

FDD Media Call: The Risks Ahead for Ukraine

May 21, 2026

Featuring RADM (Ret.) Mark Montgomery

Moderated by Joe Dougherty

DOUGHERTY: Good afternoon. My name is Joe Dougherty. I'm senior director of communications at the Foundation for Defense of Democracies, a nonpartisan research institute focused on national security and foreign policy.

On Thursday, May 21st, FDD senior fellow and retired Rear Admiral Mark Montgomery provided a readout for journalists of his 3-week visit to Ukraine, where he met with senior political and defense officials.

Mark, who previously led US Ukraine military to military relations, has traveled to Ukraine about once every quarter since Russia's invasion. I hope you enjoy this conversation.

So Mark, why don't we get started right away because we got lots of stuff going on. And just a reminder, this is on the record. We are recording this. We'll share the recording with you and we'll have Q&A as soon as Mark has done his opening remarks. Mark, over to you.

MONTGOMERY: Thank you, Joe. Look, my take on this is that Ukraine is proving it holds more cards than some assume, particularly the president. And I think they really have thwarted Russia's battlefield advances over the last few months. And I think they're going to continue to do this. I think the Ukrainians survived a hard winter. I was there in February for a couple weeks, for about three weeks. It was cold, but they took a real beating on their critical infrastructure system. They have this crazy system, by the way, in Kyiv, in most of their big cities, where they have big boiler plants that heat up hot water and stow it and then push it all around the city. I imagine in Soviet times this was seen as efficient. In today's times, it is seen as target set number one for making everyone have a cold winter. And the Russians really did hit that stuff hard.

So I think that after that winter, the foliage is starting to return. It's really fully back now. That's not good for the Ukrainians. When the foliage is back, the Russians can maneuver, they get a little bit of room for maneuver. So I would not be surprised if we see some slight Russian offensive gains here and there. That hasn't happened yet, but it'll happen, and they'll gain some limited ground. But these will be quickly blunted by Ukraine's ability to mass drones and, on occasion, even a little bit of artillery, and make that ground maneuver fatal. So you'll see these small Russian breakthroughs that will be closed down and lead to significant losses. And that's where you get the disproportionate losses. When the Ukrainians say, "Oh, we had a seven to one or 10 to one ratio of personnel casualties." It's during those moments when the Russians have pushed through a little, and the Ukrainians shut the door, and they shut the door with close-range drone fires that they're able to mass.

And now what I'm seeing is they really control that space... it used to be from zero to 20 kilometers behind the lines. It's now extending to 30 or even 50 kilometers. There's a very good US, I think [former Google CEO Eric] Schmidt-made offensive strike weapon called Hornet that really works in that 30 to 50 kilometer range, made in Ukraine, but I think Eric Schmidt's team's deeply involved with it. But that 30 to 50 kilometer range means that the Russians can't aggregate their logistics, their command and control, even along the front lines there. So I think the Russian troops have virtually no chance of achieving a major breakthrough during this year. I think to some degree, the Ukraine army has stopped bleeding manpower, while the Russian force quality continues to drop. I mean, it's low to begin with and continues to drop.

And now you see the Ukrainians doing two things. In addition to their advantage in drone warfare along the front lines, they've ramped up their strikes on mid-range targets such as logistics and air defense systems. And then you see that they've... And because they do those mid-range strikes, Russia really can't... It's hard for them to do maneuver operations. This is in the 75 to 200 kilometer range behind the lines. And so that maneuver operation, which I said was challenged in the close, is now getting challenged in the mid-range too. And this makes it really hard to initiate major combat operations and certainly to resupply a major combat operation, again, making it unlikely that Russia would take a break. So that's in the mid-range. And that's an area where the Ukrainians have come like gangbusters and got in there.



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And ironically, I think the one weapon system, the US system approved for a Ukraine Security Assistance Initiative this year is called the JDAM-ER, probably a 50 mile, 80 kilometer precision strike weapon that'll enhance that mid-range strike.

So on top of everything else, a little bit of a grudging gift from the United States Department of Defense. I say grudging because I don't think Secretary Hegseth was in any hurry to do that. That mid-range strike is enhanced by, or is in parallel with long-range strike on fossil fuel production.

