

FDD Media Call: The leverage Trump needs when talking with Putin

January 27, 2025

Featuring John Hardie, RADM (Ret.) Mark Montgomery, and Bradley Bowman

Moderated by Joe Dougherty

This transcript was edited for clarity.

DOUGHERTY: Good afternoon everyone. Thank you for joining us for today's call. My name is Joe Dougherty. I'm Senior Director of Communications here at FDD, a nonpartisan research institute focused on national security and foreign policy. We're grateful that you've taken the time to join us on what is undoubtedly a busy afternoon, as FDD experts preview a phone call that many of us are expecting soon between Presidents Trump and Putin. Joining us on today's call, Bradley Bowman, Senior Director of FDD Center on Military and Political Power, former national security advisor to members of the Senate Armed Services and Senate Foreign Relations Committees, former Army officer and Black Hawk pilot, and former West Point assistant professor.

Also joining us, Rear Admiral (retired) Mark Montgomery, FDD Senior Fellow, former policy director for the Senate Armed Services Committee, former NSC Director for Transnational Threats, former lead for US military-to-military relations with Ukraine, and former commander of Carrier Strike Group Five embarked on the USS George Washington.

And John Hardie, Deputy Director of FDD's Russia program focusing on Russian foreign and security policy, US policy toward Russia and the post-Soviet space, and transatlantic relations. John is an expert on Ukraine and Russian military strategy and tactics, particularly as it relates to the current battlefield in Ukraine.

Some quick housekeeping before we get started. Today's conversation is on the record. We will have a transcript to you plus the audio and video within 24 hours. Today's run of show as follows: first, we'll hear opening remarks from John, followed by Mark and then Brad, and then we will open up the segment to your questions and have a good discussion there.

During the Q&A portion, you may submit your questions via chat or you may use the raise hand feature, in which case we'll let you know when you've been unmuted so you can ask your questions. Let's get started. John, over to you to get us underway.

HARDIE: Thanks, Joe. Hey folks, thanks for joining. As Joe mentioned, I'm going to start with kind of a high-level overview of the battlefield situation and what I see as the Kremlin's calculus, and then I'll close by sharing some brief thoughts for the Trump administration, which I hope will segue nicely into a more in-depth policy discussion by my colleagues, Mark and Brad.

To put the bottom line up front, the Trump administration is really inheriting a challenging situation in Ukraine with the war on a negative trajectory. However, in my opinion, the war is still manageable and can be improved through coordinated action by Kyiv and its Western partners. Diving into the battlefield, Russia continues to grind out slow but steady gains in various parts of eastern Ukraine, as well as the Kursk region in Russia, though at really high cost. The rate of advance really accelerated each month from July to November before dropping a little bit in December and January. It's unclear to me whether that drop will be temporary, perhaps reflecting poor weather or a more persistent trend that may reflect manpower or equipment constraints.

In overview, in '24 and so far in '25, Russia has taken a number of towns and small cities that served as anchors in Ukraine's defensive line in the Donetsk region, and these being Avdiivka, Kurakhove, Vuhledar, and most recently here in the last few days, Velyka Novosilka.

Then Russia's basically trying to grind through or around some of the others, namely Chasiv Yar, Toretsk, and Pokrovsk. From my perspective, the main reason for Russia's gains is Ukraine's growing shortage of infantry.



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Really since late-2023, Ukrainian mobilization just hasn't kept pace with losses. A new law that you all may be tracking that came in force in mid-May in 2024 initially helped raise that rate, but Ukraine is really unable to sustain it. These days, many frontline units are really under-strength. New troops tend to be under-trained, to have lower motivation than others at the beginning of the war. The AWOL and desertion rate has really increased.

Ukraine has compounded that manpower challenge with some poor force management and some dysfunction and kind of the command layers above the brigade level. We can get into that more in the Q&A. I'll just finish off this bit by saying Ukraine has signaled efforts to begin addressing some of those issues, but how much progress it'll make remains unclear. Despite Western pressure, Kyiv remains opposed to lowering the mobilization age.

Shifting to the Kremlin's view of things. From my perspective, current battlefield trends, along with uncertainty regarding few future US aid, really gives Putin some good incentives to continue pressing his advantage. I think from his perspective, the objective is not just capturing additional territory, but really grinding down Ukrainian military and Ukraine's political will in order to facilitate a Russia-favorable peace deal further down the line. In my view, Russia will probably struggle to sustain the war past 2025, but the risk for now really is that Ukraine's battlefield position will worsen faster, giving Moscow that greater leverage.

I think one important point that to hammer home is that Putin has not and likely will not abandon his fundamental goal of dominating Ukraine. Thankfully at the moment he doesn't have the military means to achieve that just through military force alone. But I think he'll approach these potential peace talks as a backdoor way of achieving that goal and also I think from his perspective, hopefully addressing some of his broader grievances about the post-Soviet order in Europe.

I think Moscow will likely pursue and insist on peace terms that would curtail Ukraine's sovereignty and leave it vulnerable to further Russian aggression, so things like not only banning Ukraine accession to NATO, but also limiting the size of its armed forces among other terms. From my perspective, that deal would be really bad for US interests, not only because it emboldened China and Russia, but also raise the risk of a follow on war.

