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Start Ups to the Rescue: The Next Gen Industrial Base
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Troy Demmer, Co-Founder and Chief Product Officer, Gecko Robotics
Tara Murphy Dougherty, CEO, Govini
Igor Jablokov, Founder and CEO, Pryon
Moderator: **Gordon Lubold**, White House and National Security Reporter, *The Wall Street Journal*
YouTube recording: https://www.youtube.com/watch?v=IKd0KO7E7Y8

Gordon Lubold:
Well welcome everybody. Thanks for being here. I'm reminded of being here a year ago for a similar panel. Doug was here on the same panel, so there's some new faces, but I like to say some of the same old questions. So we're trying to assess where the next gen defense industrial base is and whether it's still so very aspirational or if it's actually getting there. So I'm hoping that in this, I think a 40 minute conversation today, we can kind of get subsequently to some of the questions that I have. Some of the panelists I think hopefully have for each other and maybe in the last few minutes, some of you, but this is going to be awkward. I have to hold my talk show host here. I wanted to read an excerpt from a study that just came out from the Defense Innovation Board, and I'll keep it short, but I just think it's a good scene setter, so just bear with me.
The DOD faces an existential challenge. Its incentive structures are broken, consequently obstructing innovators from adopting new technologies faster or at all. Demanding urgent reform incentives are the intrinsic and extrinsic motivators that drive talent to take calculated risks, think critically and move faster to develop and deliver capabilities to support the war fighter. Bear with me. Without swift and widespread cultural change in the ways the department incentivizes talent to innovate, our national security remains at risk, leaving us vulnerable to being surpassed by our adversaries, and I think we all know this anyway. So what I wanted to do, one is we have a very smart and informed audience I realize, but I've tried to encourage the panelists to be kind of jargon free, speak in English. What I'd like to do though is maybe start with you Troy, and give me your view of the world in that context of what I just read. You can say kind of who you are, what you're doing, but they can read your bio and then we'll go along and then we'll get to some other questions. Does that make

Troy Demmer:
Sense? Yeah, thanks Gordon and to the Aspen team for having this discussion here today. In this moment, we, and this will be no secret to those of you in the room, that our industrial base has been hollowed out. We are about 40% less than we were decades ago, and increasingly how we think about reinvigorating the industrial base is really critical. There are technologies today, gecko, for example, uses AI robots to ensure the health of our most critical infrastructure. Things like sustainment, ensuring readiness, and as well as bring new builds online in a timely and quality manner. But this is an important discussion because today we cannot out brut force our adversaries. We have to have a technology forward approach. And there are things that the non-traditional defense companies that exist out there

today are trying to break in. And I can tell you from personal experience, it is challenging, but once you do, there's a great partnership there and I'm sure my colleagues on stage wall also share that message as well.

Gordon Lubold:
Troy gets an extra, Troy gets an extra star for keeping it nice and short. So for these introductory remarks, you go,

Igor Jablokov:
Alright, I'll attempt to do the same ai. Has anybody heard of that before? Everybody thinks it's a new thing over the course of the last 24, 48 months, but when I started my career at IBM, we discovered the baby version of Watson in 2002 and I was frustrated that they didn't green light it, so I departed, stood up our last company, we're a year into it, we prototyped Siri with Apple before the iPhone even existed. That's how early they were thinking about that stuff. Five years later we got acquired by Amazon to develop what many of you know as Alexa. Alexa is my older sister's name, which is a coincidence, but the code name for it was PreOn. That's where this strange word came from. And then five years later, we knew that this style of technology needed to come to more serious pursuits, whether we're talking about critical infrastructure, commercial entities, government agencies and things of that sort. But the public sector and the private sector have been entangled in AI for decades.

