# 2026

# (U) ANNUAL THREAT ASSESSMENT

## OF THE U.S. INTELLIGENCE COMMUNITY

March 2026

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## INTRODUCTION

This annual report of worldwide threats to the national security of the U.S. responds to Section 617 of the FY21 Intelligence Authorization Act (Pub. L. No. 116-260). This report reflects the collective insights of the Intelligence Community (IC), which is committed to providing the nuanced, independent, and unvarnished intelligence that policymakers, warfighters, and domestic law enforcement personnel need to protect American lives and America's interests around the world.

This assessment focuses on the most direct, serious threats to the U.S. primarily during the next year. All these threats require a robust intelligence response, including those where a near-term focus may help head off greater threats in the future.

Information available as of 14 March 2026 was used in the preparation of this assessment.

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# FOREWORD

The 2026 Annual Threat Assessment (ATA) is the Intelligence Community's (IC) official evaluation of an array of threats to U.S. citizens, the Homeland, and U.S. interests around the world. Recent efforts to strengthen Homeland defense have had positive effects, but more work remains to be done to address the complex and evolving threats facing the U.S. For example, border enforcement has been especially successful due to President Trump sealing the U.S.–Mexico border. Migrant encounters and fentanyl seizures at the U.S.–Mexico border have sharply decreased since early 2025, thanks to a combination of tougher U.S. policies and regional enforcement. However, transnational criminal organizations are threatening our citizens, primarily by producing and trafficking illicit drugs, which are responsible for the deaths of tens of thousands of Americans, and for facilitating illegal migrant flows to the U.S. A range of terrorist groups, especially those motivated by Islamist ideology, continue to pose threats to freedom and American lives here at home and abroad. In addition, state and nonstate actors have the capability to directly strike the Homeland.

However, as the National Security Strategy (NSS) makes clear, America has world-leading assets, resources, and advantages. These make some threats to our Homeland less acute, especially since we maintain a powerful and capable military, and a secure nuclear deterrent, that help keep us safe here at home. We also maintain a favorable geographic position, with vast oceans separating us from other great powers and with no competing powers in our Hemisphere. Yet we must remain vigilant about extant and emerging threats, with intelligence playing a critical role in providing early warnings and indicators of changes to adversary intent and capabilities to inform national policymakers.

The global security environment is becoming more complex. The risk of global economic fragmentation is rising, and emerging technologies such as AI and quantum computing are expected to have a significant impact on national security. Furthermore, armed conflict is becoming more common globally, major power competition continues, and military capabilities among state and nonstate actors are improving. Intensifying competition over supply chains and technological primacy, more diverse threats in key domains, and unresolved or potential regional conflicts create interconnected risks. However, we should be cautious about thinking that every problem in the world directly threatens us or is of equal importance to the U.S. In a more complex world, it is especially important that we think prudently and prioritize our efforts, that we find opportunities to advance peace and mutually beneficial solutions to problems, while also not underrating those threats that do impinge on our freedom and our interests.

This 2026 ATA supports the Office of the Director of National Intelligence's commitment to keeping the U.S. Congress and American people informed, representing the IC's dedication to monitoring, evaluating, and warning of threats to the nation's security. In preparing this assessment, the ODNI's National Intelligence Council (NIC) worked with all IC components and the wider U.S. Government to provide the most timely, objective, and useful insights for strategic warning and U.S. decision advantage. This 2026 ATA describes threats to the Homeland first, followed by a discussion of the full range of threats organized by threat and geographic categories. The NIC stands ready to support policymakers with additional information in a classified setting.

# HOMELAND

***The IC assesses that the Homeland faces a variety of threats in the coming year, including our top concerns: transnational organized crime, illicit drug trafficking, migration, the threat of Islamist ideology and terrorism, major power competition, and WMD threats. Transnational criminal organizations (TCOs) are smuggling illegal drugs into the U.S., engaging in financial fraud, and laundering money through international financial institutions. Changes in U.S. policies during 2025 on illegal migration, and increased enforcement efforts at the U.S.–Mexico border and regionally, have deterred illegal immigration and drastically reduced migrant encounters, but the underlying factors that for years have driven migration to the U.S. from various parts of the world remain largely unchanged. Meanwhile, Russia, and China to a lesser extent, are expanding their interest and presence in the Arctic to counter perceived U.S. inroads and advance their strategic interests. China, Russia, and North Korea are also developing new, novel, or advanced delivery systems to increase or obtain a capability to strike the Homeland.***

## BORDER SECURITY

### Foreign Illicit Drug Actors

***Mexico-based TCOs involved in illicit drug production and trafficking bound for the U.S. endanger the health and safety of millions of Americans and contribute to regional instability.*** Fentanyl and other synthetic opioids remain the most lethal of drugs trafficked into the country, causing more than 38,000 U.S. deaths during the 12-month period from September 2024 to September 2025. This represents a nearly 30 percent decrease in synthetic opioid-related overdose deaths, according to CDC data. Separately, fentanyl seizures by weight have decreased 56 percent at the U.S.–Mexico border since President Trump took office, because of increased U.S. and Mexican counterdrug pressure as well as cartel infighting in the interior of Mexico. Although we do not know the total amount of fentanyl entering from Canada to the U.S., information from Customs and Border Protection (CBP) seizures on the border shows an increase during the past three years from 2 pounds to 77 pounds seized at the northern border, in contrast to more than 11,000lbs seized in 2025 alone at the Mexican border.

- Mexico-based TCOs—including the Sinaloa Cartel and the New Generation Jalisco Cartel (CJNG)—are the dominant producers and suppliers of illicit drugs, including fentanyl, heroin, methamphetamine, and South America-sourced cocaine, for the U.S. market. Official ports of entry along the U.S.–Mexico border probably remain the main access point for illicit drugs, often concealed in passenger vehicles and tractor trailers. However, some TCOs probably have at least temporarily changed smuggling techniques and routes in response to increased Mexican and U.S. border security.

- Colombia-based TCOs and illegal armed groups, including the Revolutionary Armed Forces of Colombia (FARC) and the National Liberation Army (ELN), are responsible for producing and trafficking large volumes of cocaine to the U.S. and European markets. Colombia remains the world's largest producer of cocaine and Colombian criminal groups have expanded their trafficking relationships with neighboring Ecuadorian and Brazilian gangs.

While there has been noticeable improvement, ***China and India remain the primary source countries for illicit fentanyl precursor chemicals and pill pressing equipment.*** Following a meeting in October 2025 between the U.S. President and Chinese President Xi in Busan, South Korea, Beijing agreed to halt the flow of fentanyl precursor chemicals to North America, issued an industry advisory notice to China-based companies, and established a new requirement for export licenses for certain fentanyl precursor chemicals. India has increased counternarcotics efforts during the last year. In January 2026, Prime Minister Modi and other Indian officials signaled a willingness to deepen engagement with the U.S. on counternarcotics. Despite these actions, Mexico-based drug traffickers continue to circumvent international controls through mislabeled shipments and the purchase of unregulated chemicals.

## Other Transnational Criminals

***Transnational gangs in the Western Hemisphere, some of which are involved in the U.S.-bound drug trade, threaten public health and safety in the Homeland and the well-being of civilians and partners abroad through their violent criminal activities and expansion efforts.*** These groups engage in a wide array of violent criminal activities, including murder, kidnapping, robbery, human trafficking, prostitution, extortion, drug trafficking, and firearms offenses, at times alternating between competing and partnering with other TCOs in the region, fueling increased violence and instability.

- The Venezuelan-origin transnational gang Tren de Aragua (TdA) capitalized on U.S.-bound migration to expand its presence throughout South America and the U.S. TdA members in the U.S. targeted large Venezuelan communities for extortion rackets, resulting in murders, assaults, and arson attacks.

- The Mara Salvatrucha (MS-13) transnational gang is well-established in cells in the U.S. It uses violence to intimidate the Salvadoran diaspora and engages in murder, extortion, retail-level drug trafficking, robbery, prostitution, firearms offenses, and other crimes. Many foreign MS-13 leaders are in maximum security prisons in El Salvador—a country which has reduced violence and insecurity from violent criminal gangs.

- Haitian gangs threaten the security and stability of Haiti through their attacks on security forces and through the use of intimidation and sexual violence targeting civilians. Gangs also extort businesses, conduct kidnappings for ransom, and some engage in arms-for-drugs transactions with Jamaican gangs. Since September 2025, Haitian gang members have conducted periodic gunfire attacks targeting the U.S. Embassy compound in Port-au-Prince and are seeking to sow unrest before the arrival of UN-authorized multinational security forces and national elections planned in August.