The idea here that the bombardments of oil infrastructure and defense industrial plants from 500 kilometers to 2,000 kilometers away from Kyiv, and those attacks on the fossil fuel are really aimed at refinement production and distribution or production refinement and distribution in that order. I can't tell how much. They'll claim we've hit 43%, 47% of that. Some of it's recovered. I think at any one time, 20 to 25% is down. That's massed right now. It's massed because the price of Brent C so high and with the waiver in effect, Russian shadow fleet fuel is probably selling it very close to Brent C at \$100 - \$115 a barrel a day right now instead of the \$50 it was. So that extra cash you're getting from that is masking this 25% or really hard to get the exact number, but 25 to 30% reduction in overall production in those same fossil fuels.

Once the prices come down when the Iran war ends and you get normal flow through the Strait of Hormuz and not saying that that's necessarily soon, but when that ends and in theory, the waiver gets put back in place and they drop down to \$50 a barrel for this stuff, 25 to 30% reduction in production, which may go up over time as they hit more things, and they're hard to repair, now you'll get a real bite on the Russian war machine because these fossil fuel exports are more than 40% of their overall exports. I mean, they are a plurality, if not majority of Russian exports now. And then, they then fund the government spending, which is more than 40% as well on defense spending, the war machine. And the other money's really going to hit entitlement, the equivalent of entitlement payments to kind of his base.

So he's going to have this brutal choice, Putin, of the war machine or funding his base. And this is regardless of how hard we impose sanctions. Should we impose sanctions out of the blue, in a real meaningful way, that would only make that condition worse. So that mid-range, long range strike really kicking in.

So look, I mean, you see some outward signs of this and just what the May 9th parade looked like, but you see it in how the restrictions, I think, on mobile internet access in Russia and the inability to get on social media apps. These are the kind of things that are the signs of Putin tightening the leash on his people to make sure things don't get out of the way, don't get out of control. And look, I'm not saying there's a serious risk of a coup, but I got to believe Putin's feeling pressure about this war now.

That doesn't mean he's adjusted his language. I know he called Zelensky, Mr. Zelensky, and people read a lot into that, and that he had averred that the special military operation might be coming to an end, but he continues to describe the conditions for a cessation of hostilities in the exact same terminology, the kind of maximus terminology he's been using for four years. So I'm not smart enough to know that, on the ground I can't get that. I do tell when Ukrainians ask me, how much longer do I think this is going to go on? I tell them three years, that once we get a president in power of the United States who holds Russia accountable, give it about four or five months and it'll be over. So I tell them now to be bracing for June of 2029, but in reality, it could end before then if Putin decides it needs to end.

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Kyiv is just not going to pass over Ukrainian controlled portions of the Eastern Donetsk region like Putin demands. He's not going to give up the fortress belt of cities and towns that Russia has not been able to capture over the last four years. So in my mind, the negotiations predicated on that are doomed to failure. So that's kind of how I see things there. I will make one other observation, which is that the new corps commander organization has now been in about a year, and it's impressive. They have 16 corps. So I'd say they have a hundred plus fighting brigades, 16 corps, which we would call divisions. Each one has six or seven or eight brigades. The brigades are kind of slightly undersized by American mathematics, but each corps is controlling 20 to 25,00 troops. And then the corps have operational groups above them that are now called task force.

Those names seem to change quite a bit, which were regional, like north and south and central, and they had a west as well. But in addition, they had a joint operational command that was supposed to sit on top of it and control everything. That was under General Mykhailo Drapatyi. But General Syrskiy has now moved that into just another operational commander task force that owns battlespace. I'm not sure why exactly. I mean, I'm sure there's a reason for it. It wasn't clear to me why, because normally I would've wanted to joint operational command to lead everything. But those kind of operational commands, they each control three or four corps. They seem to be doing pretty well too. So I kind of like that you're starting to see good quality operational planning. That's what we do, is training on those things and the feedback we get from our trainers and from what I observe and others observe is good. Improved operational planning, improved integration of different elements of ground forces and even when available, air, but that's not available very much.

So you see that. And then separate from that, you see an effective integrated command to handle drones, drone attacks by the Russians. I can talk about air defense in a second, but Joe, that's kind of what I saw in my most recent visit, and I thought it was pretty... Now I was confined to Kharkiv and Kyiv. I didn't go see. I tend to only go to one place where we're doing a training and participate in the training there. So I don't get these trips where you go visit three or four places, just the two. And Kharkiv was where I saw the corps and operational group or task force training and participated in it. And then Kyiv, I did some air force training separately. But that's kind of how I saw things. Over to you.