Tara Murphy Dougherty:
We used to just call it math. Thanks Gordon. Thanks to the Aspen Institute for this amazing panel. My name is Tara Murphy Doherty and I'm CEO of Gini. As Anya mentioned, we think this topic is so important. We literally dedicated the entire mission of our company to it. So Gini is a defense software company and our mission genuinely is to accelerate the defense acquisition process. We believe that if DOD can do this in tandem with the broadly defined next generation defense industrial base, then we can actually make acquisition a strategic advantage for the United States. We think of acquisition not as procurement. This isn't writing contracts. This is about the end-to-end system of fielding conceiving of producing, and for generations often sustaining military platforms. That's the system that has to change and I look forward to discussing it today.

Gordon Lubold:
Doug, go ahead.

Doug Beck:
So when we sat up here a year ago, we were just getting started on this DIU 3.0 mission as a reminder, DIU is set up back in 2017 to try to get after this exact problem and initially it was just about what I call DIU 1.0 is about just building a bridge at all between these two worlds. We weren't even talking DIU 2.0 is about proving that you could solve real military problems with commercial technology and actually or commercially derived technology and make a difference. And that's great and we've done that now many, many times all over the place. What we have to do now is take that and deliver it with scale at the

level that it can achieve true strategic effect. That means first focusing on those most critical problems we got to solve for in order to deter major conflict or when a forced to fight.
And then it means working with the rest of the department and everybody else to scale those things so that they can actually deliver the strategic impact and importantly. So all those companies out there, the ROI works and the scale can be self-reinforcing. That's the American way of doing this. That's what D IU is built to do. You were asking me before Gordon, how it's going and the answer is we are further along at this point than I ever could have dreamed that we would be in just a year. And we have so much further to go for all the reasons that we were just talking about and I'd love to drill into that a little bit more maybe as we get into this.

Gordon Lubold:
Absolutely. I'm temp. Let me come back to that. Since scaling is always the kind of looming or the subtext of all these conversations, and I think there's two kinds of scaling that we were chatting about, the scaling that we talk about, which is how do you get innovation? You kind of get it in the front door, but then how do you get it into the rest of the house? That kind of scaling but also scaling the capability that DIU brings and bringing it to across the department, the defense department, not necessarily through DIU, but just getting the systems. And I think to Tara's point, I was talking to her earlier, the bureaucracy is still not wired to help folks like these guys get in the door so we don't have to go in order or whatever. But Tara, do you want to just talk a little bit about the building wiring and how do you scale on both those fronts?

Tara Murphy Dougherty:
Yeah, absolutely. I think until DIU and the types of activities that DIU has very successfully established to help companies enter, turn into or get incorporated into the normal operations of the Pentagon and its systems, we're always going to struggle here and I'll give you a perfect example. Well first of all, on your point about scaling, which I think is exactly right, one thing that DOD has scaled in this regard in the wrong direction is mini dus. The department of is a single cabinet level department. It does not need more than 40 different technology incubators and accelerators. But today that's what exists.
I think a lot of people would be talking, yes. Well the reason that that happened is a good one. It's because DIU got some things right, including early on and the department said we need to do more of this. So now we've brought these companies in. I think the door is open for businesses to enter, but then once you get past that SIBER phase three or that OTA and you're looking for that production level procurement level contract, that's not DIU and it's 39 friends anymore, that's contracting command. That's the PEOs. And that system needs to change still

Gordon Lubold:
Across the services I assume and it across the department.

Tara Murphy Dougherty:
Yes, exactly.

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Gordon Lubold:
Can

Doug Beck:
I build on that one Gordon a little bit?

Gordon Lubold:
Yeah.

Doug Beck:
So I couldn't agree more with Tara's point and this DIU 3.0 strategy, which we were kind of talking about a little bit when I was here last time, and which we submitted to the secretary actually the next month and we're now just about a year in

Gordon Lubold:
And you've since got a billion dollars right since we talked.

