
RECORD VERSION

STATEMENT BY

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BEFORE THE

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Chairperson Jackson, Ranking Member Crow, and Members of the Committee, thank you for the invitation to provide the Defense Intelligence Agency's (DIA's) assessment of the global security environment. This year, even more than years past, the threat landscape is changing rapidly and we are using this Statement for the Record to convey not only what we see as the current threats, but also to illuminate the trends and threats we see going forward that we must address. While additional details are available at higher classifications, providing this open statement is a critical service for the Congress, the American public, and our allies and partners.

DIA commits to you that we are constantly evolving to best posture, collect, analyze, predict, warn, and meet every challenge presented by the global security environment. We will always provide exceptional decision advantage to our Nation through world-class support to the warfighter, our national leaders, and the acquisition community. I am privileged to lead this organization, and I want to assure you that DIA officers, who serve in more than 140 nations around the world, are dedicated to providing our Congressional Oversight committees the soundest and most predictive insights into the strategic, operational, and tactical security threats confronting the United States.

My aim through this statement and in this hearing is to crystalize these threats and to support this committee in its critical work of defending the Nation. Thank you for your continued confidence. We are grateful for your vital support.

National Security Threats Expanding, Fueled by Advanced Technology

The United States is confronting an increasingly complex national security threat environment. As our adversaries pursue military modernization, developments in artificial intelligence (AI), biotechnology, quantum sciences, microelectronics, space, cyber, and unmanned systems are rapidly transforming the nature of conflict and the global threat landscape. Our adversaries are deepening cooperation and lending military, diplomatic, and economic support to each other's conflicts and operations to circumvent U.S. instruments of power. Transnational criminal organizations and terrorist groups are exploiting geostrategic conditions to evade authorities. Advanced technologies also are enabling foreign intelligence services to target our personnel and activities in new ways. The rapid pace of innovation will accelerate in the coming years, generating additional pathways for our adversaries to threaten U.S. interests.

The U.S. Homeland and Southern Border

The United States continues to face threats emanating from adversaries and nonstate entities seeking to target U.S. citizens and erode U.S. competitive advantage. Our adversaries are developing long-range and novel missile capabilities to target the homeland and continue to seek new avenues to threaten our cyber networks and critical infrastructure. Along our southern border, transnational criminal organizations, drug trafficking organizations, and terrorist groups are attempting to evade regional and U.S. security forces to conduct activities aimed at harming U.S. citizens.

Missile Threat

U.S. adversaries continue efforts to advance their missile capabilities—including traditional ballistic missiles, aeroballistic and cruise missiles, and novel nuclear and conventional warhead delivery systems—to threaten the homeland. China and Russia are expanding their missile inventories and aggressively pursuing new systems, such as hypersonic glide vehicles, to support their nuclear strategies

of coercion and deterrence and to complicate U.S. defenses. Both countries are attempting to undermine the development of Golden Dome for America and are probably developing methods to attempt to defeat the system in the event of a conflict. In October, North Korea displayed a new solid-propellant intercontinental ballistic missile (ICBM), which is likely intended to improve North Korea's ability to challenge U.S. homeland ballistic missile defenses.

Terrorism

The primary Salafi jihadist terrorist threats to the U.S. homeland in 2026 probably will include ISIS's branches in Syria and Afghanistan-Pakistan, and al-Qa'ida's affiliate in Yemen. These groups give high priority to attacking the United States, exploiting a broad online network of supporters to advance plotting in the U.S. homeland. We have no current indications they are planning to exploit the U.S. southern border to enable their plotting, particularly after southern border and immigration restrictions were implemented in early 2025.

Cartels and Drug Trafficking

Mexico-based cartels and other Western Hemisphere-based U.S.-designated foreign terrorist organizations (FTOs) leaders probably will continue to refrain from authorizing attacks on U.S. personnel, facilities, or the U.S. homeland as they evaluate the implications of U.S. counternarcotics efforts on their trafficking activities. We have not yet observed significant retaliation against the United States in response to enhanced counternarcotics operations, including U.S. strikes against drug trafficking vessels in the Caribbean and Pacific, the arrest of Nicolas Maduro, or after Mexico's extradition of nearly one hundred high-profile cartel members to the United States this past year. Nonetheless, continued efforts by these groups to traffic hundreds of metric tons of drugs per year, which harm U.S. citizens, are a catalyst for destabilizing violence throughout the Western Hemisphere.

Since the escalation of U.S. counterdrug activities in August, traffickers have reacted to U.S. operations in Latin America by stockpiling cocaine, rerouting shipments to existing and new markets, and seeking alternative conveyance methods such as fishing vessels and self-propelled semisubmersibles. Fentanyl seizures at the U.S. border declined for a second year, altogether dropping 65 percent. Mexican drug producers are experimenting with alternative fentanyl precursors to overcome supply chain constraints, and some have suggested that the risk and cost of producing and smuggling fentanyl is expanding.

Mexican cartels have access to a wide variety of improvised explosive devices and military-grade weapons, such as .50 caliber sniper rifles, machine guns, miniguns, and rocket and grenade launchers. More than 70 percent of firearms used in major crimes in Mexico are smuggled from the United States, according to the Mexican government. Similarly, from 2017 to 2025, firearms originating from the United States accounted for nearly 70 percent of seizures in the Caribbean, arming FTOs and gangs that destabilize citizen security in Haiti, Jamaica, and other Caribbean islands. Mexican cartels also have demonstrated an ability to effectively target rivals and Mexican security forces using weaponized drones.

Unmanned Systems

The threat posed by unmanned systems (UXSs) to Department of War (DoW) interests and the U.S. homeland will likely increase in coming years, driven by advances in UXS-enabling technologies, lessons learned by adversaries in active combat zones, and the difficulty in attributing intent to actors using

these systems. Hostile actors may exploit these factors to improve UXS weaponization and surveillance capabilities against the United States.

Many UXSs are inexpensive, widely available, and easy to operate and adapt—enabling a broad range of actors to exploit their capabilities. As technology advances, the means by which UXS can potentially surveil and threaten the U.S. homeland, including critical infrastructure and military installations, will expand.

More advanced UXS swarms complicate the threat posed to traditional U.S. defense systems, given continued improvements in range, payload, and power. UXS technology’s continued maturation and convergence with other technologies—including AI, big data, and 5G telecommunications—will exacerbate this threat.

Cooperation Among U.S. Adversaries

Beijing, Moscow, Pyongyang, and Tehran continue efforts to enhance ties to undermine the influence of the United States and its allies. Russia’s war in Ukraine accelerated some of this cooperation among our adversaries, most of which is transpiring in bilateral channels. This cooperation is likely to take the form of supporting one another in regional conflicts and in international fora, collaborating to evade sanctions, and taking steps to pressure the West. However, friction rooted in general mistrust and competing agendas will persist among China, Russia, Iran, and North Korea—most recently as a result of tension over the lack of support to Iran during the past year. We anticipate any multilateral cooperation among these adversaries will lag behind individual bilateral cooperative relationships as these governments give priority to the transactional nature, discretion, and speed of bilateral partnerships. Prominent areas of cooperation include:

- **China** will likely continue to advance its strategic partnership with Russia but will avoid formal alliances and will likely take measures to avoid providing lethal military assistance to Russia that might elicit strategic, reputational, or economic costs. China continues to bolster Russia’s economy against international sanctions through trade, and People’s Republic of China (PRC) defense firms have provided crucial dual-use components to support Russia’s defense industries. Beijing legitimizes Russia’s global actions by meeting with Russian leaders and working with Moscow in various fora such as: the United Nations; Brazil, Russia, India, China, and South Africa (BRICS); the Shanghai Cooperation Organization (SCO); and the Association of Southeast Asian Nations (ASEAN). Beijing is steadily expanding bilateral military exercises and patrols with Moscow, including the first combined submarine patrol this past year. China probably will continue to block new efforts to sanction North Korea. China approaches its defense ties to Iran with caution because of Beijing’s aversion to reputational damage, harmful sanctions, and conflict entanglement—factors that probably will dissuade Beijing from providing advanced weapons systems to Tehran during the next year.
- **Russia.** The war in Ukraine has deepened bilateral cooperation between Russia and China, Iran, and North Korea, all of whom share Moscow’s opposition to U.S. global influence and military power. Moscow very likely will further expand these bilateral partnerships over the next year, while seeking to maximize benefits and avoid commitments that conflict with Russia’s national

security interests. This expanded cooperation probably will include sharing lessons learned in Ukraine, conducting joint exercises, and sharing technology.

- **Iran.** Iran has signed strategic cooperation agreements with both China and Russia but neither agreement includes a defense clause or requires China or Russia to provide war-time military support to Iran. Iran has publicly touted its relationship with China and Russia, but so far has not received full weapons systems from these partners or North Korea in its conflict against the United States and Israel. Iran is seeking to acquire intelligence, air defense systems, and other military equipment from China and Russia given Iran's cooperation with Beijing and Moscow in these areas in the past. Iran historically has benefited from its ties to China, which accounts for 90 percent of its oil sales, and Chinese commercial firms have provided satellite imagery and dual-use goods and chemical precursors with potential military applications.
- **North Korea.** North Korea balances relations with China and Russia, while seeking to obtain the most concessions from each country, and limiting interactions with Iran primarily to statements of support. North Korea continues to rapidly develop its bilateral relationship with Moscow by supplying materiel for Russia's war effort against Ukraine, gaining technical, diplomatic, and economic support for Pyongyang's nuclear and military programs in return. Since 2024, North Korea has provided more than 150 ballistic missiles to Russia for use against Ukraine and more than 11,000 troops to Russia to assist in operations to clear Ukrainian forces from and defend Kursk, including demining and construction efforts. Pyongyang probably is willing to sell to Moscow shorter-range, next-generation theater ballistic missile systems in its inventory. North Korean Leader Kim Jong Un has taken advantage of closer relations with Russia to improve relations with, and reduce dependency on, China. Beijing has dropped reference to North Korean denuclearization from public statements. Despite the lack of coordinated trilateral engagement, North Korea is better positioned today to resist pressure from international sanctions thanks in part to its improved relationships with Moscow and Beijing.