## Migration

***Foreign public perceptions of stricter U.S. migration policies and U.S. and regional border security enforcement have contributed to a sharp decrease in migrant encounters at the U.S.–Mexico border since early 2025. These perceptions probably will continue to serve as a deterrent for migrants seeking to illegally enter the U.S. Most cases of migration are a matter of economic migration. Some migrants are likely to continue to see the U.S. as a preferred destination over regional alternatives despite the increased risk of failure, because of proximity, established routes and smuggling networks, family ties in the U.S., the lure of employment or government programs and benefits, improved social conditions, and better public security***.

- As of March 2026, migrant encounters on the southwest border continue to decline. Based on CBP data, January 2026's monthly encounters are down 83.8 percent compared to January 2025. Encounters declined 79 percent in 2025 compared to 2024.

- Instability and significant hardships for the populaces in several countries, particularly Cuba and Haiti, almost certainly will continue in 2026, creating the risk of potential migration surges from each of these countries if conditions worsen.

- Real or perceived changes to immigration laws or travel policies in destination and transit countries could trigger unexpected spikes in irregular migration and overwhelm transit countries already struggling to manage persistently high migration flows.

- Extreme weather events are likely to continue to indirectly drive migration by worsening the economic and food security of many low-income countries, particularly in Central America.

- Regional governments are likely to prioritize short-term enforcement efforts over more expensive, sustained measures to grant legal residency to migrant communities because of public opposition, budget shortfalls, and competing security demands, which may increase pressure for migration to the U.S.–Mexico border.

Human smugglers continue to operate, adapting to enforcement of laws and policies, as TCOs and criminals view such activities as low-risk and lucrative. They will likely exploit the increased demand created by migrants seeking other means of entry to the U.S.

# TERRORISM

***The U.S. continues to face a complex and evolving threat landscape with a geographically diverse set of Islamist terrorist actors seeking to propagate their ideology globally and harm Americans, even as al-Qa'ida and ISIS are significantly weaker than at their respective peaks during the early 2000s and mid-2010s.***

- A decade ago, ISIS controlled large parts of Iraq and Syria and in November 2015 had launched coordinated attacks around Paris, killing 130 people and injuring more than 400 others. Up through the mid-2010s, al-Qa'ida had repeatedly advanced innovative plots threatening the West including efforts to bypass aviation security with hidden explosives.

- By 2019, under sustained pressure from U.S.-led global CT operations, ISIS had lost its physical caliphate, while the capture or removal of many of al-Qa'ida's key leaders and plotters over a decade had significantly degraded its ability to develop sophisticated plots. Nevertheless, elements of these groups—including al-Qa'ida in the Arabian Peninsula (AQAP) in Yemen and ISIS branches in South Asia and Syria—persist in efforts to rebuild and threaten the U.S. Homeland and our global interests.

***The spread of Islamist ideology—in some cases led by individuals and organizations associated with the Muslim Brotherhood who have provided financial and other forms of material support to terrorist groups such as HAMAS and Hizballah—poses a fundamental threat to freedom and foundational principles that underpin Western Civilization.*** Violent networks, including supporters of al-Qa'ida and ISIS, often use appeals to Islamist identities and ideology to fuel recruiting and financial support for terrorist groups and individuals around the world. At the extreme end are groups that endorse the violent imposition of Sharia in governance, directly undermining fundamental Western freedoms of speech and religion, with the ultimate aim of establishing an Islamist caliphate. There are growing examples of this in various European countries such as Austria, Germany, and the UK. The designation of Muslim Brotherhood chapters that fund and promote violence as Foreign Terrorist Organizations (FTOs) is a mechanism to secure Americans against this threat.

***In response to setbacks to their capabilities that have mitigated the threat of large-scale, complex attacks and reinforced the regional focus of the largest groups, Islamist terrorists have shifted attention to executing information operations to spread propaganda and inspire or enable individuals located in or with access to the West.***

- U.S. military operations and collaboration with international partners in Iraq, Pakistan, Somalia, and Syria during 2025 removed key terrorist leaders and operatives, degrading the capability of al-Qa'ida and ISIS to pursue terrorist attacks against the Homeland and U.S. interests overseas.

- Border security measures adopted last year and deportations of individuals with suspected links to Islamist terrorists have reduced access to the Homeland and removed potential sources of future violence. We face, however, an enduring challenge of detecting individuals who might seek to commit acts of terror after entering the Homeland, including from the population of tens of thousands of asylees and Afghan evacuees who entered the U.S. during the past few years. Since January, U.S. officials have only had a handful of encounters at our southern or northern borders with individuals associated with terrorist groups with a strategic intent to attack the Homeland, such as al-Qa'ida and ISIS. While this is a positive trend, we need to continue efforts to identify, locate, and remove suspected foreign terrorists who have exploited border vulnerabilities during the last five years.

***In recent years, al-Qa'ida and ISIS plotters intent on targeting the Homeland have focused more on virtually recruiting U.S.-based aspirants to encourage and enable potential attacks.*** This shift probably has been driven by CT operations degrading foreign terrorist groups' capabilities to locally train and deploy operatives, coupled with increased border security, stricter screening and vetting, and improved international information sharing that have disrupted potential operatives' travel.

***While al-Qa'ida and ISIS maintain the intent to launch operations targeting the U.S., the most likely terrorist attack scenario in the Homeland involves U.S.-based lone offenders—such as the New Orleans attacker on New Year's Day in 2025 and the perpetrator of the attack on a pro-Israel gathering in Boulder, Colorado in June 2025.*** These individuals take inspiration from foreign terrorist ideologies and propaganda that often exploit world events such as the Gaza conflict to fuel radicalization and mobilization. Al-Qa'ida and ISIS release media encouraging U.S.-based supporters to conduct attacks and often offer tactical guidance.

- In 2025, AQAP increased its media production calling for attacks in the West, including against senior U.S. officials. Meanwhile, ISIS's ability to inspire violence was underscored by the New Orleans attack, which used tactics promoted by the group to kill 15 people and injure many more amid holiday celebrations.

- Teenage Islamist extremists were responsible for a significant portion of U.S.-based plotting in 2025, continuing a trend from the past several years. These individuals were driven in part by the ease of accessing terrorist messaging and networks on social media. In March 2025, a 16-year-old from Virginia, motivated by Islamist ideology, who had consumed terrorist media and wanted to join ISIS, rammed a stolen vehicle into a police car in New Jersey and tried to stab the officer.

***Jihadist ideology and influencers play a key role in mobilizing individuals to violence by advancing anti-Western and pro-militant narratives.*** Such narratives have influenced most U.S.-based Sunni violent extremist attacks in recent years. Those promoting Islamist ideology have been able to appeal to broader and younger audiences through their use of technology, and in recent years have increasingly focused on emotionally evocative and grievance-based narratives rather than on traditional jihadist scholarship and ideological writings. Moreover, migrants who were already influenced by Islamism before they arrived, particularly in Europe, create risks that could increase given the deteriorating security environment in some countries.

- These ideological narratives are delivered online using sensationalist short-form content that seeks to provide religious justification for violence. Jihadists create close-knit online communities isolated from the outside world by framing perceived grievances within a larger narrative of Muslim oppression and redefining Islamic identity in opposition to Western values of freedom, including religious freedom, and democratic governance.

- Jihadist narratives that address personal grievances may be attractive to individuals seeking validation of violent desires or moral clarity, even if they lack familiarity with Islam. Such content normalizes intolerance of other beliefs and persons and attracts followers to Islamism. Anti-Western and anti-Semitic narratives probably influence Muslim youths facing integration challenges or who are disaffected by the West's role abroad, including with the Israel–HAMAS conflict.

***Al-Qa'ida and ISIS pose the biggest threat to U.S. interests overseas in parts of Africa, the Middle East, and South Asia, where these groups operate.*** These groups will continue to exploit political instability and ungoverned territory, striving to rebuild their capabilities and relying on the resilience of geographically distant elements.

- Al-Qa'ida probably has between 15,000 and 28,000 members worldwide, while ISIS has between 12,000 and 18,000 members. The growth of these groups during the last five years has occurred primarily in local conflicts in Africa—where their largest and most violent affiliates and branches are active. AQAP in Yemen, ISIS-Khorasan (ISIS-K) in South Asia, and ISIS in Syria probably are the most likely groups to support external plotting. ISIS in Syria probably will seek to rebuild its ranks, expand support networks, and solicit funds by reengaging with at least some of the several hundred ISIS detainees and thousands of ISIS-linked women and children who escaped or were released from prisons and displaced persons camps previously run by the Syrian Democratic Forces in northeast Syria.

