

The Heritage Foundation

2026 INDEX OF U.S. MILITARY STRENGTH

edited by
Robert Peters,
Daniel R. Green, PhD,
and Wilson Beaver

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Contents

Contributors vii
Acknowledgments ix
Preface xi
Kevin Roberts, PhD
Introduction 1
Executive Summary: Restoring Peace Through Strength 3
The American Way of War 17
Douglas and Sarah Allison Center for National Security
The U.S. Defense Industrial Base 25
Jim Fein
A Conservative Defense Budget 37
Wilson Beaver
Global Operating Environment
- Assessing the Global Operating Environment 49
- Latin America and the Caribbean 51
  Andrés Martínez-Fernández
- Asia 73
  Jeff M. Smith, Bryan Burack, Andrew J. Harding, and Allen Zhang
- Europe 123
  Jordan Embree
- Middle East 161
  Daniel Flesch
- Africa 195
  Douglas and Sarah Allison Center for National Security
- Conclusion: Scoring the Global Operating Environment 213

Threats to U.S. Vital Interests
- Assessing U.S. Vital National Security Interests 219
- China 227
  Yuichiro Kakutani and Allen Zhang
- Russia 257
  Paul McCarthy
- Iran 289
  Daniel Flesch and Phillip Smyth
- North Korea 317
  Robert Peters
- Conclusion: Global Threat Level 331

U.S. Military Power
- An Assessment of U.S. Military Power 337
- U.S. Army 347
  Wilson Beaver
- U.S. Navy 371
  Brent D. Sadler
- U.S. Air Force 409
  Jason Camilletti
- U.S. Marine Corps 433
  Mike Jernigan

U.S. Space Force 455
Shawn Barnes
America's Strategic Deterrent 479
Robert Peters
Missile Defense for the 21st Century 497
Robert Peters
U.S. Coast Guard 513
Phillip Smyth
U.S. Merchant Marine 533
Salvatore R. Mercogliano, PhD
Conclusion: U.S. Military Power 547
Methodology 555

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We believe this *2026 Index* will help to provide a better-informed understanding and wider appreciation of America's ability to "provide for the common defence"—an ability that undergirds The Heritage Foundation's vision of "an America where freedom, opportunity, prosperity, and civil society flourish." The *Index* continues to be cited and referenced across government—by Congress, the executive branch, and officials within the U.S. Department

of Defense/War and supporting government agencies—as well as in the media, academia, and policy institutes and among the public. There is no other source where one can find information about the status of U.S. allies and partners, competitors and enemies, and America's ability to defend itself and its interests compiled in one volume in such a readable, concise, and fully documented format. We remain encouraged that so many Americans are concerned about the state of affairs in and the multitude of factors affecting our country and that they turn to Heritage's *Index of U.S. Military Strength* to gain a deeper and more comprehensive understanding of what is urgently needed to defend our country and its interests.

In addition to acknowledging all of those who helped to prepare this edition, very special recognition is due to the Heritage members and donors whose support continues to make the *Index of U.S. Military Strength* possible. Finally, as we do each year, The Heritage Foundation expresses its enduring appreciation to the members of the U.S. armed forces who continue to protect the liberty of the American people in an ever more challenging world.

Preface

Kevin Roberts, PhD

"To be prepared for war is one of the most effective means of preserving peace."

—President George Washington

Peace Through Strength: This simple expression has formed the cornerstone of our national security since the founding of our Republic. It is a perspective rooted in a strength that is tempered by humility and maintained through vigilance that protects the American people, our way of life, freedom of commerce, and the republican institutions that guarantee our liberties anchored in faith. Peace comes about by maintaining a robust and lethal U.S. military, fiscally responsible and led by confident and capable leaders who support the defense *and* pursuit of America's national interests properly understood. It does not seek to impose our values on foreign lands but will defend the interests of our people around the world. We are humble in our overseas ambitions, but we will not accept the imposition of hostile values on the United States or our allies by foreign powers bent on domination.

American conservatives must avoid nation-building projects or efforts to remake the world in America's image, recognizing that attempts to do so in Iraq, Afghanistan, Libya, and elsewhere spent American blood and treasure and squandered the peace dividend and unipolar moment achieved through American victory in the Cold War. At the same time, American military action to defend American security and prosperity in pursuit of American interests based in realism is both moral and rational. The successful strike on Iran's nuclear weapons infrastructure, a limited target with a clearly defined end state, is an example of what should be humility in the ambitions of our national security leaders: no endless wars with undefined objectives. As of this writing, deterring Chinese aggression to prevent Chinese hegemony in Asia and combating the narco-terrorist cartels that are destabilizing America's backyard and eroding sovereignty and borders throughout the Americas are America's two most pressing national security concerns.

The Heritage Foundation's *2026 Index of U.S. Military Strength* is anchored in these core values. Its theme—"Restoring Peace Through Strength"—is not simply an expression of our national security priorities, but rather a recognition that after more than a decade of decline, as documented by past editions of the *Index of U.S. Military Strength*, we are starting to turn the corner on restoring our armed forces. The *2026 Index* is a comprehensive diagnostic tool that analyzes the capacity, capabilities, and readiness of our armed forces and their ability to address the threats to vital U.S. national interests in the contemporary operating environment. As I said in my book, *Dawn's Early Light: Taking Back Washington to Save America,* "A recommitment to the U.S. interest must be matched with a sober assessment of the state of U.S. power today."

The *Index of U.S. Military Strength* is the yardstick against which we measure how the national security enterprise meets its core obligations of defending the homeland and our interests; its results show that much work remains to be done. As with every great change, this restoration is urgently needed, but it will take years of effort to undo the damage caused by the neglect and misplaced priorities that have long undermined our national security discourse.