China

China seeks to become the dominant power in the Indo-Pacific, unify with Taiwan, advance the development and resiliency of their economy, and become technologically self-sufficient by 2049. In pursuit of these goals, China continues to advance its global capabilities to compete with the United States and likeminded regional partners across the diplomatic, information, military, and economic domains. PRC President Xi Jinping will continue to oversee a whole-of-government effort to prepare China for competition with the United States and likeminded regional partners, to include efforts to test U.S. military alliances and partnerships across the Indo-Pacific region.

This past year, Beijing closely watched for possible changes in Washington's policy priorities for international diplomacy, defense, trade, U.S.-PRC relations, and support for Taiwan's self-defense capabilities. Despite perceiving an increased U.S. focus on the homeland, Beijing continues to view Washington as committed to militarily containing China and suppressing its rise. In the year ahead, China will seek opportunities to drive wedges between Washington and its allies and partners. Along its periphery, China likely will sustain multidomain pressure campaigns against Japan, the Philippines, South Korea, Taiwan, and other partners that resist China's attempts to assert its unilateral territorial claims.

Beijing will promote narratives that criticize Washington’s foreign policy and military actions to present the United States as destabilizing and China as a more responsible global leader.

Military Modernization and Spending

China is rapidly advancing its military modernization efforts and developing capabilities across all warfare domains that could enable its military to seize Taiwan by force, project power across the First Island Chain, and disrupt U.S. attempts to intervene in a regional conflict. In 2021, Xi Jinping set forth a strategic “three-step” plan with specific military modernization targets for 2027, 2035, and 2049 to transform the People’s Liberation Army (PLA) into a “world class military.” This plan continues to drive current modernization efforts and aligns the PLA’s development with broader national objectives, such as promoting “a new type of international relations,” increasing involvement in “global governance,” and unification with Taiwan.

- In 2025, China announced a nominal 7.2-percent annual military budget increase to \$253 billion, and in 2026, China announced another 7-percent increase to \$275 billion. However, as of 2025, China’s actual defense spending probably was between \$325 billion and \$400 billion, which includes omitted categories such as subsidies to defense-industrial companies and province-level defense investments.
- In September 2025, China commemorated the 80th anniversary of the end of World War II with a parade featuring both fielded and developmental weapons to emphasize nuclear deterrence and unmanned capabilities as a foundational element of a modernized PLA. In particular, the PLA displayed systems from all three legs of its nuclear triad for the first time, as well as multidomain UXS including carrier-capable unmanned aerial vehicles (UAVs) and unmanned underwater vessels.

The PLA’s priorities for the next 5 years, embedded within the 15th Five-Year Plan, emphasize accelerating the development of advanced combat capabilities, strengthening Chinese Communist Party (CCP) governance of the military, and enhancing strategic assets. Beijing has also prioritized the construction of a military-civil fusion system to improve the two-way flow of technology and resources between the military and civilian sectors. China seeks to dominate a range of advanced and emerging technologies—including AI, biotechnology, quantum technology, advanced semiconductors, and advanced energy generation and storage—that promise to be foundational for future civil and military innovation.

- China has sustained its military pressure around Taiwan following an increase in 2024 after the election of Taiwan president Lai Ching-te. In April 2025, Beijing’s STRAIT THUNDER exercise showed that the PLA is advancing its capabilities to blockade Taiwan, including the targeting of energy infrastructure on the island. In June 2025, the PLA Navy (PLAN) executed its first exercise with two aircraft carriers beyond the First Island Chain, with one of the carriers transiting beyond the Second Island Chain—east of Guam—for the first time ever. These exercises demonstrate China’s growing ability and capacity to project power across the Indo-Pacific region.
- In November 2025, the PLA commissioned its third aircraft carrier, the Fujian class CV-18. The CV-18 utilizes an electromagnetic catapult system and can carry 60 aircraft to include UAVs, J-15T and J-35 fighters, and the KJ-600 airborne early warning aircraft.

- Following a reorganization in 2024 that realigned the Aerospace Force, Cyberspace Force, Information Support Force, and Joint Logistics Support Force directly under the Central Military Commission (CMC), the PLA conducted several exercises demonstrating its ability to maintain and coordinate command and control during joint combat operations. The PLA's peacetime and wartime requirements for real-time data support to joint operations, analysis, and decision-making continues to fuel demand for advanced and domestically produced C4ISR systems.
- As of 2025, the PLA Rocket Force had fielded approximately 900 short-range ballistic missiles (no change from 2024), 1,300 medium-range ballistic missiles (MRBMs) (no change from 2024), 550 intermediate-range ballistic missiles (up from 500 in 2024), 400 ICBMs (no change from 2024), and 300 ground-launched cruise missiles (down from 400 in 2024).
- China most likely possesses capabilities relevant to chemical and biological warfare (CBW) that pose a threat to U.S., allied, and partner forces as well as civilian populations.

Despite these military advances and the PLA's expanding operational areas, Beijing continues to be either unwilling or unable to avoid unsafe interactions in international air and maritime domains, which threatens U.S. and international air and sea traffic operating in the area. In July, a PLA ship lased a German military aircraft operating in the Gulf of Aden. In the South China Sea (SCS), PLA operators have acted aggressively. A PLAN ship collided with a China Coast Guard (CCG) vessel while pursuing a Philippine patrol boat near Scarborough Reef in August. In October, a PLA Air Force aircraft released flares in close proximity to a Royal Australian Air Force P-8A Poseidon maritime patrol aircraft conducting a maritime surveillance patrol.

Throughout 2025, Xi intensified his anticorruption and political rectification campaign across the PLA, targeting senior officers at all echelons, including top national-level leaders and operational commanders. In October, China's Ministry of National Defense confirmed widespread speculation about the disappearance of several senior PLA officers, announcing the removal of nine military leaders for "serious violations of Party discipline" involving "extremely large sums of money." Among the officers removed were former CMC Vice Chairman He Weidong, former Political Work Department Director Miao Hua, and former Eastern Theater Command Commander Qin Shutong. Xi also elevated Zhang Shengmin, secretary of the CMC Discipline Inspection Commission, to CMC vice chairman, signaling his continued focus on combating systemic corruption and enforcing political loyalty within the PLA in the year ahead. Xi probably views corruption within the PLA as the greatest threat to the CCP's political control of the military, undermining political loyalty, ability to follow orders, and military readiness and morale.

Nuclear Capabilities

China's nuclear warhead stockpile probably has surpassed 600 operational nuclear warheads. We estimate that China will have more than 1,000 operational nuclear warheads by 2030—many of which will be deployed at higher readiness levels for faster response times—and will continue growing its force through 2035, in line with its goal of ensuring PLA modernization is "basically complete" that year. This supports the PLA's objective to achieve a more diverse nuclear force, comprising systems including low-yield precision strike missiles and ICBMs with multi-megaton yields, to provide a broader range of nuclear response options.

- China’s approach to using nuclear force is based on PLA “deterrence” of an enemy first strike and “counterstrike” against an adversary’s military capability, population, and economy when deterrence fails. Beijing probably seeks to use nuclear deterrence to deter and limit adversary military intervention in a conventional conflict. China’s current force modernization suggests that it seeks to have the ability to inflict far greater levels of overwhelming damage to an adversary in a nuclear exchange.

Space and Counterspace Capabilities

China is expanding its space and counterspace capabilities at an increasing rate, aiming to erode U.S. space superiority, contributing to the PLA’s capabilities, and exploiting a perceived U.S. reliance on space-based systems. In 2025, China conducted 93 space launches that placed approximately 304 satellites in orbit, which surpassed its previous record of 68 launches in 2024, and was second worldwide to the United States in the total number of space launches. China now has nearly 1,200 satellites in orbit with over 500 satellites with optical, multispectral, radar, and radio frequency sensors, which improves China’s ability to detect U.S. military units such as aircraft carriers, expeditionary forces, and air wings.

- China is fielding advanced communications satellites, including large satellite constellations in low Earth orbit, capable of transmitting large amounts of data with potential military applications. In 2025, China’s state-owned enterprise SatNet continued to launch satellites for its communications large satellite constellations project, bringing the total to approximately 127 currently in orbit with plans to place 400 satellites in orbit by 2027. In October 2025, China launched the sixth batch of approximately 18 Qianfan Internet satellites, and it now has more than 100 of these satellites in orbit.
- China has placed satellites in orbit that could expand its counterspace capabilities, including several new TJS and Shiyang-series satellites. China announced its first-ever satellite refueling experiments in geosynchronous Earth orbit with the Shiyang-21 and Shiyang-25, which could potentially be applied to extending the range and firepower of orbital weapons. Additionally, the PLA continues to research and develop ground-based antisatellite weapons that can threaten satellites, including their signals and sensitive electronics.
- Beyond Earth’s orbits, China is developing cislunar capabilities that support national political, economic, and military goals on and near the Moon. In 2025, China experimented with cislunar communication, navigation, and maneuvering through its Distant Retrograde Orbit and Tiandu satellite missions. In 2026, China plans to conduct its first launch of the Long March 10 rocket and the Mengzhou crew spacecraft, which will have both low Earth orbit and lunar variants. Through 2028, China plans to land near the lunar south pole, to lay the foundation for China’s International Lunar Research Station.

Cyberspace Capabilities

PRC cyberactors continue to target a wide range of government, critical infrastructure, and business networks in the United States and globally. These cyberactors conduct cyberoperations to collect intelligence relevant to PRC interests, and probably have pre-positioned for potential cyberattacks on U.S. critical infrastructure networks during a crisis or conflict. China very likely will continue to develop access to networks it assesses will provide it with intelligence or military value.

- Since at least 2021, PRC-affiliated cyberactors known as Salt Typhoon have targeted U.S. and allies' telecommunications, government, transport, lodging, and military infrastructure networks. The data stolen by these cyberactors enables China to identify and track communication and movement of its intelligence targets.
- Since at least 2019, another group of PRC state-sponsored cyberactors, Volt Typhoon, has been compromising and pre-positioning itself on U.S. critical infrastructure organizations' networks, probably to enable disruption or destruction of critical services in the event of increased geopolitical tensions or military conflict with the United States and its allies.

Taiwan

Beijing likely will sustain its campaign of diplomatic, information, military, and economic pressure on Taipei to advance China's objective of unification with Taiwan, deter any move by Taiwan toward independence, and test Washington's resolve to support Taipei.