To close, just a few brief notes on policy issues. In my view, Kyiv and its Western partners really need to find a common strategy toward a good and durable peace deal. I think that'll require both steps to stabilize the front and tighten economic and military screws on Russia. Ukraine, for its part, needs to mobilize more men and exercise better force management.

Washington needs to do its part by continuing to surge aid to Ukraine. I think Trump would be wise to push Congress to pass what we've been calling Ukraine aid or Ukraine leverage package. From my perspective, that would be really useful because it would show Putin that, hey, you can't just wait out US military aid and give him an incentive to negotiate now rather than later. Then also tighten sanctions, hopefully accelerating the point at which Russia's economy cannot continue to sustain the war.

Then in the meantime, I think Washington needs to continue engaging with Kyiv and other Western partners to devise a plan for credible security guarantees post-war. In my view, absent those guarantees, any peace deal will probably just be a Band-Aid that doesn't really address the fundamental reasons for this war. It would be a lot like kind of the Minsk agreements after the 2014-2015 war, which of course led to the current war that we're in right now. I'll stop there and turn it over to my colleagues.

MONTGOMERY: Hey, thanks John. This is Mark Montgomery. For the group, I traveled to Ukraine late last year. I did kind of pro bono operational planning with a couple other retired general officers. I had a pretty good opportunity to meet with their leaders and troops and see firsthand where they really do need our support in keeping Putin's aggression at bay.

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First thing I want to say is, without a doubt, and I know Brad will talk to this, so let me say it quickly, that Ukraine is in a war with all four authoritarian aggressors. There's a lot of stuff from particularly North Korea that's problematic and makes things really hard for Ukraine. When we think about this, it is not a Russia-Ukraine conflict, this is a Ukraine-against-the-aggressors conflict. Look, I was on the ground there, and I think in the two months since I would say Russia is still on its front foot in Ukraine. In other, despite significant combat losses over the last 32 months, they're still gaining territory against Ukrainian forces, as John referred to.

While Russia has manpower issues, I think Ukraine struggles more mightily with manpower issues and is facing some really tough decisions over the next two months. They have significant supply chain issues. Then, of course, they have restrictions from the US on how and where to use the weapons and munitions. Those restrictions are then carried out by the Europeans who have similar weapons systems.

I think we overreact to Putin's threatened, his threatened actions to declare war on the US or lowering of the nuclear threshold. He hasn't done that. Each time we've pushed forward with a sale of M1A1 tanks, sale of F-16s, release of ATACMS ranges, things like that. We have to prevent Putin continuing to take these fake, these allusions to escalatory steps and then having it affect our response. We have to continue to support Ukraine and continue to make decisions that are in the best interest of our relationship, US and European relationship with Ukraine.

I know President Trump says he wants to end the war as soon as possible now that he's taken office. I think he's finding out now that not only was that not a one-day solution, it's probably not even 100-day solution. But I think he needs a minimum of a four- to six-month pressure campaign to gain the upper hand in negotiations. A number of parallel efforts are needed before President Trump actually begins to negotiate with Putin and Zelensky, and the worst thing you can do now is negotiate before that pressure campaign is conducted. The first thing is the easiest one, continue the relaxation of weapons usage to allow Ukraine to use its weapons systems in the most tactically and operationally relevant way possible. To hit the appropriate target sets in Ukraine that are within their ranges.

This involves ATACMS, it could eventually involve -- ATACMS is a ground launch, I think everybody knows, a ground launch weapon -- but also could involve JASSM, an air-to-surface missile that could be launched from the F-16.

The second is, provide Ukraine with improved targeting support. I was shocked as a admiral who did a lot of war planning and execution of war plans, the targeting support the Ukrainians are having to rely on it, on what I would consider significantly timely targeting. It wasn't the normal time-sensitive targeting requirements of the US. In other words, I expect when I fought -- minutes, not hours, timely imagery. We got to figure out how to get that imagery down tight. I think they're working it at the end of the Biden administration, but I think the Trump administration is going to have to deliver that. That will make every weapon we give, long-range weapon we give Ukraine, more effective. The Trump administration's got to complete the execution of the ongoing congressionally approved security assistance. We know that the Biden administration announced presidential drawdown authorities, but these things have to execute. They're not immediate. The president doesn't sign a piece of paper and 155 millimeter rounds start landing in Poland. These are weeks- and months-long processes that need to be executed.

Then even more so, the longer-term Ukrainian security assistance initiative. When we promised money in 2022, 2023 and 2024 to that -- 30 plus billion dollars worth of that -- much of it hasn't delivered yet. It needs to continue to deliver. Not all those weapons are the perfect weapons they need at this very moment. It's not all 155 artillery. It's not all surface-to-air missile defense systems, but it is some really important stuff in there.

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I do agree with President Trump. He's got some great ideas on how to lean on Europe to do more and maybe lean on Europe if necessary. If they don't have the defense industrial base, buy our stuff. Buy our stuff right off the line, prioritize it number one and send it. That'd be good for American industry. It'd be good for Ukraine and the Europeans can feel like they did something.