Restoring Peace Through Strength

This past year has seen a serious and comprehensive effort by the Trump Administration and

the U.S. Congress to restore our armed forces, confront uncomfortable truths about national security, and begin the process of reforming and restoring our military. The cornerstones of this restoration are humility in approach, focused accountability, investments in victory, and economy in execution. President Trump set the tone for the nation by calling for "restoring the U.S. military's mission of lethality and leading with peace through strength." Secretary of War Pete Hegseth, in his "Message to the Force" issued just a year ago, charged the U.S. Department of War with "achiev[ing] Peace through Strength" by "restoring the warrior ethos, rebuilding our military, and reestablishing deterrence." He further stated that "[a]ll of this will be done with a focus on lethality, meritocracy, accountability, standards, and readiness." While much remains to be done, the initial results have been dramatic and encouraging.

The Administration has reasserted a central pillar of our Republic—rewarding individual hard work and merit—by abolishing Diversity, Equity, and Inclusion (DEI) and other woke initiatives that had undermined good order and discipline within our military. It has acted aggressively to remove officials, both civilian and uniformed, who promoted this base attack on the strength of our armed forces and has restored winning our wars rather than serving as social science guinea pigs as the central focus of our military. By reasserting meritocracy and removing incompetent officials, it has ensured that our armed forces are on a firmer footing and better able to deter the aggressive actions of our competitors and, if required, win our nation's wars.

The Administration has also focused on reducing a bloated Pentagon bureaucracy, cancelling unnecessary weapons systems, replacing expensive capabilities with cheaper, more effective technological solutions, and economizing across the Department of War. The insistence on a full audit of the Department is also a necessary reform to bring sanity back to its fiscal house. These initiatives have freed resources to invest in the capabilities needed to deter aggressive actors. The broader dire fiscal condition of our nation's finances must be taken into account as reform of our military takes place; the taxpayer must be protected and respected, and we must steward our nation's resources and economic health both continually and responsibly.

President Trump has also pushed our allies to take on more of the financial burden of their own defense and reduce the overseas footprint of our armed forces given the range of global challenges the United States uniquely faces. These necessary reductions further relieve the Department of War of costs that those who are defended should rightfully be footing.

The signing into law of H.R.1, the One Big Beautiful Bill Act, by President Trump on July 4, 2025, represents the America First investment in our armed forces that does not seek to manage our military's decline but instead seeks to arrest it and focus on building capabilities for the future. The bill unleashed a $150 billion cash infusion in our military that is starting to turn the tide of a decade of decline. This sum supports investments in the shipbuilding maritime industrial base ($29 billion); munitions ($25 billion); nuclear deterrence ($15 billion); Golden Dome missile defense ($25 billion); air superiority ($9 billion); and Pacific deterrence ($12 billion), among many other critical projects. These topline additions need to be reflected in future budgets to continue the process of building greater capacity, capabilities, and readiness to defend the homeland and protect American interests abroad effectively. The President's January 7, 2026, statement calling for a $1.5 trillion defense budget—$500 billion above the existing budget—in order to build the "Dream Military" is further evidence that "Peace Through Strength" is the cornerstone of conservative defense policy.

Deterring and Defeating China

The central national security challenge for the United States is the People's Republic of China (PRC) as it seeks to impose its will on other nations and push the United States out of the Indo-Pacific region. It competes with the United States from nanobytes to space, and its imperial ambitions are a direct threat to U.S. safety, interests, and values. The challenge is comprehensive and long-term and requires our leaders to prioritize the capabilities that will deter the PRC's aggressive and malign activities. Secretary Hegseth made this challenge very clear when he said that, while the United States does not seek conflict with Communist China, "we will not be pushed out of this critical region" and "will not let our allies and partners be subordinated and intimidated." He further said that China is

"credibly preparing to use military force to alter the balance of power in the Indo-Pacific" and that any conflict over Taiwan would have "devastating consequences."

As focused as our leaders must be on deterring the threats from China, we must also understand what a protracted conflict with Communist China would look like. In a first-of-its-kind effort, the Allison Center for National Security at Heritage conducted an artificial intelligence simulation of a protracted conflict between the United States and the People's Republic of China. Called TIDALWAVE, it simulated a series of conflict scenarios centered on a Taiwan invasion. Its results, published this year, dramatically underscore that we must grow the force; reinvigorate our defense industrial base; build more munitions, ships, and planes; and invest in logistical support and fuel delivery capabilities while harnessing the creative power of the American people.

The national security challenge of an aggressive People's Republic of China will be the dominant threat our nation faces in the future. More must be done to deter its aggressive actions, and America must be ready for a conflict with China if the PRC's leaders choose war.

The American Way of War

Article I, Section 8, Clause 1 of the U.S. Constitution, the founding document of our Republic, says that the Congress of the United States "shall... provide for the common Defence and general Welfare of the United States." For far too long, however, our elites went in search of dragons to slay overseas while neglecting the basic security needs and welfare of the American people. The efforts by Republicans and Democrats alike to remake the world in America's image by spreading democracy through force resulted in suboptimal regional outcomes even as they drained American blood and treasure and distracted the United States from the rise of China and the return of great-power competition.

The analysis in the *2026 Index of U.S. Military Strength* makes clear that these distractions undermined our military readiness to the point where we now lack the capacity and capabilities to deter the People's Republic of China and, if needed, defeat it in a conflict. Further, our fiscal house is in total disarray, and our debt burden has exploded as protracted conflicts have become the norm. We must have a strong national defense, and it must be rooted in prudence, guided by justice, oriented to peace, and anchored in the reality of the lives of the American people.

We are beginning to turn the corner on military readiness as our nation's leaders make the investments that our armed forces require, but more remains to be done. We must always remember to live up to the sacrifices of our servicemembers and make clear that a defense and foreign policy rooted in peace through strength is the greatest guarantor of freedom. As President Ronald Reagan said in his March 1983 address to the nation on defense and national security, "We maintain the peace through our strength; weakness only invites aggression."