China will continue to develop its capabilities for a variety of military options to force or compel unification with Taiwan, including military pressure operations, air and maritime blockades, joint firepower strikes, seizure of Taiwan's smaller outlying islands, and a full-scale amphibious invasion. China's leaders probably view the PLA's capabilities for a Taiwan campaign as improving but remain unsure of the PLA's readiness to successfully seize Taiwan while countering potential U.S. and allied involvement. Beijing appears willing to defer seizing Taiwan by force as long as China calculates peaceful unification is achievable with means short of war. As of today, China's risks and costs of forcing unification probably continue to outweigh the benefits, and its stated redlines have not been crossed.

South China Sea

China is employing elements of its national power to overwhelm rival claimants and consolidate regional control over disputed areas of the SCS. China continues to contest the Philippines' presence in the SCS, particularly at Second Thomas Shoal, despite a 2016 international tribunal ruling in favor of Manila. The PLAN, CCG, and China Maritime Militia forcefully assert China's sovereignty by using water cannons, lasers, and jamming technologies against Philippine ships and aircraft and conducting dangerous and aggressive maneuvering, resulting in collisions with Philippine assets. China also emplaces oceanographic buoys, threatens to conduct live fires near contested features, and continues to use legally accepted means—such as announcing establishment of a nature reserve—to assert China's sovereignty over Scarborough Reef. These aggressive responses by the PLA are likely to continue during the next year, creating conditions that risk escalation.

Global Military Operations

Beijing is improving PLA systems to operate farther from China for longer periods and establishing a more robust overseas logistics and basing infrastructure to sustain deployments at greater distances—efforts that can potentially impede U.S. global operations or international commerce during a conflict. Beijing is pursuing a mix of military logistics models—including preferred access to commercial infrastructure abroad, exclusive PLA logistics facilities with pre-positioned supplies collocated with commercial infrastructure, and bases with stationed forces—to support China's overseas military logistics needs.

- In April 2025, Cambodia’s prime minister hosted a PLA delegation to inaugurate the Joint Logistics and Training Center at Ream Naval Base in Cambodia. China’s Ministry of National Defense insists that the center will support combined operations in areas like counterterrorism, disaster prevention, humanitarian assistance, and training. The PLA has continuously stationed two naval combatants at the facility’s pier, even before the training center was officially inaugurated.
- In addition to its support base in Djibouti, China probably also has considered establishing PLA military facilities in Angola, Bangladesh, Burma, Cuba, Equatorial Guinea, Gabon, Indonesia, Kenya, Mozambique, Namibia, Nigeria, Pakistan, Papua New Guinea, Seychelles, Solomon Islands, Sri Lanka, Tajikistan, Tanzania, Thailand, United Arab Emirates, and Vanuatu. The PLA is probably most interested in military access along the sea lines of communication in the Malacca Strait, the Strait of Hormuz, and other areas in Africa and the Middle East.
- In the past 2 years, China has undertaken various overseas deployments, including PLA Navy Marine Corps participation in an exercise in Brazil, and visits by a PLA military medical ship to several countries in the Caribbean, the Pacific, and Latin America. These deployments further China’s soft power and military influence.

Russia

Russia’s war against Ukraine is entering its fourth year, and Russian President Vladimir Putin remains determined to prevail in what he has described as an existential and legacy-shaping conflict. Putin has reiterated his non-negotiable demand that Ukraine remain permanently prohibited from joining NATO, while insisting Kyiv withdraw all forces from Donetsk, Luhansk, Kherson, and Zaporizhzhia Oblasts. He has also vowed not to return any Russian-occupied territory and declared there can be no peace without Ukraine’s neutrality, demilitarization, and so-called “denazification.” Russia’s slow but steady territorial gains probably have bolstered Putin’s confidence in Russia’s ultimate victory and his belief that Russia can outlast Ukraine and its Western backers. Putin is under little domestic pressure to soften his demands due to these battlefield gains and lack of domestic backlash against the war.

Trajectory of the Conflict

The battlefield probably will remain in Russia’s favor through at least 2026, though Russian gains will come at the expense of high personnel and equipment losses. Russian casualties have exceeded 1 million since the start of the conflict, with nearly 400,000 in 2025 alone. Despite these losses, Russia probably has the economic, industrial, and demographic means to sustain the war through at least 2027. Over the past year, Russian forces have made steady but slow progress toward capturing the remaining territory of Donetsk and Luhansk Oblasts, and advancing in Kherson and Zaporizhzhia Oblasts. Russia captured approximately 4,000 square kilometers in 2025, a 22-percent increase from 2024, roughly the size of the state of Rhode Island. Russia, in late 2025, increased the scope and scale of its long-range strikes against Ukrainian energy infrastructure to impose costs on the Ukrainian public ahead of the winter, a tactic that Russia previously employed to degrade Ukrainian national support for the war. In response to perceived Western-enabled Ukrainian long-range drone and missile attacks into Russia, Moscow has conducted reciprocal, conventional strikes against Ukraine, almost certainly to demonstrate its resolve while managing the risks of escalation with NATO.

Military Capabilities and Modernization

Russia's conventional capabilities to deter, fight, or militarily compete with NATO almost certainly will remain constrained through at least 2026 because of the ongoing invasion of Ukraine. However, during the past year, Russia has dramatically increased the production and use of UXs, providing Moscow a low-cost and effective tool to impose costs on Ukraine—both on the battlefield and beyond. In 2025, Russia announced the creation of a new military branch for UXs, enabling Moscow to speed up the adoption of UAV best practices learned in Ukraine and streamline training for, and employment of, these systems for future conflicts.

Russia's Navy very likely will remain Russia's primary global power projection tool over the next year as its ground forces and the majority of its aerospace forces remain committed in Ukraine. In 2025, the Russian Navy conducted multiple multinational patrols and exercises, including with China, which involved the first joint submarine patrol between the two navies.

Russia has the world's largest and most diverse nuclear weapons stockpile, which Moscow views as a sufficient strategic deterrent against the United States and NATO and the ultimate guarantor of its sovereignty and regime security. During the past year, Russia has continued to enhance and update its extensive stockpile of theater-level nuclear or dual-capable weapons. Russia is also continuing its modernization of early warning and nuclear command, control, and communication (NC3) infrastructure, very likely to bolster its ability to respond to adversary missile attacks.

In October 2025, Russia demonstrated significant technical advancement by testing two novel, intercontinental-range nuclear weapons—the RS-SSC-X-9 “Skyfall” nuclear-powered cruise missile and the nuclear-powered Poseidon torpedo. In doing so, Moscow signaled the importance it places on maintaining its ability to inflict unacceptable damage even under the most challenging circumstances, as well as its longstanding commitment to undermining U.S. homeland defense systems. These systems represent only a portion of an increasingly modernized and diverse nuclear weapons program, which likely includes about 2,600 strategic and 2,000 nonstrategic nuclear warheads. In September, Russian and Belarusian state officials reiterated plans to use Belarus as a forward operating base for Russian tactical nuclear weapons.

Russia also continues to pursue a satellite capable of carrying a nuclear device. This type of space-based capability would pose a threat to the thousands of satellites operated by countries and companies around the world. Russia continues to develop—and in some cases has already fielded—nonnuclear counterspace weapons, including jamming systems, lasers, and a ground-launched antisatellite missile.

Russia is continuing to prioritize the expansion of its space and counterspace capabilities, even as international sanctions constrain supply chains and military operations in Ukraine compete for resources. From January through December 2025, Russia conducted 17 space launches, on par with 17 launched the previous year, and placed upwards of 70 satellites in space. These included three Russian satellites that conducted close proximity maneuvers in space and one satellite co-orbital with a U.S. Government satellite, which could have potential military applications. In July 2025, Russia declared that it would jam European commercial satellites it views as aiding Ukraine, and in November 2025, British and German officials claimed Russia had tracked and jammed their space assets.

Russia maintains offensive CBW programs and probably is expanding these capabilities. Russia has used fourth-generation nerve agents in targeted killings in 2018 and 2020, employed pharmaceutical-based agents in special operations in 2002 and 2005, and used riot-control agents and chloropicrin in battlefield operations in Ukraine.

Moscow's public plans for FY 2026 are to spend \$130 billion on defense, though since the start of the war, Russia has overspent its planned defense budget by an average of \$25 billion annually. During the past 4 years, Russia has concentrated investments in its military-industrial complex, which makes up nearly 8 percent of its GDP, at the expense of its civilian economy. Russian budget documents show that Russia is planning to sustain high levels of defense spending through at least 2028.

Cyberspace Capabilities

Russia has evolved and adapted its cyberoperations throughout the Ukraine conflict, improving Moscow's ability to integrate cyberoperations with its conventional forces. Russian cyberactors are incorporating recent developments in large-language models and generative AI into their offensive cyberoperations, which probably will improve Russia's ability to automate cyberoperations targeting U.S. networks.

Indirect Competition Activities

Moscow uses indirect actions to compete with the West and overcome military overmatch by exploiting asymmetry to advance Russian interests without incurring the costs of full-scale warfare. Moscow also employs covert action, information operations, cyberactivities, airspace violations, and proxies to undermine Ukraine's war effort, compete against the West, and test NATO capabilities and resolve while remaining under the threshold of direct armed conflict. Since at least early 2024, pro-Russian saboteurs acting at the behest of Russian intelligence have been linked to various covert plots using arson, sabotage, and assassinations against military and civilian targets in Europe to undermine Western cohesion and military support to Ukraine.

Russia's Global Presence

Russia is expanding its military, diplomatic, and economic ties with the Global South to portray itself as a great power, undermine U.S. global power and prestige, and promote an alternative to the U.S.-led world order. Moscow is pursuing basing agreements in the Mediterranean Sea, Red Sea, and Indian Ocean regions to enhance its power projection capabilities, while modestly expanding joint military exercises, arms sales, and technology transfers. Additional focus areas for Russia's partnerships include:

- **Asia.** Russia relies on China as its key partner in countering the United States in the Indo-Pacific region, and almost certainly will advance ties in 2026 by continuing military technical cooperation, combined patrols, and sharing lessons learned from its war in Ukraine. Russia almost certainly will also maintain military, diplomatic, and economic cooperation with North Korea through 2026. This cooperation likely includes sharing lessons learned in Ukraine, supporting North Korea at the United Nations, and employing North Korean workers.
- **Central Asia.** Russia views Central Asia as its traditional sphere of influence and almost certainly will attempt to counter Western actions in the region through 2026. In July, Russia officially recognized the Taliban as the government of the Islamic Emirate of Afghanistan—the first

country to do so—and probably will strengthen its diplomatic and security ties to Kabul during the next year.