DOUGHERTY: Thanks, Mark. Appreciate that insight. We're going to move to the Q&A section of the call right now and we'll open the floor to your questions. You can use the raise hand feature and I will call on you, or you could submit it in the chat feature or in the question feature. Just to get things started, Mark, I did have a question for you, and I've got one from one of our participants today. "Have FPV [First-Person View] drones slowed down the Russian defensive operations and what lessons can Israel and perhaps others learn from Ukraine?" And I guess we're thinking Taiwan because you've been to Taiwan numerous times.

MONTGOMERY: Yeah, I should say that when I say that they're controlling that area from 30 to 50 kilometers behind the front lines, that's almost all FPV. That's what's happening is the range of the FPV is increasing and increasing. Their ability to operate in an electronic warfare or jamming environment is improving. And so I hear statistics, I've never seen this borne out and that's just from my visual, that 80% of casualties, Russian casualties come from some type of unmanned vessel, whether it's a UAV [Unmanned Aerial Vehicle] or a UGV [Unmanned Ground Vehicle], a ground vessel that's acting like a mine. Not the UGVs they're talking about that look like little John Deere tractors going around doing all kinds of cool stuff, but the UAVs that go out, land, and act as a mine for when someone comes by, they pop up and explode. Reportedly, 80% of Russian casualties come from that. So the unmanned vehicles really are making a difference.

Look, this is why when someone asked me, "Should we be at Kharg Island," I was like, "Oh, heck no." I would not put a Marine Expeditionary Unit there or the 82nd Airborne. The last thing I'd want to do right now is fix forces 20 or 30 miles away from an adversary because I believe the FPV range of concern is probably between 30 and 50 kilometers and you better be at least 30 or 50 kilometers away from an adversary or have a highly developed drone defense capability.

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So that's kind of how I see that. Israel's already beginning to experience this and you see it in some of their Gaza operations, how they did self-protect on that. They're definitely experiencing it with coming out of Lebanon from just slightly south of the Litani River, a lot of wire-guided and other fiber optic drones and things. So they're beginning to see it.

And for a Taiwan operation, they need to be able to impose this on the Chinese. We tend to think of, well, if they're going to knock out all these maritime, these ships coming across, they're going to need a lot of maritime drones, and they probably do need a lot of unmanned surface vessel one-way attack drones, USVs [Unmanned Surface Vehicles]. Ukrainians have one called the Magura, another called Sea Baby. I've seen both of them in action and they're impressive. I mean, they hit the target a lot. But Taiwan needs more than that. They also need the unmanned air. And so I see some opportunity there.

And long-term, I would hope that Ukrainian companies partner with American companies to go work in Taiwan where they can access a red-free supply chain to build weapons that the United States would be interested in, while at the same time passing off all this battlefield, hard-earned battlefield experiences to the Taiwanese so they can build the most useful and effective drones themselves.

DOUGHERTY: Copy. Back to Ukraine, what could get better? What do you see getting better? What do you fear getting worse?

MONTGOMERY: Yeah. So I mean, look, I think I've said this before to most of the people on this call, but I don't see Ukraine losing this war on the ground, but it can get worse. It can get worse because they lose access to US intelligence. I don't think our intelligence is like sensor to shooter, target's here, get your weapon released there, but it's very effective in terms of warning and development of the battlefield situation. So losing that would hurt. And it's certainly useful for long-term targeting against a strategic target. That's number one.

Number two would be the loss of PURL [Prioritized Ukraine Requirements List] would hurt. If the US cut off PURL, which is the initiative where European countries can buy American weapons and give them to Ukraine. It hasn't taken off like gangbusters. I would've thought it would be, if it was truly replacing the US spigot, it would be in the \$5 to \$10 billion a year range. I don't think we're near there yet, but this is how they will get any kind of air defense weapons from us.

And one of the ones I'm really interested in is the Advanced Precision Kill Weapon System, APKWS, which is a 2.75 inch rocket fired from F-15s, F-16s, F-18s. An individual plane can carry usually about 14 of them and they are pretty good one-on-one against a drone. They will take down a drone. They only cost about \$25,000 to \$30,000 themselves, the APKWS. So they cost equal to or less than the Shahed drone they're shooting down. And you can really thin the herd as a bunch of drones are headed towards Kyiv or Lviv or some other city. They're not great on the exact frontline because the Ukrainians aren't going to fly in Russian territory to shoot down drones before they enter, but they're great for rear targets.