Kevin Roberts, PhD
President
The Heritage Foundation
February 2026

Introduction

As currently postured, the United States military is at significant risk of being unable to defend America's vital national interests. Decades of underfunding, prolonged deployments, inconsistent appropriations, poor discipline in program execution, and a lack of urgency across the national security establishment have made the U.S. military unable to respond effectively to the range of growing threats.

The theme of the 2026 Index—"Restoring Peace Through Strength"—supports a renewed focus on warfighting and lethality and the prioritization of those programs essential to establishing deterrence and, if required, defeating all threats to our nation. The *2026 Index* assessment determined that substantial increases in major warfighting platforms, a revitalized defense industrial base, expanded munitions production, increased logistical and fuel support, and the prioritization of essential programs to build long-term resilience for a prolonged conflict were critically needed. The Trump Administration is arresting the decline of successive Administrations and building on the progress made in its first term. The passage of the One Big Beautiful Bill Act (OBBBA) and the President's call for a $1.5 trillion defense budget have arrested a decade of decline and provide a path forward toward restoration of the world's greatest military, but significantly more must be done.

Restoring Peace Through Strength

The Heritage Foundation's *2026 Index of U.S. Military Strength* is the only independent, comprehensive diagnostic analysis of the United States military that assesses the state of the armed forces of the United States in the context of the global operating and threat environment. Its analysis looks at the capacity, capability, and readiness of the U.S. military and determines their overall ability to operate simultaneously in two MRCs set against the conditions of a protracted conflict. It also considers logistical, fuel, and industrial capacity as well as budgetary, programmatic, and leadership factors.

The theme of this year's *Index* is "Restoring Peace Through Strength," which is a strategic doctrine that is concerned with how and when to use military force abroad as much as it is with the U.S. military's ability to deter opponents and, if required, defeat them in armed conflict. It also reflects a recognition that, as the *2024 Index* made clear, after a "decade of decline" and although much more still needs to be done, the U.S. military is starting to rebuild its strategic strength. As noted, passage of the OBBBA and the President's advocacy of a $1.5 trillion defense budget—an increase of approximately $500 billion over current figures—demonstrate this greater focus on resourcing military strength. This approach also emphasizes the core security interests of the United States instead of foreign policy distractions of the sort that drained U.S. resources as strategic opponents built their arsenals.

The *2026 Index* builds on the analytical work of the previous 10 volumes and expands its scope in service analysis, regional focus, and assessments. In part as a recognition of the Trump Administration's 2025 *National Security Strategy* and the 2026 *National Defense Strategy*, the *Index* has expanded its regional focus to include Latin America and Africa. These regions, in addition to Asia, Europe, and the Middle East, form the core of the Global Operating Environment section of the *2026 Index*. These expanded areas recognize that great-power competition is occurring globally and that the malign influence of adversaries needs to be assessed as much as the need to bolster the abilities of friends and allies.

The Threats to Vital U.S. Interests section continues its focus on the PRC, Russia, Iran, and North Korea by assessing the behavior and capabilities of these adversaries. Analysis has been updated

to reflect the two years since the *2024 Index* was published as well as the foreign and defense policy decisions of the first year of the Trump Administration. The analysis of the PRC's capabilities, military operations, and strategic posture significantly informs the overall analysis of the *2026 Index* and influences Heritage's assessments of the U.S. military. This focus buttresses the key insights of Heritage's TIDALWAVE initiative, an artificial intelligence–enabled model and computer simulation to replicate an extended escalation scenario between the United States and China in the Indo-Pacific. This effort identified gaps and deficiencies and corresponding solutions to resolve anticipated shortfalls in the ability of the United States to project and sustain forces and to exploit adversary vulnerabilities in order to degrade their ability to conduct military operations. Its key findings are as follows:

- In a conflict with China, the United States culminates (becomes incapable of continuing operations because of a lack of platforms, ammunition, and/or fuel) in less than half the time it takes China to reach the same state. The result: catastrophic defeat.

- The United States is neither equipped nor arrayed to protect and sustain the Joint Force in a conflict with China in the Indo-Pacific.

- Critical U.S. munitions begin to be unavailable within five–seven days and are completely exhausted within 35–40 days across most scenarios.

- People's Liberation Army (PLA) ammunition stockpiles of critical munitions begin to be depleted after 20–30 days of major combat operations, but substitutes extend munitions sustainment by months.

However much additional budgetary resources are necessary to restore credible deterrence, an expedited sense of urgency must also be pursued to expand munition production, logistical and fuel support, and overall resiliency in the defense industrial base.

The U.S. Military Power section, which forms the core of the *Index*, has also expanded its focus to include the U.S. Coast Guard and U.S. Merchant Marine. These two services were included partly to reflect the need to understand all available sea assets that may need to be called upon in a protracted conflict, especially one in the Indo-Pacific, and partly because of their value as part of a comprehensive strategy of great-power competition and, quite possibly, great-power confrontation. Their respective capabilities require significant increases in resources, capabilities, and—frankly—attention. Consistent with past *Indices*, this section also assesses the U.S. Army, Navy, Air Force, Marine Corps, Space Force, and nuclear arsenal and missile defense capabilities. These assessments evaluate the capacity, capabilities, and readiness of the services and are conducted against the requirements of each service's role in addressing two major regional contingencies (MRCs) simultaneously (the Marine Corps is assessed against a one-MRC standard).