- **Arctic.** As the Arctic becomes a focal point of international competition, the Kremlin is increasingly concerned by the growth of NATO forces in the region and the perceived threat they pose to Russia’s economic interests. In response, Moscow is modernizing its military forces in the region to counter NATO, defend these economic interests, and ensure its dominance over the Northern Sea Route, though requirements in Ukraine constrain resources devoted to these efforts.
- **Middle East.** Russia suffered a setback in Syria with the ousting of the Asad regime, but is engaging with the new Syrian government in the hope of preserving its military presence at Hmeimim Airbase, the port of Tartus in northwestern Syria, and the Qamishli airport in northeastern Syria. Iran remains the Kremlin’s most important strategic partner in the Middle East and a substantive backer of its Ukraine campaign.
- **Turkey.** Russia has sustained diplomatic cooperation and strong economic ties with Turkey, which have helped Moscow to weather Western sanctions and avoid international isolation. Putin’s longstanding relationship with Turkish President Tayyip Erdogan has enabled him to prevent tensions in the Caucasus and Turkish support for Ukraine from imperiling bilateral relations.
- **Caucasus Region.** Russia is losing influence in the Caucasus region after its failure to defend Armenia from Azerbaijan in 2022. Moscow’s focus on Ukraine has hindered its ability to counter Armenia’s Western drift, which probably will compel the Kremlin to consider more provocative measures to pressure the Armenian government in an effort to recoup its influence.
- **Africa.** Russia’s Africa Corps is playing an increasing role in addressing the security needs of various African states, which enables Moscow to try to parlay such engagement into greater prestige and influence. Moscow has sought to expand its footprint in Africa, gain access to natural resources, and build political influence with various states through opportunistic arms sales, paramilitary deployments, and military basing and access agreements.
- **Latin America.** Russia attaches relatively low priority to Latin America, though it maintains historical partnerships with Cuba, Nicaragua, and Venezuela. Moscow opportunistically collaborates with receptive nations on arms sales, equipment maintenance, security training, and military deployments, while seeking to maintain Latin American nations’ neutrality in the Russia-Ukraine conflict.

Iran and its Proxy Forces

Iran and its proxies are engaged in a multifront armed conflict against the United States, Israel, and their regional partners. Coalition strikes during Operation EPIC FURY have eliminated some of Iran’s civilian and military officials, including former Supreme Leader Ali Hoseini-Khamenei, further degraded Iranian military capabilities, and destroyed key infrastructure supporting Iran’s energy sector. Tehran almost certainly expanded its wartime objectives beyond securing the regime’s survival to include deterring strikes on Iran and extracting U.S. concessions, primarily by exploiting its control of the Strait of Hormuz. Tehran and its proxies have conducted weeks of attacks on U.S. and Israeli targets—including those in densely populated civilian areas and in the Gulf states—to raise the conflict’s economic, human, and

political costs. Should the regime survive, it almost certainly will focus on reconstituting its military capabilities to improve its ability to defend against external attacks and domestic dissent, especially following its late December 2025 to mid-January 2026 economic-driven protests. Iranian authorities almost certainly are keenly aware of widespread discontent among the Iranian populace, judging from the volume of celebrations following the former supreme leader's death, and have instituted drastic measures to thwart any attempt at a popular uprising.

- Before the 2026 conflict, Iran had attempted to restore its degraded defenses and mitigate its military capability shortfalls that were exposed in the 12-Day War. Iran focused on rebuilding damaged infrastructure and pursuing Russia- and China-origin systems and materials to replace equipment destroyed by Israeli strikes since 2024. Iran prepared designated succession plans for military commanders and decentralized command and control which enabled Tehran to partially mitigate the effectiveness of coalition decapitation strikes.

Military Activity, Capabilities, and Priorities

Iran retains thousands of missiles and one-way attack UAVs that can threaten U.S. and partner forces throughout the region, despite degradations to its capabilities from both attrition and expenditure. In addition, Iran poses a persistent threat to freedom of navigation throughout the Persian Gulf, Strait of Hormuz, and Gulf of Oman, including retaliatory seizures of commercial ships and the threat of mining the Strait of Hormuz. Since the beginning of Operation EPIC FURY, Iran has effectively closed the Strait of Hormuz by conducting and threatening attacks on commercial ships. Iran's ground and air forces have outdated equipment and limited training and sustained damage during coalition strikes; they almost certainly cannot defeat a technologically superior adversary. Iran likely will further asymmetric warfare advancements to augment its conventional capabilities as it remains in conflict with the United States and Israel.

Between the 12-Day War and the current conflict, Tehran attempted to improve its military capabilities by domestically developing systems with improved accuracy, lethality, and reliability, and requesting support from its partners. Iran's official FY 2025 defense budget was approximately \$16.8 billion, representing 4.2 percent of GDP. During the past 4 years, Iran has more than doubled the portion of the budget dedicated to defense modernization, reaching almost \$8 billion in 2025.

Cyberspace Capabilities

Iran's cyber capabilities range from cyber-enabled information operations and cyberespionage to disruptive and destructive attacks, including mass data-deletion attacks, against poorly secured government and commercial networks. Iranian cyberactors are also able to compromise and manipulate vulnerable critical infrastructure devices resulting in minor, temporary effects. Before the current conflict, Iran largely refrained from cyberattacks against the United States, except for a handful of low-level disruptive attacks. However, on 11 March, we observed Iran's first destructive cyberattack against a U.S. company since 2014, when Iranian cyberactors conducted a data-deletion attack against a U.S. medical company. Iran almost certainly will continue using cyberattacks to impose costs on the United States throughout the remainder of the conflict.

Weapons of Mass Destruction (WMD) Capabilities

Iran's former supreme leader maintained his nuclear weapons ban following the 12-Day War, despite Iranian officials' warning that strikes against Iranian nuclear facilities would cause Tehran to reconsider weaponization. However, his death on 28 February has called into question the status of the ban. On 18 March, Iran's Foreign Minister Abbas Araghchi claimed Tehran's nuclear doctrine is not likely to change, but cautioned that the new supreme leader, Mojtaba Hoseini-Khamenei, the former supreme leader's son, has yet to publicly express his view on the matter.

The Qods Force and the "Axis of Resistance"

Since Operation EPIC FURY began, the IRGC-QF has provided attack guidance and attempted to surge materiel support to Iraqi Shia militias and Hizballah, enabling Iran to broaden the conflict beyond its borders and impose costs on regional adversaries. Iraqi Shia militias have conducted hundreds of attacks against U.S. forces in Iraq and across the region, while Hizballah has focused on attacking Israeli forces in northern Israel and southern Lebanon despite lingering capabilities shortfalls, demonstrating both groups' commitment Tehran. The Huthis have emerged as Iran's most capable partner given the fall of the Asad regime and Israeli degradation of HAMAS and Hizballah during the past 24 months. HAMAS' degraded status and the Huthis' domestic prioritization and concern for U.S. retribution have so far dissuaded these groups from attacking the United States after entering the conflict in late March. Iran probably will continue to press the Huthis to participate in the conflict while refining attack guidance to Iraqi Shia militias and Hizballah to better align with Tehran's evolving strategic intent, such as closely managing escalatory attacks on regional energy infrastructure or embassies.

North Korea

North Korean Leader Kim Jong Un has worked to enhance his international political standing with likeminded countries through expanded counterpart engagement this year. North Korea poses a grave risk to U.S. forces and our allies in Northeast Asia, developing ICBMs to target the U.S. homeland, and implementing lessons learned from its fighting against Ukraine to modernize its capabilities.

Military Capabilities and Modernization

The Korean People's Army almost certainly is capable of defending North Korean territory while inflicting severe damage on South Korean and U.S. forces stationed on the Korean Peninsula. North Korea remains one of the most militarized nations in the world with more than 1 million active-duty personnel and more than 7 million reserve and paramilitary personnel. North Korea is using its growing bilateral relationship with Russia to gain new military capabilities, experiences, and equipment to compensate for long running resource constraints that have slowed wider force modernization efforts.

- North Korea probably can defend against U.S. and allied aircraft entering North Korean airspace.
- North Korean Special Operations Forces are improving tactics and equipment to reinforce capabilities honed through deployments to Russia, including use of UAVs in combat situations.
- The North Korean Navy is investing in new naval capabilities—including launching two new frigates this year—to upgrade its primarily coastal fleet and better enforce competing maritime claims with South Korea.

Missile Research and Development and WMD

During the past year, North Korea constructed a new long-range missile base, which probably is capable of storing and launching ICBMs with little-to-no warning. It also displayed a new solid-propellant ICBM that probably is intended to improve North Korea's ability to challenge U.S. homeland ballistic missile defenses. North Korea continues to test modern theater class ballistic and cruise missiles capable of threatening U.S. and South Korean forces on the Korean Peninsula. These efforts align with Pyongyang's defense modernization goals of improving deterrence against Washington through the development of a modern solid propellant missile force. North Korea's extensive underground facility program supports its development and fielding of ballistic missiles. These underground facilities offer protection for key elements of North Korea's evolving ballistic missile and nuclear programs, which pose a potential nuclear threat to Northeast Asia and the U.S. homeland.

North Korea very likely relies on imported materials, goods, and technical knowledge to support and advance its WMD and ballistic missile programs. North Korea acquires these dual-use goods mainly through procurement networks in China and Russia. Pyongyang funds these imports partly via foreign revenue generated through IT work for foreign companies, cryptocurrency theft, ransomware, and coal and iron ore exports.

North Korea's 2021–2025 plan includes developing "smaller and lighter nuclear weapons" and "ultra-large nuclear warheads." Consistent with this, last year Kim directed the expansion of the DPRK's nuclear weapons arsenal to address external threats. Pyongyang is also building a probable additional uranium enrichment facility at Yongbyon to increase stockpile production towards that goal. In June 2025, North Korean state media claimed North Korea simulated a nuclear counterstrike on U.S. and South Korean forces, using missiles capable of delivering tactical nuclear weapons. North Korea continued to develop a nuclear weapons management system, which it claimed to test initially in 2024 and then again in 2025. North Korea also maintains its CBW capabilities and may use such weapons in a conflict or in an unconventional or clandestine attack against the United States or its allies.

