

Conclusion: Scoring the Global Operating Environment

Because the United States is a global power with global security interests, threats to those interests can emerge from any region. The U.S. military must therefore be ready to operate in any region when called upon to do so and must account for the range of conditions that it might encounter when planning for potential military operations. These considerations necessarily inform its decisions about

the types and amounts of equipment it purchases (especially to transport and sustain the force); the location or locations from which it might operate; and how easily it can or cannot project and sustain combat power when engaged with the enemy.

Aggregating the three regional scores provides a global operating environment score of **FAVORABLE** in the *2024 Index*.

Global Operating Environment

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Europe				✓	
Middle East			✓		
Asia				✓	
OVERALL				✓	

Europe. Overall, the European region remains a stable, mature, and friendly operating environment. Russia remains the preeminent military threat to the region, both conventionally and unconventionally, and its invasion of Ukraine marks a serious escalation of its efforts to exert influence on its periphery. China continues to maintain a significant presence in Europe through its propaganda, influence operations, and investments in key sectors. By mitigating the effect of sanctions, it also has significantly enhanced the Russian government's ability to conduct the war in Ukraine. Both NATO and many non-NATO European countries should be increasingly concerned about the behavior and ambitions of both Russia and China, although agreement on a collective response to these challenges remains elusive.

In the *2023 Index*, we noted a strengthening of alliance relationships as NATO member countries conducted reviews of their respective military establishments and the ability of NATO as a whole to coordinate actions. NATO placed renewed emphasis on logistical matters and the extent to which it could respond to an emergent crisis.

In the past year, we have seen a galvanizing effect within political establishments that, while still dynamic and pointed within the domestic context of each country, appear to have made gains in aggregate stability as countries once again focus on national matters that arguably have been neglected since the end of the Cold War. Within specific countries, there are shifts between liberal and conservative governments, but the net result has been generally positive with respect to U.S. security interests,

Global Operating Environment: Summary



especially as countries commit to improving their defense capabilities, readiness, and posture.

This has led us to increase Europe’s score for political stability from “favorable” to “excellent.” It is difficult to predict whether NATO’s renewed emphasis on collective defense and its reinvigorated defense spending will continue over the long term or is merely a short-term response to Russia’s aggression in Ukraine. Given the potential for Russia to replace its battlefield losses with newer, more modern equipment, NATO defense spending on capability will be an important issue, both in the medium term and over the long term.

Scores for Europe remained largely steady this year as they have in previous years with one exception: As noted, the score for political stability has risen from “favorable” to “excellent.” The *2024 Index* again assesses the European operating environment as “favorable” overall.

The Middle East. The Middle East will remain a focus of U.S. military planners for the foreseeable future because of the interests involved and the region’s volatile nature. The Middle East region is now highly unstable, in large measure because of the erosion of authoritarian regimes, the strain on World War I–era borders, and the fact that the region remains a breeding ground for terrorism. Overall, regional security has continued to deteriorate. Iraq has restored its territorial integrity since the defeat of ISIS, but the political situation and future relations with the United States will remain difficult as long as a government that is sympathetic to Iran is in power. U.S. relations in the region will remain generally complex, although this has not stopped the U.S. military from operating as needed.

The supremacy of the nation-state is being challenged in many countries by non-state actors that wield influence and power comparable to those of small states. The region’s primary challenges—continued meddling by Iran and surging transnational terrorism—are made more difficult by Sunni–Shia sectarian divides, the more aggressive nature of Iran’s Islamist revolutionary nationalism, and the proliferation of Sunni Islamist revolutionary

groups. The result could well be further destabilization of the post-pandemic operational environment for U.S. forces.

In the Middle East, the U.S. benefits from operationally proven procedures that leverage bases, infrastructure, and the logistical processes needed to maintain a large force that is forward deployed thousands of miles away from the homeland. The personal links between allied armed forces are also present, and joint training exercises improve interoperability and provide an opportunity for the U.S. to influence some of the region’s future leaders.

America’s relationships in the region are based pragmatically on shared security and economic concerns. As long as these issues remain relevant to both sides, the U.S. is likely to have an open door to operate in the Middle East when its national interests require that it do so.

Although circumstances in all measured areas vary throughout the year, in general terms, the *2024 Index* assesses the Middle East operating environment as “moderate,” but the region’s political stability continues to be “unfavorable,” and its overall score could decline to “poor” in the future if current trends toward further instability continue.

Asia. The Asian strategic environment includes half of the globe and is characterized by a variety of political relationships among states with wildly varying capabilities. This makes Asia far different from Europe, which in turn makes America’s relations with the region different from its relations with Europe. American conceptions of Asia must recognize the physical limitations imposed by the tyranny of distance and the need to move forces as necessary to respond to challenges from China and North Korea.

The complicated nature of intra-Asian relations and the lack of an integrated, regional security architecture along the lines of NATO make the defense of U.S. security interests in Asia more challenging than many Americans appreciate. However, the U.S. has strong relations with allies in the region, and their willingness to host bases helps to offset the vast distances that must be covered.

The militaries of Japan and the Republic of Korea are larger and more capable than European militaries, and both countries are interested in developing missile defense capabilities that will be essential in combatting the regional threat posed by North Korea. In Japan, public awareness of the need to adopt a more “normal” military posture in response to China’s increasingly aggressive actions continues to grow. This indicates a break with the pacifist tradition among the Japanese that has lasted since the end of World War II and could lead to improved military capabilities and the prospect of joining the U.S. in defense measures beyond the immediate vicinity of Japan.

We continue to assess the Asia region as “favorable” to U.S. interests in terms of alliances, overall political stability, militarily relevant infrastructure, and the presence of U.S. military forces.

Summarizing the condition of each region enables us to get a sense of how they compare in terms of the difficulty that would be involved in projecting U.S. military power and sustaining combat operations in each one. As a whole, the global operating environment maintains a score of “favorable,” which means that the United States should be able to project military power anywhere in the world to defend its interests without substantial opposition or high levels of risk.