The *2026 Index of U.S. Military Strength*'s theme of "Restoring Peace Through Strength" reflects the growing need for strategic prioritization of those capabilities within the U.S. military arsenal that are essential to credible deterrence and available for conflict if deterrence fails. It also reflects the recognition that after years of underinvestment, a moribund defense industrial base, and strategic confusion, the U.S. military is not postured for victory in one major regional contingency—let alone two MRCs.

Executive Summary: Restoring Peace Through Strength

It is critical that the American people understand the condition of the United States military with respect to America's vital national security interests, threats to those interests, and the context within which the U.S. might have to use military force to protect them. The Heritage Foundation's *Index of U.S. Military Strength* employs a standardized, consistent set of criteria, accessible both to government officials and to the American public, to gauge the U.S. military's ability to perform its missions in today's world. The inaugural 2015 edition of the *Index of U.S. Military Strength* established a baseline assessment on which each edition builds that both assesses the state of affairs for its respective year and measures how key factors have changed over time. The *2026 Index* can be compared to the initial year to see whether the U.S. military's ability to defend America's interests has improved or degraded. The 2026 *Index* is not an assessment of what should be, but should be seen instead as a report card that indicates how well or poorly conditions, countries, and the U.S. military have evolved.

What the *Index* Assesses

The *Index of U.S. Military Strength* assesses a number of factors, from the capacity, capability, and readiness of the U.S. military and associated major capabilities to the operating environment in various regions across the world and the threats posed by America's major adversaries. Assessments of our adversaries are based on their capabilities, their intent, and the degree to which they threaten U.S. national interests. When it comes to U.S. military power, the *2026 Index*, as with previous editions, assesses capabilities as measured by the effectiveness of modern equipment, the capacity to execute and potentially sustain combat operations during protracted conflict, and the readiness of the personnel and material to engage in combat operations. This framework provides a single-source reference for policymakers and other Americans who seek to know whether our military is up to the task of defending our national interests.

Any assessment of military power requires a clear understanding of what interests must be defended in which theaters of operation and in what types of contingencies. Three vital interests have been specified by various Administrations over a number of decades:

- **Defense** of the homeland;
- **Stability** within those regions that are of critical interest to the U.S.; and
- **Preservation** of freedom of movement within and across international air and sea lanes through which the world conducts its business.

To defend these interests, the United States requires a military force of sufficient capacity. The many factors involved make determining how big the military should be a challenging effort, but successive assessments and analyses across the decades have come to a general agreement on the driver of U.S. force size: an ability to deter and, if necessary, succeed in two major conflicts simultaneously. This rationale stems from American involvement in the Second World War, when the United States fought two high-intensity wars in two parts of the globe. Similarly, America's experience in the Cold War suggested that the United States required requisite forces to deter and, if necessary, fight in East Asia and Europe

simultaneously. The strategic logic that enabled the United States to deter Communist aggression in the Cold War—by presenting sufficient military force in Europe against the primary Soviet adversary while still presenting sufficient military force in Asia to deter and, if necessary, defeat lesser threats in the Indo-Pacific exists today, but with the prioritized theaters inverted. Today, the United States, across both Republican and Democratic Administrations, has prioritized China as America's preeminent foreign security threat (and, therefore, the Indo-Pacific as the prioritized theater of operation) with Russia as a secondary foreign threat (with Europe as the theater of secondary strategic importance). For this reason, the *2026 Index* continues the two-war force as the benchmark for its assessment.

Accordingly, the *2026 Index*'s benchmark for a two-war force is derived from a review of the forces used for each significant conflict that the United States has undertaken since World War II and the toll that extended use of military forces can exact even when the enemy is not a peer competitor. Further, this analysis is augmented by analysis conducted at The Heritage Foundation, including the in-depth TIDALWAVE study that examined thousands of sets of data when assessing the impact of a protracted conflict between the United States and China. The *2026 Index* therefore concludes that a standing two-war–capable force would consist of the following active-duty components:[1]

- **Army:** 50 Brigade Combat Teams (BCTs).
- **Navy:** 400 battle force ships and 624 strike aircraft.
- **Air Force:** 1,200 fighter/ground-attack aircraft.
- **Marine Corps:** 30 battalions.

This recommended force does not account for missions in defense of the homeland, which are generally handled by Reserve and National Guard forces. Nor does it include the elements of the military that perform critical support and combat-enabling functions that are required for modern military operations such as logistics, transportation, communications, among many others.

The Global Operating Environment

Because the United States has interests in a variety of regions, threats can emerge from the Western Hemisphere, East Asia, Europe, or the Middle East. The U.S. military must therefore be ready to operate in a variety of regions 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 the military's 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 regional scores provides a global operating environment score of "moderate" in the *2026 Index*.

Western Hemisphere/Latin America. After years of military, economic, and political cooperation with the United States, the operating environment within the Western Hemisphere is broadly supportive of U.S. relations and military activities, but it also is under stress. Illegal immigration, drug cartels, and the malign influence of the People's Republic of China have strained both regional stability and relations between many countries and the United States. The Venezuelan regime in particular, as well as continued activities by Cuba, has accelerated destabilization in the region, but the removal of Venezuelan President Nicolas Maduro could significantly mitigate some of these trends. We assess Latin America as "moderate" with respect to U.S. interests in terms of alliances, overall political stability, and military threats.

Asia. The Asian strategic environment includes half of the globe and is characterized by a variety of political relationships among states with widely varying capabilities. This makes Asia far different from Europe or Latin America, which in turn makes America's relations with the region different from its relations with other parts of the world. 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, the U.S.'s primary adversary, and the nuclear-armed regime in North Korea.

The complicated nature of intra-Asian relations and the lack of an integrated regional security architecture similar to NATO make the defense of U.S.