Space and Cyberspace Capabilities

North Korea continues to develop its space launch capabilities, though it has not launched a space launch vehicle since its failed attempt to place a second satellite in Orbit in May 2024.

North Korea maintains offensive cyber capabilities to illicitly generate revenue through criminal enterprises, such as cryptocurrency theft and ransomware. North Korea conducts cyberespionage against foreign officials, academics, and defense and aerospace industries to gain insight into U.S. and allied capabilities and policies, and to aid the regime's weapons development program. North Korean cyberactors continue to improve their tactics and are implementing AI to automate phishing attacks, creating fake resumes, and using voice changers for interviews.

Latin America

Latin America's stability is a critical component of securing the U.S. homeland. Latin America is the primary source of illegal drugs and migrants driven by political, social, and economic instability. These same socioeconomic conditions also provide opportunities for U.S. adversaries to secure political, economic, and security influence in the region. In the past 36 months, Colombian FTOs and other criminal organizations' membership has grown by 67 percent, propelled by a record amount of coca

cultivation, the Colombian government's stalled peace negotiations, and an uneven security strategy. Regional countries remain divided in their support for ongoing U.S. counterdrug operations in the region.

Venezuela

The Venezuelan government has united under interim President Delcy Rodriguez following the capture of Nicolas Maduro in early January. Delcy has been able to maintain social order and anti-regime protests have not been observed. Localized armed gangs and community members, often referred to as *colectivos*, supported initial efforts to discourage unrest.

Venezuela's senior-most security officials—to include the Defense Minister Vladimir Padrino and Interior Minister Diosdado Cabello—quickly recognized Rodriguez as commander in chief and have regularly accompanied her during public events, almost certainly to demonstrate cohesion. In her first month, she maintained the military high command, but approved about 20 out-of-cycle changes to senior military operational command and administrative positions. Her first military leadership decision was to place Gen Gustavo Gonzalez—who had previously worked for her—into the head of the military counterintelligence agency and Venezuela's equivalent of the U.S. Secret Service. Padrino has called for a review and unspecified adjustments in the military in preparation for potential future conflict.

Venezuela has made some token gestures to Washington under Delcy's leadership, though she has also publicly defended Caracas' right to maintain relations with China, Cuba, Iran, and Russia. As of late January, we had not observed substantive steps taken to cut or reduce ties to U.S. strategic competitors, and neither have there been indications hinting at the restoration of democratic processes.

Other Regional Concerns

U.S. FTO-designated organizations continue to be the main perpetrators of destabilizing activities in Colombia, Ecuador, Haiti, and Mexico. Mexico has consistently asserted a willingness to cooperate with the United States in pursuit of shared and enduring counterdrug priorities.

. Mexico's Operation NORTHERN BORDER, launched in February, continues to combat cartel illicit activities across Mexico's six U.S.-Mexico border states—having significantly boosted arrests and seizures of FTOs' weapons, drugs, fuel, and property. Colombian FTOs have increased deadly attacks against security forces to protect remote coca plantations and cocaine production facilities, pushing Bogota towards a more militarized counterdrug response. Ecuador faces unprecedented levels of violence by FTOs and drug trafficking groups, including assassinations of political candidates and a lethal car bomb detonated in an urban commercial center. Haitian foreign security forces have been unable to secure FTO-controlled territory in Port-au-Prince to enable the establishment of a legal and political framework for elections, which last occurred in 2016.

Narcotics Traffickers, Narco-Terrorists, and Transnational Criminal Organizations

Latin America-based U.S.-designated FTOs perpetuate regional insecurity and threaten U.S. interests through drug trafficking, migrant smuggling, money laundering, weapons trafficking, and corrupting institutions. Competition for revenue-generating territory and resources almost certainly remains the greatest drivers of inter-cartel fighting, resulting in high levels of violence in contested areas such as near ports of entry along the U.S. border, near maritime ports, and along highways and trafficking corridors.

- In addition to drug trafficking, cartels maintain diverse illicit revenue generation streams including extortion, kidnapping, human and migrant smuggling, human trafficking, and other illicit enterprises that generates an estimated \$430 billion annually in Latin America and the Caribbean.
- Cartel infighting since mid-2024 has resulted in some disruptions to cartel operations. The Sinaloa Cartel's Los Chapitos faction, a key organization responsible for fentanyl production and trafficking into the United States, has faced substantial setbacks due to conflict with a rival faction and enforcement efforts by the Mexican government. Other FTOs and cartels, including the Gulf Cartel, Northeast Cartel, and Juarez Cartel, continue to vie for control of critical trafficking infrastructure along the U.S. border. Meanwhile, the New Generation Jalisco Cartel (CJNG) is using ad hoc agreements with other organizations to steadily consolidate drug trafficking activities and routes throughout Mexico.

China, Russia, and Iran in Latin America

China's engagement in Latin America and the Caribbean probably is intended to solidify its trade ties in the region, source critical minerals, and reduce the number of Taiwan's diplomatic partners, as well as develop access and capability to monitor U.S. activities. The region accounts for 7 of the 12 countries that maintain diplomatic relations with Taiwan. Although China does engage in modest defense sales and military training with Latin American countries, Beijing is making greater inroads through the space domain and soft power avenues.

- A PRC military hospital ship arrived in Latin America in November 2025 as part of an international goodwill mission; the last time a PRC military hospital ship visited the region was in 2018.
- Beijing recognizes the Panama Canal's strategic importance to global trade and China's economy, and seeks to ensure its ships are not barred from using the canal. PRC companies have won a handful of contracts to build or operate infrastructure near the canal.
- China has its largest space infrastructure footprint outside of mainland China in Latin America and the Caribbean. Beijing's interest in expanding its space domain footprint throughout Latin America almost certainly provides China with enhanced space domain awareness capabilities, including against U.S. military space assets.
- Latin American and Caribbean countries generally are receptive to opportunistic engagement with China in their economic and infrastructure sectors, to the extent that it does not harm their bilateral security relationships with the United States. Latin American countries—most notably Argentina, Brazil, Chile, and Colombia—have accepted PRC investment in port infrastructure, telecommunications, mining, agriculture, and space programs.

Russia attaches relatively low priority to bilateral relations in Latin America, though maintains its historical defense partnerships with Cuba, Nicaragua, and Venezuela. Moscow opportunistically collaborates with receptive nations on arms sales, equipment maintenance, security training, and military deployments, seeking to maintain Latin American nations' neutrality in the Russia-Ukraine conflict.

- Receptivity to Russian engagement among Latin American countries probably has waned in the past 12 months—with the exception of traditional partners such as Cuba, Nicaragua, and Venezuela, and Brazil due to sanctions against Moscow.

Iranian expansion of bilateral cooperation with other countries in Latin America probably will remain limited in the next year, because regional leaders place priority on relations with the United States, China, and Russia.

Venezuela is Iran’s main security partner in Latin America, but Iran’s future cooperation with Venezuela is uncertain following the U.S. capture of former President Nicolas Maduro, which will probably complicate Iran’s ability to maintain its influence in the country.

Terrorism

The Salafi jihadist terrorist threat to the U.S. homeland in 2026 will remain dynamic and diffuse as both ISIS and al-Qa’ida rely on increasingly sophisticated online tools to help recruit new members, disseminate anti-U.S. propaganda, and enable external attack plotting. In addition to homeland threats, ISIS and al-Qa’ida will also pose a threat to U.S. interests abroad. This threat probably will be particularly acute in Africa, where some ISIS and al-Qa’ida affiliates are expanding their operational reach and attack capabilities—including armed UAV deployment—and are encroaching on capital cities that host U.S. personnel and facilities.

ISIS

ISIS branches in Syria and Afghanistan-Pakistan likely pose the primary threat to the U.S. homeland in 2026. Most other ISIS branches probably will give priority to their fight against local governments. During the past year, ISIS has continued adapting to leadership losses by concealing their leaders’ identities—even within the organization—and by geographically dispersing leadership to avoid vulnerabilities associated with concentrating them in a particular country or region.

In Syria, ISIS has exploited the Asad regime’s collapse to gain some regional freedom of movement and access to weapons and released prisoners. Despite key personnel losses, ISIS-Syria is using these new capabilities to stoke sectarian violence and plot against U.S. targets in Syria and in the U.S. homeland.

In Afghanistan and Pakistan, ISIS-Khorasan is navigating considerable Taliban and Pakistani pressure. At the same time, the group has a sophisticated media arm that it is using to inspire attacks and to contact supporters for worldwide plotting, including in the United States and Europe.

In Africa, ISIS branches in the Sahel and West Africa are expanding their operational reach—including near some capitals such as Abuja, Nigeria—and strengthening attack capabilities, including armed UAVs.

Al-Qa’ida

Nearly all of al-Qa’ida’s affiliates probably will focus on localized plotting against U.S. and partner interests abroad this year. Sustained leadership losses over the past decades have left al-Qa’ida largely decentralized, with an emir and senior leadership cadre that guides but does not have robust control over its largely autonomous and geographically dispersed affiliates. Nevertheless, al-Qa’ida’s media continues to call for attacks against the United States.

Al-Qa'ida's affiliate in Yemen, al-Qa'ida in the Arabian Peninsula (AQAP), probably is the only al-Qa'ida group that still gives high priority to attacking the U.S. homeland. AQAP is also the most recent al-Qa'ida affiliate to conduct an attack in the U.S. homeland, killing three U.S. servicemembers at Naval Air Station Pensacola in 2019.

In Africa, two of the group's affiliates in Somalia and in West Africa and the Sahel are threatening regional capitals, respectively, Mogadishu, Somalia, and Bamako, Mali. Al-Shabaab in Somalia almost certainly is also the most persistent threat to U.S. forces of any terrorist group on the continent, routinely attempting attacks against or near U.S. forces in the region. The group also is seeking to acquire more advanced weapons from the Huthis.

In Syria, al-Qa'ida's official presence disbanded soon after the fall of the Asad regime, but al-Qa'ida-aligned elements are exploiting their enhanced freedom of movement and access to the deposed regime's weapons. Some al-Qa'ida-aligned factions also integrated into the Syrian Transitional Government's forces after the fall of the Asad regime, but the status of their current links to al-Qa'ida is unclear.