***We are continuing to assess how the U.S.–Israel–Iran conflict will affect the worldwide terrorism landscape during the coming year.*** Iran and Iranian-aligned terrorist actors—including HAMAS and Lebanese Hizballah—have been severely degraded by Israeli-led operations, U.S. intelligence and weapons support to Israel, and U.S. operations in the region following HAMAS's attack against Israel in October 2023 through the current U.S. and Israeli-led military campaign. Nevertheless, these groups remain capable of asymmetrically attacking U.S. interests and our allies in the Middle East, and continue to spread Islamist propaganda to incite terrorist acts.

- Iran has proven capable of developing lethal operations against Americans at home and abroad and probably will attempt to pursue such efforts again if the current government remains in power and is able to rebuild. Hizballah and HAMAS probably are still able to conduct attacks outside the Middle East, but Israel intends to continue to degrade their capabilities. The Huthis and Iraqi Shia militias probably remain resilient and are likely to continue to threaten U.S. and allied interests in the Middle East. During Operation Epic Fury, some Iraqi Shia militias responded to Iran's call to attack U.S. bases, causing some damage and demonstrating their continued threat to U.S. interests and to Iraq's security and stability.

- Some Shia worldwide, particularly in the Middle East and South Asia, responded to the killing of Iranian Supreme Leader Ayatollah Ali Khamenei on 28 February with anger and protests. Prominent Shia religious leaders in Iran issued religious decrees calling to avenge Khamenei, which is likely to inspire at least some individuals to seek to conduct terrorist activities against U.S. targets worldwide. Meanwhile, while condemning the U.S. and Israeli attack on Iran, Grand Ayatollah Ali al-Sistani in Iraq issued a statement calling on all countries to stop the conflict and find a peaceful solution.

## HOMELAND DEFENSE

***The U.S.'s secure nuclear deterrent capability continues to ensure our safety here at home. However, China, Russia, North Korea, Iran, and Pakistan have been researching and developing an array of novel, advanced, or traditional missile delivery systems with nuclear and conventional payloads, that can strike the Homeland.*** The IC projects threats to the Homeland will expand to more than 16,000 missiles by 2035, from the current figure of more than 3,000 missiles.

- North Korea has successfully tested ICBMs capable of reaching the entire Homeland, and prior to Operation Epic Fury, Iran had developed space-launch vehicles that it could use to develop a military-viable ICBM by 2035 should Tehran decide to do so.

- In spite of the growing proliferation of one-way attack UAVs that perform missile-like functions, China, Iran, North Korea, Pakistan, and Russia will continue to prioritize advanced missiles that can threaten the U.S. However, their militaries almost certainly will plan to pair their high-end missiles with cheaper, expendable systems to stress U.S. missile defenses.

***Adversaries will seek to understand U.S. plans for advanced missile defense for the Homeland, almost certainly for the purposes of shaping their own missile development programs and assessing U.S. intentions regarding deterrence.*** China, Russia, and North Korea almost certainly will continue enhancing their own missile and counterspace capabilities during the next five years.

- Chinese officials probably fear that the Golden Dome for America will reduce Washington's threshold for initiating military action against Beijing in a crisis, which is likely driving China to focus on using international arms control discussions, particularly on its space-based elements.

## ARCTIC

***Russia has the largest Arctic coastline and views itself as part of the neighborhood. Russia is our primary challenge in the Arctic as it aims to further its interests in the region as part of broader global balance-of-power competition. Moscow is seeking to expand and deepen its presence in the Arctic through increased maritime trade, natural resource extraction, and military activity. In addition to its own domestic economic and security concerns, this activity is aimed at countering a perceived growing U.S. emphasis on expanding its influence and presence in the Arctic as a key national security strategic objective.*** As a non-Arctic country, China is engaged in more limited efforts in the region to advance its strategic and economic interests primarily via its relationship with Russia, and Beijing has signaled its intent to grow its presence when international waters are accessible.

Russia controls about half of the Arctic coastline and views the region as essential to its economic well-being and national security. Moscow wants to further develop its Arctic oil and gas reserves and position itself to reap benefits from expected increases in maritime trade. While Russia has enhanced its ability to operate in the Arctic by focusing on combat readiness and using dual-use technologies and facilities for defense, its war with Ukraine has limited its ability to fully achieve its Arctic ambitions.

- The bulk of Russia's Arctic forces are concentrated in the Kola Peninsula, which hosts about two-thirds of Russia's second-strike nuclear capabilities. The area is home to Russia's Northern Fleet, including seven of the country's nuclear-armed ballistic missile strategic submarines. Russia has made major investments in the fleet, including adding long-range missiles, UAVs, and underwater drones. Russia has at least three air bases on the Kola Peninsula that host fighter jets, surveillance, and transport aircraft.

- In January 2025, Russian President Putin emphasized that Moscow was intensifying its efforts to develop its icebreaker fleet, which is already the world's largest. The Russian Arctic Fleet has 42 icebreakers, including eight nuclear and 34 diesel-electric. Russia is building what could become the most powerful nuclear icebreaker in the world, which is reported to be operational by 2030.

China describes itself as a polar power and is seeking to expand its presence in the Arctic including plans to incorporate the "Polar Silk Road" into its Belt and Road Initiative as shipping lanes become more accessible and economically viable. Beijing seeks to expand its Arctic presence using scientific research, investments, and commercial ventures along the Northern Sea Route. Russia has invited China to cooperate at times in the Arctic, including conducting joint patrols.

# TECHNOLOGICAL CHALLENGES

***Leadership in emerging technologies is increasingly defining global power and influence. For technology powers such as the U.S. and China, AI and quantum information science—especially quantum computing—are at the center of this leadership competition. These technologies will foster broad new capabilities during the coming years that will impact economies and countries' national security advantages. At the same time, these technologies open up new risks across the spectrum of domestic and national security interests that require serious analysis and mitigation from the outset.***

## AI

***AI is a defining technology for the 21st century, enabling computers and machines to simulate human learning, comprehension, problem solving, creativity, and autonomy.*** Recent developments in generative AI—or models capable of creating original content such as long-form text, high-quality images, and realistic video and audio—have sparked global interest in AI that shows no signs of slowing. However, it is essential to make sure that humans maintain control of the machines and how AI is used.

***Maintaining a global leadership role in AI provides the U.S. with first-mover advantage.*** Other global powers' robust progress in AI is challenging U.S. economic competitiveness and national security advantages.

- AI's growing impact on all industries and domains will increase during the coming years. In the defense industry, AI has already been employed in recent conflicts to influence targeting and streamline decisionmaking, marking a significant shift in the nature of modern warfare. AI also has the potential to aid in weapons and systems design, influence offensive and defensive cyber operations, and increase the autonomy of uncrewed vehicles. In the intelligence domain, AI allows analysts to rapidly make sense of immense datasets and generate novel ideas and insights on complex national security issues. These applications,

however, also carry risks that require careful human engineering to appropriately mitigate risk of AI autonomy before they are broadly deployed.

Advanced semiconductors, also known as advanced chips, underpin the most advanced AI R&D, allowing the largest and most expensive models to train on massive datasets at speeds and scales that might otherwise be impossible. Because advanced chip R&D and manufacturing is concentrated in few regions, and demands deep expertise and precision, the ability to design and produce these chips domestically is both an economic and geopolitical priority for the U.S., China, and other countries.

The leading position of the U.S. in AI innovation, including advanced chip design, is driving other global powers to build competitive AI ecosystems of their own. China is the most capable competitor in the AI space, and aims to displace the U.S. as the global AI leader by 2030. China is driving AI adoption at scale—both domestically and internationally—by using its sizeable talent pool, extensive datasets, government funding, and burgeoning global partnerships.

## QUANTUM COMPUTING

***Early developers in quantum computers will give their countries an extraordinary technological advantage over others in terms of the ability to both quickly process national security information and break current encryption methodology.*** Quantum computers consist of quantum bits, or qubits, which play a similar role to the bits in today's digital computers. However, qubits can encode exponentially more information than bits, and by manipulating information stored in these qubits, scientists can produce high-quality solutions to vexing problems. Indeed, quantum computing may revolutionize human abilities to solve problems that are hard to address with even the largest supercomputers.

The emergence of a cryptographically relevant quantum computer (CRQC), which no country has yet to build, threatens the encryption underpinning secure online transactions and communication. CRQC could break the current encryption methods used to protect sensitive finance, health care, and government information, leading to a compromise in the confidentiality and integrity of the information. The far-reaching consequences of such a compromise has strengthened technology leaders' interest in quantum-resistant encryption methods to safeguard national security information.

The timeframe for transitioning to quantum computing is unclear due to a multitude of challenges. These include the need for more effective private-public coordination, scaling qubits and the overall quantum computer architecture, and R&D in foundational areas such as advanced software and algorithms, materials, hardware, and standards and benchmarks, at a minimum. The U.S., China, EU, Japan, and the UK are all investing billions of dollars to overcome these challenges and secure a first-mover advantage in this emerging field.