Global Operating Environment: Summary

VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT

security interests in Asia very challenging. 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 many European militaries, and both countries are interested in further developing missile defense capabilities that will be essential in combatting the regional threats posed by China and 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. Nevertheless, however favorable alliances and political stability in the region may be, the continued growth of China's military and its aggression in the region as U.S. military posture and infrastructure have weakened prompt a downgrade of the region's overall stability from "favorable" to "moderate."

Europe. Overall, the European region remains a mostly stable, mature, and friendly operating environment with one notable exception. 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 and covertly supporting Russian efforts, 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 *2024 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 emerging crisis. In the past two years, U.S. prodding and leadership have had a galvanizing effect on political establishments, causing them to focus their efforts on supporting Ukraine more effectively and increasing their defense expenditures. Subsequently, greater numbers of countries have increased their military budgets, seeking to meet their NATO obligation of 5 percent of national expenditures, although many other countries continue to fall short of this commitment. 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, especially as countries commit to improving their defense capabilities, readiness, postures, and industrial bases. However, significant work remains to be done if Europe is to assume more leadership of its collective defense and rebalance its national budgets to support greater defense spending.

Despite these enduring challenges, the overall picture has led us to score Europe's political stability score as "excellent" once again in the *2026 Index*. 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 are merely short-term responses to Russia's aggression in Ukraine. Given the potential for Russia to replace its battlefield losses, 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. The *2026 Index* again assesses the European operating environment as "excellent" overall.

The Middle East. The Middle East will remain an area of concern for 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 significantly more stable because

Operating Environment: Latin America

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances				✓	
Political Stability			✓		
U.S. Military Posture		✓			
Infrastructure			✓		
OVERALL			✓		

Operating Environment: Asia

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances				✓	
Political Stability				✓	
U.S. Military Posture		✓			
Infrastructure			✓		
OVERALL			✓		

Operating Environment: Europe

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances					✓
Political Stability					✓
U.S. Military Posture				✓	
Infrastructure				✓	
OVERALL					✓

Operating Environment: Middle East

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances			✓		
Political Stability		✓			
U.S. Military Posture				✓	
Infrastructure			✓		
OVERALL			✓		

Operating Environment: Africa

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances		✓			
Political Stability			✓		
U.S. Military Posture		✓			
Infrastructure		✓			
OVERALL		✓			

Global Operating Environment

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

of Israel's successful military operations against Hamas and Hezbollah and U.S. efforts to destroy Iran's nuclear weapons infrastructure and capabilities. Additionally, successful operations against the Houthis in Yemen have reduced threats both to U.S. interests and to broader global economic shipping.

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 partner 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 *2026 Index* assesses the Middle East operating environment as "moderate," but the region's political stability continues to be "unfavorable."

Africa. Africa is an enormous region of great complexity. Its operating environment is multifaceted, and what U.S. interests exist there vary based on military infrastructure, terrorist threats to the homeland, illegal immigration, unfavorable trade practices, and the destabilizing effects of Russian and Chinese influence. We assess Africa as "moderate" with respect to U.S. interests in terms of political stability but "unfavorable" overall because of alliance, infrastructure, and U.S. military posture challenges.

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 remains broadly stable with the United States able to project military power anywhere in the world to defend its interests without substantial opposition or high levels of risk. However, increased activities by China cause the overall global environment to be downgraded from "favorable" to "moderate" in the *2026 Index*.

Threats to U.S. Vital Interests: Summary

SEVERE	HIGH	ELEVATED	GUARDED	LOW

Threats to Vital U.S. Interests

America faces a range of challenges to its security and interests at home and abroad from a number of countries. The United States faces the challenge of employing the right mix of diplomatic, economic, 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 based on the military threat posed by each of the following actors.

China—the most comprehensive threat the United States faces—remains "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 nuclear, 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 Australia 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, recent U.S. actions in Venezuela and Iran, and broader 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. While Russia is unable to threaten U.S. global interests to the extent that the Soviet Union did, it threatens a number of U.S. allies and interests in Europe. Russia's invasion of Ukraine reintroduced large-scale conventional war to Europe: it is the largest conflict on that continent since the end of World War II, and its economic and security repercussions are felt across the globe. Moscow also remains committed to massive pro-Russia propaganda campaigns in other Eastern European countries in addition to 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. And although such a strike against the American homeland is unlikely at present, Russia's massive arsenal of non-strategic nuclear weapons does pose a clear and present danger to European nations.

The *2026 Index* assesses the threat emanating from Russia as "aggressive" for level of provocative behavior and "gathering" for level of capability. Although Russia remains aggressive, it has lost significant amounts of its combat power to Ukrainian forces and, while its manpower remains robust, has been forced both to conscript more forces and to rely extensively on foreign assistance from North Korea, Iran, and China. While Russia maintains the world's largest nuclear arsenal, it is not the formidable conventional power it once was. Nevertheless, it still retains its industrial capacity and has shifted its economy to a wartime footing.

Iran represents by far the most significant security challenge to the United States, its partners, and its interests in the greater Middle East. Its open hostility to the United States and Israel, sponsorship of terrorist groups, illegal pursuit of nuclear weapons, and history of threatening the commons underscore the problem it could pose. Iran's provocations are of significant concern to the Middle East region and America's partners, friends, and assets there.

Iran relies heavily on irregular (to include political) warfare against others in the region and fields more ballistic missiles than are fielded by any of its neighbors despite its losses during its conflict with Israel. Its development of ballistic missiles and its remaining 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

Threats to U.S. Vital Interests

BEHAVIOR	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
China		✓			
Russia		✓			
Iran	✓				
North Korea			✓		
OVERALL		✓			

CAPABILITY	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
China	✓				
Russia		✓			
Iran				✓	
North Korea			✓		
OVERALL		✓			

efforts to shape the domestic political landscape in Iraq, adding to the region's general instability. However, Israel's campaign against the leadership and capabilities of Hamas and Hezbollah, its efforts to destroy Iran's missile capabilities, and U.S. efforts to degrade Iran's nuclear program through aerial strikes have significantly degraded the threat from Iran. The *2024 Index* assessed Iran's behavior as "aggressive" and its capability as "gathering." The extended military campaigns between Iran and Israel have caused Iran to be assessed as "hostile" for level of provocative behavior in the *2026 Index*, but the severe degradation of Iran's combat power and nuclear capabilities has caused it to be rated "aspirational" for level of capability.