Southeast Asia

Southeast Asian countries remain concerned about regional stability, great power competition in the region, and ongoing sovereignty disputes. Unresolved SCS territorial and maritime disputes continue to be a flashpoint and frequently trigger cycles of tension between China and Southeast Asian SCS claimants, particularly the Philippines. Additionally, Southeast Asian countries' lingering disputes regarding overlapping territorial and resource claims continue to influence regional security dynamics, as highlighted by this year's Cambodia-Thailand border dispute. Most Southeast Asian countries are wary that these dynamics could disrupt and undermine the primacy and effectiveness of regional institutions, such as ASEAN, in managing regional security dynamics.

In response to intensifying tensions, most regional countries continue to pursue hedging strategies that balance growing economic dependence on China with security outreach to the United States and its partners. However, Southeast Asia's continued security and economic reliance on China probably reduces some countries' willingness to challenge China's growing influence. Burma's military relies on China and Russia for lucrative infrastructure investment and military materiel support as it battles anti-junta groups for territorial control. Cambodia also remains closely aligned with China, as evidenced by the PRC-funded Ream Naval Base modernization project, which opened on 5 April.

PRC-Philippine tensions continue to dominate the SCS security environment, with PRC forces using dangerous maneuvers, ramming, and water cannoning to impede Philippine attempts to assert sovereignty through expansion of SCS maritime and air operations. Tensions over the Scarborough Reef culminated in mid-August when a PLAN combatant collided with a CCG ship while expelling a Philippine Coast Guard ship from the reef. The Philippines condemned China's September declaration of a nature reserve at Scarborough Reef and raised concerns over buoy placement and potential land reclamation. Although the PRC-Philippine Second Thomas Shoal Provisional Understanding has mitigated tensions during BRP *Sierra Madre* resupply missions, China still continues to block Philippine access at other disputed SCS features such as Half Moon Shoal and Sandy Cay.

Manila views the U.S.-Philippine alliance as critical to deterring PRC aggression, and it is expanding defense cooperation with partners through exercises and SCS maritime cooperative activities. Manila is also building a defense-partner network to enhance interoperability and has established status of forces agreements with the United States, Australia, Canada, France, Japan, and New Zealand.

Other Southeast Asian SCS states—Brunei, Indonesia, Malaysia, and Vietnam—are taking calibrated approaches to defend their territorial sovereignty while avoiding actions that risk direct confrontation with China.

South Asia

South Asia's security situation is shaped by cross-border and internal terrorism and longstanding mistrust among neighboring states, several of which are modernizing their militaries and nuclear capabilities. Tensions between India and Pakistan, heightened by their brief and intense military conflict in May, continue to precipitate ongoing instability in the region. Terrorist activity in Afghanistan and Pakistan will challenge military and security forces, and the stability of their shared border. India and China's Line of Actual Control (LAC) border negotiations are progressing, but underlying irritants persist. Beijing and Moscow continue efforts to integrate regional powers into their respective spheres of influence, but many South Asian countries are receptive to simultaneously improving their U.S. partnerships.

Afghanistan

The Taliban almost certainly will remain firmly in control of Afghanistan during the next year and continue to combat ISIS-Khorasan and anti-Taliban resistance groups, though these groups still have the ability to conduct deadly attacks in the country. The Taliban also continues to restrict al-Qa'ida and its affiliates' activities in accordance with the Taliban's perception of its Doha Agreement obligations, though some al-Qa'ida elements probably circumvent these restrictions to provide modest covert support to anti-Pakistani militant groups. Low-level Taliban members continue to kill and arrest former Afghan government and military personnel, but senior regime leaders probably are not directing this campaign.

The Taliban has made some progress toward gaining official recognition from regional partners, despite persistent concerns about the state of human rights, inclusive representation in government, and militancy in Afghanistan. In July, Russia publicly recognized the Taliban as the legitimate government of Afghanistan, the first country to do so, in an effort to advance Moscow's counterterrorism efforts in the region. Although the Taliban has held multiple engagements with other countries using economic, political, and cultural ties to attract greater recognition, other stakeholders have not moved toward official recognition.

- In September, SCO members upgraded Afghanistan from an observer country to dialogue partner while also calling on the Taliban to form an inclusive government and to uphold human and women's rights. In July, India abstained from a UN vote against the Taliban because of the Taliban's strong condemnation of the Pahalgam terrorist attacks in April.
- While Beijing praised Russia's recognition of the Taliban, China is not ready to recognize the Taliban because of persistent terrorism concerns. Pakistan similarly said publicly that it is in no

hurry to recognize the Taliban, due to unresolved, longstanding terrorist sanctuaries in Afghanistan.

India

Indian Prime Minister Narendra Modi's defense priorities will probably focus on demonstrating global leadership, countering China, and enhancing New Delhi's military power. India views China as its primary competitor and Pakistan as a secondary challenge. To counter PRC influence and boost its global leadership role, New Delhi is giving priority to advancing its bilateral defense partnerships in the Indian Ocean region through exercises, training, arms sales, and information sharing. New Delhi also has increased trilateral engagement in the Indo-Pacific region and actively participates in multilateral fora such as the Quadrilateral, BRICS, SCO, and ASEAN.

New Delhi almost certainly will continue promoting its "Make in India" initiative this year to build its domestic defense industry, mitigate supply chain concerns, and modernize its military. New Delhi continued to modernize its military throughout 2025, including testing its nuclear-capable, rail-launched Agni-I Prime MRBM and Agni-V ICBM.

Throughout 2025, New Delhi and Beijing continued to abide by their October 2024 agreement to disengage forces along the disputed LAC, reducing lingering tensions from a 2020 incident when troops on both sides were killed in a border clash. The disengagement did not resolve the longstanding border dispute but is part of a slow trend of reducing bilateral tensions. Senior officials from both countries have held bilateral meetings since the LAC draw down, culminating in Modi and PRC President Xi Jinping's meeting in September 2025 on the sideline of the SCO meeting, where they declared that the two countries were not rivals. In November 2025, India resumed direct flights to China, and China is expected to resume direct flights to India in 2026.

India will maintain its relationship with Russia through 2026 because it views its ties to Moscow as important for achieving its economic and defense objectives, and it sees value in the relationship as a means to offset deepening China-Russia relations. Under Modi, India has reduced its procurement of Russian-origin military equipment but still relies on Russian spare parts to maintain and sustain its large inventory of Russian-origin tanks and fighter aircraft, which form the backbone of its military ability to counter perceived threats from China and Pakistan.

Pakistan

During the next year, Islamabad's top defense priorities likely will focus on offsetting India's military advantage by pursuing nuclear and military modernization plans. Tensions between Pakistan and India have remained elevated since the April 2025 terrorist attack in Kashmir and the subsequent May Pahalgam Crisis, when the countries engaged in 4 days of air-to-air combat and launched air-to-ground missiles at military installations. Tensions along the Line of Control almost certainly will be elevated in 2026 due to New Delhi's new counterterrorism doctrine that ties terrorist acts to Pakistan and Islamabad's strategy of marginal escalation during a conflict. Pakistan repeatedly has called for international intervention to protest Indian-administered Kashmir's territorial status, which Islamabad alleges is illegal.

Islamabad is modernizing its nuclear arsenal, including the development of battlefield nuclear weapons and a nuclear triad, and maintaining the security of its nuclear materials and nuclear command and

control. Pakistan continues to pursue the development of more accurate long-range, naval, and battlefield nuclear weapons. Pakistan almost certainly procures WMD-applicable materiel from foreign suppliers and intermediaries.

Despite Pakistan's daily counterterrorism operations during the past year, terrorist violence from anti-Pakistan militants, such as Tehrik-e Taliban and Baloch nationalists, reached a 10-year high in 2025. Since 2025, Pakistan and the Taliban engaged in multiple, increasingly violent cross-border clashes over their disagreements on how to stop anti-Pakistani militants based out of Afghanistan from attacking Pakistan. Despite cease-fires and symbolic efforts to improve the bilateral relationship and find a diplomatic resolution, tensions will remain high in the next year.

Middle East

Israel, Regional Conflict

Since HAMAS's deadly terrorist attack on Israel on October 7, 2023, Israel has engaged in more than 2 years of near-constant conflict along multiple fronts, with only a brief respite following the U.S.-sponsored October 2025 cease fire and peace plan for Gaza. Since late February, Israel has returned to high-intensity warfighting, launching Operation ROARING LION against Iran and sending additional ground troops into southern Lebanon for another round of fighting with Hizballah. Israeli casualties on both fronts have been light so far, with fewer than 30 civilians killed in Iranian missile attacks.

- There has been minimal activity along the Gaza front since the October 2025 cease-fire between Israel and HAMAS, with HAMAS choosing to stay out of the Iran conflict and continuing to navigate disarmament negotiations. Israel has warned it is willing to return to war in Gaza if HAMAS does not disarm or meet cease-fire obligations.
- The Huthis ceased attacks on Israel following the October 2025 cease fire in Gaza and re-entered the fight against Israel in March, almost 4 weeks after Israel's start of operations against Iran.

Lebanon

In Lebanon, the November 2024 cease-fire has collapsed. Since early March, Hizballah entered the conflict on behalf of its Iranian patron, launching attacks against both Israel proper and Israeli forces in southern Lebanon. Hizballah appears fully committed to fighting Israel, and we expect hostilities to continue. Hizballah has not attacked U.S. personnel or facilities in Lebanon since the late 1980s; however, the group may consider this option if it perceived the United States directly threatened its interests there.

The Lebanese Armed Forces (LAF) probably will continue to make incremental progress on disarming Hizballah over the next year. LAF leaders have historically been unwilling to use force to disarm Hizballah out of fear that direct confrontation with the group could fracture the LAF along sectarian lines, provoke retaliation, and lead to civil war. However, in early March, the Lebanese cabinet voted to make Hizballah's military activities illegal, which could indicate a shift in anti-Hizballah sentiment. As of November, Hizballah Secretary General Naim Qasim had publicly stated that attempts to disarm Hizballah would be viewed as an existential threat, triggering a violent response.

Yemen

Since the Israel-HAMAS conflict began in October 2023, the Huthis have conducted hundreds of attacks against Israel, commercial ships, and U.S. naval forces, and emerged as the preeminent Iran-aligned Axis of Resistance group—willing and able to threaten the United States and regional partners. The group uses ballistic and cruise missiles, UAVs, and unmanned surface vessels in its attacks and has debuted new weapons, including a domestically produced UAV. The Huthis have also employed novel tactics to disrupt air operations, including by launching a surface-to-air missile in close proximity to a U.S. F-35 fighter, forcing the pilot to take evasive action.

