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TRANSCRIPT

Event

"The New National Security Strategy: Strengths, Shortfalls, and Shockwaves"

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Heather Williams: On December 4th, the White House released the 2025 National Security Strategy explaining the Trump administration's vision and strategy for U.S. foreign policy. The document pivots the focus of U.S. national security toward the defense of the homeland and Western Hemisphere. This point was recently emphasized by chairman of the Joint Chiefs of Staff, General Dan Caine.

(Video clip plays.)

General John Daniel Caine: And what's clear in that document, and the things that we do on behalf of the country, is that protecting the homeland is not just a term that we say anymore. It's a real thing. And homeland security is national security.

(Video clip ends.)

Dr. Williams: The National Security Strategy calls for increased expectations for burden sharing by allies and partners and for using economic and industrial policy levers to exert U.S. influence abroad. It also highlights the importance for nuclear modernization, the Golden Dome missile defense initiative, and space technology. So what are the strengths, shortfalls, and surprises of Trump's new national security blueprint? What does this mean for the future of U.S. alliances? How will adversaries interpret this strategy?

Welcome back to HTK, a series devoted to talking about strategic forces issues of the day. HTK stands for Heather, Tom, and Kari, but for the defense wonks out there it also stands for "hit to kill." I'm Heather Williams, director of the Project on Nuclear Issues here at CSIS. Here to unpack these questions I'm joined today by Tom Karako, director of the Missile Defense Project, and Kari Bingen, director of the Aerospace Security Project. We will take audience questions, so please submit those online via the event page.

Tom, let's start with you. National Security Strategy. What were some of your big takeaways? We talked in the intro about strengths, shortfalls, surprises, shockwaves. So when you read this what jumped out at you?

Tom Karako: Well, to stay with the S, I also appreciate its brevity, or that it's short. That's a good thing. I'll tell you, I liked, you know, that it wasn't 100 pages long. And I liked, actually, the way in which it asked some basic, fundamental questions. I think we'll probably get to whether it answered those questions as it said it was going to, and we might get to some thoughts on the quality of those answers, but I kind of like the framing. Very blunt and in your face. Sometimes it's important to be explicit. As I think it says, you know, in there at one point, it's a little of a

cautionary note that, you know, when these things became a laundry list, and you have to mention every country and mention every topic, if it's not in the National Security Strategy then it's not important. There's a little truth to that in terms of how sometimes the executive branch quotes this to justify this, that, or the other thing. But I think that's actually, in the scheme of things, a good thing.

Look, I think in some ways it kind of looks like it came together quickly. But that's neither here nor there. I also kind of like the classical references to Atlas. You know, the United States is not Atlas holding up the world. Always good to work in some Greek mythology. I also, frankly, liked – and I was a little surprised by – its reference to soft power. That we want – and, by the way, the document says "we want" I think 38 times, maybe a little bit less than that, throughout the document. So it's clear about we want, X, Y, and Z. But that included to want soft power, and it said kind of to be unapologetic about pursuing our interests. And I think that's fine. It used to be called public diplomacy. That's what institutions like Voice of America and other things were in their heyday. Good to be – good to be doing.

I think some of the things that I was less amazed by, you know, I think it kind of begins, and it sometimes has a little bit of a Kissinger envy, in terms of perhaps claiming to be a little bit more grand than I think it kind of lives up to. It talks about, you know, we're not going to mention everything, but we're really going to focus on these core vital interests. And has a list of what those are. Well, actually, that language has kind of been there for a while. This didn't invent the concept of core or vital interests. So that's something to talk about.

Another thing is, you know, it says a core interest in – the United States' core interest to negotiate an expeditious cessation of hostilities in Ukraine. Like you have to think through how you get there in terms of, by the logic of this document, you know, why is that necessarily the case? I think that's perhaps a little bit peculiar. But I think the big – two – maybe the big thing is what happened to great-power competition? I mean, I'm old enough to remember the first Trump administration's 2017, National Security Strategy and National Defense Strategy. And great-power competition was the central strategic issue of our time. You don't see that. You see different language here, which perhaps reflects a different crew.