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; for the United States, its ability to threaten the American homeland with a nuclear weapon is obviously a particular concern. 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 low-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 seek concessions from the United States in negotiations on its nuclear program and various aid packages. 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 *2026 Index* therefore assesses the overall threat from North Korea, considering the range of contingencies, as "testing" for level of provocative behavior and "capable" for level of capability.

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

Based on our assessments of these threat sources, the *2026 Index* rates the overall global threat environment as "aggressive" for threat actor behavior and "gathering" for material ability to harm U.S. security interests. China's dramatic expansion of its power projection abilities (especially its investment in nuclear weapons) and 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, in addition to Iran's ongoing

investments in its nuclear and ballistic missile programs, result in an overall score of "high" in the *2026 Index*.

The Status of U.S. Military Power

The military power of the United States is assessed in three areas: capability, capacity, and readiness. We approached this assessment service by service as the clearest way to link military force size; modernization programs; unit readiness; and (in general terms) the functional combat power (land, sea, air, and space) that each service represents. These areas of assessment are central to the overarching questions of whether the U.S. has a sufficient quantity of appropriately modern military power and whether military units are able to conduct military operations on demand and effectively.

We characterized the services and the nuclear enterprise on a five-category scale ranging from "very weak" to "very strong," benchmarked against criteria elaborated in the full report. These characterizations should not be construed as reflecting either the competence of individual servicemembers or the professionalism of the services or Joint Force as a whole; nor do they speak to the U.S. military's strength relative to the strength of other militaries around the world in direct comparison. Rather, they are assessments of the institutional, programmatic, and material health or viability of America's hard military power, benchmarked against historical instances of use in large-scale, conventional operations and current assessments of force levels that would likely be needed to defend U.S. interests against major enemies in contemporary or near-future combat operations.

Our analysis concluded with these assessments:

- **The U.S. Army as "Marginal."** Based on the historical use of its ground forces in combat, the Army has less than two-thirds of the forces in its Active Component that it would need to handle more than one major regional contingency. This shortfall in capacity might be offset if the modernity or technological capability of its forces were very high, but this is not yet the case, and the Army has a long way to go in modernizing its key systems. The Army has fully committed to modernizing its forces for great-power competition, but its programs are still in their development phase, and it will be a few years before they are ready for acquisition and fielding. Insufficient capacity for more than one MRC might also be offset if capabilities and readiness in the National Guard and Reserves were enhanced.

  In other words, the Army is aging faster than it is modernizing, in addition to which it has faced relatively stagnant budgets in comparison to the Navy and Air Force. At the broadest strategic level, this makes sense, as the Navy and Air Force are more central to Indo-Pacific planning and need major investments to keep up with the People's Liberation Army. The Army, however, also has an important role to play in the Indo-Pacific and needs targeted investment in new capabilities like the Multi-Domain Task Force (MDTF). More generally, the Army also needs to maintain an edge over all potential adversaries in the traditional aspects of ground power. The Army remains "weak" in capacity with 62 percent of the force it should have but has significantly increased the force's readiness, exceeding its own internal requirement that 66 percent of its BCTs must be at the highest readiness levels, thereby earning the highest score of "very strong" for readiness.

- **The U.S. Navy as "Weak."** The technology gap between the Navy and its peer competitors is narrowing in favor of competitors, and the Navy's ships are aging faster than they are being replaced. The fleet is too small relative to mission workload, and supporting shipyards are overwhelmed by the repair work that is needed to ensure that ships are available. This inadequate maintenance infrastructure contributes to ships not returning to the fleet in a timely manner, which in turn causes readiness problems as steaming days needed to train crews to levels of proficiency are lost. The Navy is projected to have a fleet of 280 ships by 2027, which is smaller than the current force of 290 and well below the 400 needed to meet operational demands. Current and projected funding shortfalls will make it harder to deal effectively with any of these serious deficiencies. This leaves the Navy unable to arrest and reverse the decline of its fleet as adversary forces grow in number and capability.

U.S. Military Power: Summary

VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG

- **The U.S. Air Force as "Weak."** Despite outstanding performances in Iran and Venezuela over the past few months and its next-generation bomber and fighter programs, the reality is that today's Air Force is smaller, older, and less ready than at any point in its history. This matters because America's asymmetric military advantage is the ability to own the skies and hold adversary targets at risk across the globe. The Air Force's responsibility to America is to field an appropriately sized, capable, and ready force that can execute these critical, Joint Force–enabling military functions. During the decades following the Cold War, this responsibility has gradually been marginalized, and America's ability to own the skies and hold adversary targets at risk has been steadily eroded, particularly in comparison to the extraordinary growth of China's air capabilities. As a result, the United States is accepting more strategic risk than it should—risk not just of conflict or deterring a conflict, but risk of losing a conflict. For example, the Air Force has only two-thirds the number of active-duty combat-coded fighter aircraft required to fight two MRCs. Additionally, its warfighting readiness is very low because of aircraft age, aircraft availability, and low sortie rates and flight hours for its aircrew. Finally, the Air Force's fleet seemingly gets smaller every year, and the fiscal year (FY) 2026 budget continues this downsizing trend despite President Trump's OBBBA.