But most importantly, the number one thing he's got to do is increase pressure on the Russian economy. My old boss, Senator John McCain, said something along the lines of, "Russia's a gas station masquerading as a country or a country operating a gas station." Your choice on that. The bottom line is just a significant amount of their day-to-day, the liquidity of the government and the ability to pay for things. Remember, they're now spending 40% to 45%, somewhere in there, of their government expenditure is on defense. It comes from the sale of oil, natural gas, fossil fuels. We have got to put pressure and there are ways to do this through the shadow fleet, proper sanctioning, the secondary and tertiary, getting after the Indian and Chinese companies who are doing this, really enforce that. Working with our Saudi partners with whom President Trump has a long-term positive relationship, to lower the global cost of those fossil fuels of oil and natural gas down to a level for which the extraction cost for Putin exceeds the value of the sale.

These are the kind of things that put real pressure on them. I don't know how many more oligarchs you can push out the 17th floor and grab their funds afterwards to keep his economy going. I think there's real limits on that. So if we really pressurize these oil and natural gas, these fossil fuel exports, that's what gets President Putin to the negotiating table in a way that you could read in the Art of the Deal, where Trump has the leverage. That's how I look at things. I'll pass it over to Brad.

BOWMAN: Thank you, Mark, Admiral Montgomery. Thanks, John. And thanks all for joining. I'll try to be brief here, because I'm excited to get to your questions, any questions you might have. Let me just mostly do a zoom out here and try to tie this into some of the larger policy issues that are on the table. I think when we hear this administration, others, talking about US policy toward Ukraine, Europe, and the threat from Russia, it's often framed in the context of having to balance finite American resources and dealing with a whole number of threats and, also, the threat from China.

I agree with the Trump administration that China is the number one threat we confront. I agree with that. I agree with the Trump administration that we need to do more in the Indo-Pacific to deter aggression there and strengthen our posture for that purpose. But I think it's important to add that we also have vital and important interests elsewhere, including in Europe and the Middle East.

And if we are not careful and we don't devote sufficient time, attention, resources to protecting those vital and important interests in places like Europe and the Middle East, then problems that are small or smaller or manageable would become bigger and it will pull those finite resources from things we want to do in the Indo-Pacific to deter China. So even if someone is skeptical about my argument, which I think withstands scrutiny that we have vital national security and economic interests in Europe. Even if one is skeptical about that and only cares about China and Indo-Pacific, then you want to make sure that you're at least implementing economy of force strategies in Europe and the Middle East to keep small or smaller problems from getting much bigger and ultimately, siphoning off resources, time, and attention in a way that guts your China strategy or your Indo-Pacific strategy.

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So just the one comment on that is, as we balance these competing demands and finite budgets that we have, a quick comment on the axis of aggressors. Here at FDD across all three of our centers: the one that Mark leads, the one I lead, and our Center on Economic and Financial Power, we've been looking at the ways that China, Russia, Iran, North Korea are cooperating. And just within our Center on Military and Political Power, we've documented over 350 instances of five different types of security cooperation between China, Russia, Iran, North Korea since 2019. And it is truly accurate to say that these partners are partnering in ways that we have not seen, that makes each of them more effective in their respective spheres of aggression or potential aggression, makes them more capable, additional capacity, more resilient. And we're all familiar with what Iran, North Korea, and China have done to support Putin's naked aggression in Ukraine.

So how's that relevant? Well, the point here is that if our adversaries understand the value of partners, we should too. And when you have a partner like Ukraine who's dealing daily body blows to the second leading conventional military threat we confront. You know, destroying over 10,000 Russian tanks and armored vehicles, more than 273 Russian aircraft, at least 28 naval vessels, and the list goes on and on. Then, that's the kind of partner you want, and that's the kind of partner that you would be wise to pass the Louisville Slugger over the back fence to so that they can brutalize the home invader a.k.a. Putin and he reconsiders his line of work. So, this kind of talk you hear in the beltway about axis of aggressors, this isn't just some theoretical thing. It's a real thing and we need to wake up that our adversaries understand the value of partners, and we should too.

A quick word on deterrence. Again, sounds kind of wonky, but has real-world implications here. Many Republicans like to point out that Biden's disastrous withdrawal from Afghanistan may have underscored widespread perceptions of weakness in the Biden White House and may have played some role in Putin's thinking as he was contemplating this largest invasion in Europe since World War II. I believe that that's probably the case. Difficult to prove what was in Putin's mind. But I think that's a credible view that many hold, including myself.

Well, we should keep this potential connection between disaster in Afghanistan and invasion in Ukraine in mind when we're considering policy toward Ukraine. If a failure in Afghanistan contributed to Putin's invasion of Ukraine, how much more will failure in Ukraine potentially increase the chances of communist China's aggression toward Taiwan? So what President Trump does or doesn't do in Ukraine will have implications in Ukraine, of course, and in Europe, but may have some sort of direct impact on what Beijing decides that it wants to do in the Taiwan Strait.