Doug Beck:
And Congress has been very generous both with the appropriation as well as with the nature of the appropriation, which gives us increased flexibility about how those dollars get spent, which is something I hope we talk about a little bit today as well. That DIU three point strategy is really all about trying to help crack exactly what Tara was talking about. So without going into all the details, I'll just maybe tick through some of the key pieces of what's in there. First, it's about embedding with the war fighter. So that's about going deep with the combatant command. So for example, now the CTO and deputy director of the Joint Mission Accelerator, it's called out at Indo Paycom, which reports directly to AMO bapa, that's a DIU embed. And we've got a team around that or out in Ucomm general. kfo I think is here. We have an embed in his immediate staff as well as the security assistance group Ukraine, where the s and t lead is the D IU embed, whose role is to help bring in the capability from across full innovation enterprise.
So that's about really being there to help both understand and shape the needs so that we can figure out where commercial tech can help leapfrog and get after it. Then the second big thing is about partnering in every way, and this is exactly to your point with what I call the true engines of scale of the department, which is the services as well as our partners in places like A and s acquisition and sustainment, research and engineering, other places around the department that are all about helping to scale things. And we've shifted from what used to be at DIUA bar that would say, Hey, we need to have a transition partner for that. There's somebody in the department who wants it now. There has to be a pathway to scale or we're not going to do it because there's got to be a pathway there.
And that's also about being now embedded in real ways in these core operations of the department in the Pentagon. And we've got a new deputy director for policy strategy and national security partnerships who's sitting right there, a DD who's doing this all the time. That's about all kinds of things like that. You don't want to know the acronyms, things like DAGS for budgets and the new DISG and replicator and all

of these things are about helping to take that innovation and connect it with the scale so that we can actually get there. So that's the second big one. The third one is about the 40. There's actually 267 organizations around the department that self-identify as an innovation org. And we've created something called

Gordon Lubold:
Self-identify.

Doug Beck:
We've created something called the defense Innovation community of entities, and we have the role of convening that group, making sure that we're working together to identify synergy, eliminate diss synergy, and also use that group to find the place where there's systemic barriers that get in all these people's way so we can go knock 'em down. The fourth is about taking, taking. We do the tech sector or the next level and we'll talk about that I know more later. And this is about international activity. Those are the pieces, and as I said before, we are way further along than I hoped we were going to be, and that's because of enormous support, great partnership with our tech sector depart been enormous work from leadership across the department and importantly in Congress.

Gordon Lubold:
Good thanks. I think it's fair to say that we wouldn't be up here right now if everything was rainbows and birds chirping and stuff. Let me bring in you two a little bit. What do you think is not working thus far in this continuum of startups?

Igor Jablokov:
Here's a fun one for you. Where do you typically get French food in a place called a bistro? Do you know where that word came from? When the Russian imperial troops and they ended up in Paris. The Russian word for faster is bistro. That's it. So that's where the word came from. Today's one fact. Yeah, so what I would say is just move it velocity now. Why do you even care about these startups? Why do you care about Little Tech? Why did DIU care to have a vision to even give us a seed at the table with things like Liz McNally is working on the Ensin Accelerator and the like. I'll tell you why. I know the answer to who's going to solve and cure cancer. I know the answer, who's going to solve faster than my travel? And I know the answer to who's going to create unlimited energy. You know who it is. It's an infant that's out there right now. And so while you never heard of these three brands before, until they showed up on this stage and you wonder who they are, that's what Little Tech represents and that's what DI's vision was. Get 'em at the table, get these obstacles out of their way. Allow rapid prototyping, fast early growth, make them aware of the requirements and connect those dots because of those opportunities that are before us and do that before adversaries do.

Troy Demmer:
One of the ways that we were able to break into the government business I think was through partnerships that we had on the commercial side. Without that backing, without having worked with

hundreds of the largest Fortune 1000 companies in energy manufacturing and having that support, having that revenue base, having that ability to iterate on our product, it would've been very challenging to break right into to the government sector for us. And I think furthermore, one of the things that we've learned is that when we can approach a problem with a less from a requirements or regulatory standpoint and more from a needs-based, here's the outcome that we're trying to pursue. These types of companies that are represented up here can move very quickly and fill those gaps and leverage existing technology stacks that they have to go fulfill that mission. And so to give some credit here, I think to what DIU is doing that has enabled some of these other contract vehicles to be put to good work for our types of technologies.

Gordon Lubold:
Tara, I feel like you wanted to say something.