  Overall, the service is not ready for peer conflict at a time when the world is increasingly dangerous. Fortunately, a properly sized, capable, and ready Air Force can reduce strategic risk, deter conflict, and ensure that the nation could prevail if deterrence fails, and there are encouraging signs, including enactment of the OBBBA in July 2025, that Congress may be ready to resource the Air Force in line with today's strategic environment. To this end, Congress should increase the Air Force's budget to account for the immense cost of nuclear modernization, increase the size of the service's fleet to meet the requirements the Air Force identified in 2018's "The Air Force We Need" for a 2030 fight with China, and help the service to improve the readiness of combat units with the right mix of jets, maintenance capability and capacity, and trained aircrew, all while prioritizing the core missions the service is uniquely tasked to execute: air superiority and global strike. These actions would ensure that America's Air Force is ready to "fly, fight, and win" anytime and anywhere.

- **The U.S. Marine Corps as "Strong."** The Marine Corps' capacity is evaluated against a one-MRC standard, whereas the other services are evaluated against a two-MRC construct. The Corps consistently meets its unique requirement to produce three simultaneous Marine Expeditionary Units. The Corps' strong capacity and capability ratings stem in large part from the inherent flexibility of fighting as O6-led Marine Air Ground Task Forces (MAGTFs). MAGTFs combine ground and air combat power with their associated logistics support under a single commander and can be modified as mission sets dictate. The Marine Corps' strong readiness rating comes from a consistent equipment modernization campaign and being five years into reorganizing itself to fight the PRC more effectively if needed.

  The Marine Corps is not without its challenges. The shortages of amphibious shipping, sealift, long-distance transportation, and sustainment affect the entire Joint Force, but the Marines may feel those impacts most acutely in their role as America's rapidly responsive expeditionary force. However, while these challenges are significant, they do not yet prevent the Marine Corps from completing its assigned missions.

U.S. Military Power: Army

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability			✓		
Readiness					✓
OVERALL			✓		

U.S. Military Power: Navy

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity	✓				
Capability			✓		
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Air Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability				✓	
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Marine Corps

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity				✓	
Capability				✓	
Readiness				✓	
OVERALL				✓	

U.S. Military Power: Space Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability			✓		
Readiness		✓			
OVERALL			✓		

U.S. Military Power: Nuclear

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Nuclear Stockpile				✓	
Strategic Delivery Systems				✓	
Extended Deterrent Credibility				✓	
NNSA Warhead Modernization			✓		
Nuclear Delivery Systems Modernization			✓		
OVERALL				✓	

U.S. Military Power: Missile Defense

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Integrated Command and Control				✓	
Existing Under Layer				✓	
Existing Ground-Based Layer				✓	
Existing Space-Based Overlayer			✓		
Theater Defenses				✓	
Architecture Evolution				✓	
OVERALL				✓	

U.S. Military Power: Coast Guard

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability		✓			
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Merchant Marine

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability		✓			
Readiness	✓				
OVERALL		✓			

U.S. Military Power

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Army			✓		
Navy		✓			
Air Force		✓			
Marine Corps				✓	
Space Force			✓		
Nuclear				✓	
Missile Defense				✓	
Coast Guard		✓			
Merchant Marine		✓			
OVERALL			✓		

- **The U.S. Space Force as "Marginal."** The Space Force is assessed the same in this year's *Index* as it was in the *2024 Index*. The Space Force has made significant progress in the six years it has existed. The service's FY 2026 budget is projected to be more than 250 percent larger than its first-year budget. The Space Force established a field command dedicated to testing, training, education, and readiness. It has fielded many new domain awareness sensors and command-and-control systems, has launched many next-generation GPS satellites and operationally accepted the long-beleaguered GPS command-and-control program, is taking advantage of commercial space capabilities and international allies and partners, has architected and begun to field resilient data transportation and missile warning constellations of satellites, and has embraced and initiated many of the acquisition reforms directed by the FY 2026 National Defense Authorization Act and Secretary of War Pete Hegseth.

  At the same time, however, the Space Force has not kept pace with the rapidly advancing threats to and from space. China and Russia are fielding ground-based and space-based threats to our space assets that outpace the Space Force's efforts to develop resilient architectures and defensive capabilities. China is also rapidly fielding space systems that will target our fixed and mobile air, land, and maritime forces in the Pacific Area of Responsibility (AOR). The Space Force must field capabilities to defeat these space-based threats. Additionally, our nation continues to ask more of the Space Force, which will need, for example, to provide critical sensors and interceptors as part of the Golden Dome missile defense program. The Air Force has retired or will retire airborne intelligence, surveillance, and reconnaissance (ISR) and air battle management sensors; the Space Force is racing to field capabilities to mitigate these retirements. The nation's growing economic dependence on space capabilities suggests that the Space Force will need to have the capability to defend all of our interests in the domain. In short, while the Space Force has made remarkable progress in a few short years, it will need to accelerate its capabilities and capacities if it is to be fully capable of answering our nation's demands.

- **U.S. Nuclear Capability as "Strong."** America's strategic deterrent remains strong and credible and able to impose significant—even catastrophic—costs on any who would carry out a strategic attack on the United States or its allies. However, challenges in modernization of delivery systems, particularly the Sentinel ballistic missile system, and the production

of plutonium pits prevent a rating of "very strong." Moreover, as time progresses, America's nuclear-armed adversaries—particularly China—will field larger arsenals that will create ever larger deterrence challenges for the United States. Consequently, the United States in the coming years must field a larger and more diverse nuclear arsenal, particularly among theater nuclear weapons, to deter adversary aggression successfully. This means not only that the nuclear modernization program of record (to include the relevant components within the Department of War and Department of Energy) must be put back on schedule, but also that the United States will likely have to augment the program of record to increase the number of operationally deployed nuclear weapons.