And that's because, as we know, deterrence is based on perception of military capability, yes, but also, political will. And political will is not hermetically sealed to one region or the other. What we don't do or do in one region affects perceptions of what we will and won't in another region. If we're not willing to spend about 2.8% or less in comparison to what we spent on the Pentagon during the same time period to help Ukraine defend itself and deal body blows to the second leading conventional threat, reduce the likelihood of a war with NATO, and send a positive deterrent message to Beijing, why the heck would Beijing believe we're going to send thousands of troops to fight and potentially make the ultimate sacrifice in the Taiwan Strait?

So, what's to be done? I'll move to conclude with this. President Trump said that he would try to get a deal done within 24 hours. That was always a little ambitious, shall we say. Part of that is because these things are just hard. But part of it, also, is I would say, the main reason, is the hostility and lack of goodwill from Vladimir Putin. Putin, as John implied earlier or said earlier, he wants international recognition for the Ukrainian territory that he seized by force. And he wants to leave Ukraine isolated politically and weakened militarily, so that the Kremlin can come back for a larger chunk later. And if you look at his main objectives, that's the goal he's pursuing. So, Trump has not been able to deliver on this commitment to get a deal in 24 hours. I think that's likely because Putin perceives that Trump is really eager for a deal and he's eager or willing to reduce aid for Ukraine, and he's unwilling to place real significant additional pressure on Moscow. That's my sense of the Russian perception.

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So, if Trump wants a deal that solidifies his legacy and serves US national security interests, he should really, as Admiral Montgomery and John Hardie have argued in their publications and elsewhere, he should make Putin wince and he should try to put the United States and Ukraine in the strongest position. Trump has talked about tariffs, taxes, additional sanctions against Russia. I think that's all good, but we would have to actually deliver on those steps, one. And they'll almost certainly be insufficient, or at least slower, if not accompanied by support for Ukraine. And so, Admiral Montgomery's ideas about how we can further help Ukraine, I think, are wise and would put us in a much better position.

And Mark mentioned the *Art of the Deal*. I mean, the actual quote... Check this, but I think the actual quote from the book is, "The best place to negotiate is from a position of strength and you get that with leverage." That's President Trump writing at the time in *Art of the Deal*. And I think he'd be wise to take his own advice there as he looks at policy toward Ukraine.

And I'll end with one last quote, a quote that I use too much, but it's just too good. On April 14th, 1984, then-Secretary of State George P. Shultz told an audience at Kansas State University that, "Negotiations are a euphemism for capitulation if the shadow of power is not cast across the bargaining table." An insufficient shadow of power is over the negotiating table right now. That's why Putin is unwilling to deal and unwilling to deal in good faith. That's the bad news. The good news is that President Trump has the power to change that. Thanks.

DOUGHERTY: Thanks, Brad. We will now open the conversation up to your questions and answers. So please use the Raise Hand feature if you would like to ask a question or you could submit it in the chat, and we are closely tracking those things. I will get the questions started. Both President Trump and new Defense Secretary Hegseth have mentioned the US industrial base and wanting to pick that up. Couple angles to address it this way: Where is the industrial base now? Is the US industrial base where it needs to be? Where should it ramp up? How could it affect this situation in Ukraine now in particular? And so, I know Brad, and Mark in particular, you've looked at the industrial base. And then, John, what specific equipment would you recommend that they focus on now that could help Ukraine? So I'll leave that with the three of you.

MONTGOMERY: Brad, you go first.

BOWMAN: Okay. I'll be quick and I'm eager to hear from Mark and John on this. I'll just quickly highlight another major report that we're finalizing that we hope to publish in the coming weeks, that we're eager to share with all of you if you're interested. We looked at the question of whether providing arms to Ukraine, and then after October 7th we added Israel, has materially slowed the delivery of weapons to Taiwan.

And so, we looked at US foreign military sales to Taiwan. And then, we asked ourselves, "Did providing those weapons to Ukraine or Israel slow down their provision to Taiwan?" And in every instance, the answer was no. It did not materially slow delivery. Some things were slow and delayed, but one could not credibly blame that on supporting Ukraine. So, I hasten to add that because anyone who says that we have to abandon or significantly reduce support for Ukraine because it's negatively impacting our ability to give Taiwan what it needs, has not done the homework that we have. So, I'd say that.

But that is not the same thing as saying that everything is hunky-dory in our defense industrial base. For those very same weapons systems, we went ahead and asked ourselves, the second question is, "What is the relative health of those respective industrial bases for those munitions and weapons systems?" and assigned a green, yellow, red assessment to each. And in many cases, the defense industrial base for those systems while improved, since February 2022, thanks to the brutal wake-up call that Putin delivered, were much better now. But there are still significant problems.

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And one of the main problems is insufficient defense production capacity. And one of the reasons for that, among many, is that over time we have not devoted enough funding to purchase them. Acquisition is complicated and difficult, and you can spend a life studying it. But at some level, it's simple. If you want a defense industrial base that is healthy, that is producing things at the necessary quality and quantity, then you need to buy more. And we have not bought enough for all kinds of reasons, including an insufficient defense budget. We're spending 3% of our GDP on defense right now. Other than 1999 to 2001, by that measure, that's the lowest we've spent on defense since 1940, one year before Pearl Harbor. Mark, over to you.

