



## SECURITY / DEFENCE POLICY

## After Quantico: US Defence Reform Between Directive and Delivery

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## Executive summary

On 30 September 2026 Secretary of War Pete Hegseth used a State of the Force address at Marine Corps Base Quantico to announce six initiatives: an Autonomous Warfare Command, America's Corps of Cadets, the FORTRESS America homeland-resilience programme, a Next Great American Base, an Office of Religious Affairs and Project Meridian, a 120-day study of future warfare. The department published a same-day release with a memorandum for each. For organisations, the useful distinction is between what was ordered that day, what was claimed as achieved, and what still depends on money from Congress.

The orders are dated and published. The achievement claims are thinner. Hegseth said the number of generals and admirals had been cut by 20 percent; press accounts of department figures show 851 active-duty generals and admirals in July 2026, above the 831 reported for May 2025, and the Pentagon offered nothing beyond his remarks. The money sits in a request. Eight days earlier, Under Secretary of War for Policy Elbridge Colby told the Senate Armed Services Committee that the President's \$1.5 trillion FY27 request is the essential vehicle for the department's momentum, if enacted.

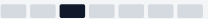
**SF Custos Global assessment:** Quantico sets direction for autonomy, homeland resilience and personnel standards. The posture that organisations meet abroad changes more slowly. The nearer effects are in the Middle East, where the department says thousands of robotic systems already support Operation Epic Fury, and in US supply chains, where FORTRESS America points demand towards domestic rare earths, semiconductors and installation power. Planning should follow dated orders and enacted budgets, and treat speech figures as claims until a department table confirms them.

**1 A one-fifth cut in generals and admirals is unlikely to show in published figures by April**

The latest tally in press reporting sits above the May 2025 level, and the Pentagon has offered nothing to substantiate the claim.

## OUTLOOK

**A published department tally showing 665 or fewer active-duty generals and admirals, one fifth below the 831 reported for May 2025, is unlikely between 2 October 2026 and 2 April 2027.**

Likelihood  **unlikely** Window 2 October 2026 – 2 April 2027

**Basis** Press accounts of department figures show 851 in July 2026 against a statutory cap of 857; asked about completion, the Pentagon offered nothing beyond the secretary's comments.

**Counter-indicator** A department table or personnel release showing a fall towards 665, or a formal reduction of statutory general-officer authorisations.

**Confidence**  **moderate** – Two outlets report the July figure and the cap consistently; the department table itself was outside the material reviewed.

**2 Publication of the Project Meridian report by April is a realistic possibility**

The release sets 120 days and a public report; the three co-directors work outside the department.

## OUTLOOK

**Publication of the unclassified Project Meridian final report between 2 October 2026 and 2 April 2027 is a realistic possibility.**

Likelihood  **realistic possibility** Window 2 October 2026 – 2 April 2027

**Basis** The release directs completion within 120 days of establishment, with an unclassified public report and a classified annex, under co-directors Elon Musk, Palmer Luckey and Newt Gingrich and facilitated by Chief Technology Officer Emil Michael.

**Counter-indicator** An announced extension, a change of co-directors, or a decision to publish only a summary.

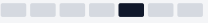
**Confidence**  **low** – The deadline is explicit, but study timelines often slip and the external co-directors carry other commitments.

**3 A US counter-ISIS presence in the region is likely to continue after Operation Inherent Resolve ends**

The Lead Inspector General records a headquarters move to Jordan and a limited presence in Iraq, which points to a smaller footprint rather than a regional exit.

## OUTLOOK

**Public confirmation by US officials or the Lead Inspector General of a continuing US counter-ISIS mission or presence in Iraq, Jordan or the wider region after the scheduled 30 September 2026 end of Operation Inherent Resolve is likely between 2 October 2026 and 2 April 2027.**

Likelihood  **likely** Window 2 October 2026 – 2 April 2027

**Basis** The April–June 2026 Lead Inspector General report records the task-force headquarters move to Jordan to continue counterterrorism, the transfer of the last open US base in Syria, and a limited presence in Iraq.

**Counter-indicator** An announced full withdrawal from Iraq and Jordan, or a Lead Inspector General report closing the mission without a successor.

**Confidence** ● ● ○ **moderate** – The posture facts are documented; the successor arrangement after 30 September was outside the public record reviewed.