Tara Murphy Dougherty:
Can I give a specific example?

Gordon Lubold:
We love specific examples. Yes.

Tara Murphy Dougherty:
So just to make it real, when we talk about the progress that has been made on getting these non-traditional companies, little Tech is a great way of putting it because importantly we are not small businesses. Scale is the goal. We've made this phenomenal progress thanks to DIU and others getting these businesses in the door, entering into the system. And that transition that we've talked so much about is the part that's so hard. Why is it so hard? That's the interesting conversation to have and I think there are a few reasons, but a major one is the fact that once you get outside of the apparently 267 incubators and into Maine DOD, the understanding of Little Tech or even the big successful tech companies that have already IPO'ed, their business model does not exist. So the Army recently put out some market research, notified the market that they are going to establish a 10 year billion software development contract.
That's exciting. I would like to go after a billion dollars to do amazing things for the Army and the Army's mission when it comes to deploying Gini software, their entire contract, all billion dollars is going to be issued as a cost plus contract. No firm fixed price, no venture capital backed company that DIU and every other part of DOD who has worked so hard to get us into the system, none of our companies can bid on that and that disconnect, that's it. That's what we're talking about here. So until we get the parts of the department who actually put the billion dollar 10 year contracts in place to understand what it means to work with companies like ours and how to, this isn't going to work.

Gordon Lubold:

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So who's the villain though? I mean I like this, we villain, but I mean who is the villain when it comes to scaling, when it comes to rewiring the building, to getting these things to work better together and actually get something done? Go ahead Doug.

Doug Beck:
So I dunno if I like the word villain.

Gordon Lubold:
I know moderator's prerogative

Doug Beck:
Antagonist. I do think that the challenge, first of all, the challenge has changed. So even three, four or five years ago, senior leaders across the department didn't even know they wanted all that tech also and certainly didn't know they wanted it from amazing companies like the ones that we work with. And I can see, I see Josh Ra, sorry, he's here from Vanover Labs and I see lots of other partners as ours out there didn't even know they wanted that tech. What's changed now is they know they want it and the villain, if there is one is sometimes it's policy and sometimes it's law, but much more frequently it's culture. It's just culture. It's learned behavior. This is how we've always done it. Sometimes it's rice bowls, sometimes it's ego, but it's human and that takes time to change and the way you change it is with success.
And so we're working really hard right now at DIU but across the department at putting points on the board because what we need to do is put points on the board not just for successful companies but successful companies that can get to scale. So an example of one that's a positive example that people are probably familiar with is you think about counter UAS and the role that annual plays in that. That started off back in 2020. There was a in 2020 DIU with SOCOM did A CSO, which is our kind of rapid acquisition vehicle to come up with a counter UAS capability came up something, DIU funded the first aid sites and then SOCOM came in with a billion dollars, which is still now happening now right now DIU is helping the Marine Corps extend those things into Marine Corps installations as this is installation UAS kind us, but we need lots more success stories like that so that it's easier both inside to say, I'm going to take a risk on that. And it's also easier outside to say I'm going to take a risk on that.

Gordon Lubold:
So I have a couple of nitnoid questions, but one other thing. First, Bob Gates me when he was in the building, famously pushed the MRA through the process, but he did it by meeting regularly, I think weekly if not multiple times a week to make sure that all the pieces were moving to do it. Is there anybody now in the Pentagon who's doing that with that fervor? And I want to ask you guys that

Igor Jablokov:
I want to give you a villain since you're not, I don't think you'd be satiated.

Gordon Lubold:
Four villains.

