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DEFENSE

E-BOOK:

2024: Year In Review / 2025: The Look Ahead

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Note from the Editor

Big changes are on the horizon, but no one really knows what they will be.

Talking with members of the national security community in the two months since Donald Trump won the November presidential election, that's the clearest consensus: Trump and his team will be making major moves to the world of defense, but exactly what that's going to look like is, for now, guess work.

That uncertainty is reflected in the collection of pieces by the Breaking Defense staff, looking forward to 2025. But it also permeates the team's reflections on 2024, which was a year in which the presidential election kept everything in limbo. That doesn't mean there wasn't news — we published almost 2,000 stories, op-eds and features on the site, and the editors have dark circles under our eyes to prove it. But 2024 felt like a transition year, and 2025 is going to be the payoff, in whatever form it takes.

Each December I ask the staff to reflect on their year of coverage and what they will be tracking in the coming year. In this ebook you'll see just a sampling of those pieces - 30 in all - that ran at the end of 2024. You can read the rest [by clicking here](#), and you can find out if our predictions come true by checking BreakingDefense.com throughout the year.

Thanks for reading.

Aaron Mehta

Editor in Chief, Breaking Defense





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A year of next-gen fighter doubts for the Air Force

This was supposed to be the year that the Air Force selected a winning vendor to build its next-gen fighter. Then reality set in.



Lockheed Martin Skunk Works concept art of a sixth-generation fighter. (Lockheed Martin)

By [Michael Marrow](#) - December 27, 2024

WASHINGTON — After years of development, the Air Force [broke cover](#) on its futuristic stealth fighter in May 2023 to announce that a winner would be picked to build the platform in 2024, teeing up the highly anticipated next generation of airpower.

And then reality started to set in, leading to what is perhaps the Air Force's biggest programmatic headwind of the year: the question over whether it will field the Next Generation Air Dominance fighter at all and, if so, in what form.

The trouble started this summer, when whispers about NGAD's fate first started swirling around Washington. Budget constraints bearing down on the Air Force — thanks to high-profile headaches like cost overruns with the [nuclear-tipped Sentinel ballistic missile](#) and pricey new programs like the B-21 Raider — began to exact their toll as the service built out its fiscal 2026 budget.

In June, Air Force Chief of Staff Gen. David Allvin [appeared to suggest](#) NGAD was in hot water, equivocating when asked whether the service could commit to the program. Air Force Secretary Frank Kendall subsequently confirmed the stealth fighter program was on pause, and bowing to the obvious, the service [announced this month](#) that the “way ahead” for the program would officially be decided by the Trump administration.

Given the Air Force's competing priorities, it may be tempting to view the NGAD dilemma as simply a financial one, but the issue goes deeper than dollars. Kendall, known for his motto of “China, China, China,” has frequently expressed exasperation at the scale and scope of modernization by the People's Liberation Army. The second look at NGAD, [he told Breaking Defense](#), has been driven in part by an “accumulation” of the threat posed by the PLA, namely through longer-range, more capable air defenses. The implied underlying question: Is a new, manned fighter the best way to keep up with America's Asian rival?

The service's own capabilities have also rapidly evolved, featuring tech like space-based ISR and comms, drone wingmen dubbed Collaborative Combat Aircraft (CCA) and a budding "kill web" that threads together disparate sensors, weapons and shooters to neutralize a threat.

Any NGAD fighter is "going to need to work with CCAs. It's going to need to work in an architecture which includes space-based support and other off-board support and an architecture that uses our most advanced weapons," Kendall said in July. "So we've got an opportunity here to really just be careful and make sure we're on the right path before we make the final commitment."

The NGAD challenge also lies in unforgiving geography. Should American troops clash with the PLA, particularly over the Taiwan Strait, Chinese forces would enjoy a significant homefield advantage. Beijing's burgeoning missile arsenal further threatens to lay waste to critical American installations in the region, which includes aircraft that could be caught in the crossfire while parked on the ground — creating a [rift between the Air Force and Army](#) on air base defense.

"The infrastructure that's required to support an F-22 class aircraft, if you will, leads to some vulnerabilities. Runway length, for example," Kendall previously told Breaking Defense.

Beyond operational implications, uncertainties around NGAD carry industrial base consequences. Though they've declined to raise their hands publicly, Boeing and Lockheed Martin are understood to be locked in a dogfight over the contract. A win [would provide much needed relief](#) to beleaguered giant Boeing, which has already invested billions of dollars to build up next-gen manufacturing at the company's fighter hub in St. Louis. For Lockheed, it would extend the company's stealth fighter winning streak after producing hundreds of now cutting edge fifth-gen F-22s and F-35s.

The same is true for engine-makers GE Aerospace and Pratt & Whitney, who are separately competing to build the NGAD fighter's powerplant. After the Air Force [passed on re-engining the F-35](#), the [Next Generation Adaptive Propulsion effort](#), the program name for the NGAD engine, appears to be the only avenue left to carry revolutionary, "adaptive" powerplant technologies forward.

Ironically, the Air Force's NGAD pause could very well prompt the Navy to go first on a different next-gen fighter. While the Air Force wrestles with its sixth-gen design, a Navy official [previously told Aviation Week](#) the sea-based service remains confident in its plans, and is still on track to award an engineering and manufacturing development contract by the end of fiscal 2025 for its own future airframe.