MONTGOMERY: No, I agree with what Brad said. So first, ironically, the Russian illegal invasion of Ukraine is what highlighted most of Congress and some of the senior DOD leadership to what a lot of us understood and had been complaining about for over two decades, which is a significant, persistent underfunding of munitions. What we're seeing now is max production of most of the munitions that we would want for a war with Ukraine or with Russia in Eastern Europe or for a war in the Asia Pacific. And in fact, they're saying, money to increase what that max production could be.

But these efforts now, started in 2023, 2024, won't really evidence themselves with some small exceptions until 2027, 2028, 2029. The exception is one of them being 155 millimeter artillery where we put a very specific effort into it. So when you ask, "What do we need right now?" We're close to out of what Ukraine really needs: 155 artillery, 105 artillery, and air defense weapons like AMRAAM missiles for the NASAMS system and Patriot missiles. And many of our allies and partners are really down to bare bones on those as well, not really to provide them.

So we do need those production lines to increase and then there needs to be a decision made. In many cases, a Ukraine purchase is not number one in the line for a NASAMS or a Patriot. They need to be moved to number one. And additionally... And we need to remind ourselves, what North Korea gave Russia in artillery is jaw dropping. It's between 5 and 6 million rounds, so those could be mortars, 105 -- their equivalent of smaller artillery. And then, 162 -- their equivalent of 155 artillery, larger artillery rounds. They gave them decades of US production. So we really need to concentrate on this and get them everything we can out of the... We really have to be looking around our allies' armories and our own to make sure we're pushing that. So that you can get the artillery exchanges down from 7, 8, 9, 10 to 1. That's 7, 8, 9, 10 Russian for every outbound Ukrainian. And so, to me, it's get them artillery, get them air defense, and then keep our production lines going.

DOUGHERTY: John, would those be helpful?

HARDIE: Yeah. Absolutely. And I'll just take your question in a little bit different direction and say that, for one of the things that we provide, it's most important to keep Ukraine in the day-to-day fight. That's 155 millimeter artillery munitions Mark just discussed. As you know, we've already put a significant investment in and we're just starting to see some of the fruits of that pay off. So this year, the goal is to get to 100,000 rounds per month, somewhere around the end of maybe the summer or so. Check the exact date. But from my perspective, we'd be foolish to have paid all the costs upfront and then just when that source of additional leverage to help Ukraine stabilize its lines... You have to be aware of the relationship between artillery fire, rate of fire, and manpower, right? So when you can fire more artillery, takes the burden of some of your infantry and vice versa, right? From my perspective, we'd be foolish not to make full use of that investment and supply as much of that to Ukraine as possible.

DOUGHERTY: Thanks. We have questions. Viola, I'll be getting to you in a moment. Same thing with you, Howard. We're going to start off, Tara at AP. Over to you. You are unmuted.

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TARA COPP: Okay. Thanks for doing this. So my question is about the foreign aid assistance part of it, because the amount that's left in PDA that's still available to Ukraine, there's a question of what kind of money will flow for weapons, but another part of Ukraine just functioning was all the money that the US was providing to pay salaries for the administrative stuff, for the schools, for all the government stuff. And that seems to be affected by this foreign aid, just stop. Wanted to get your input on that.

MONTGOMERY: Yeah, I agree. I mean, we were talking specifically to security assistance. There are also places where we and the Europeans provided very specific governance and humanitarian assistance as well. And particularly we provided governance and the Europeans provided humanitarian assistance and recovery assistance. And I think on our end, I mean, there's questions about what these restrictions do.

The only two clean waivers I saw were Israel and Egypt. So it's important that we determine how long this perturbation is going to be and what can be done to gap fill against it. And when it kicks in, there's usually a delay. The money we give today was for a check how many weeks from now? Six, eight, ten? You know what I mean? That kind of thing. So we just have to figure that out.

But yeah, this is a concern and I don't think it's an anti-Ukrainian effort by the Trump administration. I think this is part of a much broader, 'what are we spending money on' effort by the Trump administration. So while not a target of this, it is a victim of it.

BOWMAN: Hey, Tara, Brad here. Thanks for the question. You mentioned PDA. Just a quick comment on that. As you know, but some of your readers may not, there's a difference between PDA authorization, which allows you to transfer that respective value or that amount of weapons from the US military inventory to Ukraine. And then there's the appropriation to replace that which has been transferred in the US arsenal. And something that Mark and I and others have been saying for a while now, that it's very, very important to continue to use PDA because it gets vital capabilities there quicker. But it's very, very important also that any PDA authorization be accompanied by an appropriation to replace that munition or system that's been transferred in the US military arsenal, or over time you'll have a degradation in the readiness of the US military.

And so I think some of what we have seen or may see is the services are pushing back a little bit on some of this because they want to support the Washington's policy, but they also understandably don't want to go too low in some of their inventories and transfer stuff, which is then not replaced, and that's understandable.

With that said, I would say from an American grand strategic perspective, when we decide what to do with a munition or a weapon system, we have to ask ourselves, where does that system best serve American interests? And if you have allies or partners like Ukraine and Israel, which are literally degrading our adversaries as we speak, then an argument has to be made in some cases that transferring that munition or weapon system best serves the American interest by being transferred rather than keeping it in our inventories. But with that said, as Mark Montgomery knows well, we have to keep our inventories at a certain level for our contingencies and war plans.