But you also see this quote, "that superpower competition has given way to great-power jockeying, in which the United States retains the most enviable position." And I think if you look at this document in sum, what they seem to mean by "great-power jockeying" seems to be, first and foremost, economic security. There's a huge emphasis on the

Western Hemisphere. And I'm sure we'll kind of get to that. There's an interesting section on Europe. But I think what really jumps out to me is fundamentally the primacy of economic security as opposed to, let's just say, military security. Or, frankly, peace through strength. You see littered references here to peace through strength, but I think it's economic security that trumps hard power.

And just an example of this is that the defense industrial base section here is kind of a subset, a subhead to the section on economic security. So I have – I'm scratching my head a little bit at that one, inasmuch as, you know, the document proclaims in the very beginning to be about ends and means. Well, I think about the defense industrial base, I don't think of it as a jobs program, or about money. I think about as a means to the end of hard power – national security defined especially as hard power. And I'll just say in the news here, you know, what did we just see in the news here? The administration cleared the sale of these pretty robust NVIDIA chips to China. That's striking some hawks as a little bit peculiar, for example.

So I'll probably pause there, turn it over you, Kari, see what you liked and didn't, and we'll go from there.

Kari A. Bingen: I think we may have some similar themes in how we read the new National Security Strategy. You know, and I like the framework of strengths, shortfalls, and shockwaves. From a strength perspective, it outlines our basic objectives, what we as Americans want, our vital national interests. I'd say those are fairly universal and they're pretty much said in any administration's National Security Strategy. So there wasn't much new there. Sometimes it's a lot of pablum, but it is what it is. And it's good to just remind Americans, here's what we – here's what we stand for, and here's what's of a vital interest to us.

I thought there was goodness in the focus on homeland defense, missile defense, nuclear modernization. They even mentioned space in a national document, which I thought was good. The linkage, as you said, Tom, between defense and national security and economic security was very strong. And the language of a strong economy is the bedrock of our global position that enables a strong defense. In this aspect of commercial just diplomacy, you know, I think there's an opportunity here that the – to use these economic tools, these finance mechanisms – so International Development Finance Corporation, Ex-Im Bank – pairing it with some of the industrial policy decisions that you're seeing come out of this administration.

Greater use of those for defense purposes, for dual technology purposes that strengthen our industrial base and that hard power but at the same

time open up global markets, particularly for some of our commercial capabilities. And I just got out of a conversation this morning where we were talking about the incredible soft power of our commercial space sector, and how many allies and partners around the world could benefit from that data. But it requires a bit of a push and the right kind of policies from this administration to open up the aperture there. I also, just like with any of these strategies, that administrations will set priorities. If everything is priority, then nothing is a priority. So you do need that, whether you agree with those priorities or not.
Shortfall-wise, Tom, similar to you, what was most striking to me were the contradictions in the strategy. But they were big, foundational contradictions. So while I can understand the focus on the Western Hemisphere, and I'm sure we'll get into that in detail, it sets up this dynamic of global spheres of influence. United States, we're going to dominate the Western Hemisphere. Does that imply that, China, you go ahead and dominate Asia? Russia, you go ahead and dominate Europe? And I don't think that's in our strategic national interest. And, oh, by the way, I think that belies the fact that threats today have much further reach than just staying within one theater.

And we see it here, advanced missiles, conventional, nuclear forces, asymmetric capabilities that the Chinese are pursuing, the Russians, whether you're talking drones – you know, Operation Spider Web is a great example, where you had – you know, Ukraine launched this incredible drone operation within Russia, where it hit Russian strategic forces at their bases. I could envision something like that happening here. The China airship that launched, what, two years ago over the U.S. homeland, cyberattacks that can reach our critical infrastructure here across the board. Those kinds of global threats that China presents, that Russia, Iran, North Korea present, are not just contained to one hemisphere or one region. And I think we need to recognize that. Our security strategy needs to recognize that.

And then the last point I would make, from a shortfall perspective, is that I would just emphasize that U.S. leadership and engagement in the world matters, particularly with our allies and partners. And I want to cue up a slide here. Tom and I were at the Reagan National Defense Forum this weekend. Every year they do a defense survey. And I thought what was really interesting in the first chart here is that the polling that they've done over the last six years, one of the questions they ask is, you know, Americans, do you continue to favor U.S. leadership and engagement on the world stage? That number continues to rise. So Americans, the majority of Americans both Republican and Democrat, still believe that our leadership and engagement on the world stage matters.

