

REBUILDING THE "ARSENAL OF DEMOCRACY": A STRATEGIC ASSESSMENT OF THE UNITED STATES NATIONAL DEFENSE INDUSTRIAL STRATEGY

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Abstract

This paper provides a comprehensive analysis of the US' National Defense Industrial Strategy (NDIS), announced by the Department of Defense in January 2024 as a strategic response to the evolving dynamics of global security. Amid growing competition among major powers - particularly from China and Russia - the NDIS aims to revitalize the US DIB through four strategic pillars: (a) enhancing supply chain resilience, (b) developing a high-quality and diverse workforce, (c) reforming procurement processes, and (d) strengthening international cooperation for economic deterrence. Employing a systemic-structural approach, the study integrates qualitative methods such as policy analysis, document analysis, interpretive techniques, and strategic forecasting to scientifically examine the objectives, implementation mechanisms, strengths, and limitations of the NDIS. While the strategy presents a robust and forward-looking framework, it also faces significant structural limitations, including (a) concerns about financial sustainability, (b) internal tensions between protectionist policies and global cooperation goals, (c) innovation bottlenecks, and (d) a lack of comparative analysis with the capabilities of "potential" adversaries. By addressing a notable gap in existing academic research, this paper provides in-depth insights into the NDIS. The findings contribute to a deeper understanding of how the US seeks to maintain technological superiority and strategic primacy in a turbulent international system marked by rising instability and complex security threats.



Keywords

Defense, strategic competition, National Defense Industrial Strategy, Department of Defense, United States.

Resumo

Este artigo fornece uma análise abrangente da Estratégia Industrial de Defesa Nacional (EIDN) dos EUA, anunciada pelo Departamento de Defesa em janeiro de 2024 como uma resposta estratégica às dinâmicas evolutivas da segurança global. Em meio à crescente competição entre as grandes potências - particularmente da China e da Rússia - a EIDN visa revitalizar a Base Industrial de Defesa dos EUA através de quatro pilares estratégicos: (a) aprimoramento da resiliência da cadeia de suprimentos, (b) desenvolvimento de uma força de trabalho de alta qualidade e diversificada, (c) reforma dos processos de aquisição, e (d) fortalecimento da cooperação internacional para dissuasão econômica. Empregando uma abordagem sistêmico-estrutural, o estudo integra métodos qualitativos como análise de políticas, análise documental, técnicas interpretativas e previsão estratégica para examinar cientificamente os objetivos, mecanismos de implementação, pontos fortes e limitações da EIDN. Embora a estratégia apresente uma estrutura robusta e visionária, também enfrenta limitações estruturais significativas, incluindo (a) preocupações sobre sustentabilidade financeira, (b) tensões internas entre políticas protecionistas e objetivos de cooperação global, (c) gargalos de inovação, e (d) falta de análise comparativa com as capacidades de adversários "potenciais". Ao abordar uma lacuna notável na investigação acadêmica existente, este artigo fornece perspectivas aprofundadas sobre a EIDN. As conclusões contribuem para uma compreensão mais profunda de como os EUA procuram manter a superioridade tecnológica e a primazia estratégica num sistema internacional turbulento marcado pela crescente instabilidade e ameaças de segurança complexas.

Palavras-chave

Defesa, competição estratégica, Estratégia Industrial de Defesa Nacional, Departamento de Defesa, Estados Unidos.

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Introduction

Global politics is currently witnessing a profound geostrategic transformation phase, marked by the reshaping of the power balance between major powers and the erosion of the foundation of the current international order (Levy & Singhal, 2025). The contemporary era is characterized by an unprecedented level of geopolitical instability since the end of the Cold War, with increasingly evident geostrategic fault lines across the global spectrum (Kiet & Hiep, 2025, p. 3). The Russia-Ukraine conflict has transitioned into a protracted conflict phase with extensive strategic consequences, as Russia accelerates the transformation of its socioeconomic structure to a wartime model and intensifies military campaigns in Ukraine (Global Conflict Tracker, 2025). Concurrently, the Middle East situation faces the risk of conflict expansion from the Israel-Hamas flashpoint into a comprehensive regional confrontation, with complex developments in the Red Sea, Lebanon, Iraq, and Iran significantly increasing the risk of escalation into a regional-level conflict (Financial Times, 2024). In this context, China's rise under President Xi Jinping with increasingly evident geopolitical ambitions through "wolf warrior diplomacy" has reshaped the security environment in the Indo-Pacific region (Kiet et al., 2025). Beijing's robust military modernization combined with assertive "nine-dash line" claims in the East Sea, particularly regarding the Taiwan issue, has created urgent challenges to the US-led regional security architecture in this region (Soong, 2021; Kiet et al., 2024).