And just a quick comment on salaries. The salary support that's provided to Ukrainian government officials is really, really important so they can continue to function. But I think if our European allies are reading the political moment in the United States well, they better be moving, I'd say quickly, to try to pick up most or all of that burden because I could see that's something that would be among the first things that the Trump administration would be looking at to reduce in the future potentially.

DOUGHERTY: Thanks to you both. Howard, over to you for your question. You are now unmuted.

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HOWARD LAFRANCHI: Great. Thank you. I wanted to ask a question about security guarantees. I think it was you, Admiral Montgomery who mentioned eventually in any negotiations or would have to be a working out of some kind of security guarantees. I too, I was in Ukraine in November and everywhere I went, I mean, from military to just average people... In fact, it was amazing to see just people in markets and things who you ask a question about what Ukraine would need and specifically mention security guarantees. And there's just kind of this bitter laughter referring back to earlier agreements. I think maybe you mentioned those as well, 1994 when Russia in exchange for -- maybe it was a Budapest Accord -- but in exchange for Ukraine giving up its nukes, it would not be invaded, it would not face a Russian invasion. And of course, those didn't stand up. So short of NATO membership, what kinds of security guarantees could be offered that would really reassure the Ukrainians and impede the Russians?

MONTGOMERY: I mean, they're going to have to be significant. I don't think with President Trump we're going to be able to pull NATO membership into this discussion. So I think this is going to have to involve European troop commitments, European security guarantees like that. It can be backstopped by US guarantees of action if there's a violation. But I don't believe... As much as I would like to see some kind of path to NATO membership over three to five to six years, which by the way, is how long it would take to really get NATO forces ready, I mean Ukrainian forces, ready for NATO. They're pretty kick butt on the let's do integrated infantry and armor together and integrated artillery. They're not so good on the, how do you run a military judicial system or procurement agencies and things like that. So they need some work, but I don't think that's likely. I think it's much more likely to be some kind of European security guarantee through either European troops, backstopped by the United States saying, "We will take specific actions." John.

HARDIE: Yeah, I would just add that I agree with Mark that the European led idea would probably be the most feasible. Although I think if you talk to European officials, I don't think they would think it's feasible without the United States. So I think that the Trump administration is going to have a lot of wrestling to do, and I think it's going to have to look itself in the mirror and ask, does it actually want to end this conflict? Because if it does, we will probably have to put some skin in the game in terms of backstopping that agreement, or at least providing certain enabling capabilities to whatever force is in Ukraine.

BOWMAN: Hey Howard, I appreciate the question and you mentioning the Budapest memorandum. I can send you an article we published of all days on February 25th, 2022, right after the 24th where we highlighted how Ukraine was let down by the Budapest memorandum, as it sounds like you know, but others may not. This was signed by Ukraine, Russia, the US, and the United Kingdom in '94. It promised respect for "the independence and sovereignty and the existing borders of Ukraine," to "refrain from the threat or use of force," to "refrain from economic coercion." And again, Russia was a signatory to that, of course. And then Ukraine agreed to give up the Soviet nuclear weapons on Ukrainian territory in return for those commitments.

And if you read the language carefully, and this is detailed in the article we could send you, the commitment was, 'hey, if these things happen, we'll take them to the UN Security Council,' which is laughable in hindsight, not very shrewd, right? Because we know who has a veto on the UN Security Council. And so that's just some background, but it's also relevant to the future, I think, because something tells me Kyiv is not going to be happy with some assurances unless they are backed by American political will and combat power.

And so much of what we're talking about right now is like, hey, 'let's get Ukraine military capabilities to help them currently on the battlefield.' But even if the war stops tomorrow, we're still going to need to get those capabilities to Ukraine because we know Putin is a predator and he'll be back for more, especially if Ukraine is not prepared to defend itself. So this is not a one-month or one-year thing. This is a long-term policy interest and objective the United States of America has to make sure that the people of Ukraine have the means to defend themselves because they understand and we should understand too that they've got a big aggressive bear right on their border.

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MONTGOMERY: No, I also think this is a reminder to the defense priorities in Quincy and the other co-funded think tanks that push this restrainer or prioritizer philosophy that when you abandon your adversaries in the field, whether it's in Afghanistan or in Ukraine, you get that kind of chuckle afterwards. And that chuckle is, 'I'm not going to rely on the United States again.' And the problem is you may think that's okay. 'Well, I won't be the security guarantor of this or this,' but if we're not the security guarantor for democracies and capitalist and market-based economies around the world, then we will very rapidly not be their economic security guarantor either. And when that happens, we begin to lose access and the strength of the United States, our economic role in the world will be limited and eventually marginalized if we don't remain the security guarantor of choice.

And this idea that you can magically do nothing for someone's security, but they'll bend to your knee on economic issues, flies in the face of centuries of world politics. And so it is a very important thing that we continue to support countries and philosophies like democracy and market-based economy that we put forward. And everyone can agree in those groups that walking away from Afghanistan, we could all see the fault that it created and the signals it gave to Putin that he had a green light in Ukraine, that we had a weak administration that wasn't going to take action. But suddenly now it's like, but on top of that, if we walk away from Ukraine, that's a second signal across two administrations. So we have to be very careful treading down that line.