# DIVERSE THREAT VECTORS

***The global security landscape is volatile and complex, with armed conflict growing more common and posing potential threats to U.S. interests. Strategic competition and regional and smaller powers becoming more willing to use force to pursue their interests heighten the risk of conflict. The space domain is becoming increasingly contested, with China and Russia developing counterspace capabilities to challenge our own space efforts and U.S. dominance more generally. The threats of nuclear proliferation and chemical and biological warfare capabilities continue to grow.***

## MILITARY

***Armed conflict across the globe may pose a threat to U.S. interests and forces through the end of the decade.*** The trend is likely to vary significantly in scope and severity, ranging from full-scale conventional wars to low-intensity irregular conflicts, including violence and coercion below the threshold of war. This dynamic stems from a combination of major power competition, state and nonstate actors choosing to use force to achieve their goals, instability within states and regions, and increasing military and unconventional capabilities of both state and nonstate actors.

- In 2024, there were 61 active state-based conflicts across the world, the highest number since the end of World War II, according to the Peace Research Institute of Oslo. These conflicts resulted in about 129,000 battle-related deaths, the fourth highest of any year since the end of the Cold War, and were superseded only by 2021, 2022, and 2023.

- The risk of conflict is heightened by major power competition. Beijing and Moscow view Washington and its allies and partners as aggressors, and hostile toward their interests in Europe and the Asia-Pacific region. They could respond with force should they determine there are critical threats to their core interests.

- Even if the great powers refrain from conflict, many regional and smaller powers are growing much more willing to use force to pursue their interests. Countries such as Egypt, Israel, Pakistan, Turkey, and the UAE are using a mix of lethal aid, proxy forces, or their own military assets to provoke or undermine their rivals or to tilt nearby conflicts in their favor.

- Many countries are now more willing to use deniable, coercive, or violent approaches below the threshold of war. These include acts of sabotage, assassinations, detentions, non-lethal attacks, and the use of migration as a weapon.

***The fundamental principles of warfare are unchanged, and combatants are likely to blend many "tried and true" approaches with innovative technologies and techniques.***

- Future warfare will require rapid adaptation, both on the offense and defense. In particular, the proliferation of remotely operated or autonomous weapons systems on the battlefield in Ukraine has shortened timelines for tactical adaptation, with both sides of the conflict devising new measures and countermeasures in the span of weeks.

- Future warfare will require a balance between quality and quantity. Exquisite, high-end capabilities—expensive and slow to manufacture—cannot be continually replenished at scale in a lengthy, high-intensity conflict. Alternatively, some combatants have mass produced cheap and low-tech weapons whose sheer numbers make up for their lack of sophistication.

- Intelligence and information will continue to be important to military success. Uncrewed systems are already ubiquitous on the battlefield, and these will make real-time surveillance and targeting achievable for many militaries, particularly when teamed with commercial imagery and AI or machine learning systems. Proliferation of commercial networks, personal devices, and extensive video recording capabilities will provide additional vectors to gain intelligence insights.

- Future battlefields are more likely to be urban given the steady growth of cities worldwide as well as their political and economic significance.

## SPACE

***Rapid advances in space technology, lower barriers to entry, the deployment of counterspace systems, and the expansion of civilian and military applications have solidified the space domain as a key arena for strategic competition and future conflicts.*** Decreasing costs for space launches and satellite manufacturing have enabled a greater number of actors—both state and nonstate entities—to develop or to exploit others' space capabilities. A broader range of actors can now use space capabilities to threaten U.S. and allied military operations, expose sensitive U.S. intelligence activities, and facilitate illicit activities such as drug trafficking and terrorism.

- China has eclipsed Russia as the key U.S. competitor in space. Beijing's rapid deployment of space capabilities positions it to use space to advance its foreign policy goals, challenge U.S. military and technological superiority in space, and project power on a global scale. Russia remains a capable space power, even while its space industry suffers from systemic underfunding, quality control issues, international sanctions, and export controls.

- The evolution of the Russia–Ukraine war has heightened global awareness of the impact that space services have on military operations. Ukraine demonstrated for the first time that a nation without its own space infrastructure can integrate commercial and partner space services to defend against an adversary with established space systems and decades of military space operations experience.

***Competitor threats to U.S. space architectures are growing in scale and complexity as nations prioritize the development of extensive counterspace capabilities to contest U.S. space dominance.*** Architecture improvements aimed at making satellites and constellations safer and more capable will pose a security dilemma to U.S. competitors, and probably will incentivize them to pursue new weapons and more aggressive strategies that introduce new escalatory risks.

- Competitors are closely monitoring U.S. space developments, and probably will seek new ways to overcome or counter larger and more resilient U.S. space architectures during the coming decade. Ukraine's use of Starlink for resilient communications and U.S. plans to deploy hundreds of missile defense satellites probably are amplifying adversary views of the importance of defeating large constellations.

- Disruptive attacks against space services have become more common and probably will be normalized during crises or periods of strained relations between nations. Adversaries are using jammers against U.S. satellites, and the risks stemming from cyber attacks against satellite communications are also growing as global reliance on digital systems expands the number of exploitable cyber vulnerabilities associated with space services.

***Nuclear weapons are a growing threat to satellites.*** Russia is developing a new satellite meant to carry a nuclear weapon as an antisatellite capability. A nuclear detonation in outer space would harm all countries' national security and commercial satellites and infrastructure, as well as impair U.S. use of space as a driver for economic development.

## CYBER

***Cyber actors from China, Russia, Iran, North Korea, and ransomware groups will continue to pose critical threats to U.S. networks and critical infrastructure.*** These global cyber actors almost certainly will continue malicious cyber activities because they gain unmatched intelligence collection value and financial incentives from these operations. These cyber adversaries also have the ability to pre-position or execute disruptive and destructive attacks against U.S. critical infrastructure and other targets. They continue to pour resources into operations to compromise U.S. systems and core global IT resources.

***China is the most active and persistent cyber threat to U.S. Government, private-sector, and critical infrastructure networks, while Russia poses a persistent, advanced cyber attack and foreign intelligence threat.*** Both countries are continuing their R&D and pre-positioning efforts to advance their premier cyber attack capabilities for use against the U.S.

***Iran poses a threat to U.S. networks and critical infrastructure in the form of cyber espionage and cyber attacks. Iran's cyber operators previously have used cyber attacks to effect against poorly defended targets and weaker opponents, such as Albania.*** Iran maintains persistent intent to target the U.S. and its allies and partners with cyber operations despite the challenges it faced most recently on display during the 12-Day War in 2025, during which Tehran struggled to defend itself against Israeli cyber attacks and to respond in kind. We note that Iranian proxies and hacktivists outside of Iran will also seek cyber-enabled operations against U.S. targets but these probably will be less technically advanced. On 11 March, a hacking group linked to Iran claimed

responsibility for a cyber attack against a U.S. medical technology company in retaliation for U.S. attacks against Iran. The hacking group claimed that it had erased 200,000 systems and extracted 50 terabytes of data from the company.

***North Korea's cyber program—combined with Pyongyang's use of IT workers with falsified credentials to gain employment with unwitting companies—is sophisticated and agile, and North Korea is capable of conducting espionage, cybercrime, and cyber attacks.*** It is focused on evading financial sanctions, stealing funds to support its military, and conducting cyber espionage to fill gaps in the regime's weapons programs. Pyongyang's cyber forces are capable of achieving a variety of strategic objectives against diverse targets, including in the U.S. and South Korea, while its growing use of human insider access to circumvent cyber security measures threatens targets with stronger defensive measures. Cryptocurrency heists and other financial crimes also continue to net at least $1 billion each year to fund the regime's weapons programs. North Korean cyber actors' expansion of ransomware attacks and other cybercriminal activities increase the disruptive threat to the U.S. IT systems and critical infrastructure entities.

***Financially or ideologically motivated nonstate actors such as ransomware groups, other cyber criminals, and hacktivists are taking more aggressive cyber attack postures.*** Ransomware attacks in particular harm U.S. critical infrastructure and business operations, leading to operational disruptions, loss of revenue, and loss and theft of sensitive data. Ransomware groups are shifting to faster, high-volume attacks, making it harder for security experts to identify and mitigate incidents.

## WMD

***Governments' respective threat perceptions and competition with other states will continue to drive WMD modernization, expansion, and testing efforts.*** Countries probably will continue to develop a range of WMD capabilities with small and large effects to diversify their toolkits of military options. Countries without WMD capabilities may choose to pursue them in response to perceived increases in regional insecurity, a deterioration of global WMD norms, greater doubts about relying on existing security agreements with others, and reduced confidence that the international community would impose and maintain credible consequences.

