

Conclusion: Global Threat Level

America faces challenges to its security at home and interests abroad from countries and organizations that have:

- Interests that conflict with those of the United States;
- Sometimes hostile intentions toward the U.S.; and
- In some cases, growing military capabilities that are leveraged to impose an adversary's will by coercing or intimidating neighboring countries, thereby creating regional instabilities.

The government of the United States constantly faces the challenge of employing—sometimes alone but more often in concert with allies—the right mix of diplomatic, economic, public information, intelligence, and military capabilities to protect and advance U.S. interests. Because this *Index* focuses on the military component of national power, its assessment of threats is correspondingly an assessment of the military or physical threat posed by each entity addressed in this section.

China, the most comprehensive threat the U.S. faces, remained “aggressive” in the scope of its provocative behavior and earns the score of “formidable” for its capability because of its continued investment in the modernization and expansion of its military and the particular attention it has paid to its space, cyber, and artificial intelligence capabilities. The People's Liberation Army continues to extend its reach and military activity beyond its immediate region and engages in larger and more comprehensive exercises, including live-fire exercises in the East China Sea near Taiwan and aggressive naval and air patrols in the South China Sea.

China is rapidly closing the capability gap between its forces and those of the United States and is no longer a distant competitor. It has continued to conduct probes of the South Korean and Japanese air defense identification zones, drawing rebukes from both Seoul and Tokyo, and its statements about Taiwan and exercise of military capabilities in the air and sea around the island have become increasingly belligerent. China is taking note of the war in Ukraine and U.S. military developments and has been adjusting its own posture, training, and investments accordingly.

Russia remains the primary threat to American interests in Europe as well as the most pressing threat to the United States. While it may not threaten U.S. global interests the way the Soviet Union once did, it threatens a number of key U.S. allies and interests in Europe and the Middle East. Russia's invasion of Ukraine reintroduced conventional war to Europe—the largest conflict on that continent since the end of World War II and one with economic and security repercussions that are felt across the globe. Moscow also remains committed to massive pro-Russia propaganda campaigns in other Eastern European countries, as well as disruptive activities around its periphery and across the Middle East. It maintains the world's largest nuclear arsenal, which poses an existential threat-in-being to the U.S. homeland, although a strike is highly unlikely at present.

The *2024 Index* assesses the threat emanating from Russia as “hostile” and “formidable” (the highest categories on the scale) for level of provocative behavior and for level of capability, respectively. Though Russia is consuming its inventory of munitions, supplies, equipment, and even military personnel in its war against Ukraine, it is also replacing those items and people. Russia's industrial capacity, unlike Ukraine's, remains untouched by the war,

Behavior of Threats

	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
China		✓			
Russia	✓				
Iran		✓			
North Korea			✓		
Non-State Actors		✓			
OVERALL		✓			

Capability of Threats

	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
China	✓				
Russia	✓				
Iran		✓			
North Korea		✓			
Non-State Actors			✓		
OVERALL	✓				

Threats to U.S. Vital Interests

	SEVERE	HIGH	ELEVATED	GUARDED	LOW
China		✓			
Russia		✓			
Iran		✓			
North Korea		✓			
Non-State Actors		✓			
OVERALL		✓			

and Russia's military is gaining combat experience. Russia has shifted to a wartime economy. Consequently, the war may actually serve to increase the challenge that Russia presents to U.S. interests on the continent.

Iran represents by far the most significant security challenge to the United States, its allies, and its interests in the greater Middle East. Its open hostility to the United States and Israel, sponsorship of terrorist groups like Hezbollah, and history of threatening the commons underscore the problem

it could pose. Today, Iran's provocations are of primary concern to the region and America's allies, friends, and assets there.

Iran relies heavily on irregular (to include political) warfare against others in the region and fields far more ballistic missiles than are fielded by any of its neighbors. Its development of ballistic missiles and its potential nuclear capability also make it a long-term threat to the security of the U.S. homeland. In addition, Iran has continued its aggressive efforts to shape the domestic political landscape in

Iraq, adding to the region's general instability. The *2024 Index* extends the *2023 Index*'s assessment of Iran's behavior as "aggressive" and its capability as "gathering."

North Korea's military poses a security challenge for American allies South Korea and Japan, as well as for U.S. bases in those countries and on the island territory of Guam. North Korean officials are belligerent toward the United States, often issuing military and diplomatic threats. Pyongyang also has engaged in a range of provocative behavior that includes nuclear and missile tests and tactical-level attacks on South Korea.

North Korea has used its missile and nuclear tests to enhance its prestige and importance domestically, regionally, and globally and to extract concessions from the United States in negotiations on its nuclear program and various aid packages. Such developments also improve North Korea's military posture. U.S. and allied intelligence agencies assess that Pyongyang has already achieved nuclear warhead miniaturization, the ability to place nuclear weapons on its medium-range missiles, and the ability to reach the continental United States with an intercontinental ballistic missile. North Korea also uses cyber warfare as a means of guerilla warfare against its adversaries and international financial institutions. The *2024 Index* therefore assesses the overall threat from North Korea, considering the range of contingencies, as "testing" for level of provocative behavior and "gathering" for level of capability.

A broad array of terrorist groups remain the most hostile of any of the threats to America examined in the *Index*. The primary terrorist groups of concern to the U.S. homeland and to Americans abroad are the Islamic State of Iraq and al-Sham

(ISIS) and al-Qaeda. Al-Qaeda and its branches remain active and effective in Syria, Yemen, Iraq, and the Sahel of Northern Africa.

Though no longer a territory-holding entity, ISIS remains a serious presence in the Middle East, in South and Southeast Asia, and throughout Africa, threatening stability as it seeks to overthrow governments and impose an extreme form of Islamic law. Its ideology continues to inspire attacks against Americans and U.S. interests. Fortunately, Middle East terrorist groups remain the least capable threats facing the U.S., but they cannot be dismissed. This prompts a score of "aggressive" for their collective, overarching behavior but only "capable" for their ability to harm the most important U.S. security interests, combining to an overall score of "high."

Just as there are American interests that are not covered by this *Index*, there may be additional threats to American interests that are not identified here. This *Index* focuses on the more apparent sources of risk and those that appear to pose the greatest threat.

Compiling the assessments of these threat sources, the *2024 Index* rates the overall global threat environment as "aggressive" and "formidable" (up from the *2023 Index*'s "gathering") in the areas of threat actor behavior and material ability to harm U.S. security interests. Taking into account concern over China's dramatic expansion of its power projection abilities (especially its investment in nuclear weapons), as well as Russia's potentially desperate desire for victory in its war against Ukraine, which could lead it to be more aggressive in other areas of military competition with the U.S. and Western allies, and Iran's unabated investments in its nuclear and ballistic missile programs, this leads to an aggregated score of "high."

Threats to U.S. Vital Interests: Summary