The other piece that that they presented which I thought was really interesting is that when you start to look at the demographics and the breakout of that, again, whether Democrat, Independent, Republicans, majority – the majority of them, and even within the Republicans, whether you're MAGA Republican or not. Even the – I'll say, even the MAGA Republicans also support U.S. leadership on the international stage, and greater U.S. engagement on the international stage. So I think that maybe belies some perceptions out there that there is this desire for retrenchment.

Dr. Williams: Mmm hmm. If we can, I really want to dive a little bit deeper into Kari's last point about allies, and what this means for allies. And I'll call out a few things that jumped out to me. In terms of allies, I saw – I got a lot of mixed messages from the document, because on the one hand it clearly does want to maintain U.S. leadership. And I think the data that Kari just showed really reinforces that. But in terms of allies, it very much makes it sound like the spheres of influence. And so I'm not sure which of those messages should be the one that we're listening to. And I think allies are also pretty confused.

The bumper sticker for me of this National Security Strategy is burden sharing to burden shifting. And that clearly has been one point of consistency, I think, in the administration since the beginning in January, and increasing – getting allies to increase their defense spending. However they come up with that 5 percent number is a little bit of creative mathematics, but they're still trying. And there clearly has been an increased commitment by allies to raise that number. But the page that jumps out at me the most is page 25 in the NSS, which I've come to think of as the European pep talk.

And it says, you know, Europeans need more self-confidence. Europeans need to embrace greatness. And there's this one line that – it mentions nukes, so obviously that caught my attention. But it said, this lack of self-confidence is most evident in Europe's relationship with Russia. European allies enjoy a significant hard power advantage over Russia by almost every measure, save nuclear weapons. And I read that as the U.S. saying, we still have something unique to offer in terms of extended nuclear deterrence, but they don't quite come out and say, we will continue to extend nuclear deterrence. And that's something where I think more crisp language would be helpful and would help avoid some of this confusion.

There's a term I heard from a senior European official a few months ago that keeps ringing in my head. When they said, we want your deeds to match your – or, we want your words to match your deeds. Because in practice the allies still feel pretty reassured, especially in terms of

extended nuclear deterrence. But policy documents and policy statements don't always match the actions and the commitments that we are quite – that we are really living up to right now. But do either of you want to expand in particular on how you read this document? If you were an ally sitting in Warsaw or Seoul, what would be your interpretation of this?

Dr. Karako: I'll jump on the Europe thing. And I'm going to be a little contrarian here, because, frankly, if I'm an ally sitting in Seoul, which doesn't get a whole lot of attention here, for instance, or I'm in Europe, first of all, I've kind of heard this before. And there's been a lot of response, I think, to this document as, oh my goodness, this is, you know, an attack on Europe. It's a criticism. It is certainly a criticism. But, you know, probably the Ur-document on this is the J.D. Vance speech, you know, from several months ago. And he was pretty tough on him. And, you know what? There was a lot of truth in that. It's not just about a metric or a percentage of defense spending, however you define it. It is also, you know, to some extent, civilizational.

And this is not necessarily playing into the – let's just say, the far-right parties in Europe. That's what pops up when you handle issues badly for so long and over time. You know what? Great Britain does have a real free speech and censorship problem. You know, that's a human rights problem. They're getting rid of jury trials, you know, things like this. So there are some broad historical sweeps that, again, you pair that with birth rates that have just plummeted – not merely in Europe, but let's say South Korea, especially. You know, it's going to be a different world 20, 50 years from now. Demographics are the sort of trend that is really hard to – that is hard to change.

And then I'll just say that, in terms of also – staying with the region here for a minute, and it's you, Kari – which is the Trump corollary, right? This is touted as the central thing of this document, which really sounds like, you know, this Western Hemisphere focus. And I'll just say here as well, which is we have also neglected a lot of attention to the Western Hemisphere. And it is true that years of – years of being a little bit too lax on the southern border has resulted in this huge attention on it from the Trump administration coming in. So what is this Trump corollary?

We will deny non-hemispheric competitors the ability to position forces or other threatening capabilities or to own or control strategically vital assets in our hemisphere. Now, immediately I think about missiles in Venezuela, or the Panama Canal, or things like that. But the problem with this phrase is that it's got too many caveats, like the ability to position forces. Does that mean that you're going to have a giant wall halfway in the Pacific so they can't shoot something over here or sail

something over here? You know, the business of owning – not owning stuff next to an ICBM base is, sure, but the more I looked at this, this formulation of the of the Trump corollary, I think the softer it kind of gets.