Though all this, Kendall has maintained he's confident an NGAD fighter, in some form, will be built. And to that end, internal Air Force analysis now supports the development of a manned, next-gen platform, Breaking Defense [previously reported](#). But a new administration will take over in January, where "Department of Government Efficiency" co-leads Elon Musk and Vivek Ramaswamy have both called into question current fighter procurement efforts.

What the Trump administration will do is unclear, though if history is any guide, manned fighter jets may be here to stay for at least one more generation. Like the flying car, the death of the manned fighter has been predicted for decades, but neither have come to pass.

Space Force gets loud and proud about warfighting role

“You are warfighters, whether you carry a gun or not,” Chief of Space Operations Gen. Chance Saltzman told Guardians on Dec. 10. “You are trained and expected to carry out offensive and defensive actions against military forces of other countries.”



Chief of Space Operations Gen. Chance Saltzman addressed the Space Force Association's Spacepower 2024 conference in Orlando, Fla., on Dec. 6, 2024. (Space Force Association)

By [Theresa Hitchens](#) - December 27, 2024

WASHINGTON — Over the past year, Chief of Space Operations [Gen. Chance Saltzman](#) has issued a series of internal “Commander’s Notes” that have sought to create the [culture](#) and [operational concepts](#) for the newest military service, with a firm focus on the Space Force’s warfighting role.

It’s clear that as 2024 comes to a close and the Space Force celebrates its fifth birthday, what one observer called “chest-thumping rhetoric” clearly has entered into the public domain — a change that defined how the service went about its public and private posturing over the last year.

Saltzman spent most of this year charging up the forces to think of themselves not as support specialists, but as frontline capabilities — or, as he told Guardians assembled at the Space Force Association’s [Spacepower 2024](#) conference in Orlando, Fla., on Dec. 10, “You are warfighters, whether you carry a gun or not.”

“In accordance with the law and at the direction of the president, you are trained and expected to carry out offensive and defensive actions against military forces of other countries, or support other military elements that do. When you’re in a combat squadron, you’re the first line of defense for conflict in space and your actions directly impact lives on the ground, in and out of harm’s way.”

In conjunction with this culture setting, top brass from Saltzman on down have become ever-more open about the service's plans and classified [offensive capabilities](#) to take out Chinese and Russian satellites on orbit in any future conflict — whether the mission be to defend American military and commercial satellites or to attack enemy birds being used to target US terrestrial forces.

Saltzman told the Spacepower conference that “[space control](#)” is now the Space Force's top priority because adversaries “will absolutely try to disrupt, degrade and destroy US capabilities. This is unacceptable. In short, what we have, we will fight to keep.”

Further, he stressed that China in particular “can and will use their space capability to hold the joint and combined force at risk,” thus making it imperative that the Space Force be trained and equipped “to make sure that doesn't happen.”

Space Force Gen. Stephen Whiting, who commands US Space Command, told reporters on Dec. 11 that “[space fires](#) is our number one Integrated Priority List gap.”

The Integrated Priorities List is an annual compendium of requirements put together by each combatant command to inform the military services of their operational needs to be included in budget and acquisition plans.

Whiting explained “fires are defined in joint doctrine as the ability to affect or influence targets, and those could be targets in any domain that support the space mission. ... If we are trying to achieve [space superiority](#), there are targets that need to be influenced — in the cyber realm, in the terrestrial realm, [and] in space.”

Lt. Gen. Douglas Schiess, who commands the Space Force's component for providing trained operators to SPACECOM called [Space Forces-Space](#), told reporters on Dec. 11 that his first priority is “to protect the joint warfighter from space-enabled attack, and secondly, to defend our assets and our allies' assets from attack from someone else.” To do this, he added, operators need “effectors that can negate” adversary space capabilities.

The loud new messaging moves away from the Pentagon's traditional silence on space warfighting plans — with the traditional focus on support services to the joint force such as communications and positioning, navigation and timing.

Speaking to reporters after his Spacepower presentation, Saltzman said that in the past the Defense Department kept information about “offensive and defensive” space capabilities “close to the vest” — asserting that some of the rationale was “just kind of hand-wringing” rather than a need to “protect” anything.

“We have to conduct counter space operations to deny an adversary the ability to target our forces,” he said, and that requires “offensive and defensive capabilities. ... I have no problem saying that we are gonna be ready to contest the space domain,” he added.

How the Pentagon domesticated the chatbot

This December, after 16 months of studies and experiments, the Department of Defense decided it had figured out enough guardrails for generative AI to start embracing the new technology wholesale.



Sailors assigned to Navy Cyber Defense Operations Command monitor, analyze, detect and respond to unauthorized activity within U.S. Navy information systems and computer networks. (DVIDS)

By [Sydney J. Freedberg Jr.](#) - December 30, 2024

WASHINGTON — Large Language Models haven't achieved [human-like consciousness](#) and transformed or shattered society — at least not yet — as prominent figures like Elon Musk [suggested](#) early in the hype cycle. But they also haven't been crippled to the point of inutility by their tendency to [“hallucinate” false answers](#).

Instead, generative AI is emerging as a useful tool for a wide but hardly unlimited range of purposes, from summarizing reams of regulations to drafting [procurement memoranda](#) and [supply plans](#).