In the maritime domain, the group remains capable of threatening ships transiting the Red Sea and Bab al-Mandeb Strait. The experience the Huthis gained attacking commercial ships and U.S. and partner warships probably will enable them to hone capabilities and refine antiship tactics, ensuring the group remains an enduring threat to freedom of navigation through critical waterways for at least the next several years.

Following the onset of Operations EPIC FURY and ROARING LION, the Huthis voiced solidarity with Iran but initially withheld attacks until late March, when they began striking Israel. Despite this, the Huthis likely seek to preserve the May 2025 cease fire with U.S. forces. Until at least the start of Operation EPIC FURY, the group almost certainly continued to receive Iranian lethal aid and technical support, which has been key to reconstituting Huthi military capabilities since last year. Operation EPIC FURY is almost certainly hampering the Huthis' ability to receive support from Iran, but we assume it continues in at least some capacity. In January, the Huthis threatened to attack Israeli activity in Somaliland and accused Riyadh of attempting to unify Saudi-backed groups in Yemen against them.

Syria

One year after the fall of the Asad regime, Syrian President Ahmad Husayn al-Shara remains focused on stabilizing the country through economic development, a commitment to pluralism, and outreach to the international community. Shara is leading Syria for a 5-year transitional period, which will culminate in the adoption of a permanent constitution and formation of a new elected government.

Shara is working to integrate the Kurdish-led Syrian Democratic Forces (SDF) in the northeast and the Druze minority in the south, which both seek local autonomy and other guarantees. On 30 January, the Syrian government signed an integration agreement with the SDF following a government offensive into SDF territory, stipulating the SDF will be integrated into three brigades. Implementation of the military integration is ongoing while integration of political institutions remains unclear.

In southern Syria, periodic clashes between Syrian security forces and Druze militias have threatened to disrupt the U.S.-sponsored cease-fire and path to peaceful reconciliation. Damascus has joined the Global Coalition against ISIS, recognizing that ISIS has sought since the fall of the Asad regime to exploit instability, fuel sectarian tensions, and discredit the new government. Damascus is negotiating with Moscow for diplomatic, economic, and military assistance, and the future of Russian basing in Syria, and is committed to countering Iran and the Axis of Resistance.

Iraq

Baghdad is attempting to balance its partnership with the United States against Iran and the Iraqi Shia militia's pervasive influence. Despite this, Baghdad has largely failed to prevent the militias from conducting daily attacks against U.S. and partner forces during Operation EPIC FURY. Baghdad is

nevertheless eager to secure continued U.S. aid—in part to strengthen its counterterrorism capabilities. Iraqi security forces probably are able to secure Iraq against ISIS for at least 2 years, even absent U.S. assistance, because ISIS only has the capability to conduct sporadic, low-level attacks, mainly in rural areas.

In Iraq's 11 November 2025 parliamentary elections, Prime Minister Mohammad Shia al-Sudani's party and other Shia Coordinating Framework parties gained the most seats, again ensuring Iran-aligned Shia prominence in Iraqi politics. However, the ongoing regional conflict and post-election party dynamics probably will prolong the prime minister selection process through at least mid-2026, leaving Iraq's government in caretaker status and preventing it from advancing foreign policy decisions.

Iraqi Shia militias have claimed more than 500 attacks using some of their most advanced weapons against U.S. and partner forces in Iraq and across the region since Operation EPIC FURY began, and can sustain these attacks for months. The militias aim to inflict heavier casualties and view themselves as engaged in an existential conflict to defend Iran. The militias have notably expanded their target set beyond U.S. military targets to include attacks against U.S. diplomatic facilities, civilian infrastructure, and regional energy infrastructure. These groups rely on Iran for their weapons stockpiles and remain largely responsive to Iranian guidance, despite some misgivings about Tehran's military effectiveness. In the year leading up to the conflict, the militias conducted only sporadic attacks against U.S. bases in Syria and against partners in Iraq, demonstrating their then-focus on self-preservation after 2 years of setbacks to Iran's Axis of Resistance.

Africa

African countries are grappling with widespread and persistent security challenges that pose threats to U.S. interests and crises that impede efforts to pursue commercial opportunities and stave off malign competitor influence. Insecurity stemming from terrorism, insurgency, civil war, competition for resources, or communal conflict is testing many governments' ability to maintain stability, causing massive humanitarian suffering, and driving foreign outreach, including to U.S. adversaries. Transnational terrorism activity remains high, and government entities have also turned to partners such as Turkey and the UAE for help. Moreover, discontent among African citizens toward their governments has led to sudden unrest that has posed collateral threats to U.S. citizens, such as in Madagascar and Tanzania.

The vast Sahel region demonstrates a confluence of terrorism, anti-Western sentiment, strident focus on sovereignty, and military control of governments—factors which have obstructed efforts to combat insecurity and opened the way for ineffective Russian security assistance and its accompanying malign influence. Terrorist groups here have expanded territorial control, threatened the stability of governments, and threatened to spread into Coastal West Africa.

Africa is a leading source of critical minerals that are crucial to the technological and military supply chains of the United States and adversaries such as China. Chinese investment in Africa's minerals sector is extensive and widespread, and China's largest overseas military facility is in Djibouti. Africa defense cooperation with China continues to deepen as seen with China and Djibouti conducting a 3-day combined training exercise in late 2025 that involved multiple branches of the armed forces. Other

countries in the Gulf of Guinea and along Africa's eastern coast may allow a similar presence for economic reasons, enabling a PRC military footprint that would boost the PLA's power projection.

In 2025, ISIS and al-Qa'ida carried out more than 4,300 attacks across the continent, a slight decrease in attacks from past year. However, the groups' still high number of attacks highlights shortfalls in regional militaries' abilities to effectively combat Salafi jihadist terrorist groups. In September, al-Shabaab attacked U.S. forces in Somalia, and a U.S. citizen was kidnapped in Niger in October, emphasizing the sustained threat Africa-based terrorist groups pose to the United States.

North Africa

North Africa remains Africa's most stable sub-region, with governments weathering protests driven by socioeconomic concerns and opposition to Israeli operations in the Gaza Strip. Morocco achieved international support for its autonomy plan for the disputed Western Sahara region, where a low-level insurgency simmers. Algeria's acquisition of advanced Russian aircraft demonstrates its intent to maintain parity with Morocco, even amid a window of opportunity for rapprochement. Algeria's concerns about instability in Mali and diplomatic tensions with Mali's government resulted in the Algerian military shooting down a Malian-owned UAV. In Libya, the internationally recognized Government of National Unity and its opposition, the Libyan National Army, have maintained their cease-fire, but show little inclination to pursue national unity.

West Africa and the Sahel

Much of West Africa's instability continues to emanate from the Sahel, where embattled military-led governments in Burkina Faso, Mali, and Niger remain plagued by internal security threats and difficult relations with neighboring nations. Russian military support to these governments has failed to turn the tide against terrorist and insurgent groups, raising questions about the efficacy of such support, and underscoring the need for reliable security partnerships to work toward shared goals. The kidnapping of a U.S. aid worker in Niger, and the terrorist fuel blockade and encirclement of Bamako in late 2025 have underscored the terrorist threat in West Africa. Meanwhile in Nigeria, overstretched security forces have struggled to respond to nationwide insecurity from terrorism, land disputes, separatists, and socioeconomic drivers.

East Africa

East Africa is experiencing multiple crises that risk overlapping in a region that hosts the largest U.S. military presence in Africa. Sudan's 3-year civil war has led to an influx of weapons from foreign powers and mass atrocities by both sides, creating the world's largest current humanitarian disaster. Somalia continues to rely almost exclusively on foreign assistance, including an under-resourced African Union mission, to hold back terrorists such as al-Shabaab. The fragile federal government suffers from a legitimacy crisis and unilaterally extended its mandate one year as it attempts to assert control over member state election processes. Mounting rhetoric in landlocked Ethiopia, which is facing its own domestic insurgencies, suggests it is considering initiating conflict with Eritrea over access to a Red Sea port. Chronically fragile South Sudan has experienced multiple rounds of violence between the government and opposition that, since last March, have threatened the power-sharing agreements that ended the country's civil war, and have the potential to quickly threaten U.S. citizens in the region with little warning.

Central and Southern Africa

In the mineral-rich Great Lakes region, the U.S. and Qatari-led peace processes have made progress toward implementing security commitments between warring Democratic Republic of the Congo and Rwanda, but lingering violence and the presence of armed proxies threaten a return to widespread war. The region's militaries are also working to combat Sunni terrorist groups that foment instability and jeopardize Western investment, including in Mozambique. Several countries in this region, including Mozambique and Tanzania, are strengthening bilateral defense engagement with China to modernize their militaries. In January, South Africa hosted the third iteration of a combined naval exercise with China and Russia—this year also including Iran and the UAE—highlighting the importance adversaries and competitors place on maintaining influence with this strategic country.

The Polar Regions

China and Russia are actively working to increase their respective presence and infrastructure in the Arctic to shape international norms associated with the region to advance their security and economic objectives. For more than a decade, Russia's leadership has given priority to its Arctic region in its national security strategy, foreign policy, and economic planning; approximately 25 percent of Russian territory is located above the Arctic Circle, and 65 percent of Russian land is permafrost. The region holds strategic natural resources, under-ice areas operating areas for Moscow's ballistic missile submarines, and a heavy concentration of critical Russian military infrastructure.

- Russia aspires to improve its military posture in the Arctic to enhance its ability to defend against a strategic attack, and respond to Western operations in the region. Much of Russia's strategic nuclear and conventional forces are stationed on or near the Kola Peninsula, some only a few miles from the Finnish border.
- Though the war in Ukraine has heavily degraded specialized ground forces previously based in the Arctic, most of Russia's naval, strategic air, and air defense forces stationed in the region remain intact.

Meanwhile, China is developing scientific, technological, and naval capabilities to improve its ability to operate in the Arctic region. Since at least 2018, China has publicly asserted its right as a "near-Arctic state" to conduct resource exploration and exploitation in the region. Looking ahead, China almost certainly will advance its ongoing diplomatic, commercial, and military efforts to expand its access to the Arctic's natural resources and the Northern Sea Route, and normalize its presence in the Arctic.