The intersection of these strategic competitive dynamics has prompted a systemic shift in how the Biden administration perceives and responds to the increasingly complex multi-dimensional security environment. To effectively address these geostrategic fluctuations and maintain superior military-technological positioning, the US Department of Defense (DoD) released the National Defense Industrial Strategy (NDIS) on January 11, 2024, as a comprehensive policy framework in efforts to restore the "arsenal of democracy" coordinated between the US and Western allies. The NDIS establishes a strategic vision and four priority pillars aimed at restructuring and enhancing the



resilience of the US Defense Industrial Base (DIB) against diverse and increasingly sophisticated threats from nations intending to end the US-led "rules-based" world order. This strategy builds upon the foundation of the 2022 National Defense Strategy (NDS), while emphasizing a systematic and integrated approach in mobilizing DoD resources to *"build multifaceted partnerships with domestic and international stakeholders to strengthen the DIB, optimize logistics systems, and enhance the resilience of global defense supply chains against sabotage, infiltration, and technology theft"* (US Department of Defense, 2022). Entering his second term in 2025, President Donald Trump has not yet made substantial adjustments to the NDIS, and has even proposed cutting budgets in healthcare, education, and clean energy sectors to increase defense funding (Kapur, 2025). Simultaneously, President Donald Trump has implemented reforms in foreign weapons sales within the NDIS framework to improve rapid weapons transfer to partners (White House, 2025) - President Trump's actions demonstrate that the DoD will inherit and continue implementing the NDIS despite it being a strategy developed under President Joe Biden - whom President Trump claims left "a huge mess" for US.

Although the NDIS holds particular importance for the US as well as countries worldwide, the global academic database contains a research gap in conducting in-depth and comprehensive analysis of the content, impact, and potential limitations of the NDIS. Since the DoD released the NDIS in early 2024 until the present (May 2025), a review of all Scopus/WoS academic data through keyword search for "National Defense Industrial Strategy" has not revealed any in-depth international research analyzing this strategy. This research aims to fill this important knowledge gap through systematic analysis of NDIS content, assessment of its implications, and identification of fundamental advantages and limitations in this policy design. The research findings will not only enhance deep understanding of strategic directions in US defense technology, but also provide valuable insights for other countries in developing appropriate policy responses in a global security environment undergoing profound and comprehensive transformations.

2. Methodology

The research is designed on a systemic-structural approach through utilizing policy analysis methods to systematically examine the NDIS. Simultaneously, this research integrates document analysis and strategic interpretation and forecasting techniques to provide a scientific, logical research process for detailed assessment of the strengths and weaknesses of the NDIS. The research design follows a structured analytical framework with three interconnected phases:

The first phase conducts an extensive and systematic literature review, focusing on key data sources. Specifically, the research collects and analyzes: (a) the original text of the NDIS and accompanying technical appendices; (b) supplementary official documentation from the DoD, including strategic reports, policy statements, and implementation plans; (c) policy messages from relevant US government agencies; and (d) in-depth analyses from the international security research community through media channels. This document synthesis methodology allows for building a solid knowledge foundation about



the internal components of the NDIS, the strategic-historical context of policy formation, and multidimensional assessments from global defense and security experts.

The second phase deploys policy analysis methods, combining interpretive techniques and document analysis to decode and evaluate the four strategic pillars of the NDIS. This process includes in-depth examination of: (a) the theoretical foundation and conceptual framework underlying strategic priorities; (b) specific policy implications and practical application capabilities; (c) implementation mechanisms and performance evaluation indicators; and (d) potential barriers in strategy execution.

The final phase focuses on comprehensive assessment of the effectiveness, feasibility, advantages, and limitations of the NDIS. This includes thorough examination of the strategy's alignment with broader US foreign security policy objectives, its potential impact on international defense cooperation, and its responsiveness to contemporary global security challenges, particularly in protecting allies in the European region and the Indo-Pacific region.

In general, this methodology ensures a rigorous, multidimensional, and highly systematic analytical process, allowing the research not only to capture the technical and strategic aspects of the NDIS, but also to assess the broader implications of this strategy for global security architecture in the context of ongoing power competition between major powers.

3. Results

3.1. Overview of the NDIS: Four Pillars for Sustainable Development of US Defense Capabilities in the Context of Global Strategic Competition

The NDIS represents a significant strategic shift in the US approach to the DIB through a comprehensive policy framework released on January 11, 2024 (Cook, 2024). This 59-page strategic document concretizes the foundational principles established in the NDS, reflecting a profound understanding of the systemic challenges facing the US defense industrial ecosystem amid rapidly changing international security conditions. Status assessments in the NDIS have identified structural weaknesses including bureaucratic system inertia, lack of flexibility in adapting to emerging technologies, and uneven investment in human resource development and supply chain optimization (Department of Defense, 2023). The core objective of the NDIS is to build an advanced, highly resilient, and rapidly adaptable defense industrial ecosystem, not only to effectively deter US strategic competitors but also to promptly meet increasing production demands in an increasingly unstable security environment (US Department of Defense, 2024a). Laura Taylor-Kale, Assistant Secretary of Defense for Industrial Base Policy, who led the research team developing the NDIS, emphasized the strategic importance of this initiative:

We are implementing the NDIS with the goal of ensuring that the DIB not only continues to be the foundation for domestic national security, but also serves as a key tool in reassuring and supporting our global network of allies and partners (US Department of Defense, 2024a).



