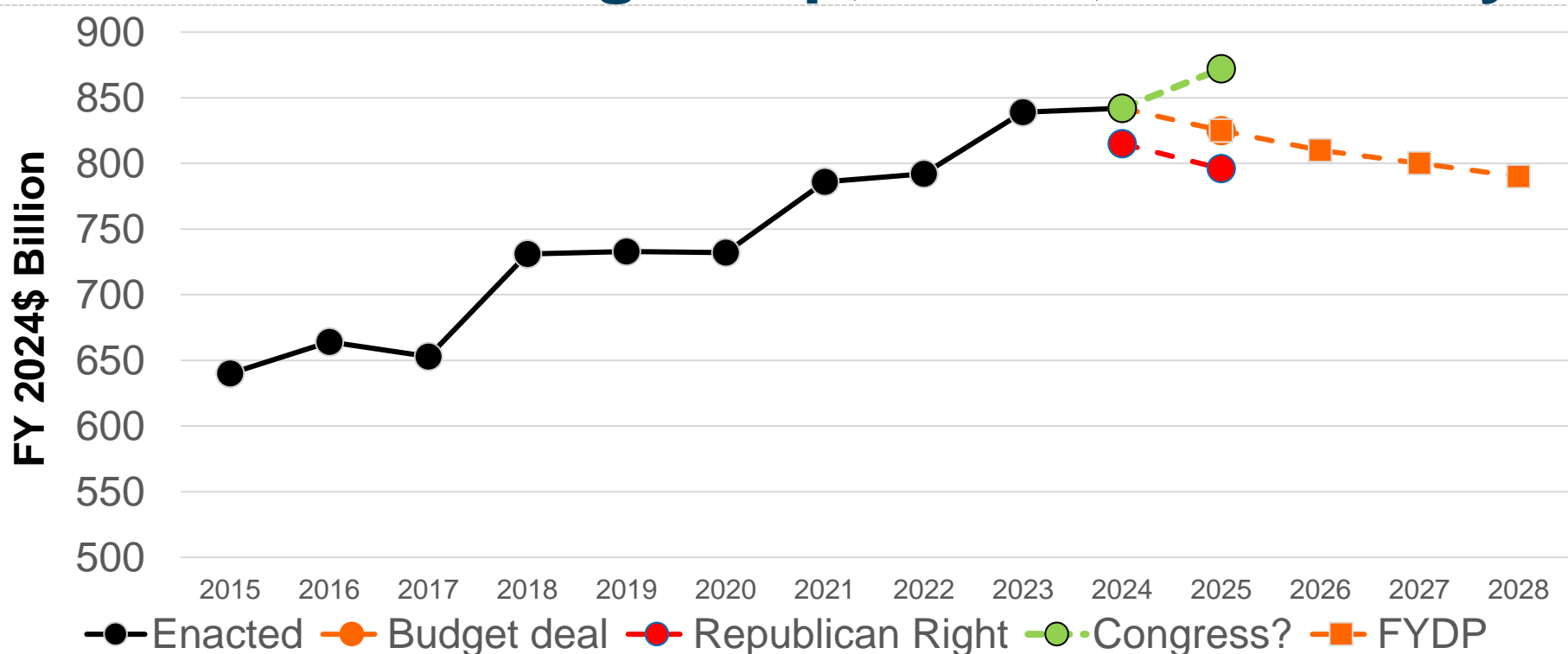
- [Strategy context]
- Likely Trump Policies
- The Defense Budget: Up, Down, or Sideways?
- Defense Program Impact
- Ukraine, Israel, and China/Taiwan
- CRs, Shutdowns, and Political theater

Likely Trump Policies

- Seal border—National Guard in support
- Use of military domestically—?
- NATO—Stand by for heavy seas!
- Overseas bases—Allies paying more
- Overseas operations—No “quagmires”
- “Woke”—Out!
- Transgender/HIV+ personnel—Out!
- The generals and admirals—Under suspicion
- “Schedule F” —Control over the civil service



The Defense Budget: Up, Down, or Sideways?



Theme: “Peace through Strength”
Defense hawks vs. deficit hawks

Programs to Watch

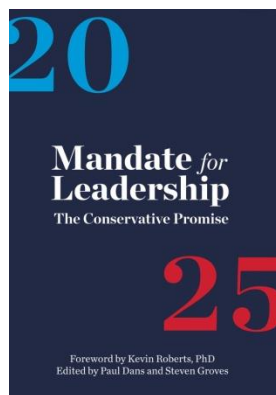
Missile Defense (“Iron Dome”)

- National and regional



Project 2025/Defense hawks

- Everything!
- Innovation!