- Beijing views nuclear modernization as critical for strategic competition with the U.S. For its part, Moscow views U.S. long-range precision-strike systems and future developments in U.S. missile defenses as threats to its nuclear deterrent. In addition, North Korea is investing in nuclear-capable systems to deter the U.S., challenge regional missile defenses, and hold targets in South Korea at risk.

- Adversary states probably maintain offensive CBW programs in part because they perceive that the U.S. and its allies have these capabilities. Some states with these offensive programs probably will continue to invest in their large-scale CBW capabilities as part of their broader suites of military options and contingencies, including stockpile replenishment, the modernization of production capabilities, and the development of delivery systems.

***Countries with WMD capabilities are modernizing, expanding, and testing those capabilities and delivery systems.*** The range of WMD threats to the U.S. will grow as states create more diverse use options and delivery systems that could reduce the threshold for use, circumvent U.S. missile defenses, or evade detection. The ongoing development and inclusion of these dual-use technologies also challenge the IC's ability to collect on and detect their emergence or developmental progress, including for WMD efforts, as well as identify ways to counter the development and production of these capabilities.

- With varying degrees of success, China, North Korea, Pakistan, and Russia probably will continue to research, develop, and field delivery systems that will increase their ranges and accuracy, challenge U.S. missile defenses, and provide new WMD-use options. India also is developing new and longer-range nuclear delivery systems.

- Russia has the largest and most diverse nuclear weapons stockpile and is modernizing its nuclear weapons capabilities in the face of multiple failed tests of new systems. China remains intent on modernizing, diversifying, and expanding its nuclear posture for strategic rivalry with the U.S. Both countries are continuing to develop nuclear-capable systems meant to penetrate or bypass U.S. missile defenses. North Korea is strongly committed to expanding its nuclear weapons arsenal, as shown by its pace of flight tests and publicized uranium enrichment capabilities.

- Prior to Operation Epic Fury, Iran was pursuing increasingly capable missile systems, was non-compliant with its Chemical Weapons Convention obligations, had not abandoned its intention to conduct R&D of biological agents and toxins for offensive purposes, was intending to try to recover from the devastation of its nuclear infrastructure sustained during the 12-Day War, and refused to live up to its nuclear obligations with the IAEA, including refusing to allow IAEA access to key nuclear facilities. During Operation Epic Fury, the IAEA confirmed recent damage from airstrikes to the entrance buildings of the underground Natanz Fuel Enrichment Plant, but did not anticipate any release of radiological materials. We are monitoring Iranian WMD-related capabilities and actions following the initiation of Operation Epic Fury.

***Most states with CBW programs have developed these weapons for tactical use such as targeted killings, special military operations, and CT or counterintelligence operations, and probably will continue these investments during the next several years.*** States with CBW programs are developing a range of capabilities designed to challenge the ability to detect, treat, or attribute attacks, and in recent years some have pursued, maintained, or expanded large-scale CBW capabilities for battlefield use. China, North Korea, and Russia probably maintain the knowledge and capability to produce and employ traditional biological pathogens and toxins, and historically have pursued—or, in the case of North Korea, continues to pursue—pathogens that cause highly infectious or contagious diseases.

- Russia's scientists continue developing new CBW capabilities. Its intelligence services have used Novichok nerve agents twice since 2018 in assassination attempts, and its military has used chemicals in thousands of attacks against Ukrainian forces since 2022. China probably possesses CBW capabilities that threaten U.S., allied, and partner forces as well as civilian

populations. North Korea maintains its CW capabilities, and Pyongyang may use such weapons during a conflict or in an unconventional or clandestine attack.

- State programs are pursuing advanced technologies to develop military capabilities, such as novel industrial processes and bioenergy sources, which may also support the creation of antiagriculture, antimaterial, and antipersonnel agents. Advances in dual-use biotechnology—including bioinformatics, synthetic biology, nanotechnology, and genomic editing—could lead to novel biological threats or raise the potential for biological safety events resulting in the unintentional release of pathogens.

### Arms Control

Some countries will continue to challenge arms control regimes and normative behavior regarding WMD development by avoiding, abandoning, or subverting existing or future agreements; using perceived tolerance of small-scale use and testing; and developing asymmetric capabilities. Russia, in particular, has undermined arms control agreements during the last five years and used chemical weapons in Ukraine, although Moscow probably will continue to abide by the longstanding norm against the large-scale use of chemical, biological, and nuclear weapons absent a significant shift in its conflict with Kyiv.

Since the start of its war in Ukraine, Russia has levied nuclear threats against the U.S. and NATO, declared that it deployed nuclear weapons in Belarus, and unilaterally suspended its data exchanges required by the New START Treaty, while holding to its central numeric limitations. Moscow has also deratified its participation in the Comprehensive Nuclear Test Ban Treaty. In addition, Moscow is developing space-based antisatellite nuclear weapons, which, if deployed, would be inconsistent with its obligations under the Outer Space Treaty.

## REGIONAL CHALLENGES

***China, Russia, Iran, and North Korea view the U.S. as a strategic competitor and potential adversary, perceiving it as a threat to their respective interests and ambitions, and seek to counter and undermine U.S. influence and power through a range of diplomatic, economic, and military means.*** China aims to dominate its region and challenge Washington's leadership, promote its own multilateral and economic influence, and strengthen its military while viewing the U.S. as its main strategic competitor. Russia continues to challenge U.S. interests and power, seeking to restore its influence in the former Soviet space, particularly Ukraine. Iran's strategic position faces extreme challenges as it attempts to address potentially regime-threatening conflict and the ongoing risk of domestic unrest. For now, it retains the ability to project power in the region and to suppress internal threats to the regime's hold on power. North Korea is committed to expanding its strategic weapons programs, including missiles and nuclear warheads, to solidify its deterrent capability. However, even in an era of major power competition, these powers will sometimes have common or overlapping interests where they can cooperate for mutual benefit, as we saw recently between the U.S. and China with the Busan Agreement.

***Selective cooperation among China, Russia, Iran, and North Korea, driven by the common goal of balancing U.S. efforts and actions and supporting their own strategies, is bolstering the threat that each of them poses to the U.S.*** However, the relationships are limited and primarily bilateral, and the concept of "adversary alignment" overstates the depth of cooperation that is currently occurring. China's economic support for Russia and Iran and their increasing trade has helped Moscow and Tehran to each withstand U.S.-led international sanctions. North Korea's and Iran's military support to Russia have helped Moscow in its war against Ukraine, which is in turn bolstered by Western support. These four countries are likely to continue to look for opportunities to increase their cooperation, although enduring divergent interests as well as concerns over directly confronting the U.S. will constrain the actual scale and scope of their relationships.

## Western Hemisphere

***Flagging economies, high crime rates, pervasive organized crime, migration flows, corruption, and narcotics trafficking present continuing risks to U.S. interests, while strategic competitors seek greater influence in the region that challenges Washington.*** Latin America and the Caribbean almost certainly will see hotspots of volatility during the coming year, which have the potential to undermine or distract countries, particularly U.S. partners, from improving living conditions, tackling illicit drug flows, and warding off foreign influence.

- Venezuela continues to struggle with many of these dynamics, but since the arrest of Nicolas Maduro—who led a corrupt, authoritarian government—we have seen a willingness on the part of the Venezuelan Government to cooperate with the U.S. to open up its economy and develop the country's abundant oil and natural gas extraction capability. The government has released some political prisoners as part of an amnesty program.

- The review of the U.S.–Mexico–Canada Agreement (USMCA) scheduled for 2026 almost certainly will increase uncertainty among Latin American economies, particularly those that rely on Mexico as an export destination for intermediate goods for manufacture and onward export to the U.S. Some are being affected by new Mexican tariffs, designed to limit the practice. Expecting stricter requirements under a revised USMCA, the Mexican Government took action in December 2025 to protect North American supply chains from foreign transshipment when it approved new tariffs on inputs from countries lacking free-trade agreements with Mexico.

- China, Russia, and Iran are seeking to sustain economic, political, and military engagement with Latin America that may conflict with U.S. interests in the region. China's demand for raw materials is likely to drive continued economic outreach to Latin America, while Russia probably wants to expand its current security and diplomatic ties with Cuba, Nicaragua, and Venezuela.

## Asia

**China Strategic Overview**

***President Xi and his government aim to achieve "the great rejuvenation of the Chinese nation" by 2049. China will seek to increase its power and influence to shape its region and world events; create an environment favorable to Chinese interests; overcome perceived containment efforts by the U.S.; secure its freedom of movement at sea; reduce U.S. military presence and operations on its periphery; and fend off challenges to its reputation, legitimacy, and capabilities at home and abroad. China also sees benefits to and is prioritizing a productive, stable economic relationship with the U.S., as evinced by its approach to the Busan Agreement with the Trump administration.***

- Beijing has been deeply suspicious of Washington's intentions and has long viewed the U.S. as pursuing a coordinated effort to contain China's development and rise, undermine Chinese Communist Party (CCP) rule, and prevent the country from achieving its aims.