## What matters now

- **Orders, claims and money:** Six initiatives carry dated memoranda. The 20 percent flag-officer cut and the line on religious affiliation are speech claims. The \$1.5 trillion is a request.
- **Autonomy first in the Middle East:** The department says Drone Dominance has delivered thousands of robotic systems to the region for Operation Epic Fury. That is nearer than the 2027 command.
- **Home-front demand:** FORTRESS America points to domestic rare earths, specialty metals, semiconductors, propellants, installation power and reserves of munitions, fuel, medicine and blood.
- **A base competition:** Governors and adjutants general are invited to pitch for a new installation of hundreds of thousands of acres, built off the commercial grid.
- **Mission end with presence:** Operation Inherent Resolve was set to end on 30 September 2026; the headquarters had already moved to Jordan.
- **Strategy intact:** Colby's statement keeps denial along the First Island Chain at the centre of the China approach.

## Current operating picture

**Six initiatives, six memoranda.** The department's same-day release describes each initiative and links a memorandum. The Autonomous Warfare Command is designed as a four-star functional combatant command by 1 October 2027 to scale autonomous warfare across the Joint Force. The department calls this the fastest peacetime operational shift in modern military history; that is its own characterisation. The office leading Project Agincourt, the pathway to the command, is DRPM UxS, directed by Owen West, the current Director of DIU, and Navy SEAL Senior Chief Max Strasiser in a CEO-COO partnership. America's Corps of Cadets adds Louisiana State University, Liberty University, Tuskegee University, Mississippi State University and Hillsdale College as Distinguished Military Colleges with Honor School priority in commissioning. FORTRESS America is described as the department's national insurance policy for the homeland. Project Meridian will be co-directed by Elon Musk, Palmer Luckey and Newt Gingrich, with Chief Technology Officer Emil Michael facilitating, and is to finish within 120 days with an unclassified public report and a classified annex.

**The audience.** The Pentagon News account carried by the Army says Hegseth spoke to 600 O-3 officers and E-6 enlisted service members, with Gen. Dan Caine, Chairman of the Joint Chiefs of Staff, present. Hegseth framed an "E-6/O-3 Rule": whether a policy, procedure or decision helps or hinders the daily reality of those grades. That choice of audience makes junior leaders the judges of delivery.

**The flag-officer claim.** The Hindu, carrying AFP reporting, quotes Hegseth on firings of about 10 percent of generals and admirals plus a further 10 percent cut in general-officer slots, a "20% reduction across the board". The same report cites Pentagon figures of 831 active-duty generals and admirals at the end of May 2025 and 851 at the end of July 2026. Asked whether the cut was complete, the Pentagon said it had nothing further beyond the secretary's comments. CBS News, citing a Defense Department tally, reports 851 in July against 848 a year earlier, under a statutory cap of 857. Slot reductions may show later than firings. Until a department table shows the fall, the figure belongs to the speech.

**Faith and the force.** The Office of Religious Affairs reports directly to the Secretary. The release says it will not compel religious participation, favour one faith, or diminish the rights of personnel of any faith or none, and that the service

chaplains remain the primary providers of religious support. Military Times reports Hegseth's statement that less than 5 percent of the joint force identifies as nonreligious, and adds that the Pentagon has published no official report on the religious makeup of the military since 2019 and that the office's director was still unnamed. The release sets a boundary; the speech uses a different register. The charter and the first director will show which one governs practice.

**Money and industry.** Colby's statement of 22 September calls the full \$1.5 trillion FY27 request the essential vehicle for sustaining momentum and ties its effects to enactment. The Munitions Acceleration Council, established in FY2026, is to receive nearly \$53 billion for prioritised munitions under the request. Colby names shipbuilding as the place where the gap between strategy and supply is widest: Virginia-class deliveries of roughly 1.1 to 1.2 boats a year since 2022, against a requirement of 2.0 for US needs alone.

**Theatres.** Colby's Indo-Pacific section centres on deterrence by denial along the First Island Chain, alongside regular contact with Beijing; Hegseth has spoken with Admiral Dong Jun on three occasions over the past year. In the Middle East, the Lead Inspector General's report for April to June 2026 records that Hegseth confirmed on 14 July that Operation Inherent Resolve would end by 30 September 2026. The task-force headquarters had moved to Jordan to continue the counterterrorism mission, the last open US base in Syria was transferred to the Syrian government in April, and a limited presence remained in Iraq.