And obviously if they can get Patriot [air and missile defense system] or AMRAAM [Advanced Medium-Range Air-to-Air Missile], that's very useful. I think their numbers must be low on those. I think they're doing a lot of conservation on how they use the missiles, conservation being a shock doctrine policy where you reduce what you protect. So those are two very bad things.

Also, I don't think it benefits them right now to go on the offensive, the Ukrainians, unless they're doing a raid. If you think of Kursk, the first two weeks of Kursk is a raid where your goal was to humiliate Putin, grab some territory, capture some prisoners so you could trade prisoners, things like that. That was a great success. Staying there four months turned into a tactical defeat with a lot of soldiers, valuable units being really chewed up.

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So raid's fine, but a large offensive, I'd wait for more cracks in the Russian machine before I did that right now. That's just my personal opinion. I could be proven wrong on that, but that's the takeaway I had from that and that some of the Army colonels and lieutenant colonels that I was working with felt the same way, retired ones who were there in Ukraine.

So, Joe, those are kind of the three thoughts I had on that.

DOUGHERTY: Very good. Again, if you'd like to submit your question, you can use the raise hand feature, you can submit it in the Q&A feature there, as well as in the chat feature. I did have a follow-up question on, we had mentioned Taiwan. What did you learn while you were there that could be carried over to Taiwan? And what can Taiwan perhaps teach Ukraine and teach the United States?

MONTGOMERY: So look, a lot of the journalists on here have heard me say this before though, there's a lot you could learn from here, there's a lot you shouldn't learn. But on the could learn, when I look at the Taiwan scenario, I call it East Coast, West Coast, Tupac, Biggie [i.e., an irreconcilable divide — referring to the 1990s rap rivalry between Tupac Shakur and The Notorious B.I.G. that split fans into two opposing camps].

The West Coast going across the Taiwan Strait towards China is [U.S. Indo-Pacific Command commander Admiral] Samuel Paparo calls it a hellscape. I agree with that. The whole idea is that you would fight there using layers of drone warfare, air, surface, subsurface, mines, everything you can throw out there. And there, there's some analogies to the density and scale of warfare that we see in Ukraine would have to play out in Taiwan where air power is not a dominant ... Chinese airpower is probably present after a few days, but it's not a dominant feature.

And the goal there is a lot of attrition, to minimize the size of the Chinese lodgment. And if I was in a cross-strait invasion or I was China, I wouldn't just be ships. There'd be a divisional size airborne assaults with helicopters. All right, there, there's lessons to be learned.

On the flip side, there's a lot of the Taiwan conflict that's about high-end warfare trading away PLA [People's Liberation Army] submarines and ships and aircraft that are east of Taiwan facing out into the Pacific Ocean trying to keep the United States forces away while they conduct their business in Taiwan. And that, there's more analogy to the war with Iran where one side is trying to use air power to attrit the other sides. And we'd also be using submarines and other things, but to try to trick the forces and allow the US to get airpower back over the mainland. So some areas you can really learn from it, some you can't.

The one thing I would say that there's a unique thing going on where two very different militaries are doing something really cool. One is the Ukrainians and the speed of adaptation on technical changes to drones. And it happens in two ways in Ukraine. One, some places, the battalion building the one-way drones, the FPV one-way attack drones, there'll be a battalion within a brigade right near the front line. So the battalions, using 3D printers, are adopting DJI drones they're given, creating drones for their operators to use. So when the operator doesn't like, "Hey, this thing doesn't bank hard enough to the right when I need it to, or it doesn't do this. Or when I release the weapon, there's a two-second delay. What's going on here?" You get this immediate feedback from the operator to the builder that's unlike anywhere in the world. Pretty cool, hardware and software.

But it even exists with the drones being built back in Kyiv or Lviv or in the west of the country where there's a pretty rapid feedback from the operator to the builders and a correction comes out. And I'm told in nine days, I can't prove that, but it sounded about right. But I'm not sitting there on the production line for nine days to see if the change comes, but it sounded about right according to the operators. That's a great system, both of those.

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The only other place I've seen this is the US Navy with all the missiles being shot at it by the Houthis in the Bab el-Mandeb Straits and then shot at them by the Iranians in the North Arabian Sea and more recently in the Strait of Hormuz. Our adaptive warfare, our software engineering warfare with Aegis, the Aegis, which is the combat system on our Arleigh Burke destroyers.