And then there's these weird, very oddly prescriptive, recommendations. Like we're going to have this really close partnership with other countries in the economic – in the Western Hemisphere, for our supply chain, their supply chain. I guess that means we're going to be doing more trade with Canada and Mexico. So you got to think about that. But then there's also – this direction that our agreements with other countries in the hemisphere need to be sole-source contracts to American companies. Like that's really specific. So I guess I'm scratching my head a little bit about some of these things, but I'll say that it's not – some of this is – I think there's confusion about whether this is tough love or just toughness and bravado at some points.

Ms. Bingen: You know, I keep thinking, in each of those regional areas, what are the – what will be the implications of the language here in terms of actions and directionality? So Western Hemisphere, I mean, we know, from a military perspective it's long been the lowest priority. I mean, they were lucky if they got a frigate, and maybe some ISR, maybe some intelligence sharing. We'll have to watch, particularly as we see a National Defense Strategy come out and then the next fiscal year, 2027, budget request – which will be the administration's first real budget request – will we see a shift in force structure? You know, the administration has talked about readjusting our military presence in the South Command AOR. So personnel, equipment, ISR.

In the past, these kind of Western Hemisphere missions have been looked at as consuming readiness, because we had these other priority – higher priority fights to engage in. Now, it becomes a high priority mission itself. And it actually reminds me back during our time on the Hill. I remember as we were looking at greater security cooperation in Africa we were sending – I don't know if I have this exactly right – but we were sending, like, armored brigades to Africa to do security cooperation. You don't need tanks in Africa. (Laughter.) But there was this whole evolution that happened in how do we shape the force so that we can better engage in those kinds of missions? So I will be interested to see, as we do more in the Western Hemisphere, how do we shape the force? Or how does this administration shape the force to engage in the kinds of missions that they are prioritizing?

You know, a couple of other things. Russia, Ukraine, there was very little mention of Ukraine. There was a line in the strategy that said, we want to reestablish strategic stability with Russia.

Dr. Karako: What does that mean?

Ms. Bingen: Exactly. I don't know what that means these days, when Russia –

Dr. Williams: Well, there's a whole HTK episode about strategic stability. So somebody needs to –

Ms. Bingen: Go back to our last one.

Dr. Williams: So someone needs to watch that.

Ms. Bingen: Exactly. When you think of everything that Russia is doing and, oh, by the way, you know, assuming that we can get to some peace agreement with Ukraine, we have now, like, rattled the bear. And you think about all of the capacity, and capability, and, frankly, you know, innovation that Russian forces have undergone, what are they going to do with that? That worries me.

China, you know, we talked about the connection of the economic and trade issues with deterrence and defense. I did appreciate a line in the strategy that "we intend to preserve military overmatch as a priority." But there was very little detail beyond that. And this is such a huge issue. You know, 2027 is around the corner. The clock is ticking there.

And then just on the Middle East – and I know I'm going in a lot of different places here – but, you know, there was very much a focus on economic partnerships, investment. I have a friend that used to say, you know, we may be done with the Middle East, but the Middle East isn't done with us. And you saw that this year. As much as we have wanted to focus attention elsewhere in the world, we were pulled right back in. Whether it was Iran, you know, Midnight Hammer, Israel, Gaza, the Houthis in the Red Sea. It always tends to pull us back in. And our military resources go there.

Dr. Karako: On the Middle East thing – and, look, I'm quite happy with the Operation Midnight Hammer. And we did just – you know, we flew there and back. We weren't exactly putting a whole lot of boots on the ground. But, you know, I think the document's a little too self-congratulatory about its, you know, realism, or realistic without being realist, or something like that. You know, it's clarity of thought on this. And it's kind of contract congratulate itself on discipline. It uses the word "discipline" a lot. Well, how do you justify vaporizing billions and billions of dollars of missile defense interceptors and the defense of Israel? I think that was a good thing. But, boy, that's a heavy cost.