## Key risk mechanisms

**Announcement read as delivery.** Partners, suppliers and insurers that treat the speech as a finished reform will price capacity that is still on paper. The flag-officer figure is the test case.

**Request read as appropriation.** FORTRESS America, the new base and munitions depth depend on FY27 money. Colby himself ties the effects to enactment.

**Autonomy at the edge first.** Drone and robotic density in the Middle East grows before any new command exists. Sites near US and partner forces see more unmanned activity, and adversaries adapt to it.

**Supply-chain pull.** FORTRESS America directs demand to domestic rare earths, specialty metals, semiconductors and propellants. Foreign suppliers to US defence programmes face substitution pressure; domestic suppliers face surge requests.

**Mission end misread as exit.** A scheduled end to Operation Inherent Resolve reduces a named mission; the Lead Inspector General shows a presence that continues from Jordan and in Iraq. Security plans that assume either a vacuum or unchanged cover misjudge the posture.

## Outlook and scenarios

The base case for the next six months is reform by directive: memoranda, appointments and studies move quickly, while measurable changes in force numbers, new commands and new installations trail behind published data and enacted budgets.

### INTELLIGENCE ASSESSMENT

**Through 2 April 2027, the six Quantico initiatives are likely to advance mainly through directives, appointments and studies, with measurable changes in force numbers, command activation and new installations largely unconfirmed in published department data.**

Likelihood  **likely** Window 2 October 2026 – 2 April 2027

**Basis** Dated memoranda and appointments on 30 September; the 1 October 2027 target for the command; the July 2026 flag-officer tally; Colby's conditioning of effects on the FY27 request.

**Counter-indicator** An enacted FY27 appropriation at the requested level together with a department table showing the flag-officer reduction.

**Confidence**  **moderate** – Directive timelines are documented; congressional decisions and internal implementation pace are only partly visible.

### Scenario 1: Directive-led reform (base case)

Memoranda, appointments and the Meridian study set the agenda. Hardware, bases and reserves wait for money.

**Trigger:** FY27 funding below or later than the request. **Counter-indicator:** early enactment at the requested level.

## Scenario 2: Funded acceleration

Congress funds most of the request. Munitions, installation power and drone procurement accelerate, and contract awards cluster in 2027. **Trigger:** an enacted appropriation close to the request and visible Munitions Acceleration Council awards. **Counter-indicator:** a continuing resolution into spring.

## Scenario 3: Contested implementation

Litigation, congressional resistance or personnel turbulence slow the personnel and religious-affairs measures, and the flag-officer claim becomes a dispute with Congress. **Trigger:** court cases or hearings on the cuts or the Office of Religious Affairs. **Counter-indicator:** a published table and charter that settle the questions.

## Early warning indicators

- The next department table on general and flag officers, and whether it moves towards 665.
- FY27 enactment status, and whether munitions and installation-power lines survive at the requested level.
- A named commander-designate or implementation plan for the Autonomous Warfare Command.
- Selection criteria and a shortlist for the Next Great American Base.
- The Office of Religious Affairs charter and its first director.
- The publication date of the Project Meridian report, and whether the unclassified version names procurement priorities.
- Any statement on the successor arrangement for Operation Inherent Resolve.

## Implications for organisations

**Defence suppliers and investors:** Demand signals from FORTRESS America and the Munitions Acceleration Council are real; their volume depends on FY27 enactment. Domestic sourcing pressure favours US producers of rare earths, specialty metals, semiconductors and propellants and raises the bar for foreign content.

**Operators in the Middle East:** Unmanned systems in support of Operation Epic Fury raise the density of drones near US and partner sites. The end of Operation Inherent Resolve leaves a counterterrorism presence from Jordan and in Iraq; cover and liaison arrangements depend on that successor posture.

**European and Indo-Pacific partners:** The Quantico agenda is domestic and organisational. Colby's statement keeps denial along the First Island Chain and allied burden-sharing at the core, so expectations of partners remain demanding.

**Universities, employers and HR:** The cadet programme and the religious-affairs office change the recruitment environment for defence-adjacent employers and partner universities, and may draw scrutiny from staff and regulators.