When I was a CO [commanding officer] of a ship, I got an Aegis upgrade every year, it's like a Christmas present. We opened it up, installed it, and got all giddy and excited when it worked a couple days later. When I was an admiral, it was about every three months. For my son [now] on a ship, it could be every three to seven days. I mean, just the adaptation. Some of it's doctrinal, just "Hey, change your Aegis doctrine this way." Some of it's technical. "Here's a patch." Very little of its hardware. This is really software and tactical adaptation changes, rapidly making it so we do better and better and better fighting this type of cruise missile, this type of ballistic missile, this type of drone, this type of hypersonic. Whatever we're seeing out there, we're getting that adaptation warfare going. So I'm seeing this happen in two different places and that's pretty cool.

And Aegis and Ukrainian drones have nothing in common. One of them is a 40-year program that costs us \$40 billion to get to where we are. And one of them's a four-year program that's cost about 40 cents. I mean, I'm joking there, but they're very different things, but they've both learned to drive the adaptation REA stats really aggressively. So Joe, I know that's a long answer, but that's what I see.

DOUGHERTY: And it's an excellent answer and it raises the question, if you've got somebody from the Pentagon in front of you, you've got somebody from the White House in front of you, what are you telling them and what action should be coming out of the US administration?

MONTGOMERY: Here's what I'd say. The first thing I'd say is it is crazy that the United States -- there's two countries in the world where the United States does not actively push its active duty admirals and generals to visit and engage with two kind of partners out there. One's Ukraine, the war that's going on now and the other's Taiwan, the war that we're preparing to fight.

The idea that we would support Ukraine as we did for three years, and we did throughout the Biden Administration, no key leader engagement with general officers going over and meeting. And I'm going to tell you, as a general officer who went around the theater, if I visited three countries like Japan, Korea, and Philippines, I got back to my office and they brought me in a list. They said, "Hey, sir, we got to prioritize some work." I'm probably going to prioritize what I just heard from Japan, Korea, and the Philippines.

Not going to Taiwan, not making it in that same way a key leader engagement is crazy. And same with Ukraine. In Ukraine, this is a lost opportunity to learn. At some level, we need the senior officers able to learn. And I know [former Army Chief of Staff] General George, who's since been fired, so this isn't a great example. And Secretary Driscoll, Secretary of the Army Driscoll, visited Ukraine once for a couple hours. That's not key leader engagement. I'm talking about PACOM [U.S. Pacific Command], J2 [Intelligence], J3 [Operations], J5 [Strategy & Plans], J4 [Logistics], J6 [Communications] persistently going over the DCOM [deputy commander], the comm [commander]. Same with the functional component admiral, getting over there, getting working these issues.

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And the same in EUCOM [U.S. European Command]. Again, there's one three star that's allowed to go into theater from EUCOM into ... General Buzzard [commander of Security Assistance Group-Ukraine/North Atlantic Treaty Organization Security Assistance and Training for Ukraine] that goes into Ukraine. And I'm sure he does a good job feeding things out, but there's no way limited aperture of one set of eyes is a determinative factor. So the first thing I'd say is get your key leader engagement right. I guess the second thing I'd say is let's bring down some hardline sanctions on Russia, but I think that's on deaf ears there. That's how you end this war and get a different negotiating team would be number three. Again, that'll probably fall on deaf ears.

And then number four would be like, "Listen, Ukraine has cards. One of the cards they had was counter interceptor drones. They had an ace of spades. They brought it to us last year and said, 'Hey, we got an ace of spades. Do want us to show you how to make an ace of spades?' And at both I think the service level, the departmental level, and even the White House level, we told the Ukrainians, "No, thank you." And then we proceeded into a war with Iran where that hole in our swing, we're like a baseball player that can't hit a curve. We could shoot down a ballistic missile. We can shoot down a cruise missile. In certain conditions, we can shoot down a hypersonic missile, but that 140-knot drone cruised right through a lot of our systems and hit AWACS planes, Patriot radars, operation centers with young troopers in it.

It did a lot of damage to us. I'm not saying every bit of damage done at all 14 or 16 bases was by drones. Some was done by ballistic missiles, but our success against ballistic missiles was much better than our success against drones. We have a hole in our swing. Someone brought us, to take the analogy further, some hitting coach tips and we didn't take them and we didn't have the systems. And now we're scrambling.