The NDIS shapes three key strategic objectives with specific implementation roadmaps: (a) Comprehensive modernization of defense and deterrence capabilities through focused investment in technological innovation, enhancing supply chain resilience, and promoting extensive international cooperation with strategic allies prioritized in the NSS. The strategy emphasizes engaging partner countries more deeply in the production and processing stages of essential materials, aiming to minimize dependence on potentially "confrontational" nations such as China, Russia, and other non-allied countries (American Economic Association, 2024); (b) Ensuring the DIB is optimized to effectively address national security challenges within the medium-term strategic timeframe of 3-5 years (Levantovskaia, 2024). This objective recognizes the increasingly complex and unpredictable geopolitical environment due to fluctuations from the prolonged Russia-Ukraine conflict and China's increasing military actions around the Taiwan Strait; and (c) Building and maintaining a modern, robust, autonomous, and rapidly adaptive DIB to effectively implement comprehensive deterrence strategy and consolidate the US's superior global position (Taylor, 2024).

The NDIS focuses on four strategic priorities, with each pillar encompassing specific priority areas along with expected outcomes and measurable outputs:

a) First Pillar: Building Flexible and Responsive Supply Chains

The NDIS establishes as its first key foundation the creation of a supply chain ecosystem with high adaptability and immediate response capabilities. This structure is designed to ensure continuous production capability of essential products, services, and technologies meeting military force requirements-not only for the present but also anticipating future needs-at optimal scale and reasonable cost (Industrial Base Policy, 2024). Implementing this model requires synchronized development of multiple multidimensional coordination mechanisms. To achieve this goal, the NDIS advocates building a comprehensive public-private cooperation system, in which risk-sharing and technology transfer mechanisms are systematically established, creating incentives for the private sector to invest in developing contingency capabilities and enhancing resilience after disruption events. Concurrently, this strategy proposes significantly increasing strategic reserves for critical systems and materials, while promoting supplier network diversification within the DIB, expanding diverse production methods, and implementing comprehensive solutions to effectively respond to cybersecurity threats targeting supply chains (Handfield, 2024). The totality of these measures aims to ensure "*flexible and timely responsiveness under all operational conditions and strategic scenarios*" (US Department of Defense, 2024a).

Complex developments from the COVID-19 pandemic, the Russia-Ukraine conflict, along with shifts in the balance of power between global powers-particularly US-China strategic competition-have clearly demonstrated that excessive dependence on specific supply sources can lead to serious disruptions in supply chains, directly affecting national security. In this context, the NDIS is promoting a comprehensive restructuring process of the supply chain system oriented toward diversification and risk distribution. This strategy includes developing manufacturing centers distributed across various geographical regions within US territory and strategic allied countries such as the EU, Japan, South Korea, Australia, Philippines; enhancing domestic production capacity for



critical components; and researching alternative materials for scarce strategic raw materials, especially rare metals and rare earth elements (US Department of Defense, 2024c).

Recent research data reveals an important reality regarding China's weapons production capacity: the country currently accounts for 5.8% of total global arms exports during the 2019-2023 period, making China the fourth largest conventional weapons supplier in the world, behind only the US, France, and Russia (Gunter and Legarda, 2024). Notably, Chinese weapons technology is gradually dominating markets in South Asia, Sub-Saharan Africa, and Southeast Asia regions, while expanding influence into Central Asia and the Middle East. This phenomenon not only creates economic impacts but also changes the geopolitical landscape, directly affecting governments and defense industries of the US and its European allies. Facing strong and challenging development from China's weapons industry, the DoD is implementing a strategy integrating advanced technologies such as 3D printing, advanced automation, and industrial internet of things to significantly enhance flexibility and rapid response capability of the defense production system (US Department of Defense, 2024c). Research Director and Senior Fellow at the Carnegie Middle East Center - Hamzawy (2025), has provided the insightful observation that conflicts between major powers in the current era will take the nature of prolonged wars of attrition, in which the ability to rapidly expand production capacity during crisis periods will play a decisive role in determining the final outcome of future conflicts. Therefore, developing a highly adaptable and rapidly expandable production system is not merely a strategic choice but a survival factor in maintaining military advantage and ensuring US national security in the new era of strategic competition.

b) Second Pillar: Developing Highly Specialized and Diverse Human Resources

The NDIS focuses on developing a special workforce that not only meets quantitative requirements but must also achieve high standards of professional quality while reflecting the inherent diversity of US society (Industrial Base Policy, 2024). This strategy is not simply an ordinary recruitment plan, but a comprehensive vision aimed at building an elite workforce capable of adaptation and innovation in the unprecedented rapidly developing defense technology environment. Drawing lessons from the Russia-Ukraine conflict, the NDIS has identified the strategic priority of focusing on developing high-quality human resources particularly in advanced combat technology fields, including modern air defense systems, unmanned aerial vehicle (UAV) technology, and hypersonic missile systems. These fields have proven decisive importance in modern conflicts and require specialist teams with exceptionally high expertise.

Parallel to enhancing professional quality, the NDIS also emphasizes expanding recruitment scope toward traditionally undertapped communities, especially women and ethnic minority groups (Indo-Pacific Defense Forum, 2024). This strategy aims not only to create a workforce more representative of the US demographic structure but also to comprehensively leverage diverse talent and perspectives from all sectors of society. Research shows that diverse working groups typically have more creative problem-solving abilities and deliver higher productivity in complex technical environments. Parameter, DoD's Talent Development Director, emphasized the urgency in attracting



young workforce with a strategic observation: *"If we don't bring more Generation Z members into this workforce, we will not be able to fulfill our mission"* (Shinego, 2025). This statement reflects deep concern about ensuring continuity and sustainability in defense workforce development, especially when facing the upcoming retirement wave of the current generation of senior technical experts.