And, you know, you read the – not everything can be a priority. We got to steward things for the homeland, Western Hemisphere, and Asia-Pacific. That's kind of the second big section. Well, then explain to me what we've been doing all year in the Red Sea and in Israel. So, you know, I think it's a little peculiar. The correspondence with this to various policies that have been pursued over the past year, that's a little – that's a little loose, I would say.

Dr. Williams: Disconnect. There's a disconnect. Kari already started to tee-up the National Defense Strategy, which we are expecting sometime soon. So I'd be curious on what you both are watching for in the NDS, in addition to, you know, I think Kari gave a really great list of changes in force structure, military presence, personnel, ISR, if it gets into that level of detail. But what else are you going to be looking for in terms of implementation of the NDS, or how this is actually going to be operationalized? But then I'm also curious, you know, we have this picture behind us of the Reagan Defense Forum. You both were at the Reagan Defense Forum. I'm just curious if you heard anything while you were there that stood out in contrast to – or maybe just radically reinforced what was actually in the NSS. Kari, I don't know if you want to go first.

Ms. Bingen: I'll go first. What I will be looking for is resources. The way you make a strategy, whether it be the National Security Strategy or the National Defense Strategy, real is you put money behind it. And I haven't seen that yet. Now, we did see in FY '26 the administration announced, you know, the highest ever spending for defense, what, $1 trillion. However, to get – their base budget request was the exact same level that the Biden administration had submitted the year before.

The way they get to the 1 trillion (dollars) is the reconciliation package that Congress passed, which was 150 billion (dollars) intended as a generational investment defense spread out over, I believe, five years. Of that 150 (billion dollars), 119 billion (dollars) would go into FY '26 to be spent. And then a little bit more maybe next year. So and then we haven't seen anything beyond that. So if we're going to make, like they say, a big commitment in shipbuilding, munitions, Golden Dome, space, nuclear modernization, all these areas we've been talking about, and also bring in all this new tech, software, et cetera, that money has to be there in the budget. And I just haven't seen it yet.

Dr. Williams: If I could just add one really quick point onto it, because I want to hear what you think of this. I think following the money also will help us understand what are the actual priorities, because right now everything is a priority, right?

Dr. Karako: Well, wait, no, this document assured us that that's not the case. (Laughter.)

Dr. Williams: But you don't know what actually – what is the actual top priority. Because doing – you know, covering all three of our portfolios, as important as they all are, is probably fiscally impossible. And so, you know, for example, doing the program of record, as it currently exists for nuclear modernization and Golden Dome, I question the math of that one too. So, yeah, Tom I want to hear what you're expecting from, but also what you think about Kari's comment about follow the money – well, you didn't say follow the money – but looking at where the resourcing is.

Dr. Karako: Well, that's why – look, Secretary Hegseth's speech was very interesting. And it's important because it's kind of a preview of the National Defense Strategy. But the most important remarks at the Reagan Forum were by Russ Vought. And it was interesting to hear what he had to say, which is that he kind of toyed with – he said, look, we did this reconciliation bill. He was kind of, you know, doing a little bit of a victory lap on that. But that was – that was a big amount of money. But for Golden Dome, it's $25 billion. That'd be peanut butter spread over five years. And so he said, well, we might do another reconciliation bill. Well, you better get on that, like, today. And you need to communicate what it is you want there with Congress, like, today.

Because you're going to do the reconciliation thing again so as to avoid an increase in domestic spending tradeoff, then you got to get after that. Because otherwise you're going to lose so much time. Midterms are here, you know, less than a – less than a year away. So go look at what Russ Vought had to say. I'm not entirely optimistic on the basis of that. I think in the same way that this document is economic security first and peace through strength second or third, I think the administration overall has proven time and time again, as predicted, that they're going to prioritize economics and trade and tariffs over defense, over and over.

Ms. Bingen: Mmm hmm. And I'm glad you said that, because that's the speech that I went to go listen to as well. So Russ Vought, the director of the Office of Management and Budget, OMB, so they really do make all those big budget trades at a high, high level. And he did basically say at one point, the resources will be there. There will not be a hole as we look to '27. But beyond – well, first of all, I'm not sure what that means, from a hole perspective. But beyond that, when you're making some big commitments now that all has a tail to it. And so we haven't seen that future year, the FYDP we call it, but this future year projection of what defense spending will look like. I'm highly dubious that we'll see another reconciliation package. We're coming up on a midyear election,

when the numbers are really tight. But also, you know, we're pushing our allies to spend upwards of 5 percent on defense. We're still hovering at 3.3, 3.5 (percent). And so I'd like to see us on a pathway to that 5 percent as well.