Since the ceasefire, I know we've been reaching out to Ukraine, as have our Arab partners. And by the way, when we have a hole in our swing, our allies tend to have a hole in the swing. We became very reliant on that advanced precision kill weapon system on board an aircraft. And that worked great for shooting down drones going into Israel because these 145-knot Shaheds had to travel 300 miles, and we got in behind them and picked them off, they thinned the herd. In fact, in both cases, once with missiles and once with that APKWS rockets, we thinned the whole herd between us and the Israeli Air Force that nothing ever got to Israel.

Well, the problem that hid was when they're firing into Bahrain, Qatar, Kuwait, and certain parts of UAE and Saudi Arabia, they were only firing a hundred miles or less and we couldn't get feet dry over Iran behind them to thin the herd. So the herd hit and we had limited to no ground-based drone interceptors and the Ukrainian use a good balance of air and then a lot of ground-based drone interceptors. So hopefully we're getting really smart on that over the last four or five weeks of a ceasefire and we'll be in a better position to full-scale operations starting again. But that would've been a great thing to talk about with the White House, Joe. Again, sorry for the long answer.

DOUGHERTY: No, good answer. We do have a question in from Christopher. So Christopher, I'm going to turn it over to you. Thank you.

CHRISTOPHER BOCCIA: Yeah, Admiral, thanks for doing this. Appreciate it. Just wanted to get your sense on, there's been a lot of conversation about a brigade combat team that will not deploy for Poland and a unit in Germany as well. I'm just wondering from being in the region if you got a little clarity on what exactly is happening there, because we've gotten plenty of mixed signals.

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MONTGOMERY: Well, I don't know that we know what's happening first. I got to be careful with this because I think the Department of Defense got out in front of the president. We'll see what happens. But from what has been stated and what was said to Congress by General LaNeve, the new acting Army Chief of Staff, and the Secretary of the Army Driscoll, was that there's been a decision to cancel the next rotation of a brigade combat team to Poland that would in itself then send, I believe, task forces to Estonia, Latvia, and Lithuania, almost battalion size to each of the Baltic states. I happened to be in Estonia when this happened. I was exfiltrating. As I left Ukraine, I went to Moldova and then flew up to Tallinn for a conference, and we learned then. I met with Estonian leadership and it was clear to me that they were informed of this by their rail company that said, "Hey, did you know the Americans canceled their shipment?" And that's when they started to ask questions and they found out.

I understand that the Pentagon alleges that they sent an email to someone on SIPR to Poland. It got hung up in their system. By the way, one email to a very senior general is not actually how you inform someone of a jaw-droppingly important geopolitical decision, but okay, but you still didn't tell the other three countries and this was completely unprofessional. So where I think we're at now is... and by the way, contrary to the president's November 2025 discussion with the president of Poland that you're the kind of ally that we like, I don't think he called them a model ally yet, but they are a model ally, they had just announced their five percent level for GDP spending, 4.8% last year, I think five percent this year coming up. And he said, "I want to put more stuff in your country." And in fact, when they had the discussion four weeks ago about potentially removing a brigade combat team from Germany, the president alluded to the fact that he might move it to Poland.

And if you go on the way back machine to Trump 45, the polls were kind of cagily calling the facility they're building, they're like, Fort Trump. Well, Trump's team at the Department of Defense has created the conditions now where currently there will be almost no US troops at "Fort Trump." And as a result, I think this was a mistake. I think the president, he was in China when this happened as he sits back and focuses on this, he's still mad at Germany, I'm sure. And there may be some movement of that permanently stationed brigade combat, striking brigade combat team in Germany, out of Germany. That may still happen. That takes a long time, by the way.

But the decision to remove a rotational brigade combat team from going through Poland will be viewed, I think, by the president as a mistake. And I think that decision might either get reversed or quickly corrected after some period of grace where it looks like we didn't make a mistake when we did this. But this is a critical unit. That BCT, removing it sends exactly the wrong signal to Moscow.

Look, our political frustration with European capitals should not matter more than Russian military behavior. And Russian military behavior has been awful. Look, I think those four station units in both Poland and the Baltics are particularly critical for deterring or responding to a contingency and the removal of them sends the wrong signal to Russia. You've heard these numbers, but Poland was like, and maybe I was wrong, it was maybe 4.5% last year heading to 4.8, head into five. The Balts are all getting above five in 2026. These are model allies. They are focused on the common adversary of Russia. They spend, they don't criticize the United States. They play by the rules. The president should be very happy with them. This is not Spain.