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Igor Jablokov:
Alright, John Chambers, the former CEO of Cisco said you get in trouble when you do the right thing too long. So a lot of times whenever, if Admirals generals ss what have you, they always apologize when they get introduced to me because they put AI on a pedestal and I'm like, don't apologize for not knowing these technologies. They're like, yeah, we have to talk to you because our designated nerds are saying we need ai. And I'm like, the problem isn't that you don't have it yet, it's just you've been doing the right thing too long. The wrong things get weeded out of our systems fairly quickly. But you have to follow the model that you see In commercial circumstances like where Doug used to work at Apple, they have decided product generation after product generation to cannibalize themselves before their competitors do. And that's what we need to do.
In some ways this is disruptive, and I remember saying this because I was one of the first speakers on a podcast that the CDA folks have the AI mill folks, and I basically said, when you disrupt it, the way that you have to approach it is tell 'em the reason why you're doing it is because you love the organization, not because you're an antagonistic entity. You want it to survive and thrive to the emerging needs and conditions that the world is giving them. And I think when you approach it that way, I think all bets are off.

Troy Demmer:
To illustrate this, we've been working very closely and to give credit to Secretary Del Toro and his team at the Navy, we've been working very closely in the shipyards to help things like one third of our ships get out of dry dock on time today we're trying to build new capacity, we're not building it fast enough. We have brought a proven technology to one of the fleets. They've adopted it. They've quite frankly changed the way that they operate, taken drastically long turnaround times to get data to make decisions on how to make a repair scope or how to plan availability down to days. And so this is a capability that the entire Navy wants. However, we're getting blocked at the contracting level because the contracting vehicles that exist today don't fit that business model of a firm fix. And so we get into a scenario where the existing structures that Navy could use to directly contract with us don't work. And so now we're looking at other avenues like GSA, et cetera. There you run into some other challenges, which is there's not a PM to staff it despite having a three star admiral bang on the table saying we want this.

Tara Murphy Dougherty:
Gordon, to your point about who's the person doing the right things at the Pentagon in this regard, I actually think that what this highlights is that there are a lot of people at the service acquisition executive level, the under secretaries of the services, the deputy secretary herself who are trying to push, and then there's this disconnect once we get to the point of writing the contracts and structuring the acquisition for a program of record. And so what strikes me is that while this group broadly has been having this conversation about driving innovation and DOD for a decade now, it was always with the acquisition community and we left the contracting community out. We've got to bring that group of people into this conversation so that we can raise the aptitude about business models and our kinds of

companies and how we can work with DOD and raise the comfort level. To Doug's point about culture too.

Doug Beck:
Well I build on that, although I would say it's not time to declare victory with the broader acquisition community either, right?

Gordon Lubold:
No, I don't think anybody is. Right.

Doug Beck:
And so I think, well, my role on this is to show the light a little bit. I also want to be clear, we got a long way to go, right? And part of that is this is about putting, as I said, putting points on the board showing the way, but it's also about, in some cases training. Because a lot of those folks, it's not like they wake up every day and say, how do I make this slow? These are hardworking, patriotic Americans who are trying to do the right thing and they're trying to avoid what they perceive as being risk. And so we've got to help them understand, first of all, there are other ways to do this. We have some pieces in place that we're doing now with the acquisition university Defense Acquisition University to help train. I wanted 10, a hundred x those programs.

Gordon Lubold:
Well, it's a good point because somebody actually texted me a question last night. There's, there's a dearth of contracting officers. Is that correct? And how does that impact any of this?

Doug Beck:
Creativity takes time. Training helps with that. And I do think this point about risk and is an important one too because there are a lot of folks who they think they're protecting the department from risk and obviously themselves from risk of doing something that might be different. And that's a very proximate risk, the risk that is there if we don't solve these problems and we end up not being able to deter major conflict if when we're forced to fight those risks are abstract. And so what we've got to do is help bring that forward, right? The most innovative place I've ever worked in my life was a joint special operations task force downrange the least innovative place that I've ever worked in my life was also something I've been involved with in the Department of Defense.

Gordon Lubold:
You want to say?

Doug Beck:
No,

Gordon Lubold:

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You kind of left it there. Is there enough of a welcome sign for other startups who are not on the coasts and in other places who are not necessarily getting the attention because they're not bicoastal?

Doug Beck:
Oh

Tara Murphy Dougherty:
Yeah, go ahead.

Gordon Lubold:
Sorry, go ahead.