So, [two years](#) after the public unveiling of ChatGPT, [16 months](#) after the Department of Defense launched [Task Force Lima](#) to figure out the perils and potential of generative AI, the Pentagon's Chief Digital & AI Office (CDAO) effectively declared the new technology was adequately understood and sufficiently safeguarded to deploy. On Dec. 11 the CDAO officially wrapped up the exploratory task force a few months ahead of schedule, institutionalized its findings, and created a standing [AI Rapid Capabilities Cell](#) (AIRCC) with \$100 million in seed funding to accelerate GenAI adoption across the DoD.

The AIRCC's forthcoming pilot projects are hardly the first Pentagon deployments of GenAI. The Air Force gave its personnel access to [a chatbot called NIPRGPT](#) in June, for example, while [the Army deployed a GenAI system](#) by Ask Sage that could even be used to draft formal acquisition documents. But these two cases also show the kinds of “guardrails” the Pentagon believes are necessary to [safely and responsibly](#) use generative AI.

To start with, neither AI is on the open internet: They both run only on closed Defense Department networks — the Army cloud for Ask Sage, the DoD-wide NIPRnet for NIPRPT. That sequestration helps [prevent leakage of users' inputs](#), such as detailed prompts which might reveal sensitive information. Commercial chatbots, by contrast, often suck up everything their users tell them to feed their insatiable appetite for training data, and it's possible to prompt them in such a way that they [regurgitate, verbatim](#), the original information they've been fed — something the military definitely doesn't want to happen.

Another increasingly common safeguard to run the user's input through multiple Large Language Models and use them to doublecheck each other. Ask Sage, for instance, has over 150 different models under the hood. That way, while any individual AI may still hallucinate random absurdities, it's unlikely that two completely different models from different makers will generate the same mistakes.

Finally, in 2024 it became a best practice in both DoD and the private sector to put generative AI on a diet, feeding it only carefully selected and trustworthy data, often using a process called [Retrieval Augmented Generation](#) (RAG). By contrast, many free public chatbots were trained on vast swathes of the Internet, without any human factchecking beforehand or any algorithmic ability to detect errors, frauds, or outright jokes — like an old Reddit post about putting [glue on pizza](#) that Google's AI began regurgitating as a serious recipe in one notable example this year.

Some defense officials said this year they a savvy adversary could go further and deliberately insert errors into training data, [“poisoning”](#) any AI built on it to make errors they could exploit. By contrast, the Pentagon prefers AIs which are trained on official documents and other government datasets, and which [cite specific pages and paragraphs](#) as supporting evidence for their answers so the human user can double-check for themselves.

None of these safeguards is surefire, and it's still possible for generative AI to go wrong. But at least the guardrails are now strong enough that the Pentagon feels safe to drive ahead into 2025.

Middle East was defined by regional conflicts and increased indigenous production

This year was dominated by the fallout of Israel's war with Hamas in Gaza, which expanded into Lebanon, but elsewhere the defense industry kept chugging along.



A cloud of smoke erupts during an Israeli air strike on the village of Sujud in southern Lebanon on September 25, 2024. (Photo by RABIH DAHER/AFP via Getty Images)

By [Agnes Helou](#) - December 31, 2024

BEIRUT — As the war drums fade in Lebanon and to the east the half-century Syrian regime has toppled, I've leaned toward labeling 2024 as "the year the Middle East was reshaped."

The conflict between Israel and Lebanese group Hezbollah reached a [ceasefire](#) after a dramatic course of events including an Israeli attack on [Hezbollah](#) that included exploding [pagers](#) and walkie talkies, Israel targeting storage warehouses in civilian neighborhoods, and the assassination of Hezbollah Secretary General Hassan Nasrallah.

The US-mediated ceasefire launched a 60-day truce between Israel and Lebanon starting on Nov. 27, with a monitoring committee comprised of the US, France, Lebanon, Israel and the United Nations Interim Forces in Lebanon ([UNIFIL](#)).

Then, on Dec. 8 Bashar al-Assad fled to Russia while rebel forces swept through the country and captured Damascus. After the regime collapse, [eyes moved to](#) the fate of the Russian military bases in Syria and the potential collapse of an Iranian weapons pipeline to Hezbollah.

In late 2023, the Red Sea saw attacks from the Yemen-based Houthi rebel group, which led to an [international coalition](#) to secure the waters. Notably, [Saudi Arabia and the UAE](#) were absent from these coalitions, and Bahrain was the only Gulf state to take part in the US-led operation [Prosperity Garden](#).

Increased Partnerships And Production

While parts of the Middle East reeled from those geopolitical earthquakes, the defense industries of other nations in the region doggedly pursued their own goals, including parallel focuses on localization and expansion with international partnerships.

For instance, Qatar's [Barzan Holdings](#) is cementing the investments it's already made in platforms like unmanned vehicles, counter-UAS solutions, command and control systems and ammunition. "We have built a good portfolio in the last seven years, and we are planning to strengthen this portfolio in these sectors," deputy CEO Mohammad Al Marri told Breaking Defense in a March interview at DIMDEX in Qatar.

"We are not planning to diversify since what we have right now is competent enough. Our focus for the next five years is to ensure capability and sustainability for our platforms," he added.

UAE defense conglomerate EDGE Group expanded in 2024 its [international reach](#) with cross border cooperation plans, including founding an ammunition production line in [Indonesia](#), signing an agreement with Italian shipbuilder [Fincantieri](#) to codevelop underwater solutions in the UAE, and signing another agreement with the Brazilian navy to codevelop counter-drone systems.

"This year [2024] for us is a year to catch up on our deliveries, our commitments, whether that is a delivery of a solution, or a development," [Hamad Al Marar](#), EDGE Group CEO told Breaking Defense in February.