Dr. Karako: We're given these pep talks to our allies to get to 5 (percent), this kind of stuff, and we're not doing it ourselves. What are you going to do?

Dr. Williams: Question from the audience is about the authorship of the NSS. And I want to rejig that question slightly about the interagency process. There's usually an interagency process that goes into national security documents. This also – obviously, the NPR, or the National Defense Strategy, Missile Defense Review. I'm guessing that the process was probably a little bit different this time around for the administration. From reading this, can either of you glean anything about interagency relationships, process? How much of this reads to you like something written by Marco Rubio with his State Department hat on, versus different entities within the Pentagon, for example?

Dr. Karako: I'm not going to comment on the likely authorship, but I'll just say that it probably didn't have a whole lot of interagency review. I think you'd see different language there. I kind of complimented its simple and straightforward language. That can be a good thing. If you had the interagency with the – more terms of art would be showing up here. So I think I'm doubtful about that. I also don't think it's the end of the world. It's more of a stump speech than an interagency document.

Dr. Williams: OK. Kari, you agree with that?

Ms. Bingen: You know, I don't know who wrote it.

Dr. Williams: Yeah, I didn't want to get after the one person who wrote it. I meant more, like, the different kind of equities across the interagency.

Ms. Bingen: Yeah. And, yeah, I mean, I've known who've written previous ones. And there usually is some sort of interagency process. I just don't know what was used this time around. But I do – you know, back to where Tom started here, is I do like some of the economic security language, and the tying economic security to national security, and some of these economic and financial tools to defense. That's an area that we have not – you know, you always hear people talk about we need to do better in whole of government.

If the administration can actually bring to bear some of those financial tools to strengthen our defense industrial base, to strengthen our commercial companies by attracting greater private capital into dual

use tech, like, I think that would be a great win. If they can tackle things like export policy reforms, ITAR, which wasn't discussed at all, to actually enable those commercial companies to sell their technology to our allies and partners, not China but to our allies and partners, and open up those markets, like, those are very good things that could happen if they have White House attention.

Dr. Karako: I'll say two quick things about Marco Rubio, since you brought him up. Which is back to Venezuela. Look, we have 25 percent of the U.S. Navy steaming around the Caribbean, Venezuela. There's probably a lot of machinations going on behind then. And this has just contributed to, I think, so much confusion. Now, do I think that Marco Rubio has a vision for the Western Hemisphere, for a grand, strategic vision of what we should be changing and doing better? Yeah, I think so. I think it – is there – is there, potentially, least in the mind of Marco Rubio, an idea of what activities with and in Venezuela might do to accomplish that? Yeah. I would love if he articulates it. I do, Heather, have to compliment Secretary Rubio on changing the official font of the State Department from Calibri to Times New Roman. This is – does us right.

Dr. Williams: I was going to say, you're a Times New Roman fan. I am Garamond forever. (Laughter.) But – sorry. That's –

Ms. Bingen: I'm not biting on that. But let me throw out a question to both of you, and then I'll answer myself as well. You know, it's – in a National Security Strategy, a White House document, it was pleasantly surprising to see each of our three areas mentioned by name – nuclear modernization, missile defense and Golden Dome, and space. So although it doesn't go into much detail, what do you think it means – like, what will you be looking for in each of your areas as we go forward?

Dr. Karako: Implementation. Contracts. And that means, like, in the next month I want to see a lot more on contract for Golden Dome. It's fine, you know, it has a couple very small – very small prizes award for the space-based interceptors to go and research and prototype. But they need to put actual things on contract, especially for the battle management, or, colloquially, the command and control problems to, no kidding, put that together. It's not going to all be done by 2028. They got to get that skeleton together. And it will grow over time. They got to get that together first.

Ms. Bingen: And if I can just add on Golden Dome, and tee-up our last couple of slides here, this is back to the Reagan Defense Survey. They asked a specific question this year on Golden Dome. Do you, the American public, support a major spending increase to develop the Golden Dome

missile defense system? And their survey showed broad support for increasing resources for Golden Dome to defend the homeland.