Tara Murphy Dougherty:
Well, I was just going to say you've got to ask our Pittsburgh representative that question,

Troy Demmer:
And you have a large workforce in Pittsburgh as well. So I think it is well fitting, especially in hardware, the places where cutting edge technology is being developed for industry 4.0, robotics, drones, sensors, ai, a lot of this is in the interior of the US and the heartland and I talk every day to companies that are trying to break in because they know that they've got a solution that can greatly help our national security initiatives and they have challenges. And so we're trying to help not just ourselves get to more programmatic levels to be able to fulfill the mission, but also support those next gen companies that are also coming online throughout, really throughout all of America.

Doug Beck:
Can I pile along with some quick

Gordon Lubold:
Response and now I got another thing I

Doug Beck:
Like. Okay, so the answer is yes. So D IU is located in, we're in Silicon Valley, Austin, Boston, Chicago obviously in dc. We've got our partners in the innovation community are in a whole bunch of other places and we've now created these defense innovation on-ramp hubs. We call 'em with help from Congress. So they're in Ohio, Washington, Hawaii, Arizona, and Kansas and more to come. And then there's also, this is, you mentioned Liz is here somewhere. Her team is bringing all that together. This is partly about taking, what was that? National Security Innovation Network and DIU, although they were kind of under the same hat. We brought those together, getting the full synergy. We need to be, there's incredible talent all across this country. We've got to be able to tap into that. And into your point, different pockets of capability are in different places and we've got to get after the, but like at Apple, we knew that, right? And we know it's department too

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Gordon Lubold:
Good. My clever colleague, Heather Somerville wrote a clever piece the other day, and I'm going to screw up the number so I can just look at it a little bit. She reports that there's a study that came out. The US has spent 22 billion in recent years on technology from the top 100 nas SEC startups compared to, this is where I'm going to screwed up. It's less than half of what the venture capitalists have invested in those same companies, meaning the VC world sees opportunity that the federal government does not. Why? And anybody can jump in. I mean, do you agree?

Troy Demmer:
Yeah. Without a commercial base that Gecko had, I think and an investor base that understood DOD and more broadly national security type programs that had the fortitude to know that we were going to have to spend ahead of the curve before we recouped that. Especially as a company that is trying to build, again, technology sets that expedite things and have the incentives to bring these things to market as quickly as possible. So I think to answer your question, I mean we have gotten some sponsorship of government dollars. Our first contract was with a sibert, right? That is only possible if you have a matching fund source and one of those fund sources is venture. So I think these worlds are starting to converge and we're excited about continuing to make those possibilities inside of the government more and more accessible to other companies. I mean, it's largely a rhetorical question, but I mean I think the

Igor Jablokov:
Number is low, but

Tara Murphy Dougherty:
Number,

Igor Jablokov:
Yeah. Let me cross a couple of Ghostbuster streams because I'll connect the previous question to this one. We're based in North Carolina. Do you know who took a shine to that? And you have to assume our scouts in terms of this is a story. Alright, jd. Alright, JD Vance let our first big round of financing because I told him, look, I'm going to do be on the down low with the fact that we could be dual use and things like that. He joined our board for a couple of years as well. And then it triggered a chain reaction to that as well. Certainly through the pandemic it was stark that you needed innovation in all corners of this country. Every nook and cranny was tossed upside down to find solutions for the things that our communities or crest fallen with.

Tara Murphy Dougherty:
Gordon, can I just add, because Gini data helped inform Heather in that story and the numbers are telling to your point. So the companies that she references, essentially the defense tech community has raised more than 55 billion in venture investments in the past few years. Notably the past two years, that number on an annual basis has been declining. And in parallel, that same set of companies is only

winning about 1% of government contracts every year. And that has stayed flat over the same time period. From an investor perspective that math does not work when you're looking for 25 and 30% annual returns, you have to see better growth. And what I fear, the leading indicator in that story is that we're not talking about the community here that's looking at all of this data, is the fact that the investments are going down Partially that could be because the economic landscape is changing. Surely some of it could be because now these defense interested VCs are saying, okay, we've written our checks, DOD, it's time for you to write yours,

Gordon Lubold:
Doug, quick response. And then I got one other thing. We got to show

Doug Beck:
Two things. First of all, I actually think first, I think the metric about the total investment defense tech going down is I'm actually less worried about that one because it's actually going at a little bit lower rate than most of the rest. And there's a really good art study that just came out about that. So the whole sector is going down more than event stack. What I'm more worried as the other one, which is why we've got to put points on the board. It's delivered, delivered, delivered time now points on the board. And so that's where we're a hundred percent focused. And I would love to do a really quick story of that one I was telling you about before. If I could do it in one minute, you think

Gordon Lubold:
You can do it in one minute?