I mean, they would refer to them as the warm NATO or warm Europe, Spain, Italy, France who constantly complain about the president and consistently give two percent or less in defense. Those are the countries the president ought to be frustrated with, not Poland and the Baltic state. So I'm hoping this gets removed once the president gets a good look at it, but it would be a mistake.

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I also say that removing the long-range fires battalion that was coming in is also a mistake. It was a big deterrent signal to Russia. It was a placeholder. It was still on a rotation, but probably leaving gear behind like a Zapad exercise and then eventually falling in as a forward station thing that would be permanently stationed in Germany. It's in Germany because of strategic depth. It can move into Poland when necessary, but stay in Germany. But long-term, that unit needs to get back in the European rotation in Germany or Poland and eventually forward stationed, which means permanently there with families and equipment and everything.

DOUGHERTY: Chris, great question. And if you'd like to do a follow-up, we can certainly get to that, but I do have Stew Magnuson with his hand up. So Stew, we're going to go over to you for your question.

STEW MAGNUSON: All right. Can you hear me now?

DOUGHERTY: Yes. Thanks, Stew.

STEW MAGNUSON: Great. Yeah. So I was in a security conference in Poland the week before you were in Lithuania and when they were expressing that they were thinking they could even take those German, those 4,000 so clearly they didn't know. But the consensus at the conference was a lot of talk about the NATO 3.0 concept and a lot of the politicians and pundits were, I don't want to oversimplify what that is, but the idea that European forces should be doing the conventional and provide the bulk of the troops, while the US does the more high-end stuff, the intelligence, the nuclear and so on, and logistics, moving a lot of people around. Long-term, do you have any thoughts on the whole concept of NATO 3.0?

MONTGOMERY: Yeah, look, I mean, as NATO goes forward, they need to do three things, and the first is the Europeans need to finish their contributions to capability and capacity, which is they have capability targets, which are also capacity targets because there's numbers assigned to it, and they're \$300 to \$500 billion short of what they need to be spending to get to that per year. So they need to first do that. Now, that's not NATO 3.0. That's NATO, or NATO 2.0, I guess, which is them contributing more. That's getting up to 3.5% would do that.

I think as part of that, the United States should maintain our capability commitments there, which that's not an expansion of what we have right now, but it's the footprint we have right now, plus what we promised to send in wartime. And it's the ligature of war fighting, which is what you mentioned, targeting, ISR [Intelligence, Surveillance, and Reconnaissance], heavy-lift, theater logistics, all that kind of stuff. So I think that that NATO 2.0 needs to stay. NATO 3.0 is kind of a vision where the United States begins to reduce its troop contribution, which would mean even greater capability and capacity. So I wouldn't initiate that until I get the current capability capacity numbers right.

And if you want to have a feel about capacity, look how hard it was for European countries to get a destroyer ready to go down to the Middle East, either off of Cyprus for the Brits, or down into the Middle East for the French or... They just can't do it. I mean, ironically, I think probably the most ready navy in the rest of Europe is the Spanish Navy, and for other reasons, they're not very reliable for showing up for anything. But the navies are the ones that when you only spend 1.5% on average defense for 30 years, your navies are gone. And we've seen that with the Royal Navy, with the French Navy. They've really been hammered by this. And then the air forces are the next ones that get hurt.

But my point on this is you got to get those capabilities back, NATO capabilities and capacity, to first do what you just promised you would do, and then if you want to do NATO 3.0 where you'd start to take over a US mission, not that ligature mission, but the US capabilities, US brigade combat teams, US ships and subs, US fighter aircraft, that's another trillion euro. These are numbers that don't exist. And I'm not even mentioning the French and Germans, who don't agree on a lot, but both agree that the Europeans need to build a bigger defense industrial base; I think we'd all agree on that. But that's another half a trillion or trillion in investment euros. These are a lot of bills I'm talking about well beyond 3.5% of core defense spending.



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So my theory on NATO 3.0 is that they first get NATO 2.0 right. By the time you do three years from now, we'll have a different president. Maybe we'll be in a different position in the United States. If we have a president who continues to believe the US should reduce its commitments in Europe, then they can head to NATO 3.0. But first things first, get NATO 2.0 right, get your capability and capacity gaps filled, and then continue to have [Secretary General of NATO] Mark Rutte do heroics to keep the United States in the right position.