- At the same time, Chinese leaders will seek to reduce tension with Washington when they believe that such efforts benefit Beijing, protect China's core interests, and buy time to strengthen its position.

- Beijing will continue to strengthen its conventional military capabilities and strategic forces, intensify competition in space, and sustain its industrial- and technology-intensive economic strategy to compete with U.S. economic power, making advances in the "Global South" in advanced manufacturing and the exportation of goods. China will likely continue working to maintain U.S. dependence on sectors such as critical minerals, energy storage systems, pharmaceutical ingredients, and UAVs, while accelerating efforts to reduce China's dependence on the U.S. in sensitive or strategic areas, such as semiconductors and AI. In addition, China has shown its ability to compromise U.S. infrastructure through formidable cyber capabilities for both espionage and strategic advantage in the event of a conflict.

- China's engagement with Russia substantially strengthens Moscow's ability to sustain the war in Ukraine and resist external pressure. China's imports of Russian oil and natural gas provide key sources of revenue for Moscow, helping it weather international sanctions. China's exports of dual-use goods and technology to Russia help sustain Moscow's defense production while reducing its incentives to reach a cease-fire in Ukraine.

**China–Taiwan**

***In 2026, Beijing probably will continue seeking to set the conditions for eventual unification with Taiwan short of conflict.*** China, despite its threat to use force to compel unification if necessary and to counter what it sees as a U.S. attempt to use Taiwan to undermine China's rise, prefers to achieve unification without the use of force, if possible. The People's Liberation Army (PLA) also continues to develop military plans and capabilities for attempting to achieve unification using military force if directed to do so.

The PLA probably is making steady but uneven progress on capabilities that it would use in any attempt to seize Taiwan and deter—and, if necessary, defeat—U.S. military intervention. At times, it has increased the scope, size, and pace of operations around Taiwan.

- The IC assesses that Chinese leaders do not currently plan to execute an invasion of Taiwan in 2027, nor do they have a fixed timeline for achieving unification. However, China publicly insists that unification with Taiwan is required to achieve its goal of "national rejuvenation" by 2049—the 100th year anniversary of the founding of the People's Republic of China (PRC). Beijing almost certainly will consider a variety of factors in deciding whether and how to pursue military approaches to unification, including PLA readiness, the actions and politics of Taiwan, and whether or not the U.S. will militarily intervene on Taiwan's behalf.

- Chinese officials recognize that an amphibious invasion of Taiwan would be extremely challenging and carry a high risk of failure, especially in the event of U.S. intervention.

A conflict between China and Taiwan may disrupt U.S. access to trade and semiconductor technology critical to the global economy. If the U.S. were to intervene, it probably would face significant but recoverable disruptions to its transportation sector from Chinese cyber attacks. Even without Washington's involvement, U.S. and global economic and security interests would face significant and costly consequences, with tech supply chains disrupted and investor fear across markets. In addition, a protracted war with the U.S. risks unprecedented economic costs to the U.S., Chinese, and global economies.

**China–East Asia**

***China seeks to advance political and military control of its claimed territory in the South China Sea.*** During the past year, China has advanced its control over disputed maritime territory in the South China Sea, particularly at the Philippine-claimed Scarborough Reef and Second Thomas Shoal, through persistent military and coast guard patrols and diplomatic and legal actions.

- In September 2025, China publicly established a nature reserve at Scarborough Reef, which lies within the Philippines Exclusive Economic Zone. The reserve covers more than 3,500 hectares on the northeast side of Scarborough, with a "core zone" and outer "experimental zone" that requires approval for foreigners' entry and bans human activities, such as fishing.

***China–Japan tensions increased significantly in November 2025 following comments made by Japanese Prime Minister Takaichi describing a potential Chinese invasion of Taiwan as a "survival threatening situation" for Japan.*** *In response,* China is employing multidomain coercive pressure that probably will intensify through 2026, aimed both at punishing Japan and deterring other countries from making similar statements about their potential involvement in a Taiwan crisis.

- Prime Minister Takaichi's specific comments carry weight in Japan's system because the phrase "survival threatening situation" serves as a possible legal justification for military authorities under Japan's 2015 Legislation for Peace and Security. Her comments represent a significant shift for a sitting Japanese prime minister. China perceived her comments to be escalatory and violation of the Sino-Japanese Joint Statement of 1972 and their Treaty of Peace and Friendship of 1978, which included Japan's recognition of the PRC as China's sole government and respecting China's position that Taiwan is an inalienable part of its territory. China probably is concerned that Prime Minister Takaichi's comments will bolster Taiwan's independence movement.

- China's initial actions have included aggressive official rhetoric, the cancellation of flights and cultural exchanges, and the reimposition of its ban on Japanese seafood imports. Beijing probably will escalate to additional coercive economic measures if tensions increase.

- China probably will also increase military and coast guard activity around the Senkaku Islands—disputed territory administered by Japan but claimed by China—to signal displeasure and test Japanese responses. These activities could increase the risk of accidents or miscalculation leading to inadvertent escalation.

**North Korea Strategic Overview**

***North Korea remains committed to expanding its strategic weapons programs, including missiles and nuclear warheads, and to solidifying its deterrent capability.*** North Korea's WMD, conventional military capabilities, illicit cyber activities, and demonstrated willingness to use asymmetric capabilities to attack South Korea and the U.S. pose significant threats to the U.S. and its allies, particularly South Korea and Japan. Increased trade after the pandemic, income from selling munitions to Russia, and illicit cyber activities including cryptocurrency thefts have boosted North Korea's foreign currency revenue generation to its highest levels since before extensive sanctions were imposed in 2018. North Korea's partnership with Russia is growing, and in 2025, North Korean leader Kim Jong Un took steps to improve ties to China—still North Korea's most important trading partner and economic benefactor—after the relationship had cooled because of Beijing's earlier opposition to Pyongyang's nuclear and missile tests.

- A more confident North Korea continues to reject direct engagement with South Korea and refers to Seoul as its "main enemy."

The benefits that North Korea receives for its support for Russia in the war against Ukraine have increased North Korean capabilities. North Korean military forces have gained valuable combat experience in 21st Century warfare along with equipment. North Korea's ability to institutionalize lessons learned and consolidate gains from Russia will determine how valuable it will be. However, North Korea is likely to remain deterred by U.S. and allied forces.

- In 2024, North Korea deployed more than 11,000 troops to Russia to support combat operations in Kursk. North Korea has also provided artillery munitions, military equipment, and ballistic missiles to Russia during the course of the conflict.

**South Asia**

***During the past year, South Asia remained a source of enduring security challenges for the U.S.*** India–Pakistan relations remain a risk for nuclear conflict given past conflicts where these two nuclear states squared off, creating the danger of escalation. The terrorist attack last year near Pahalgam, in the Indian Union Territory of Jammu and Kashmir, demonstrated the dangers of terrorist attacks sparking conflict. President Trump's intervention deescalated the most recent nuclear tensions, and we assess that neither country seeks to return to open conflict, but that conditions exist for terrorist actors to continue to create catalysts for crises.

- ISIS-K maintains a foothold in the region and aspires to conduct external attacks, but the Taliban is improving its security services and has taken aggressive action against it. The Taliban has conducted extensive raids against ISIS-K targets, probably thwarted some attacks, and driven some ISIS-K leaders to relocate to neighboring countries.

- Pakistan continues to develop increasingly sophisticated missile technology that provides its military the means to develop missile systems with the capability to strike targets beyond South Asia, and if these trends continue, ICBMs that would threaten the U.S.

- Relations between Pakistan and the Taliban have been tense, with intermittent cross-border clashes, as Islamabad has become increasingly frustrated with anti-Pakistan terrorist groups' presence in Afghanistan while Islamabad faces growing terrorist violence. On 26 February, the Afghan Taliban launched strikes against Pakistani military positions along their shared border, claiming retaliation for prior Pakistani airstrikes. Pakistan responded within hours by bombing Afghan border provinces and the capital Kabul—the first time Pakistan has struck Afghanistan's urban centers. The fighting has continued since it erupted. Pakistan's army chief warned this month that lasting peace requires the Taliban to sever ties with militants targeting Pakistan. The Taliban's public posture has been to call for dialogue, but it has denied harboring anti-Pakistani militants.

## Europe-Eurasia

**Europe**

***As the primary economic and military partners of the U.S., the strength and resiliency of European countries have clear implications for U.S. interests and national security.*** European leaders have taken action to reverse decades of underinvestment in defense and national security and are increasing defense spending. At the same time, much of Europe faces challenges or capacity limitations that inhibit robust security cooperation in the near term. Several EU members face mounting levels of national debt, coupled with anemic growth. In addition, many countries across the continent are contending with the effects of large-scale migration, to include Islamist radicalization within some immigrant communities.