The firm also made its first stride in the space domain this year, launching a new company dubbed FADA.

Saudi Arabia has worked on its ambitious defense plans this year, as it eyes to join the international sixth-generation fighter jets program, [GCAP](#). Saudi Arabian Military Industries showed off its defense plans and platforms developed at second edition of the [World Defense Show](#) this year.

Turkey made confident strides in its defense production projects. Its national fifth-generation fighter jet, dubbed [KAAN](#), performed its maiden flight in February. Ankara also launched its first [mostly indigenous](#) communications satellite to orbit and [expanded](#) its [deals](#) with other nations, including its first export contract to a NATO nation.

China stirred the Pacific pot, Japan powered up and Aussie AUKUS anxiety emerged

The Chinese military itself wasn't free from drama, as Beijing cycled through defense ministers and senior officials fell under investigation.



A China Coast Guard ship (L) is seen from the Philippine Coast Guard vessel BRP Cabra during a supply mission to Sabina Shoal in disputed waters of the South China Sea on August 26, 2024. (Photo by JAM STA ROSA/AFP via Getty Images)

By [Colin Clark](#) - December 31, 2024

SYDNEY — Turmoil, violence and reaction. That was the theme of 2024 across the Indo-Pacific, with China's belligerence and attempts to remake the international order to its liking at its core driving many decisions of the nations in the theater.

In several instances this year Chinese forces engaged in hostile behavior, [ramming Philippine ships](#), allegedly [attacking Vietnamese fishermen](#) and [threatening Taiwan](#). But the actions were not without repercussions as they drove China's neighbors and NATO countries to sign major new agreements, increase exercises, sail more joint Freedom of Navigation Operations (FONOPS) and bang the diplomatic drums more loudly and more often.

Japan made among the biggest moves in 2024. Tokyo and Canberra signed a Reciprocal Access Agreement (RAA), clearing the way [for regular deployments of Japanese marines to Australia](#), similar to the rotational force the US Marines have at what Australians call the Top End. [Japan and Britain also signed](#) an RAA. Japan also announced its [biggest defense spending increase since World War II](#) in September.

"The international community is facing the greatest post-war trial yet, and has entered a new era of crisis," the first page of the their defense budget declared.

In the Pacific Islands, scene of much turmoil over the last two years [as China pressed to gain advantage](#) in the region, the situation has seemed to stabilize in favor of Australia and its allies.

Nauru, the troubled island that once had the world's highest GDP per capital and now faces possible ruin from climate change, agreed to accept \$64 million USD from Australia in return for a veto of future Chinese activities in the tiny island. Nauru President David Adeang came to Canberra [and signed the agreement on Dec. 9](#). This is similar to a treaty with Tuvalu, the [Australia-Tuvalu Falepili Union](#), which came into force in late August this year.

In addition, the Pacific Island states agreed to [join an Australian initiative to improve the region's police forces](#). Australia committed \$400 million AUD (\$253 million USD) over five years, which included creation of a regional training center in Brisbane, which opened [the day after the Nauru treaty was agreed](#).

The Chinese military itself also wasn't free of internal turmoil, which came into clear view with the suspension from office of a senior member of [the powerful Central Military Commission](#) and the previous disappearance of China's third defense minister.

All that "does not give a sense of stability within the PLA [People's Liberation Army]," Meia Nouwens of the International Institute for Strategic Studies told Breaking Defense earlier this month when the story broke.

One of the few events largely divorced from China of great import in the region was the remarkable declaration of martial law — and its retraction — by [South Korean President Yoon Suk Yeol](#). Now that Yoon has avoided immediate impeachment, there may be more regional stability than first expected, but his actions did, analysts said, put the crucial General Security of Military Information Agreement (GSOMIA) with Japan at risk because the opposition is likely to suspend or scrap it should they take power. There is also concern among China watchers that should the opposition take power, they are likely to listen more carefully to Chinese policymakers than did Yoon.

AUKUS Anxiety

Meanwhile, threading through all these events has been the uncertain course of AUKUS, the massive effort by Australia, the UK and the US to help Australia buy at least three Virginia-class nuclear-powered attack submarines and build a small fleet of SSN AUKUS boats over the next 20-plus years at an estimated cost of \$368 billion AUD (\$237 billion USD).

Australia's defense budget will not increase in real terms until after the next election — likely to be held by March or April next year — at least. Sir Angus Houston, former chief of the defense force and co-author of the Defense Strategic Review, said in late November that Australia must increase [overall defense spending to 3 percent of GDP to avoid cannibalizing the military in order to pay for AUKUS](#).

The current plan would only boost spending to 2.2 percent of GDP by 2028. And there are signs of concern among senior Australian officials about budget and execution. Australia [killed a \\$5.3 billion AUD satellite contract](#) with Lockheed Martin, which would appear to be very sort of cannibalization Houston worried about. The Australian government claims it has protected the money and will invest in a new approach, but the cut occurred roughly 18 months after the award was announced.

And in a little noticed declaration at a conference in the Indian Ocean focused on AUKUS, an Australian admiral voiced public worry that Australia's generational effort to buy and deploy nuclear powered submarines was "at risk" if the government does not take quick, decisive action on infrastructure.

The military and government needed to "get going" on crucial work to ready Western Australia for AUKUS submarines or risk falling behind, Rear Adm. Wendy Malcolm said. She added that Australia's generational effort to buy and deploy nuclear powered submarines is "at risk" if the government does not take quick, decisive action on infrastructure.