DOUGHERTY: A few questions from Viola at the Just Security. I'll read them both now and open it up to the group to respond. First question, "Is maximum pressure a useful framing considering its association with the former Trump administration's framing on Iran if the current administration has any hesitancy to pressure Putin sufficiently?" Second one, and we kind of addressed this, but maybe we can flesh it out a bit more, "To John's recommendation to ease US restrictions on US weapons Ukraine is using, do the Ukrainians definitely have the capacity to use loosened rules effectively and efficiently? And to Mark's recommendation to press Europeans to buy US weapons for Ukraine if needed, does the US have those weapons to spare? Hasn't that been an issue all along?" Again, you addressed that a little bit, but maybe we can flesh that out a little bit more. Over to you.

MONTGOMERY: So I'll take the second part, just because it was about my question about recommendations. Look, I do believe as 155s are being produced at an exceptionally fast rate, now we really give a lot of credit to the Biden administration for getting that moving and making that a priority. As they become... Look, we have to take some risk in prioritizing that it goes to Ukraine first, but we don't have to have it be our money. So we can give the Europeans head of the line at that 155 to buy if it's directly going to Ukraine. So that's one.

We'll have to see how AMRAAM, it's a air-to-air missile that's also used in the surface-to-air dual role with the NASAMS dual Norwegian US Air Defense System. As those begin to produce, again, take a look at the numbers. There'll probably be some that are called off, especially of the more modern, there's some different types of AMRAAMs. We can pull off the more modern ones for the US Air Force and Navy, and then that frees up older ones to transfer to Ukraine. And that purchase can again, be done by the Europeans.

So you can use our defense industrial base as a tool to do this. And from my perspective, it both protects Ukraine and fits Donald Trump's vision to transfer some of the financial, an increased amount of the financial responsibility, for the defense of Ukraine to the Europeans. And I'll just gently say that when we try to compare the security numbers between the US and Ukraine, we tend to use these very large numbers of how much we've given, how much they've given. And the Europeans on occasion will say, "Well, we've given more security assistance." One of the questions I have to put in there is, over what time period? In other words, our security assistance tends to be things we give today from our PDA or go buy from USIA within 12 to 18 months, and then it's delivered 12 to 18 months later. Some of the European things are promises today of future deliveries of things in a more distant future. So the Europeans can do more. I think we can drag that out of them here. So there's some opportunity.

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BOWMAN: A quick comment on the max pressure part of your question. It's my sense that the Trump administration is going to be moving to reimpose some sort of max pressure campaign against the Islamic Republic Iran, as well as a max support campaign for the Iranian people. I think that is smart and should've been implemented a long time ago, and I think that's unambiguously good to protect US interests in the Middle East and more broadly. Whether we use the term max pressure in the context of Vladimir Putin, Russia, I'm less concerned about that. The idea is that when you have leverage, you should use it. And if President Trump approaches these interactions with Putin with a weakened position or less leverage, then he's less likely to be successful for the sake of his own legacy and American national security interests.

So call it what you want. Call it max pressure this. Call it max pressure that. I don't care. The point is, and this is supported by common sense and history, that if you want to be successful at the negotiating table, you better come with a shadow of power over the negotiating table. And right now, we're saying there's about at least a half dozen things that this administration can do to support President Trump's goals to have a just outcome in Ukraine.

HARDIE: I'll just quickly touch on the long range strike piece of the puzzle that was asked about. I think from my perspective, we've done a good job loosening some of the restrictions. There's perhaps a little bit farther we could go in terms of loosening restrictions. Mark's point about prompt intelligence support is very important. I also note the issue of magazine depth. So it's great if you have authorization to strike something. If you only have, let's just use a hypothetical number, five ATACMS left, well, that's not going to be very useful, right? So anything we can do to increase that capacity is useful, whether it's a JASSM or perhaps bumping Ukraine in front of the line for ATACMS producing more of those, I think there are a range of different options that the Trump administration could consider and perhaps even pursue at the same time.

DOUGHERTY: We don't have any other questions in the queue at the moment, but I do want to ask because we've talked about Europe and NATO and how they can step up more to assist Ukraine and strengthen European defense in general. So I want to open up to get your thoughts on basically the president's approach to increasing pressure on NATO, the European allies. Is that the right approach? Are there other things he can and should be doing, or is he doing the right thing?

MONTGOMERY: Well, listen, first, I appreciate that the president is telling the Europeans they need to spend more. I think 2% is too low. I think 5% is fairly aspirational considering that the United States, as Brad mentioned earlier, is at 3.02% by most calculations of defense spending of GDP, of GDP on defense spending. We're at 3.02%. Brad and I have written extensively about how we would be considered a big victory if over the next four years, they can get it to 3.4%. That's adding 30 to 35 billion a year each year sequentially to the base of the defense budget. Not a supplemental, not a reconciliation, but adding it to the base each year. That would be fantastic.