To realize this vision, the US government has implemented a system of multifaceted collaborative initiatives between leading research universities, specialized technical training institutions, and businesses in the defense industry. Scholarship and internship programs have been significantly expanded in scale, creating opportunities for talented students to access the defense industry from the early stages of their professional training (Shinego, 2025). To address the shortage of high-quality human resources in the semiconductor field, the DoD has expanded \$11 million in funding to Purdue University during 2022-2027 to strengthen training for US's future microchip workforce, as Washington consumes approximately 50% of microchips produced worldwide but only about 12% of microchips are manufactured domestically (Vincent, 2022). Additionally, the SMART scholarship is a flagship program attracting high-quality human resources to work for the DoD; SMART has provided 1,419 scholarships, approximately 900 internships completed, and more than 1,000 scholars recruited into civilian work for the DoD (LMI, n.d.). This program has collaborated with more than 200 sponsoring facilities and more than 3,500 scholars, from pursuing degrees in key priority defense fields to employment with the DoD (LMI, n.d.). Notably, in early 2024, five days after the NDIS was released (January 16, 2024), the DoD announced the X-Force Fellowship program for undergraduate students, graduate students, and recent graduates to have opportunities to serve US by solving real national security problems such as hardware design and prototyping, software development, data analysis and visualization, technology reconnaissance, communications and marketing strategy, and defense policy research in collaboration with DoD experts (More House, 2024). This strategy not only helps nurture future generations of experts but also creates a direct talent pipeline from educational institutions into the defense industry.

An equally important aspect in the NDIS is the focus on enhancing skills for the existing workforce through specialized training programs on breakthrough technologies such as artificial intelligence (AI), quantum computing, and cybersecurity (Vincent, 2024). These pioneering technology fields not only shape the future of the defense industry but are also key factors in maintaining the US strategic competitive advantage internationally. Recent analysis reports from the DoD have indicated a concerning situation: *"These advanced technology fields are facing a serious shortage of highly specialized personnel, particularly in the context of increasingly intense strategic competition with rival powers"* (Congressional Research Service, 2024). This shortage not only puts pressure on current projects but also threatens the ability to develop and deploy advanced systems in the future. The human resource development strategy in the NDIS extends far beyond merely focusing on technical skills. It simultaneously emphasizes cultivating strategic thinking and the ability to rapidly adapt to the constantly changing security environment. In an era where threats develop at breakneck speed and are more diverse than ever before, the creative thinking ability and rapid adaptability of defense human resources become determining factors in the success of national security strategies. Therefore, the DoD believes that the success of the NDIS depends greatly on the ability not only to



attract but also to retain exceptional talent in an extremely competitive environment with the private sector, which often can offer more attractive compensation and more flexible working environments (Industrial Base Policy, 2024). This is a significant challenge requiring creative solutions in personnel policy, compensation mechanisms, and long-term career development for specialists in the defense sector.

c) The Third Pillar: Reforming the Defense Procurement System

NDIS focuses on comprehensive reform of the defense procurement system—a key element determining the adaptability and effectiveness of the entire national security ecosystem. NDIS emphasizes the urgency of developing new procurement methods with high flexibility, aimed at creating more responsive and dynamic capabilities while maintaining a balance between important factors such as operational efficiency, long-term maintenance capabilities, battlefield customization capacity, and compliance with necessary standardization for defense support platforms and systems (Industrial Base Policy, 2024). These flexible procurement models are expected to bring significant improvements throughout the entire development and deployment cycle of defense systems, focusing on substantially reducing the time from research to practical deployment, optimizing overall costs, and enhancing production scalability when necessary. Notably, NDIS also emphasizes designing systems with high interoperability between the US and its strategic allies from the initial design phase, while carefully considering factors related to potential future exportability (Alert, 2024). This strategy reflects the US' long-term vision in promoting international cooperation and enhancing interoperability between allied forces, a factor becoming increasingly important in modern military operations.

An important approach in NDIS is prioritizing procurement solutions based on commercially available technology when conditions permit. This method not only aims to promote innovation in the industry but also to significantly expand the supplier base for the defense industry (Tabler, 2024). Effectively leveraging technologies and solutions already developed and validated in the commercial market not only helps save significant financial resources but also substantially shortens the time to operationalize new systems—a factor of vital importance in today's rapidly changing security environment. To realize these ambitious objectives, the DoD is conducting a radical reform process regarding traditional procurement procedures—which have frequently been criticized for being cumbersome, inflexible, and no longer suitable for the pace of modern technological development (Wong et al., 2024). The limitations of the current system have been clearly reflected in the US Government Accountability Office (2024), which points out that *"the average time to develop and deploy a new weapons system—from initial research to actual implementation—typically ranges from 7 to 10 years."* This timeframe is too long and no longer appropriate in the context of the global security environment changing at a dizzying pace, especially when strategic competitors are continuously shortening their development cycles. To address these challenges, Ribeiro (2024) has examined and analyzed the NDIS's proposed series of synchronized reform initiatives, including:



- (1) Expanding and standardizing platform standards while enhancing interoperability between different systems, facilitating rapid integration of new technologies and minimizing dependence on specific suppliers.
- (2) Strengthening rigorous technical requirements to limit "scope creep" - one of the main causes of project delays and cost overruns in large-scale defense programs.
- (3) Prioritizing readily available procurement solutions when tactically feasible and reasonable, maximizing the use of technologies already proven in the commercial market.
- (4) Significantly improving DoD's access to intellectual property rights and technical data, enhancing efficiency in the procurement and maintenance of defense systems throughout their operational lifecycle.
- (5) Considering expanding and fundamentally reforming policies related to contract strategy, facilitating the adoption of new models of cooperation between government and the private sector.
- (6) Continuing to promote procurement process reform initiatives, eliminating unnecessary administrative barriers and optimizing decision-making processes.
- (7) Comprehensively updating defense industry mobilization agencies and plans, ensuring readiness to meet national security needs in all emergency situations.

These reforms reflect a turning point in the US approach to the defense procurement system, shifting from the traditional rigid, sequential model to a significantly more flexible, adaptive, and responsive system. This transformation not only aims to improve efficiency and reduce costs but also ensures that US armed forces are always equipped with the most advanced technologies in the shortest possible time, maintaining a strategic competitive advantage in an increasingly complex and challenging global security environment.

d) The Fourth Pillar: Building Economic Deterrence Capabilities and Promoting International Cooperation

NDIS emphasizes the strategic importance of developing fair and effective competitive market mechanisms to support the construction of a flexible DIB not only within the US but also extending throughout the network of strategic allies and close partners globally (Industrial Base Policy, 2024). The overall objective of this strategy is not simply to enhance defense production capacity, but to establish an integrated economic security system and comprehensive deterrence capability against countries identified as "hostile" or potentially threatening to the security of the US and its allies. The focus of this economic deterrence strategy is particularly aimed at the increasingly strong and deep Russia-China alliance, especially after the Russia-Ukraine conflict erupted in 2022. The strategic cooperative relationship between these two powers is not limited to the military domain but extends to many other areas including technology, energy, and trade-forming a multidimensional challenge to the national security interests of the US and its Western allies. The US Deputy Secretary of Defense - Kathleen Hicks, has emphasized the



strategic importance of NDIS in building effective deterrence capabilities: *"Developing and empowering this modern defense industrial ecosystem is key to integrated deterrence and building lasting advantages"* (Department of Defense, 2023). This statement reflects the profound recognition that in the modern world, deterrence capability depends not only on pure military strength but also on the combined strength of the entire economy and defense industrial ecosystem.

This strategy calls for a series of specific measures to strengthen economic-defense cooperation between the US and its allies, including establishing new economic security agreements and developing advanced mechanisms for technology sharing with partner countries (US Department of Defense, 2024a). These economic and technological constraints are not only intended to create direct economic benefits for the participating parties but also to create a powerful deterrent effect by making potential "hostile" countries face the prospect of being cut off from the international market system, advanced technologies, and innovation centers of the US and its allies—a consequence that could seriously damage their economic development and national security. In a strategic statement, Deputy Secretary of Defense - Kathleen Hicks further clarified the long-term vision and dual objectives of NDIS:

By aligning policies, investments, and activities internally and externally in a manner appropriate to specific competitors, our industrial ecosystem can enhance deterrence at maximum effectiveness. If deterrence fails, NDIS will position our industrial ecosystem to provide our warriors with the necessary capabilities—at the speed and scale—to defeat any nation attempting to harm the security of the US, our allies, and our partners (Department of Defense, 2023).

This statement reflects the two-fold approach of the strategy: both enhancing deterrence capabilities to prevent conflict before it begins and ensuring effective response capability in case deterrence fails. Through promoting extensive economic cooperation with the network of global allies and partners, the US not only creates an effective deterrence mechanism but also significantly reduces dependence on countries with the potential to cause tension or instability in providing critical defense-related materials and technologies (National Defense Transportation Association, 2024). Additionally, promoting economic-defense industrial cooperation with allies not only serves direct security objectives but also contributes to enhancing the soft power of the US internationally. The ability to create and maintain sustainable economic-defense alliances not only brings direct material benefits but also creates profound geopolitical influence, strengthening the US' leadership position in the international system.

In general, NDIS represents a comprehensive strategic approach to strengthen defense capabilities and enhance the competitive position of the US internationally. Through building flexible supply chains, developing high-quality human resources, reforming the procurement system, and promoting strategic economic partnerships, NDIS aims to establish superior technological advantages, strong production capabilities, and economic deterrence power against potential adversaries. This is a clear manifestation of the US'



determination to maintain its status as a military and economic superpower in the 21st century.