Defense industry could see big shakeup under Trump

President Donald Trump had a hands-on approach with the defense industry during his first administration. This time? Don't rule it out.



A model of the proposed paint scheme of the next generation of Air Force One is on display during a meeting between U.S. President Donald Trump and Canadian Prime Minister Justin Trudeau in the Oval Office of the White House June 20, 2019 in Washington, DC. (Photo by Alex Wong/Getty Images)

By [Valerie Insinna](#) - December 31, 2024

WASHINGTON— No one could predict the twists and turns of the first Trump administration, even for an area as obscure and mundane as the defense industrial base, and it would be a fool's errand to try to do that for a second one.

Instead, let's break down the current state of play in the political environment, look back at the first Trump term, and think about some of the major questions facing the defense industry during a second Trump administration:

Will Trump personally involve himself in defense acquisition, again?

For defense acquisition nerds, Trump's first term was marked by his highly unusual personal involvement in weapons contracting. Whether it was his stated desire to return to "goddamn steam" catapults on the Ford-class carrier, interrogating Boeing executives on the possibility of buying a "Super Duper Hornet" F/A-18 variant, or having personal meetings with defense CEOs on Air Force One and F-35 contracts, Trump delved into the minutia of defense acquisition in a way that no US president had done in the modern era.

With the [Wall Street Journal](#) reporting that Trump has already spoken with Boeing CEO Kelly Ortberg about the Air Force One replacement program — as well as the return of the F-35 and drone warfare to the mainstream news cycle — it's highly probable that we could see Trump once again try to make his mark on a program, putting pressure on defense contractors to highlight his deal-making skills to the American taxpayer. If I were a gambler, my money would be on Trump interference on big-name aerospace projects — most likely F-35 or Air Force One, again — but potentially also other fighter jets, including the Navy and Air Force's sixth-generation fighter programs.

What happens with defense spending?

The fiscal 24 defense budget was constrained by the spending limits imposed by last year's Fiscal Responsibility Act, and while final appropriations for FY25 won't be passed until spring (at earliest), signs point to a budget that conforms to those limits.

Those restrictions will be gone in time for FY26 — the first chance the Trump administration has to shape the defense budget, albeit not from the bottom up. While the groundwork for the FY26 was performed by the Biden-era Pentagon, whether the incoming administration doubles down on that stagnant Pentagon spending or bumps it up could be a bellwether for its approach in future years.

Analysts who spoke to Breaking Defense immediately [after the presidential election](#) were split on whether Trump would be good for defense spending. Roman Schweizer, a defense analyst with TD Cowen, pointed to boosts in defense spending under the first Trump administration and cited support for higher topline among Republican leaders on the defense committees.

However, whether defense budgets ultimately see a boost could be down to the interplay of House Republicans, as the razor-thin GOP majority in the House has given hardline fiscal conservatives enormous bargaining power.

The Department of Government Efficiency, spearheaded by Elon Musk and Vivek Ramaswamy, could be another fly in the ointment for defense spending hawks. Musk has declared his intent to use DOGE to slash \$2 trillion from the federal budget. And although lawmakers, defense executives and military leaders have suggested they're on board to cut wasteful spending (who doesn't love government efficiency?), I don't see defense companies lining up to suggest programs where they should receive less money.

Is Trump a friend or foe to the defense industry, and who benefits?

During his last term, Trump got cozy with the defense primes, celebrating the business acumen of defense executives such as then-Lockheed Martin CEO Marillyn Hewson and — before the Boeing 737 MAX crisis — Boeing chief executive Dennis Muilenburg.

It remains to be seen whether any CEOs from legacy defense primes win Trump's favor, but so far his regard seems to be centered on business leaders from the defense startup and venture capital world. The incoming president recently tapped Stephen Feinberg, who leads private equity firm Cerberus Capital Management, as deputy secretary of defense. Other executives from firms like Anduril and Palantir are also reportedly being considered for major roles inside the Pentagon, and Musk could be helping to cut Pentagon spending despite leading a major defense company in SpaceX.

One way this dynamic could play out is greater preference for inexpensive uncrewed systems — an area where defense startups have firm footing — instead of the exquisite, expensive weapons platforms traditionally made by defense primes. Pentagon leaders could potentially opt to sacrifice a discrete quantity of a major weapons system such as a single Virginia-class submarine or several dozen F-35s in order to buy hundreds of autonomous weapons and improved networks, Byron Callan, a defense analyst with Capital Alpha Partners, wrote in a Dec. 18 note to investors.

“The tension between GOP fiscal hawks and defense hawks will likely push the administration to look for lower-cost options for defense in the form of autonomous air and naval systems. The role of persons with defense tech/venture/start-up backgrounds in senior administration positions adds firepower to this battle,” he wrote.

Down further into the weeds are questions about the regulatory environment, changes to defense contracting, and how Trump's overall trade policy influences defense contractors. The previous Trump administration took a more hands-off approach to antitrust enforcement, resulting in increased mergers and acquisitions, most controversially seen in Northrop Grumman's purchase of Orbital ATK. (The Biden administration would later block a similar proposal for Lockheed to acquire Aerojet Rocketdyne.) Analysts speculate that the second Trump administration will revert back to a more permissive environment for M&A.