Dr. Karako: You email this to Russ – to OMB, and make sure they –

Ms. Bingen: And let me even unpack it a bit.

Dr. Williams: It's another dynamite effect.

Ms. Bingen: It must be, yeah. So, you know, thank you Reagan Institute for doing this. I think it's really insightful. The follow-on looked at the demographics of those polled. And so, again, widespread bipartisan support for that increased spending. So, at least – according the American public, this isn't a Republican versus Democrat issue, which is also important.

Dr. Karako: Look, we did a report on cruise missile defense of the homeland a couple years ago. And we called it North America's a region too. Back to the Western Hemisphere thing. Yeah, we got it. We have neglected the Western Hemisphere. We have neglected the air defense of the United States in gross ways. And that needs to be amended.

Dr. Williams: Hmm. So there's one line in the NSS that I was encouraged by, but it wasn't – didn't go quite far enough, where it said that the U.S. will have the most robust, credible, and modern nuclear deterrent. And that was it. (Laughs.) So I think I'm looking for three things. The first is, what is the actual strategy for deterring two peer competitors? And where do nuclear weapons fit into that?

Dr. Karako: And does that mean second to none, by the way?

Dr. Williams: I don't know. That's an important – that is one of the multiple important questions. It's been over two years since the Bipartisan Strategic Posture Commission had its findings, which said that the current program of record is necessary but not sufficient, and that the arsenal might need to be larger or different. And nothing. The Biden administration did not translate that into an actual strategy. This administration has not turned it into an actual strategy. So that's the number-one thing I'm looking for.

And then the two other things I'm looking for will flow from that. The next one is, what are the actual capabilities, including the program of record? The NSS, I don't read this as committing to the current program of record. Maybe there are additional capabilities that need to be added on top of that, a standoff weapon, moving faster on SLCM-N, more B-21. Maybe the administration will do something really drastic and change the program of record, and try to get something else through. I'm not

sure how that would go down on the Hill, but that's another option. But what are the capabilities that flow from that strategy? I think that they need to be more diverse, more forward deployed, expanded, greater allied involvement. But that's the second thing I'm looking for. And then the third, Kari hit the nail on the head, it's resources. Where is the money that is actually going to deliver the capabilities to meet that new strategy?

But, Kari, what about you?

Ms. Bingen: So in the area of space it's going to be similar. We need to grow the resources, the people, and deliver capabilities. And we're at a really unique moment here in the stars aligning on space. You have a president in the White House who created the Space Force. You have a bipartisan Congress that created the Space Force. And the legislation originated out of House Armed Services Committee. Chairman Mike Rogers was behind it. He's still there as chairman.

You think about how space is addressed here in the National Security Strategy, it is key to the Golden Dome for America, the sensor layer to do missile detection and tracking. We've been talking a space-based interceptor component to it. Space is key to our ability to deter in the Indo-Pacific, and to fight. It underpins anything that we want to do in the Indo-Pacific. Communicate across moving forces, the missile detection/missile warning, precision munitions, GPS position location. It is vital to our ability to fight and win in the Indo-Pacific. And then third which the strategy highlights is our space capabilities, and particularly our commercial sector, carry tremendous soft power.

And I did really like this concept of commercial diplomacy, because – and having worked at a space startup that did this kind of stuff – the data and services coming from commercial companies can provide connectivity, like they are in Ukraine, can provide greater data for maritime domain awareness, which so many of our allies and partners need, can also help in areas like agriculture and land management use. So there's such tremendous ability to engage with the rest of the world on those areas. So those areas, and then grow people, grow resources, and deliver capability.

Dr. Williams: Last question before we close out. This is our 15th episode. It's also our last episode of 2025. And so wanted each of us to reflect on some favorites of 2025, whether it be a favorite book, a favorite speech. I think we all have the same favorite movie. A favorite piece of analysis. Just something positive to reflect on and take into 2026 with us.

Tom, I'll start with you.