STEW MAGNUSON: Great. Thanks a lot.

DOUGHERTY: Great question, Stew. Thank you for that. Mark, you mentioned model ally, and I know that you've been talking about that recently. You recently spoke about Taiwan with the arms program there and what's going to be happening with the future of that. Jumping up to 30,000 - 40,000 feet, what do you see happening with... You got the ministerial meeting underway with NATO. You've got the summit coming up in July in Ankara. You've got the combat team that you were just referring to being held off. What's a big picture that you're seeing and that has some concern for you with the US and allies and model allies?

MONTGOMERY: Well, I mean, clearly there's a break between Eastern European NATO and the rest of NATO. And Eastern European NATO's continue to be a model ally. Not all of the countries in there. Ironically, Trump's friend Viktor Orban never got anywhere near 3% defense spending, but I guess there were exceptions for some. But getting Eastern Europe up to speed, keep them maintained, support them, the president should give strong acknowledgements to them and say, "That's the example we want set."

I think that if the president were to attend, he would continue to be very critical of Spain, potentially of Italy, France, and Germany. Now you should be careful here. I think the Germans are making a lot of inroads on their shortfalls and they're increasing their spending dramatically. And they have a real GDP, so it really matters that they're increasing their defense spending dramatically. I get that the chancellor said, I wouldn't call it a hot mic, but at an inopportune moment, I think speaking to children at a school, he was critical of the president. He made light of the president's performance in Iran as a mistake. I think they have to be more careful. We have a very sensitive president to this. And I mean, we are the big country in this relationship, and I think the Europeans should be more careful about that. Hopefully the president will understand where Germany is, the level of integration that's required there, how critical they are to NATO being successful with and without the United States.

And then I think he'll be critical of Spain. I would be critical of Spain. I mean, I would be critical of Canada. I don't like getting lectured by a Canadian prime minister who's sitting on a 30-year history of 1.3% spending on defense telling me how the middle powers are going to make things right. Well, the middle powers averaged about 1.5% on defense spending. Luckily, we weren't relying on them for much. If I were them, I would take a sedative until they're spending at about 3.5% on defense. Then they can start lecturing the United States on global power issues. But Canada and Spain have been kind of egregious freeloaders over the last 30 years. That doesn't make them bad people, it doesn't make their soldiers bad soldiers, but I'm just reflecting mathematics. And the mathematics is such that they have not carried their load, and they both need to do it. And so the president should be critical of them.

So hopefully you'll get this mix where he is supportive, egregiously, aggressively empathetic to the Eastern Europeans, supportive of Germany, and then critical of the countries that aren't carrying their load.

DOUGHERTY: Thanks, Mark. We're going to wrap up the call in just a moment. Mark, I'm going to ask you to give a 30-second-to-a-minute summary of your thoughts and maybe leave the journalists on the call with something that they should be looking at moving forward.

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But before we get to that, hey, thank you all for being on the call and thanks for your patience with our slight delay there. If you'd like to talk to Mark individually, you can reach me at press@fdd.org to either submit a question or to request a time to talk with Mark, and I'll be happy to arrange that. You can find all of Mark's research and commentary at our website, fdd.org.

Thank you to Ellie and the rest of the FDD comms team in the background for making sure everything went so smoothly today amongst the challenges. Very much appreciated there, team. And a reminder, FDD is a nonpartisan, nonprofit research institute focused on national security and foreign policy.

Mark, over to you to wrap things up, please.

MONTGOMERY: Look, I think I hit on most of the major points. I would just say, if I could circle back on the first one, I continue to believe that Ukraine can absolutely continue to hold their ground militarily against Russia. I don't see cracks in societal resilience despite the brutal... I was there for the two-day air campaign, the two days of attack post the parade. I mean, it was nighttime and daytime. It was an extensive Russian attack. It killed a number of civilians. And I just don't believe that is going to break societal resilience in Ukraine.

So to use President Trump's own words, Russia does not have the cards. Ukraine has the cards. They're going to win this contest of wills with Russia over time. And the question is, how much damage is Putin willing to inflict on his own state and the credibility of his leadership in continuing this ill-conceived and poorly executed war against Ukraine?

Thanks, Joe.

DOUGHERTY: Mark, thank you for your analysis. Very much appreciated. Thank you again each of you on the call. This does conclude today's call.