Europe braces for Trump's second term

Trump's dislike of NATO will likely lead to uncertainty over the future of the alliance, though it remains to be seen if this time around, he will again threaten to pull the US from the institution.



President Elect Donald Trump speaks during the United Nations General Assembly (Bloomberg via Getty Images)

By [Tim Martin](#) - January 03, 2025

BELFAST — President-elect [Donald Trump's](#) return to the White House looks set to spark tension and trouble in Europe with fears that he will end the war in Ukraine on terms of greater advantage to Russia.

Peace plan proposals [reportedly](#) floated by the incoming president's team include Ukraine ceding territory to its neighbor and removing future NATO membership for Ukraine. Trump's NATO position would be in direct opposition to the alliance's stated approach — that Ukraine is on an “irreversible path” to securing membership — and runs the risk of opening up a high profile dispute with allies and NATO Secretary General [Mark Rutte](#).

Rutte already appears to be pre-empting Trump's tactics and has openly talked of making Ukraine's hand “stronger” at the negotiating table with Russia by urging allies to increase military aid commitments and ramping up defense production across Europe.

Despite not singling out Trump's purported peace plan ideas specifically, Rutte has increasingly talked of not allowing a “bad deal” for Ukraine to go ahead by messaging that, “what you can never have is [high fiving](#)” between North Korea's leader Kim Jong Un and China's President Xi Jinping. He has also been clear that the peace deal must be fit for purpose because it is pivotal to the long term defense and security not just of Europe and the US, but the Indo-Pacific region too.

More generally, Trump's dislike of NATO will likely lead to uncertainty over the future of the alliance, though it remains to be seen if this time around, he will again threaten to pull the US from the institution. On several occasions during 2018, Trump [privately said](#) he wished to withdraw from NATO, according to the New York Times.

Congress has since approved legislation that stops any president from making that move without approval from the Senate or via an act of Congress. Trump's hands would not be tied entirely on the matter though, because he could call on presidential authority over foreign policy as a workaround, [per Politico](#). However those permutations potentially play out, Trump's undermining of NATO will ultimately continue to play into the hands of Russia, weaken deterrence, cast doubt on allied unity, and force European nations to look inward and take on more burden sharing.

Enacted or expected rises in defense spending across Europe, notably from Poland and the [Baltic nations](#), alongside moves like France and the UK discussing sending troops to Ukraine, appear to demonstrate that the continent will attempt to be more self-reliant on military matters. But there is little question that Europe will be considerably weakened if Trump's worst impulses are acted on.

CMMC 2.0 and the possibility of a cyber service

2025 may be a telling year for the fate of the Pentagon's new CMMC 2.0 program.



Staff Sgt. Wendell Myler, a cyber warfare operations journeyman assigned to the 175th Cyberspace Operations Group of the Maryland Air National Guard monitors live cyber attacks on the operations floor of the 27th Cyberspace Squadron. (U.S. Air Force photo by J.M. Eddins Jr.)

By [Carley Welch](#) - January 03, 2025

WASHINGTON — Over the past year, the Department of Defense has set the stage for how it wants to strengthen cybersecurity and information technology infrastructure against adversarial threats, namely the People's Republic of China.

But with another Donald Trump presidency on the horizon, all eyes are on him to see if he keeps the existing programs afloat or scales them back. Simultaneously, some cybersecurity experts and lawmakers have predicted that the president-elect will stand up a new cyber service.

These are some of the programs and shifts to look out for in the next year.

This year the Pentagon released its final rule for the long-awaited [Cybersecurity Maturity Model Certification \(CMMC\) 2.0](#), which sets new standards for contractors who handle [controlled unclassified information](#) (CUI). The 32 Code of Federal Regulations (CFR) final rule, which lays the framework for CMMC 2.0, went into effect on Dec. 16, but the DoD won't actually begin implementing the CMMC 2.0 requirement for contractors until the 48 CFR final rule is released — likely in the spring of 2025.

However, in order to avoid a scramble to meet the new regulations with little notice, those requirements won't become mandatory until after a three-year phase-in period.

The first official CMMC program was built under the first Trump presidency in 2020— one of the reasons why those in the cybersecurity realm believe the program won't change under Trump.

[Stacy Bostjanick](#), the chief of defense industrial base cybersecurity in the DoD's office of the chief information officer, told a panel in November that CMMC 2.0 is not "going anywhere."

"CMMC was initially started under the first Trump administration," she said. "We have made such progress, and so many people recognize the need for it. It endured, and we went through and did the proper rule making steps to make it, to memorialize it. I don't see it going anywhere."

Not everyone is so sure that CMMC 2.0 is sticking around. [Quentin Hodgson](#), formerly the Pentagon's director of Cyber Plans, told Breaking Defense that given the fact that Republican administrations tend to scale back on regulations, CMMC 2.0 requirements could be reduced.

"It's possible that the new administration could decide to relook at that and say this is too high a burden or not the right way to approach improving cybersecurity standards in the defense industrial base," Hodgson said of CMMC 2.0.

"I could see where there would be a relook at some of those things that were seen as maybe from a Republican or conservative point of view [...] more heavy handed than it needed to be with respect to the private sector," he added.

Though experts and Pentagon personnel may have an opinion on the fate of CMMC 2.0, its future is in the hands of the next administration, and since we don't have a crystal ball, we will just have to wait and see what 2025 brings.

The Potential For A 7th Branch

In another effort to shore up cybersecurity protections and capabilities, some experts and lawmakers believe that with another Donald Trump presidency, an independent cyber service could be a real possibility.