- Demographic trends indicate that EU members, including Italy, Germany, and many countries in Eastern Europe, will face serious fiscal challenges as waves of retirees strain public pension systems, with fewer young workers available to replace them. Much of Europe has relied on low-skilled immigration to ease labor shortages, particularly as the continent's median age surpasses 47. However, various factors, including a lack of effective assimilation, have limited the capacity to absorb new arrivals, and different values systems have fueled social tensions.

- As of 2024, Europe hosted about 90 million international migrants, mostly in Western Europe. Large increases since 2020 have included more than 6 million Ukrainians registered for temporary protection, and waves of asylum seekers and refugees, economic migrants, and family members from Asia, the Middle East, Africa, Latin America, and the Caribbean.

The lack of social integration and limited employment opportunities in some EU member countries, coupled with contrasting cultural and religious values, have made some immigrant youth more susceptible to political and religious radicalization—or they arrive having already been radicalized. Acts of terrorism, violence toward women, and anti-Semitism among immigrants from Islamic

countries are on the rise. One of the effects of these trends is unsurprisingly greater anti-immigration sentiment among many European voting constituencies.

- Many European political parties seek to curtail the tide of non-European immigration that has endured during the past 20 years. Polls suggest that most Europeans see non-European immigration as creating problems for their countries, and in the spring of 2025, European respondents ranked immigration as the top noneconomic problem facing their countries.

- There is a multiplicity of Islamic movements in Europe, some of which are connected to the Islamist ideological movement of the Muslim Brotherhood (MB). Islamist terrorist groups and hostile actors have exploited HAMAS's attacks against Israel and Israel's response as a rallying call to plot attacks against Christian and Jewish targets in Europe.

Europe's economic challenges and slow growth have been compounded by Russia's invasion of Ukraine in 2022 and COVID-era fiscal policies. High energy prices and inflation continue to hamper economic growth and may place pressure on efforts to sustain defense spending. Across Europe, governments already strained by high-deficit spending and debt are pledging dramatically higher defense commitments. Higher European defense spending could promote a more robust defense industrial base on both sides of the Atlantic.

Most European countries regard Russia as their greatest and most enduring adversary. Russia's invasion of Ukraine, employment of gray zone tactics against industry and civil society in Europe, and efforts to fuel frozen conflicts have galvanized European attitudes and strengthened Europe's focus on defense. NATO and EU member states are eager to see the war in Ukraine resolved in a way that not only preserves Ukrainian sovereignty, but also deters future Russian aggression in Europe.

- Russia's war in Ukraine revived fears of ethnic conflict and reinforced political fault lines in the Western Balkans between Russia and the West. Russia fuels instability between Serbia—which it favors—and Kosovo over Kosovo's statehood, and backs the separation of Serb entity Republika Srpska from Bosnia and Herzegovina. Russia also uses state-sponsored nongovernmental entities to direct campaigns with the goal of obstructing NATO and the EU, highlighting Serb victimhood and promoting ties to Russia, particularly in Bosnia and Herzegovina, Montenegro, and Serbia, which have large ethnic Serb populations.

- Disruptions to Europe's critical infrastructure by state-affiliated actors have the potential to cause loss of life, harm U.S. and European commercial interests, and affect Ukrainian military supplies. For example, European countries are increasing spending on capabilities to detect, track, identify, and counter small UAVs and other threats.

**Eurasia**

***Russia retains the capability to selectively challenge U.S. interests globally by military and nonmilitary means.*** Its robust, advanced conventional and nuclear forces are an enduring threat to the Homeland, U.S. allies and partners, and U.S. forces abroad. The most dangerous threat posed by Russia to the U.S. is an escalatory spiral in an ongoing conflict such as Ukraine or a new conflict that led to direct hostilities, including nuclear exchanges. Russia has also cultivated partnerships with China, Iran, and North Korea to further its own interests, and makes use of an

array of tools that fall into the gray zone of geopolitical competition below the level of direct armed conflict. At the same time, Russia's aspirations for multipolarity could allow for selective collaboration with the U.S. if Moscow's threat perceptions regarding Washington were to diminish.

- Even with wartime attrition, Russia's ground forces have grown, and its air and naval forces are intact and arguably more capable than before the full-scale invasion. Russia has advanced systems, including counterspace weapons, hypersonic missiles, and undersea capabilities designed to negate U.S. military advantages. Russia is also building novel nuclear weapons platforms to supplement its already formidable nuclear air, land, and sea-based triad, complicating U.S. nuclear deterrence calculus.

- Russia is likely to remain resilient against Western sanctions and export controls, although at the cost of expanding budget deficits and underinvestment in the civilian economy that increase the risk of long-term economic stagnation and deepening dependence on China. Moscow relies on its partnerships with other U.S. adversaries to evade sanctions. It also is attempting to evade sanctions by setting up alternate payment systems.

- Russia's gray zone tools include cyber attacks, disinformation and influence operations, energy market manipulation, military intimidation, and sabotage. Russia often hides and denies its role, complicating U.S. efforts to counter it.

***The U.S.-sponsored Peace Summit on 8 August between Armenia and Azerbaijan has created an opportunity for the two countries to establish a lasting peace deal and contributed to increasing regional stability.*** The results of the Peace Summit included a provisional agreement on the terms of a peace treaty and plans to establish the "Trump Route for International Peace and Prosperity" (TRIPP), managed by the U.S., that will connect Azerbaijan to its exclave of Naxcivan across southern Armenia, unlocking trade flows for both nations and the region.

- These developments represent a significant change in direction for Armenian–Azerbaijani relations. In 2020 and 2023, Azerbaijan militarily retook control of its Nagorno-Karabakh region from an ethnic Armenian population supported by Yerevan.

- Since 8 August, both sides have appeared willing to maintain the momentum from the Peace Summit. Border ceasefire violations between Armenia and Azerbaijan have plummeted and now are almost nonexistent. In October 2025, Azerbaijani President Ilham Aliyev announced that Azerbaijan had lifted restrictions on cargo transit through Azerbaijan to Armenia, a move that Armenian Prime Minister Nikol Pashinyan reciprocated within days. Since then, Azerbaijan has shipped gasoline and permitted transshipments of wheat to Armenia.

- There are still hurdles to the final conclusion of a peace deal. For example, President Aliyev continues to insist that Armenia change its constitution to remove a reference that he characterizes as claiming Nagorno-Karabakh is part of Armenia, a step which would require Armenia to hold a constitutional referendum whose passage is not guaranteed.

**Russia–Ukraine**

***During the past year, Russia has maintained the upper hand in its war against Ukraine and sees little reason to stop fighting so long as its forces continue to gain ground. Moscow almost certainly remains confident that it will prevail on the battlefield in Ukraine and force a settlement on its terms.*** However, U.S. efforts to forge peace hold the potential to change this dynamic and ameliorate some of the conflict's regional effects. A durable settlement to the war in Ukraine could open the door for a thaw in U.S.–Russia relations and an improved bilateral geostrategic and commercial relationship.

- The continuation of the war increases the risk of both inadvertent and deliberate escalation to direct conflict between Russia and NATO forces. Russia's continued willingness to use sabotage against U.S. and European allies to disrupt their support for Ukraine—for example, the railway explosion in Poland in November 2025—exemplifies this threat.

- Similarly, Russia's use of nuclear threats and combat use of dual-capable intermediate range ballistic missile systems in Ukraine raises the specter of a regional conflict expanding to an existential threat to the Homeland.

- The war also will continue to have spillover effects in other parts of the globe, as shown with North Korean troops gaining valuable warfighting experience and military technology from Russia for participating in combat operations against Ukraine.

**Russia Strategic Overview**

***Russia views itself as a key geostrategic competitor of the U.S. and seeks a multipolar world order in which Russia reaches and maintains a privileged position, equal to that of the U.S. and other great powers, including China. Russia is trying to reshape global politics, frequently at U.S. expense, and seeks to restore its sphere of influence and prevent further NATO expansion in the former Soviet space, especially Ukraine.*** Russia probably will continue selectively confronting the U.S. and its partners globally with its full range of capabilities where it sees opportunities to gain an advantage, driven in part by its longstanding perception that the U.S. poses a significant threat to its interests. Russia is also likely to continue collaborating with other powers, including U.S. adversaries, to jointly oppose the U.S. where their respective interests overlap.