The Europeans are not going to get to 5%, but the president was part of the reason 24 plus have gotten to 2%. Now, I'd say the other slightly bigger part of the region was Putin invaded Ukraine, but that helps. Some countries were already working to get there. So the first thing is, yes, drive them to 3% of GDP, be at the same level as us. I think all our allies, all democracies should strive to get up to that level if they're in fear of an authoritarian nearby. That includes Taiwan, Korea, Republic of Korea, Japan, over time, that's where they should be.

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But the second part of it is spend your money wisely. There are countries that spend 2% of their GDP and defense in Europe now, in NATO, who we don't get the value out of that because they build something that's duplicative or not necessary or not meeting a NATO requirement. They don't have the luxury. We had the luxury of doing that. When you spend 800 plus billion, you get to hit everything if you want to hit everything. Some of these European smaller NATO states need to have very specific tailored requirements for meeting a NATO capability requirement, and they should be fixated on that and they should become butt kicking good at that capability that they signed up for. And their 2% needs to be laser focused and then they're 3% laser focused on that. We don't need them to have presidential guards that look good, right? We need them to be contributing to NATO capabilities. So with that in mind, it's not just go from two to three, it's go from two to three and improve the quality of that 3%.

BOWMAN: Great comments by Mark there. Just building off that, I just pulled up the most recent NATO report and the current number, as he said, is 23 countries meeting that 2% minimum. And they changed it from an aspirational goal to a minimum, and yet we still only have 23 NATO member countries meeting that [as of June 12, 2024 based on estimates for 2024]. Countries like Canada and Spain are particularly egregious in terms of what they've been spending, and I believe deserve to be called out, named and shamed on that for not carrying their fair share of defense spending and meeting their own commitments.

But here's how this relates to everything that we've been saying, just to tie it all together. What you spend now doesn't yield benefits on the battlefield for years to come. And so, every month, every year in which our partners fail to honor their commitments on defense spending, they're delaying the day when they're going to be able to help more in very tangible ways, right? Because defense spending, what does it do to the degree that they spend it domestically? It increases their respective domestic defense industrial bases, which is helpful in multiple ways. It allows them to strengthen their own arsenals -- capacity and capability -- and then gives them eventually slack capacity that can be shared with Ukraine.

So, if we're talking about Europeans carrying more of the load with respect to European security and helping Ukraine, then that's going to be difficult to fulfill if they're not spending enough on defense. And so I think that's why folks, including President Trump, are right to emphasize that Europeans need to be spending more on defense, but I'll hasten to add, there's a right way and a wrong way to do that. You would never want to threaten to not honor Article V of the North Atlantic Treaty because someone's not spending enough, because that defeats the whole purpose of the treaty, which is to deter aggression. If America threatens that we're not going to honor Article V of the North Atlantic Treaty, you invite aggression, the very thing that the alliance is designed to prevent and deter.

DOUGHERTY: Before we wrap things up, and I'm going to ask each of our presenters today to just give a 30-second wrap-up in just a moment, I do want to remind you that we will provide the transcript and recording and audio of today's call within 24 hours, hopefully sooner than that. Special thank you to Krystal Bermudez in the background for keeping things running smooth, as well as just taking care of all the details there. And in closing, a reminder that FDD is a nonpartisan research institute, we're focused on national security and foreign policy. You can reach me and the rest of the press team at press@fdd.org if you would like to follow up with any of our experts today with any specific questions that you may have.

Let's go back to how we did things in order, a quick wrap-up on your key messages there. Start with John, go to Mark, wrap up with Brad.

HARDIE: Thanks, Joe, and thanks everyone for joining. I would just conclude by saying President Trump, I think, is someone who thinks in terms of getting a good deal and leverage is a way to achieve that. And if he follows his own advice, I think he'll take steps to increase his leverage with Ukraine, whether that's passing the Ukraine leverage package through Congress that we mentioned, imposing sanctions on Russian oil revenue, what have you. So I think those steps would really important toward a good deal.



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MONTGOMERY: Thanks. The one thing I'd go back and emphasize is the importance of increasing pressure on Russian oil exports to bringing Putin to the negotiating table in the right position, and that involves properly sanctioning the shadow fleet. I didn't mention this earlier, but sitting here, 'drill, baby drill, ' which really is a euphemism for increasing US production, and the perception of an increase in US production, which can influence future markets. And then, finally, working with Saudi Arabia to lower global prices in current markets.

BOWMAN: Thanks. Thanks to everyone for joining. And let me, to reiterate what Joe said, if we can be helpful to any of you dialed in, please don't hesitate to reach out. I would end with this, by saying that the principle behind what President Trump is trying to do in foreign policy is peace through strength. And I think what you hear us saying is that there are ways to make the American hand and President Trump's hand stronger so that they can implement this doctrine of peace through strength. And I think what President Trump and his administration do or don't do in Ukraine in the coming months and year or two is going to be pivotal and it's going to have far-reaching positive or negative consequences far beyond Europe, including in places like the Taiwan Strait. So, the stakes are high, and it's a good time to remember that American leadership strength is a good thing, not a bad thing. President Trump understands that. We just need to implement that doctrine with respect to Ukraine and Russia.

DOUGHERTY: To all the journalists on today's call, thank you for joining us today. We know that your schedule is quite busy. John, Mark and Brad, thank you as well. This does conclude today's call.