Gov't efficiency commission

- Reagan and Packard Commission



Aid to Ukraine

Ukraine support in supplementals, not DOD base budget

- **\$175B so far**
- **“Aid to Ukraine” misnomer; 60% spent in US**
- **Strong bipartisan support**
- **Biden administration pushing aid out the door rapidly**



Trump:

**Anger at high cost,
destruction, lack of
progress**

**Claims quick
settlement**

Vance: very hostile

Israel vs. Hamas, Hezbollah, Houthis, Iran

US dragged back into Mid-East

- Munitions expenditures and force deployments



Trump strongly supports Israel



**Iranian assassination attempt
“Maximum pressure” of first
administration**

China and Taiwan

China a bipartisan concern

**Trump focused on tariffs and
economic relations**



**Strong support for Taiwan among
defense hawks**

**Equipment drawdown authority for
Taiwan**

Theme: Taiwan→spend more

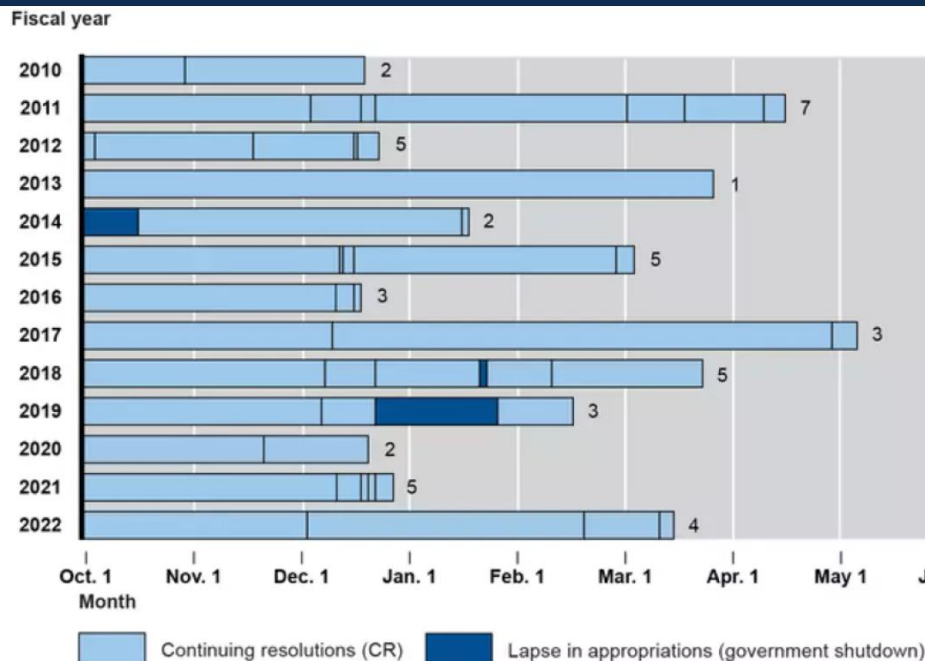
Pacific still first for defense strategy



Political Theater: Continuing Resolutions

CR= temporary continuation of funds, "keep doing what you were doing until Congress passes new appropriations"

CRs happen every year



- THE Question: Will Congress pass appropriations before the inauguration?
- Current CR for defense goes until Dec 20
- McConnell's 2017 advice
- Contractors and DOD have built these delays into their plans
- Major adverse effects begin about month 4
- Congressional politics complicated
 - Deficit hawks and defense hawks
 - A thin House majority gives Republican right leverage
 - House vs. Senate

Political Theater: Government Shutdowns

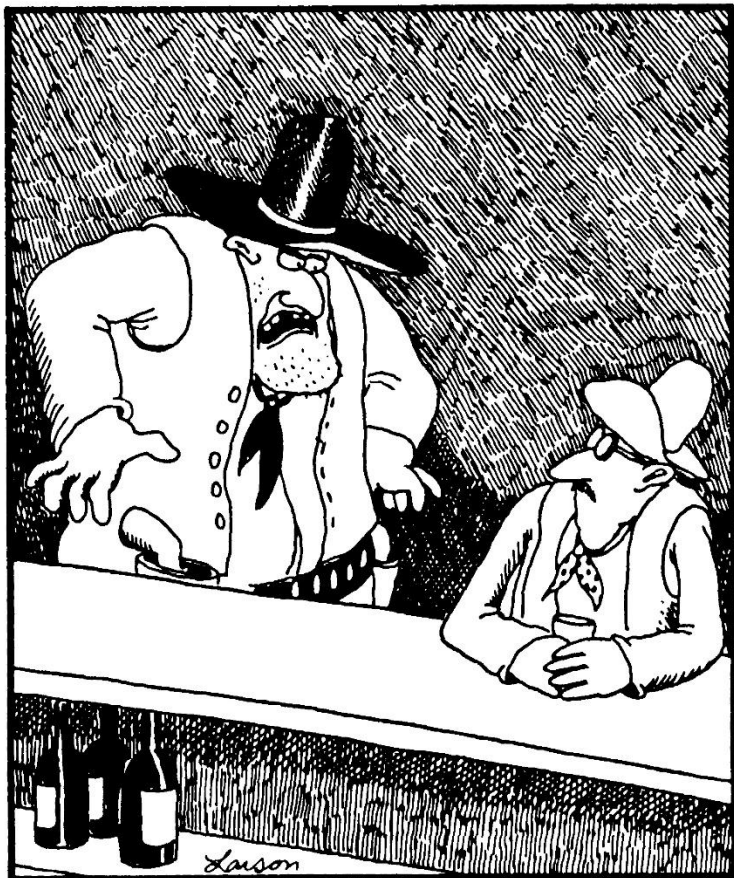
Cause: No appropriation, no CR	Three significant: 1995-1996 (26 days), 2013 (13 days), 2018-2019 (35 days) Constituents get cranky after ~2 weeks DOD effects mitigated	Unsuccessful as political tactic
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High drama, but...

Everyone gets paid!

Little or no money saved!

Watch the level of the defense budget and key elements of the strategy, not the theater



Questions?

Make my day ...Ask a question!