3.2. Comprehensive Assessment of NDIS

NDIS represents a significant strategic advancement in the DoD's multifaceted effort to restructure and comprehensively modernize the DIB, aimed at responding promptly and effectively to increasingly complex contemporary geopolitical challenges. In particular, this strategy has been shaped and developed by the DoD in the context of escalating security threats in both scale and nature due to China's powerful rise with ambitions to fundamentally change the current international order, the comprehensive Russia-Ukraine conflict with far-reaching impacts on European security architecture, and the urgent need to support Israel in addressing complex regional security threats, especially the conflict with Hamas (US Department of Defense, 2024a). In-depth analysis of NDIS reveals several notable strengths as well as limitations that need to be identified:

a) Strengths of NDIS

First, integrated and multidimensional strategic architecture: NDIS demonstrates an innovative strategic vision by not merely addressing individual issues but establishing a comprehensive and integrated systematic analytical framework, precisely identifying structural challenges to the defense industry and proposing synchronized, highly interconnected solutions. This strategy scientifically establishes four strategic priority pillars, encompassing the entire defense industrial ecosystem from supply chains, high-quality human resource development, procurement process improvements to enhanced international cooperation, all aimed at building a highly adaptable, modern, and sustainable defense industrial ecosystem. Notably, each strategic pillar has been systematically concretized by DoD policymakers into 25 specialized activity areas with specific objectives and clearly defined outputs, facilitating implementation and effectiveness evaluation (Taylor, 2024). This structure reflects comprehensive strategic thinking and a methodical approach to modernizing the DIB. Deeper analysis of the strategic structure reveals that each pillar has been designed with a logical and balanced architecture, including building flexible and highly resilient supply chains implemented through eight specialized activity areas; developing high-quality human resources carried out through five interconnected activity areas; comprehensive reform of the defense procurement process divided into seven systematic activity areas; and strengthening economic deterrence capabilities deployed through five specialized areas (Alert, 2024). This integrated vision not only addresses short-term issues but also builds a solid foundation for the long-term sustainable development of the defense industry, while creating flexible mechanisms to adapt to unpredictable fluctuations in the global security environment. This multidimensional and systematic approach has transcended the framework of traditional defense industrial strategies, which often focus on individual aspects while lacking an overall vision.

Second, strategic orientation promoting multinational cooperation: One of the outstanding strengths of NDIS is its breakthrough approach in emphasizing the strategic



importance of transnational alliance cooperation in building integrated defense industrial capabilities (Department of Defense, 2023). The strategy demonstrates profound and practical recognition that the US cannot unilaterally maintain and develop a DIB with sufficient capacity and scale to effectively respond to the increasingly complex global security challenge landscape of the future. Exemplary multilateral cooperation initiatives such as AUKUS and the "friend-shoring" model in building defense supply chains have opened strategic opportunities for technology transfer and substantive cooperation enhancement with strategic allied nations (Tabler, 2024). In particular, the AUKUS treaty with its two main pillars-nuclear submarine development and advanced defense technology cooperation-represents a breakthrough approach in sharing sensitive defense technologies with trusted partners. NDIS therefore plays a pivotal role in the overall foreign policy strategy of President Joe Biden's administration, aimed at rebuilding strategic trust and strengthening the global alliance network after the "America First" period under President Trump-a policy that significantly diminished trust and cohesion between the US and its traditional partners. This international cooperation aspect not only helps reposition the global leadership role of the US but also creates practical mechanisms for sharing the burden of technology development and defense production, while enhancing the flexibility and resilience of the global defense supply chain against geopolitical and economic shocks. The development of this defense industrial alliance network also creates an important strategic competitive advantage for the US and its partners in technological and economic competition with rival nations such as China and Russia.

Third, balanced approach in optimizing public-private partnerships: NDIS has demonstrated a multidimensional and balanced approach by acknowledging that the federal government cannot unilaterally address complex challenges in the defense sector, but requires synchronized mobilization and maximization of innovation potential and expertise from the private sector (Department of Defense, 2023). This strategy proposes building comprehensive public-private partnership models, not limited to financial investment but extending to advanced scientific research and breakthrough technology development. This multi-layered approach reflects deep and comprehensive awareness that the radical restructuring of the defense industry requires synchronized, active, and continuous coordination of both sectors within a long-term strategic framework. Private businesses and corporations possess continuously updated specialized knowledge repositories, rich practical experience, and diverse resources essential for effectively and sustainably realizing NDIS's ambitious objectives (Sax, 2024). This multidimensional cooperation model allows for optimal synthesis and enhancement between the government's policy planning, strategic direction, and stable funding provision roles with the private sector's inherent continuous innovation capability, optimal operational efficiency, and strong competitive drive (Howard, 2024). Particularly, NDIS has developed a balanced analytical framework in identifying priority areas for public-private cooperation, including: (a) Development of critical technologies such as artificial intelligence, advanced microelectronics, and new energy sources; (b) Expansion of production capacity in strategic areas such as precision ammunition, anti-aircraft missiles, and unmanned systems; (c) Strengthening the resilience of the defense supply chain; and (d) Developing high-quality human resources with specific skills necessary for the modern defense industry. On this basis, this systematic strategic linkage will create



powerful synergistic effects, thereby accelerating the comprehensive modernization process and significantly enhancing the competitiveness of the defense industry in an increasingly complex and challenging global geopolitical context.