## Recommended actions

### Within 72 hours

- Planning and risk leads tag each Quantico item in their files as order, claim or request, and remove speech figures from capacity assumptions.
- Security leads for Middle East sites confirm counter-drone reporting lines with the local US or partner liaison.

### Within seven days

- Supply-chain owners map exposure to rare earths, specialty metals, semiconductors and propellants in US defence programmes and flag foreign-content dependencies.
- Business development teams with US defence clients set FY27 enactment as the gate for capacity commitments.

### Within thirty days

- The executive team reviews Middle East cover and evacuation assumptions against the post-OIR posture published by then.
- Public-affairs and HR leads prepare a position on partnerships with institutions in America's Corps of Cadets and on engagement with the Office of Religious Affairs, where relevant.
- The strategy owner sets calendar checks for the Project Meridian report and the next flag-officer table.

## Appendix

### Reading guide: likelihood and confidence

Likelihood terms follow the seven-step PHIA Probability Yardstick. Every likelihood statement names a time window, its basis and a counter-indicator. No percentages are used in the text.

| Scale | Term                         | German                   |
|-------|------------------------------|--------------------------|
|       | <b>remote chance</b>         | äußerst unwahrscheinlich |
|       | <b>highly unlikely</b>       | sehr unwahrscheinlich    |
|       | <b>unlikely</b>              | unwahrscheinlich         |
|       | <b>realistic possibility</b> | realistische Möglichkeit |
|       | <b>likely</b>                | wahrscheinlich           |
|       | <b>highly likely</b>         | sehr wahrscheinlich      |
|       | <b>almost certain</b>        | nahezu sicher            |

**Confidence** (low, moderate, high) is stated separately: it describes the strength of the reasoning, based on the information base, analytical rigour and volatility, not the likelihood itself. **Risk levels** (Moderate to Critical) and **source status** (confirmed, reported, claimed) are further, separate dimensions.

### Selected sources

- U.S. Department of War, release: six major initiatives at Quantico, 30 September 2026: <https://www.war.gov/News/Releases/Release/Article/4615424/secretary-hegseth-announces-six-major-initiatives-at-quantico-speech/>
- Matthew Olay, Pentagon News, State of the Force address, 2 October 2026: [https://www.army.mil/article/295897/hegseth\\_delivers\\_state\\_of\\_the\\_force\\_address\\_outlines\\_series\\_of\\_new\\_initiatives](https://www.army.mil/article/295897/hegseth_delivers_state_of_the_force_address_outlines_series_of_new_initiatives)
- Elbridge A. Colby, statement to the Senate Armed Services Committee, 22 September 2026: <https://media.defense.gov/2026/Sep/28/2004007869/-1/-1/1/UPDATE-ON-IMPLEMENTATION-OF-THE-2026-NATIONAL-DEFENSE-STRATEGY-AS-SUBMITTED-TO-THE-SENATE-ARMED-SERVICES-COMMITTEE.PDF>
- Lead Inspector General, Operation Inherent Resolve, 1 April – 30 June 2026: [https://media.defense.gov/2026/Aug/27/2003988694/-1/-1/1/OIR\\_Q3\\_JUN2026\\_FINAL\\_508%20SECURE.PDF](https://media.defense.gov/2026/Aug/27/2003988694/-1/-1/1/OIR_Q3_JUN2026_FINAL_508%20SECURE.PDF)
- The Hindu / AFP, 1 October 2026: <https://www.thehindu.com/news/international/hegseth-says-us-cut-number-generals-admirals-by-20/article71534341.ece>
- Military Times, 1 October 2026: <https://www.militarytimes.com/news/pentagon-congress/2026/10/01/pentagon-launches-office-of-religious-affairs-will-report-directly-to-hegseth/>

### Method note

This report is based on open-source material available up to 2 October 2026, 17:00 UTC, and analytical assessment by SF Custos Global. Likelihood describes the assessed prospect of a development; confidence describes the strength of its evidential basis. It does not replace legal, insurance, sanctions, medical or country-specific professional advice.

Revised edition of 8 October 2026, replacing the edition of 2 October 2026. The information cut-off is unchanged; details that could not be re-checked against an accessible source were removed.