Though the idea of an individual cyber service has long been a point of contention within the Department of Defense, Hodgson told Breaking Defense that since Trump stood up the [Space Force](#) it's possible that he could stand up a cyber force.

"This change in administration potentially could give more impetus to the creation of a separate cyber service," he said. "[Trump] did that with the Space Force. It was something that the Department of Defense didn't want, but he decided he wanted it, and it's possible that that could also happen with cyberspace."

Separately, two Texas Republicans, Rep. Pat Fallon and Rep. Morgan Luttrell authored an amendment in a draft version of the [2025 National Defense Authorization Act](#) that called for an independent third-party study to help lawmakers and DoD leaders determine if a separate cyber force is necessary. (The study is being conducted by the National Academies of Sciences, Engineering and Medicine.)

However such plans seem to have been scaled back in the [final version of the NDAA](#). The new language was vaguer, calling only for the assessment of "cyber organizations" instead of a separate cyber service — an important change, as advocates of a future cyber force had been hoping to hang their argument off of a report from the academies.

Although the final NDAA language could be seen as a setback, Rep. Fallon told [DefenseScoop](#) that he's still optimistic that the DoD could create a cyber force based on the study's results.

"I am sure that the incoming administration will take a hard look at everything within the cyber realm to ensure maximum protection, efficiency, and lethality. We in Congress will do the same and I am confident we'll see changes based on the level of threats we are faced with," he told the outlet.

For the Space Force, terrestrial turf wars and rising budgets await

Other than that, for a number of reasons, including the transition to a new administration, our crystal ball for the Space Force in 2025 is pretty darn cloudy.



The moon as a crystal ball. (Images via Getty / graphic by Breaking Defense)

By [Theresa Hitchens](#) - January 02, 2025

WASHINGTON — Former Defense Secretary Donald Rumsfeld elicited some snickers back in 2002 with his famous quote about “known knowns, known unknowns and unknown unknowns” bedeviling US intelligence about Iraq’s alleged weapons of mass destruction. But those words seem pretty appropriate when trying to prognosticate what 2025 will look like for the US Space Force.

From bureaucratic turf wars to extra-terrestrial combat, the old crystal ball is just pretty darn cloudy right now.

Known Knowns: Likely Budget Increase, New Capabilities Debut

There are a few things that pundits by and large agree are clearly on the agenda next year, with outcomes that are fairly likely.

First is the likely growth in both the Space Force’s budget and force size. As this humble scribe predicted [at the end of last year](#), service leaders over the past 12 months sought to make its case for growth in personnel numbers, in mission areas and in budget. Indeed, Air Force Secretary Frank Kendall — who, according to sources, has on more than one occasion and only half-jokingly called the newest military service his “biggest unfunded priority” — called for the Space Force’s budget to be [doubled or even tripled](#).

Given that President-elect Donald Trump takes personal credit for the Space Force’s creation, service advocates appear pretty confident on social media that the service’s budget and status within the Defense Department will rise. But given the administration’s [much-touted effort](#) to cut costs by finding efficiency in government departments including DoD, few analysts are putting their bets on a funding increase anywhere close to Kendall’s call.

Second, Congress is already making noise about looking to 2025, the Space Force's fifth year, as a kind of deadline for the service to show first results from efforts to pivot to new ways of doing business — that is, to demonstrate tangible progress toward new, more resilient capabilities based on “proliferated” constellations and the use of commercial satellites and technologies. Service leaders are likely to have to answer the question: Five years on, what new capabilities to meet the growing threat actually are in the field?

And Space Force officials swear that they will have something to show for the investment so far.

In particular, the [Space Development Agency \(SDA\)](#) is expected to begin launching its first set of satellites with limited operational capabilities, called Tranche 1, in March or April. Tranche 1 includes 126 Transport Layer data relay satellites, and 35 Tracking Layer birds for missile tracking, and the agency plans to have all of them on orbit by early 2026. Tranche 1 will be the first opportunity for SDA and the Space Force to prove that constellations made up of large numbers of smaller satellites in low Earth orbit can speed needed data to warfighters while complicating adversary targeting efforts.

In addition, Col. Rich Kniseley, the head of the Space Force's Commercial Space Office, told Breaking Defense on Dec. 17 that he is confident his shop will award the first contracts under the service's fledgling [Commercial Augmentation Space Reserve \(CASR\)](#) program early next year. CASR is being developed as the Space Force's answer to the Civil Reserve Air Fleet, and those first awards will be focused on commercial providers of [space tracking data and analysis](#). Commercial industry officials are hoping CASR also will serve as a market stabilizer by providing predictable funding lines.

Known Unknowns: Space Force-IC Boundaries, Tilt Towards Offensive Ops

Despite the intervention of White House budgetmeisters and the National Space Council, the long-running [turf battle](#) between the Space Force and the two key Intelligence Community agencies with space mandates, the National Reconnaissance Office (NRO) and the National Geospatial Intelligence Agency (NGA), will continue to fester into next year.

The most pressing source of strife is the question of who is in charge of buying [commercial remote sensing](#) imagery and products when and under what circumstances — an issue that a industry officials say threatens to undercut the nascent market. Government sources have told Breaking Defense that draft memos have been inked to clarify the lanes, in particular one between NGA and the Space Force, but that squabbling has broken out again in light of the pending administration change. It is anyone's guess whether, or how, the issue will be resolved over the next year.