Fourth, specific and feasible implementation plan: NDIS does not stop at identifying abstract strategic objectives and mere theory but has taken an important breakthrough step with DoD officially announcing a detailed comprehensive implementation plan on October 29, 2024, including a system of sequential, specific, interconnected deployment steps and quantitative efficiency evaluation indicators for each phase (US Department of Defense, 2024c). This strategic move demonstrates DoD's strong, clear, and consistent commitment to comprehensively recovering and synchronously enhancing the defense industrial capabilities of the US and allied nations in the face of increasing and complex challenges from the close Russia-China cooperation on a global scale. Undersecretary of Defense for Acquisition and Sustainment William LaPlante has convincingly affirmed: *"The announcement of the National Defense Industrial Strategy marks a historic and important milestone in the multifaceted effort to systematically scale up and significantly enhance the resilience and resistance of the DIB in all situations"* (Perez, 2024). This detailed and comprehensive implementation plan will create a solid foundation for in-depth and multidimensional analysis of potential weaknesses in complex supply chains, strongly reinforcing cybersecurity systems throughout the defense industry sector, while establishing and perfecting a strategic reserve system for critical materials and resources using a scientific, systematic, and sustainable approach.

b) Limitations of NDIS

First, challenges regarding the sustainability of financial resources and budget allocation priorities: The successful implementation of NDIS requires large-scale and continuous investment over many years in both financial resources and high-quality human capital. However, careful analysis reveals that the current strategic framework has not yet established a detailed, comprehensive financial plan to ensure the necessary sustainable funding, especially in the context of intense competition with many other spending priorities in the federal budget structure. Maintaining a stable, adequately scaled, and continuous funding stream across multiple budget cycles will be a systemic challenge for the DoD. According to information from Laura Taylor-Kale: *"The recently signed and passed defense appropriation for fiscal year 2024 as well as the President's budget request for fiscal year 2025 includes billions of dollars for investment in supply chains including ammunition, maritime strike capabilities, submarine industrial base improvements and shipyards as well as workforce development initiatives"* (US Department of Defense, 2024b). This statement confirms that NDIS has been financially secured for the 2024-2025 budget cycle; however, the sustainability of the budget stream in subsequent phases remains a significant open question for the DoD, particularly as pressure from budget constraints increases due to competition from increasingly diverse and urgent domestic development priorities. Although details related to specific budget allocation plans may not be widely disclosed due to the sensitive nature of defense and national security, the absence of a clear long-term financial framework remains a significant structural weakness in the overall architecture of NDIS.



Second, internal conflict between "Buy American" protectionist policies and the goal of enhancing international cooperation: Although NDIS sets forth ambitions to promote extensive international cooperation in the defense industry, this strategy faces significant inherent barriers from "Buy American" protectionist policies-which prioritize domestic sources-and the stringent regulatory system for controlling exports of sensitive military technology. NDIS has acknowledged the challenges arising from complex US export control mechanisms, including the International Traffic in Arms Regulations and Export Administration Regulations (National Defense Transportation Association, 2024). However, the perspective reflected in NDIS that *"this acknowledgment is insufficient to neutralize the negative impact on strategic cooperation efforts with international allies and partners"* (National Defense Transportation Association, 2024) still fails to address the fundamental issue. In reality, the parallel existence of these two opposing policy systems creates genuine barriers to the ability to share and transfer technology with foreign partners-a key factor in building effective collective defense capabilities. The notable lack of interest from EU allies, reflected through limited media coverage and discussion about NDIS in mainstream European media channels, is clear evidence of the negative impact of these protectionist policies on the potential for substantive international cooperation (Taylor, 2024). Although NDIS has noted these challenges, the strategic document has not yet proposed sufficiently strong and feasible solutions to overcome existing legal and institutional barriers, creating a core weakness in the overall structure of the strategy.

Third, systemic challenges related to competitiveness and technology innovation transfer: NDIS has correctly identified structural challenges related to limited competition in the defense industry ecosystem and the "valley of death" phenomenon in the transition process from research to practical application for innovative technologies (Levantovskaia, 2024). The lack of substantive competition in the defense industry constitutes a structural barrier to innovation processes and economic efficiency. This limited competitive environment leads to the risk of forming monopolistic entities or those with few competitors, thereby creating negative consequences such as high costs, inconsistent product quality, and the absence of endogenous motivation for continuous improvement. Simultaneously, the "valley of death" phenomenon accurately describes the situation where advanced technologies encounter difficulties in bridging the gap between the experimental research phase and large-scale deployment, primarily due to a lack of effective commercialization mechanisms and necessary financial investment during this critical transition phase. NDIS needs to propose more breakthrough and comprehensive solutions to foster a healthy competitive environment and narrow the "valley of death", possibly through mechanisms such as encouraging supplier structure diversification or establishing targeted investment funds to support the deployment process of innovative technologies from laboratory to battlefield. If these structural challenges are not systematically addressed, the risk of increasing innovation stagnation, low productivity, and inefficient resource allocation will become increasingly serious. Unfortunately, the current version of the strategy has not yet proposed specific, strong, and feasible solutions to thoroughly address these core issues.