- China currently has three Arctic-capable icebreakers and probably will seek to expand its domestic icebreaker development to support future military deployments in the Arctic.
- In October 2025, PRC research vessels completed China's 15th Arctic Ocean expedition, marking the largest PRC scientific expedition in the region. The expedition included marine environment surveys, retrieving sensors, deploying ice-based buoys, as well as conducting China's first crewed submersible dives in the Arctic.
- China also is expanding its space observation infrastructure in the Arctic, which may provide Beijing with military and civilian capabilities to monitor U.S. satellites over the Arctic region.

Russia remains China's most viable Arctic partner—the two countries cooperate through limited combined military patrols, nascent economic development, and some scientific and technological research. PRC and Russian military and security cooperation probably will incrementally increase in frequency and scope in the Arctic, as both countries probably perceive it as successful strategic messaging. It also probably will marginally improve their ability to conduct combined operations. Moscow remains wary of PRC ambitions for the region and probably harbors reluctance to allowing a PRC military presence in the Arctic. However, because of Russia's growing financial and technological dependence on China as result of Western sanctions, Moscow is likely to grudgingly make limited security-related concessions in the Arctic to Beijing during the next year.

China and Russia cooperate on some Arctic economic development across several lines of effort, including maritime trade, transport and logistics, natural resource extraction, and scientific research and development. China and Russia are jointly developing the Northern Sea Route, which will enable China to more easily access the region's natural resources, to include Russian liquified natural gas, and in some instances, can cut shipping times between Europe and China by a third during favorable seasonal conditions.

In the Southern Hemisphere, China is investing in Antarctic infrastructure, having completed construction in early 2024 on the latest of its five active Antarctic stations used for environmental research and to support China's space program. The new station will provide telemetry, tracking, and communications capabilities for scientific polar observation satellites, and its equipment is well positioned to also collect signals intelligence over Australia and New Zealand. From November 2024 to January 2025, a BRICS-led mission to conduct scientific studies across the Antarctic environment conducted a circumnavigation around Antarctica. The exploration included 4 of the 11 BRICS partners including Russia, China, India, and Brazil, and also had several scientists from Argentina, Chile, and Peru.

Foreign Intelligence and Supply Chain Threats

The United States faces an extremely sophisticated global foreign intelligence threat environment. The rapid development of available and affordable advanced technologies is accelerating the capabilities and numbers of state and nonstate intelligence threat actors. U.S. adversaries' use of ubiquitous technical surveillance (UTS) capabilities—the widespread collection, processing, and analysis of aggregated data that can identify patterns of activity that link persons to things, events, or locations—presents one of the most acute, generalized threats to DoW and U.S. Government personnel traveling or operating worldwide.

Our adversaries use a wide variety of technical means to surveil U.S. personnel and operations around the world, including in the United States. Proliferating Safe City surveillance systems and facial recognition capabilities overseas will enable adversaries to track and observe U.S. activities with greater ease.

Smart devices proliferate in a market based around data collection that incentivizes and enables companies to compile data. Adversaries can discover financial transactions, communications, technology signatures, or presence and use that information to compromise costly DoW investments in defense and intelligence capabilities.

Beijing remains well-positioned to use its supply chain advantages as a strategic lever against the United States. In 2025, China continued to weaponize select supply chains by enacting strict export controls—some of which are currently paused—on many “dual-use” materials and technologies, including many critical minerals and rare-earth elements for which it has a near-monopoly on processing.

Similarly, Beijing exercises substantial influence over technology companies that manufacture components or develop software in China, and can use a host of laws to compel those companies to acquiesce to its demands. In 2025, Beijing took more aggressive actions against several named U.S. semiconductor manufacturers supplying the U.S. defense-industrial base, initiating both lawsuits and security investigations against individual companies, and implementing regulatory controls more broadly, which would threaten their business interests and thus U.S. supply chains.

Companies doing business in Russia are compelled to provide their source code for Russian government review, giving Russian intelligence services insight into commercially-produced software commonly used by large business and government enterprises. Russian cyberactors have also exploited vulnerabilities in software from private companies to strengthen Moscow’s cyberespionage capabilities.

Global Health, Biosecurity, and Bioattribution

The increasingly complex global biosecurity environment poses a threat with the potential for significant health, economic, social, and national security implications. Naturally occurring biological threats, including pandemics, do not respect borders, and distant infectious disease outbreaks can threaten the U.S. homeland. The resurgence and spread of once geographically limited infectious diseases, zoonotic diseases, newly emergent pathogens, and antimicrobial resistance can overwhelm public health and medical response capabilities, making outbreaks harder to control. The risk of laboratory accidents or intentional pathogen release may be increasing with the rise in the number of laboratories around the world conducting high-risk life sciences research on potential pandemic pathogens without appropriate oversight. Regional instability and conflict disrupt health care and laboratory systems and facilitate the spread of infectious diseases in vulnerable populations.

The infectious disease threats most likely to impact deployed U.S. forces are predominantly endemic diseases that can trigger regional outbreaks. Mosquito-borne diseases such as dengue, gastrointestinal diseases, emerging highly pathogenic avian influenza, and common respiratory pathogens such as COVID-19 pose the highest threats to military operations. Additionally, the emergence of novel and drug-resistant pathogens can undermine the effectiveness of existing medical countermeasures, putting both servicemembers and mission objectives at risk.

Developing countries almost certainly require support to prevent and contain disease outbreaks, particularly in the context of regional instability. Our adversaries have likely recognized this need and are heavily investing in medical supplies and infrastructure, personnel, and research cooperation as tools to exert influence and outmaneuver U.S. interests. Notably, since 2018, China has deployed medical teams, offered financial assistance, and supplied essential medical resources to 53 African nations. Additionally, China was instrumental in the construction of the African Union’s Headquarters for the Africa Centres for Disease Control and Prevention, illustrating its strategic use of health initiatives to enhance geopolitical leverage.

Swift detection and attribution of infectious disease outbreaks is essential to inform decisionmakers, enabling them to prioritize outbreak response options and implement timely medical countermeasures and mitigation strategies. In an environment where threats can proliferate rapidly, the ability to identify a disease and quickly trace its source can be the difference between containment and widespread outbreak. Enhanced surveillance systems, robust reporting protocols, and international collaboration are vital components in ensuring that any biological incident is addressed promptly and effectively to protect the homeland, thus safeguarding national security and public health.

Future Warfare and Advanced Technology Threats

The character of warfare will change significantly during the next 20 years as global research and development of emerging and advanced disruptive technologies reshape both the civilian world and the future battlespace. The confluence of these technologies will present novel threats to the Joint Force from below the seabed to lunar space and in the cyber, electromagnetic, and cognitive domains. Warfare in the future operating environment probably will be faster, with more interconnection between sensors, shooters, and decisionmakers; have more AI-driven robotic systems; be saturated with intelligence, surveillance, and reconnaissance (ISR) sensors; and have longer-range, smaller, more maneuverable, and smarter fires. Our adversaries recognize the potential for emerging technologies—especially AI, advanced computing, biotechnologies, quantum sciences, future communications, and novel power generation and storage—to enhance military processes, equipment, and forces. Dual-use breakthroughs in the commercial sector and the eventual proliferation of advanced military technology, such as drones and robotic systems, can enable even less-capable states and nonstate actors to benefit militarily.

- In 2025, China reaffirmed its state-led drive to mobilize resources toward scientific and technological independence and dominate critical technology fields. Beijing uses an ecosystem consisting of traditional defense manufacturers, military research organizations, academic institutions, and commercial enterprises to provide cutting-edge capabilities to the PLA. The PLA is striving to integrate advanced technologies to enhance its forces and field disruptive military capabilities. China uses a wide range of tactics to licitly and illicitly acquire the technology it needs to achieve these goals, including intellectual property innovated by DoW-funded research programs.
- Russia maintains its strategic ambition to develop advanced technologies for military capabilities. Although the Ukraine conflict has slowed research and development for some emerging technologies, Russia is transforming its military with UXS and is using the conflict to explore AI for military systems.

AI almost certainly will be the most influential technology for future warfare because it has the potential to enhance every aspect of military power, including C4ISR, electronic warfare, autonomous robotic system and swarm operations, logistics, and equipment design. Our adversaries are also using dual-use biotechnologies to develop military applications related to human performance enhancement, human-machine integration, and biological and chemical weapons. Quantum technologies—including computing, communications, and sensing—probably will provide militaries with more advanced ISR and

positioning, navigation, and timing capabilities in the nearer-term, although a quantum computer capable of decryption is probably still at least a decade away.

- Adversaries’ militaries and defense-industrial bases are teaming with commercial and academic organizations to explore the use of cutting-edge AI technologies for military applications. State and nonstate cyberactors have used generative AI technologies for malicious cyberoperations and influence operations.
- Russia has used UAVs with limited AI-enabled capabilities for navigation and target detection in Ukraine since 2023. However, in 2025, commercial companies advanced the development of AI models and hardware to allow robotic systems to better operate in the physical world, which probably will be incorporated into military systems during the next 10 years.
- Since 2024, several new open-source, AI-enabled computational biology tools have become available globally, which improve adversaries’ dual-use capabilities for both chemical and biological applications. Scientific cooperation in biotechnology among adversaries also has the potential to further their technical capabilities as they apply advancing technology to military goals.

Microelectronics represent a critical chokepoint in enabling development advances of these technologies. Although the United States and its allies maintain a technological advantage in manufacturing and design processes, our adversaries are reducing their foreign dependencies related to these critical technologies to erode our advantage.

- In 2025, China pledged to take “extraordinary measures” to advance supply chain independence in critical technologies, including semiconductors, and continues to pour resources into securing its supply chain and developing domestic high-end microelectronics manufacturing capabilities. U.S. and allied investment screening regimes have constrained China’s ability to directly invest in microelectronics companies that would enhance its ability to produce military technologies. As a result, China has resorted to indirect approaches that obfuscate its connections and access to such investments. Similarly, export controls limit China’s access to U.S. and allied technologies and are slowing its efforts, but China has used less-efficient techniques with legacy equipment and exploited policy loopholes to close the technology gap.
- Russia significantly lags other global microelectronics leaders. U.S. and allied sanctions and export controls are forcing Russia to pursue circuitous and more costly methods and turn to private companies in China and elsewhere to acquire microelectronics for its military.