Dr. Karako: This is a toughie. By the way, I am grateful this year for the HTK Series. This has been a lot of fun. You know, I think I really enjoyed our strategic stability discussion. I like our – I liked our MTCR thing. You know, going after MTCR. We didn't get it. But, look, I look back on 2025, looking from my portfolio, what's the most important thing? Most important thing is the hundreds and hundreds of missiles that were either fired in anger by Iran, and we were shooting them down like flies, swatting them down like flies. Now I expressed earlier my grave concern about the expenditure of our THAAD and Standard Missile things. And my colleague, Wes Rumbaugh, has a piece out right now on this, to take a look about the depleting inventory. But in the big scheme of things historically, this was a big year for missile defense.

Dr. Williams: Mmm hmm. Kari, what about you?

Ms. Bingen: Gosh, I have so many. But, you know, one of the areas – I don't know if this – is this isn't necessarily good news, but our response is good news. The stunning pace of China's space developments. Not just what the PLA is doing in their use of space and their counter-space weapons to target us, but what you're seeing them do in the civil sector with their space exploration activities, and also in their commercial space sector. So we'll have a report coming out next year that looks at their space industrial base and how they are trying to adopt the American model of innovation and then bring that into their military. This is the military-civil fusion.

But what it really means, for our Space Force, is ensuring they have, you know, the people and the resources so that we can – and our commercial sectors – that we can continue to keep U.S. leadership in space and then fund the capabilities that we need to fight and win wars and to hold, frankly, their assets at risk. And that's a different conversation than we've had before, is when we start talking about holding adversary satellites at risk.

Dr. Williams: On the nuclear side, I think by a country mile Midnight Hammer was the biggest piece of news. I'm sure this is controversial. I think it's a piece of good news. The Iranian nuclear program has been set back significantly. In my mind, that's a really good-news story. It is going to have implications – like this topic is not going away. This was not – Midnight Hammer, Iran nuclear problem is solved. That's hardly the situation. It's going to have implications for whether or not Iran rebuilds its nuclear program, for nonproliferation norms, but also for the nuclear order.

After this, I'm going off to Europe for some conversations about the NPT. And I am expecting Iran to be a big topic of conversation. And so while there is a bit of a good-news story in there, in that Iran's nuclear program is set back, there's going to be more to come there. And just want to really commend the research by the PONI team, PONI Deputy Director Joseph Rodgers has done some incredible satellite imagery analysis and found activity at a different nuclear site. We don't know what it is. I don't want to overstate that. But still something to watch. And Doreen Horschig and Bailey Schiff also did some really great work on this. So the good-news story is the CSIS Defense and Security Department team, the HTK Series, I think.

Ms. Bingen: And then, books. You know, we're heading into the holidays. What books do you recommend? Did you ask that?

Dr. Williams: I loved "King of Kings" by Scott Anderson, continuing on with the Iran theme. It's a historical – it's a history book about the fall of the shah. And I am not a Middle East expert by any stretch of the imagination, but my knowledge of Iran increased exponentially after reading that book. And it was actually fun to read.

Dr. Karako: Well, look, I'm reading a couple things right now, some of them early on, so I'll suspend. I want to reference our boss, colleague, Seth Jones, "The American Edge," on the basically the American industrial base since World War II. And I have to go back – I will certainly read/watch this over the holidays again. The way you sit down for "Red October" I will always be stuck anytime I see "Lonesome Dove." That's the great American novel. (Laughter.) So I'll probably watch that over Christmas as well.

Dr. Williams: Not Thucydides.

Dr. Karako: Of course, Thucydides. That's bedtime reading. (Laughter.)

Ms. Bingen: So here's where I'm going to contrast the three of us. I'm finally finishing "Chip Wars," which is fantastic on the history of, you know, semiconductors. And on my nightstand are books on quantum and AI, because I really want to get down to a really detailed technical understanding – (laughs) –

Dr. Karako: Always showing us up, Kari. (Laughter.)

Dr. Williams: I was going to say, you're such a nerd, but –

Ms. Bingen: Well, this is where the nerd complements the historian and the academic.

Dr. Karako: MIT alert. (Laughter.)

Dr. Williams: That's great. So, thanks. Thanks to both of you. And now, to everybody who tuned in, thank you. And you also now have some reading recommendations.

Thanks to the MDP, ASP, PONI, and Streaming and Broadcasting teams for making this event possible. Do keep your radars tuned to this channel so you don't miss future HTK discussions on strategic forces. And since this is our last episode of 2025, have a happy and safe holiday season, and a happy New Year to everybody. Thank you.

(END.)