Fourth, lack of comparative strategic analysis with international competitors: An important weakness in the structure of NDIS is its excessive focus on building and developing US domestic defense industrial capabilities while significantly lacking strategic



comparative analyses with potential adversary nations such as China, Russia, North Korea, Iran, and other competitor states (Handfield, 2024). In the contemporary geopolitical context, US rival powers, especially China and Russia, are implementing systematic efforts to significantly enhance their defense industrial capabilities. The defense industrial development strategies of these countries, along with investment trends, technological development trajectories, access to strategic material resources, and global markets, will have direct and profound influences on the strategic competitive environment that the US will face in the medium and long-term future. Without a comprehensive comparative analysis and in-depth assessment of developmental dynamics of competing rivals, NDIS will face significant difficulties in ensuring that its priorities and action plans are built on accurately identifying the competitive challenge context that the US needs to overcome. Adding strategic analyses of the capabilities and defense industrial strategies of potential adversary nations would help NDIS improve the foundation for making appropriate strategic decisions to maintain competitive advantage, such as identifying priorities for developing key technological areas, strengthening partnerships with specific allies, or making targeted investments in strategic production capabilities. This comparative analysis becomes even more urgent in the context where the US needs to ensure its defense industrial system maintains a superior position compared to competitors to preserve its leading role in global defense.

c) Overall Assessment of NDIS

The US NDIS represents an important strategic advancement in efforts to comprehensively restructure and modernize the defense industry. Developed in the context of increasingly complex and multidimensional geopolitical challenges, NDIS's outstanding advantage is demonstrated through its systematic, comprehensive, and multi-layered approach, going beyond short-term tactical vision to build a sustainable, flexible, and highly adaptable defense industrial ecosystem in the face of global security environment fluctuations. The most notable aspect of NDIS is the harmonious and balanced combination between long-term strategic vision and specific implementation steps that are highly feasible in the short term. The strategy not only provides a theoretical framework for guidance but also delivers a detailed action roadmap with 25 specific activity areas systematically distributed across four main strategic pillars. In particular, NDIS demonstrates profound strategic thinking by recognizing that US's future defense strength depends closely on the ability to mobilize and optimize comprehensive resources from both public and private sectors while building a network of sustainable and reliable alliance relationships on a global scale.

However, through comprehensive analysis, the US NDIS faces four core structural challenges: (a) The complex problem of ensuring financial resources and long-term budget sustainability; (b) Internal conflict between domestic defense industry protectionist policies and the objective requirement for extensive international cooperation; (c) Systemic barriers to promoting healthy competition and overcoming the "valley of death" in the innovation technology transfer process; and (d) Significant deficiency in comparative strategic analysis with key international competitors. If not addressed systematically, comprehensively, and thoroughly, these structural limitations could significantly diminish the feasibility and practical effectiveness of NDIS in its



mission to ensure national security and maintain the US' leading defense technology position in the context of global geopolitical competition that is increasingly intense in magnitude and complex in nature. In the medium and long-term vision, the comprehensive success of NDIS will depend greatly on the ability to maintain political commitment throughout US presidential terms (a significant challenge due to the self-adjusting mechanism of defense policy continuously reflecting differences in strategic thinking between presidential administrations), as well as the ability to adapt flexibly and promptly to rapid and unpredictable fluctuations in regional and global security environments. NDIS is not simply an ordinary defense strategy but essentially a large-scale restructuring project with a long-term vision, requiring synchronized, harmonious, and effective coordination between government agencies, the private business sector, and the international partner network to realize the strategic vision of a strong US DIB with sufficient capacity to comprehensively respond to the diverse and complex challenges of the 21st century.

Conclusion

NDIS marks a pivotal turning point in the US' geostrategic response to multidimensional security challenges within an increasingly unstable international order. This comprehensive analysis reveals the NDIS as a sophisticated policy framework that transcends conventional defense planning by establishing a cohesive quadrilateral structure comprising four interrelated pillars: strengthening supply chain resilience, developing human capital, enhancing procurement system efficiency, and expanding international cooperation capabilities. The hallmark of this strategy lies in its systematic integration of diverse policy dimensions into a unified strategic ecosystem designed to effectively counter emerging threats from US's strategic competitors and their allied networks. However, the NDIS also faces significant structural limitations that may undermine its long-term effectiveness. These include constraints on fiscal sustainability, inherent tensions between protectionist inclinations and the imperatives of international collaboration, barriers to innovation diffusion, and an insufficiently robust comparative assessment of adversarial capabilities. These limitations constitute core vulnerabilities that necessitate systematic remediation to ensure strategic coherence and operational feasibility.

The NDIS reflects a strategic recognition by the US that maintaining technological superiority in an evolving multipolar security environment requires the synchronized mobilization of both public and private sector resources within a consistent strategic framework. As geopolitical competition among great powers intensifies, the success of the NDIS depends on sustained political commitment across successive administrations, agile adaptation to dynamic threat landscapes, and effective navigation of complex domestic and international constraints. Thus, the strategy is not merely a recalibration of defense industrial policy, but a comprehensive restructuring of the US' strategic posture in response to profound transformations in the global security architecture. In essence, the NDIS represents a deliberate effort to revitalize the "arsenal of democracy" - the foundation of US strength that proved decisive in the world wars and the Cold War. This strategy is aimed not only at safeguarding US hegemonic primacy but also at unlocking new opportunities and confronting emerging challenges in the global defense



technology domain. By examining the core themes of the NDIS in this study, national security policymakers can draw critical insights to formulate adaptive strategies, reinforce defense capabilities, and contribute to regional and global stability and sustainable development.

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