Savvy betters will be putting money on a marked shift in budget priorities next year towards the development of new kit and capabilities for targeting Russian and Chinese space systems, whether those be [suspected killer satellites](#) or more traditional military support systems such as intelligence-gathering satellites. Chief of Space Operations Gen. Chance Saltzman has spent much of this year [advocating for such a shift](#) — one that from all past evidence the incoming Trump administration likely will support.

The unknown here is how far that tilt will go, given that the Space Force is still struggling to make a number traditional satellite systems foundational for warfighting fit for purpose. And as noted above the budget will not be unlimited.

Unknown Unknowns: ???

All things considered — the churn in domestic politics, the famous unpredictability of the incoming POTUS, the increasingly volatile international security scene and the runaway pace of technology innovation in the commercial space market — 2025 seems even more ripe than this year for supernova-sized surprises.

Honestly, who had the [fall of Syria](#) or [North Korean garbage balloons](#) on their 2024 bingo card? What's next, extra-terrestrial craft among the ever-increasing drone swarms? Chemical weapons production in space? A materials breakthrough enabling a (squee!) [space elevator](#)?

Obviously, all of those are pretty far out — but you never know. Proceed at your own risk, and hardhats are highly recommended.

From a new civilian leader to modernization priorities, Army changes afoot

As the Army heads into the new year, it will be greeted with questions about weapon affordability and ways to carve out efficiencies.



Gen. Randy George, Chief of Staff of the Army, discusses next generation command and control (C2) system capabilities with a 1st Infantry Division Soldier during a human machine Integration demonstration at Project Convergence – Capstone 4. (US Army/Sgt. Brahim Douglas)

By [Ashley Roque](#) - January 02, 2025

WASHINGTON — An upcoming civilian leadership shakeup across the entire Department of Defense next year could usher Daniel Driscoll in as the 26th Army secretary if Senators give their blessings.

President-elect Donald Trump [announced](#) his pick — a former soldier and adviser to Vice President-elect JD Vance — to lead the ground service in early December. The gig brings with it a [host of decisions](#) including ways to move weapon development programs into production; revamp ones that have foundered in early development; and carve out efficiencies.

Army Chief of Staff Gen. Randy George, who still has several years left of his tenure, talked about some of these challenges back in October.

“It should be clear to all of us that the days where we indiscriminately could buy an entire Army’s worth of inventory in a single program of record are gone,” he told an audience during the Association of the US Army annual conference. “We can’t afford to invest in obsolescence.

“There are also some things that we are going to stop buying, old, stand-alone tech that doesn’t connect to our network, equipment that can’t operate in our [transformation in contact] formations, all of the outdated stuff that isn’t survivable on the modern battlefield,” the four-star general later added. “Even if it was a requirement in the past, even if it was a program of record, we may have to stop buying it.”

While he didn't name names of possible programs on the cutting room floor, the service has been grappling with a flat budget as it pushed forward with modernization priorities categories — long-range precision fires, next-generation combat vehicles, future vertical lift, the network, air and missile defense and soldier lethality — that were inked out during the first Trump administration. By and large, those priorities remained during the Biden administration, with the exception of some systems being killed off, like the [Future Attack Reconnaissance Aircraft](#) (FARA), and others sent back to the drawing board. While service officials haven't disclosed if 2025 will be the year they need to make sweeping cuts and prioritize funding, they do have some key decision points set for the coming 12 months.

This year, for example, the service officially announced it was [halting development](#) on its Extended Range Cannon Artillery (ERCA) platform after spending several years integrating and testing out the addition of a 30-foot, 58-caliber gun tube to BAE Systems' Paladin M109A7 self-propelled howitzer. It subsequently announced that five companies had been picked — Rheinmetall, BAE Systems, Hanwha, General Dynamics and Elbit Systems — to demo their existing platforms. In early December, Director of the Long-Range Precision Fires Cross Functional Team Brig. Gen. Rory Crooks said those early evaluations indicate that the vendors are "absolutely ready for competitive evaluation," which means the service may decide not to delve into another lengthy development phase, and a decision is likely coming in 2025.

Depending on when a new Army civilian leader is ultimately sworn in, a couple of other big-ticket items may await including the [Integrated Visual Augmentation System \(IVAS\) Next](#) and a single vendor selected for the [Robotic Combat Vehicle](#) Phase II.

The Army is also [poised to use](#) next year's Project Convergence capstone event to test out the service's future command and control (C2) architecture to see if it's on the right track. If testing there goes well, senior leaders will likely hand the prototyping project over to the Army Futures Command's (AFC) Network Cross-Functional Team to continue work.

That team is "already getting the requirements developers together. They're already looking at the budget that it will require, and working [on] the acquisition approach," explained Col. Michael Kaloostian, the AFC's networks and security director for Next Generation C2.

Part of that tentative plan ahead revolves around delivering a "minimal viable product" to units later in 2025 for continued testing before the service begins fielding it to soldiers, possibly in 2026.

Another hot topic across the government next year is poised to be the Department of Government Efficiency, [or DOGE](#). An initiative rather than a department, there have been threats of major cuts to the DoD, and for his part, George has said is in favor of finding efficiency inside the Army.

"We've talking about process innovation in the Army for the last year," he told an audience in early December out at the Reagan National Defense Forum. "If it doesn't make us more lethal or our teams more cohesive, we have to be looking at, you know, should we be doing it? So I think we have to review everything that we're doing in that light."

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