***Regional developments in the post-Soviet space, particularly the South Caucasus and Central Asia, pose both challenges and opportunities for the U.S.*** The region contains substantial reserves of key resources, including critical minerals, oil, and gas. Opportunities also exist for U.S. investment in diversified transit corridors connecting the Eurasian landmass with global markets and commercial opportunities. However, Russian political and economic influence in many of these countries presents an obstacle for U.S. private-sector engagement, as does pervasive corruption. Growing Chinese economic and political influence—often at Russia's expense—poses similar difficulties while also threatening to divert critical resources to the Chinese market. The region also remains a hub for drug trafficking and jihadist terrorist activity, which continues to pose a threat to the U.S. and our allies and partners. Ongoing U.S. engagement to resolve regional conflicts, such as between Armenia and Azerbaijan, can improve U.S. access to the region and facilitate strategic investments and commercial opportunities.

## Middle East

***In the Middle East during the next year, conflict and instability will shape security, political, and economic dynamics in a variety of ways. The U.S.-led Operation Epic Fury launched at the end of February is advancing fundamental change in the region that began with HAMAS's attack on Israel on 7 October 2023 and continued with the 12-Day War, resulting in weakening Iran and its partners and proxies.***

***Simultaneously, Israel's tolerance for persistent threats on its border has eroded and its policy of projecting military force beyond its borders to address emerging or potential threats has created domestic pressure on Arab leaders, challenged Gulf economic plans, and made overt Arab partnerships with Israel more challenging.***

- Israeli leaders this year are likely to continue using proactive and sometimes provocative military action in a bid to undermine and deter regional adversaries. If the regime in Tehran survives, Israel is likely to use all available means to prevent Iran from rebuilding its capabilities devastated during the 12-Day War and Operation Epic Fury. It will also seek

additional ways to undermine the regime. Iran, meanwhile, will try to recover and rebuild its influence, including maintaining its ability to project power and pose a viable retaliatory threat to Israeli and U.S. interests.

- Meanwhile, leaders across the region, and particularly in Egypt, Jordan, Lebanon, and the West Bank, are facing substantial political and socioeconomic strains that are exacerbated by regional conflict. Additional shocks—such as mass population movements from Gaza or neighboring countries, or new rounds of conflict—could provoke large-scale popular unrest and test government stability.

- The conflict with Iran has at least temporarily smoothed the tensions between Saudi Arabia and the UAE, which emerged in part over divergent visions for Yemen, as they seek to present a united front against Iran's aggression, avoid extensive damage, and preserve their economic transformation agendas. In the aftermath of the conflict, these tensions could reemerge, with implications for a broad range of regional issues.

- Syria's Government is focused on asserting control over the vast territory formerly controlled by the Kurdish-led Syrian Democratic Forces and advancing President Ahmad al-Shara's goal of unifying Syria. Shara' is likely to try to integrate Druze-controlled southern Syria next. His success will be shaped by his ability to establish security, govern, rebuild economic opportunities, and develop trust with skeptical domestic and foreign audiences. Syrians, for their part, hold entrenched and often conflicting visions for their country's future, and are concerned about hardline Islamist terrorist elements within the Syrian Government, a major hurdle to establishing a stable and inclusive government.

***When the conflict with Iran concludes, the region's key players are likely to reexamine longstanding assumptions and alliances as they determine how best to advance their interests in the changing region.*** Among the key decisions will be how the emerging balance of power between Jerusalem and Tehran affects the desirability of partnership with Israel and their levels of commitment to the U.S.-backed peace plan for Gaza, which represents additional opportunities for regional security and economic cooperation.

***With Iran weakened and focused on survival, Axis of Resistance members are on the back foot. Israel has seriously weakened the conventional military capabilities of these groups, which are likely to lean into asymmetric methods to threaten Israeli and U.S. interests in the region and beyond. In the meantime, non-Iran affiliated terror groups will seek opportunities to drive and take advantage of instability in the Middle East.***

HAMAS is degraded but has used the cease-fire with Israel to restore some of its capabilities and control over parts of Gaza. HAMAS's refusal to disarm and Israel's concerns about its ability to continue to threaten Israel are delaying progress toward fulfilling the terms of the President Trump's peace plan, even as stakeholders continue to develop the plan's security and governance institutions. We expect that HAMAS will accept some degree of disarmament but will seek the minimum level that it considers necessary to preserve the cease-fire while allowing it to remain the dominant force in Gaza. Israel may increase attacks against HAMAS during the coming months, depending on its progress against other adversaries, if it believes that the group is slow-rolling disarming.

Lebanese Hizballah's decision to attack Israel on behalf of Iran has exposed the group to new military pressure from Israel at the same time that support from Iran appears uncertain going forward. The group had been trying to rebuild its military capabilities and revive its political influence in Lebanon, but renewed conflict with Israel almost certainly will further weaken the group and lead to internal debate about its future. Hizballah's actions have also prompted Lebanon's leaders to declare its military activities to be illegal, but Hizballah is prepared to resist domestic attempts to disarm. Meanwhile, Israel is likely to continue striking Hizballah targets and maintain its bases in southern Lebanon until it perceives that the group no longer poses a threat.

The Huthis in Yemen remain a resilient challenger to U.S. and partner interests in the region, and their military capabilities and strategic location on the Red Sea allow them to try to extort concessions from the international community.

ISIS and al-Qa'ida will seek to expand their safe havens in Syria as they aim to play spoiler by exploiting governance gaps, sectarian violence, and external interventions to stage attacks that undermine trust in the Syrian Government's ability to provide security. ISIS probably is indoctrinating thousands of children of former ISIS fighters who fled from displaced persons camps in northeast Syria and preparing them to serve as the next generation of ISIS members.

**Iran Strategic Overview**

***Operation Epic Fury almost certainly has curtailed Iran's ability to project power, but it is using all of its remaining capabilities—including advanced ballistic missiles, UAVs, and the Axis of Resistance—to retaliate against us and our allies in the hope of bringing the conflict to a close. Even before the conflict, Iran's strategic position was significantly degraded by setbacks in the region and its failure to resolve domestic frustrations.***

- Iran has incurred a series of strategic setbacks since October 2023, including Israel's degradation of Lebanese Hizballah and the ouster of the Asad regime in Syria. Iran's credibility among its proxies and partners as a steadfast opponent of Israel was undermined by its failure to retaliate for Israeli actions during the Gaza conflict, including the killing of senior IRGC-QF officers and Hizballah Secretary General Hasan Nasrallah.
- The economic, political, and societal seeds of popular discontent in Iran persist and could threaten further domestic strife akin to widescale and prolonged internal protests in 2022, 2023, and 2025-2026. The economy is beset by low growth, exchange rate volatility, and high inflation, exacerbating the population's discontent. Absent sanctions relief, these trends probably will continue for the foreseeable future. The Iranian public is also cognizant of—and deeply frustrated by—government mismanagement and high-level corruption, factors which manifest themselves in low voter turnout and high cynicism about the likelihood of affecting political change through peaceful means.
- If the regime survives, Tehran almost certainly will seek to exact revenge for the death of Supreme Leader Ayatollah Ali Khamenei; it still maintains its long-term strategic intent to avenge the death of former IRGC-QF Commander Qasem Soleimani by targeting current and former U.S. officials.

## Africa

African governments will use their wealth in critical minerals to seek partnerships that will deliver them meaningful assistance. Concurrent conflicts and crises across the continent will continue to put large numbers of U.S. citizens at risk and cause further instability. Infectious diseases endemic to Africa, such as Ebola and Mpox, continue to crop up in new regions on the continent and threaten to spill over.

- Africa harbors vast reserves of critical minerals that are vital to U.S. advanced defense systems and economic competitiveness. China-based firms own more productive mines across Africa for five critical minerals—bauxite, cobalt, graphite, lithium, and manganese—than any other country. These minerals are all critical to advanced weapon and computer processing technology, areas in which China is seeking to become a global leader and achieve technological self-reliance.

Africa has increasingly become a focal point for the global Sunni jihadist movement, as al-Qa‘ida and ISIS have exploited weak governance and local conflicts to expand their areas of operation, heightening the threat to U.S. interests in the region and fueling instability.

- Al-Shabaab has encroached on Mogadishu, Somalia, where U.S. personnel are located, during the past year and intensified indirect-fire attacks there. Moreover, al-Shabaab continues to coordinate media with other parts of al-Qa‘ida and has provided funding to AQAP in Yemen. Al-Qa‘ida elements in the Sahel have implemented an economic blockade of Bamako, Mali, threatening the Malian Transition Government’s hold on power and the U.S. presence in the city.

- U.S. military operations in Somalia have hindered ISIS-Somalia’s ability to pursue attacks against the U.S. and U.S. interests in the region, while ISIS in West Africa and the Sahel have increased the intensity of their attacks against local security forces and have expanded their areas of operation, moving closer to cities with a U.S. presence.


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