Doug Beck:
I can do it in one minute. Okay. So with all these tools that we've been given, including one of the things we were talking about before, one things Congress gave us is much more flexible ability to use funding. The way it's supposed to work is not the bridge to nowhere it's supposed to work that first. The Army, in this case, the Army Futures Command General Jim Rainey, who we worked with super, super closely, they identify a critical need based on what they see in Ukraine for company level UAS. They want to do that. We can help them with the initial prototyping and selection of all that in the way that we always normally would. And DIU can help fund that the way we always normally would. We now can also help with that initial fielding in this year. So in FY 24 we can get started on that because we can now, in addition to the onesie twosie millions, we could put tens of millions because we are no longer restricted just to prototypes.
We can help with initial fielding. That's a law change that's in 24. In 25. The Army can figure out how to start leveraging money that they've already got or that's already their lines for, to be able to help continue that thing along while we are bringing our funding for it a bit down. And then in 26, potentially without getting ahead of the president's budget, that's enough time for even our traditional processes to actually have budget there to help scale the thing for real. That's that's an example of kind of how we got to do this thing. That's really important.

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Gordon Lubold:
So you touched on budget, Igor touched on Jay Vance. So I have a budget politics question quickly and I still want to try to get out here. Doug does not want, he wants to sit this one out. But I guess the real question is like, okay, so depending on the outcome in November, do any of you see a significant contrast in what might come of it? But I guess the real question is certainly Republicans would throw more money at the problem, but I think the issue then is more money doesn't always help if the building's not wired right, if the bureaucracy is not wired right. So what are your quick takes on the impact of November?

Tara Murphy Dougherty:
I think it could potentially be positive to have a Trump administration for the tech industry trying to work with DOD. And I say that on the basis of two data points. One, the fact that they're already talking about Manhattan projects for AI shows they're serious about the adoption and acceleration of artificial intelligence for military purposes, which when done responsibly is absolutely essential to guaranteeing American leadership in years to come and frankly being competitive against China. And then the second data point is the fact that president, the former president Trump has picked a running mate who comes from this space. And if there's somebody who can force the rest of the bureaucracy to see the light, then it might have to come from an office like the vice presidents.

Igor Jablokov:
Yeah, I'm on a board of a bipartisan group called with honor that has congress persons from both sides of the aisle as well. And so I think you're going to see a lot of that continuity. I mean, Doug wouldn't be able to, and his organization wouldn't be able to do what they do without that strong ecosystem behind them to have that continuity because we're competing with folks that have 10 plus year plans. And I think that's what happens. This is a place of convergence where both sides care about defense.

Troy Demmer:
For the missions that we serve, it's very bipartisan. I think we all care about critical infrastructure being there and not collapsing around us. And I think we expand the aperture beyond just the defense industrial base to the broader industrial base. Thinking about what did Covid teach us? Supply chains are fragile. 50% of our steel today doesn't come from the us, it comes from China, 4% comes. So if we're trying to onshore manufacturing, if we're trying to create some independence, we have to move a lot faster in a lot of domains. And I think it goes much more broadly to public infrastructure and beyond.

Gordon Lubold:
Great. Thanks. There's a big virtual hook and we just got it. I think so we have to close. I want to ask you to join me in thanking our panel. I also just want one quick PSAI wear a button for my colleague. He's stuck in a jail in Russia and he's not getting to enjoy the mountains in the breezes. Sorry. Please keep him in your thoughts. Thank you.