- **U.S. Missile Defense as "Strong."** Missile defenses have shown—from Ukraine to the Middle East to live-fire tests—that they work remarkably well. Integrated air and theater missile defenses continue to demonstrate their value in deterring and, if necessary, mitigating the impact of adversary missile strikes. As the United States builds Golden Dome, which will integrate existing homeland missile defenses with regional missile defense architectures, and expands global sensor coverage while at the same time fielding additional ground-based and space-based missile interceptors, it will be better postured to deter and, if necessary, defeat enemy missile threats.

- **The U.S. Coast Guard as "Weak."** Despite some successes in 2025, such as record-breaking drug seizures, a continued fast response to disasters and search and rescue missions, an improvement in recruitment, and a much-needed increase in funding from the One Big Beautiful Bill Act, the U.S. Coast Guard (USCG) remains burdened by a variety of negative issues. Historically, the Coast Guard has been an underfunded service, and many of its ships and aircraft are old and experience heavy usage, which causes further deterioration. In addition, newer vessel designs have been beset by delays. The USCG's cutters, the backbone of its fleet, have suffered from poor maintenance, maintenance backlogs, and delays in programs that are intended to bring new, more advanced, and more functional modular cutters online. This necessarily has a negative effect on the interdiction of narcotics and illegal immigration insofar as they involve the Coast Guard.

  Faced with over 2,500 miles of U.S. Arctic coastline along with missions to U.S. bases in the South Pole, the USCG operates only two medium icebreakers and one heavy icebreaker—and its only heavy icebreaker is now 50 years old. Coast Guard helicopters, particularly the workhorse HH-60s, have experienced maintenance issues and groundings as a result of accidents and heavy use. Although recruitment improved in 2025, retainment issues persist. The Coast Guard has also gone without antisubmarine training, a deficiency that, in view of the drug cartels' increased use of narco-submarines and the service's duty to escort U.S. vessels during wartime, puts it at a distinct disadvantage. As a result, the USCG would also be at a disadvantage in the event of a conventional great-power conflict, particularly in the Pacific. Acquiring newer modular vessels, aircraft, unmanned systems, and newer training regimens can help to reverse these trends, but the process will necessarily be a slow one.

- **The U.S. Merchant Marine as "Weak."** Most emblematic of this sad state of America's sealift is the sidelining of 17 Military Sealift Command ships because of crew shortages. That too few seaworthy commercial ships is a persistent problem that drives low readiness assessments is borne out in activation exercises like Turbo Activation 19 Plus. Moreover, there is little good news on the horizon as both future classes of logistic ships and the revival of America's commercial maritime industry seem to be stalled and delayed. Action is urgently needed to reverse this trend and begin a serious effort to fill gaps in the military and assured commercial shipping that the nation would need to sustain a prolonged major war.

In the aggregate, America's overall military posture must be rated "marginal." The Space Force and Army are rated "marginal," and the Navy, Air Force, Coast Guard, and Merchant Marine are rated "weak." Only the Marine Corps, nuclear forces, and missile defense are rated "strong," but the Corps is a one-war force, and its overall strength is therefore not sufficient to compensate for the shortfalls of the larger services. Strong conventional forces of necessary size are essential to America's ability to respond to emergent crises in areas of special interest.

The *2026 Index* concludes that the current U.S. military force is at significant risk of being unable to meet the demands of a two-MRC benchmark. The force would probably not be able to carry out successful operations greater than what is required to execute a single MRC against a peer-competitor such as China and is certainly ill-equipped to handle two nearly simultaneous MRCs—a situation that is made more difficult by the generally weak condition of key military allies.

In general, the military services continue to prioritize readiness and have made some progress over the past few years, but modernization programs, especially in shipbuilding and the production of fifth-generation combat aircraft, continue to suffer as resources are committed to preparing for the future, recovering from 20 years of operations, and offsetting the effects of inflation. With respect to the Air Force, some of its limited acquisition funds are being spent on aircraft of questionable utility in high-threat scenarios while research and development (R&D) receives a larger share of funding than efforts meant to replace quite aged aircraft are receiving. As observed in the 2021, 2022, 2023, and 2024 editions of the *Index of U.S. Military Strength*, the services have normalized reductions in the size and number of military units, the forces remain well below the level needed to meet the two-MRC benchmark.

As currently postured, the U.S. military is at significant risk of not being able to defend America's vital national interests with assurance. It is rated "marginal" relative to the force needed to defend national interests on a global stage against actual challenges in the world *as it is* rather than as we wish it were. As demonstrated by The Heritage Foundation's recent TIDALWAVE war simulation, these challenges are particularly grave in a protracted conflict. This is the inevitable result of years of sustained use, underfunding, unclear priorities, shifting security policies, poor discipline in program execution, and a lack of seriousness across the national security establishment even as threats to U.S. interests have surged.

Although the One Big Beautiful Bill Act signed by President Trump on July 4, 2025, added more than $150 billion in defense spending on top of annual defense appropriations, more investment is needed. The President's January 7, 2026, call for a $1.5 trillion defense budget—more than $500 billion larger than the current budget—is a positive sign that greater investment is on the way, but this must be done in a disciplined and fiscally responsible manner that also seeks savings, reforms, and efficiencies from the U.S. Department of War.[2] The focus of the United States should be on restoring peace through strength, and while some work has been done, much remains to be finished to reverse the effects of years of defense budgetary decline and lack of prioritization.

Endnotes

1. The analytical work for this assessment is contained in the *2018 Index of U.S. Military Strength*.
2. See U.S. Senate Committee on Armed Services and U.S. House Committee on Armed Services, "SASC/HASC Defense Reconciliation Overview," undated, https://armedservices.house.gov/uploadedfiles/obbb_hasc_and_sasc_defense_legislation_summary.pdf (accessed January 13, 2026).

The American Way of War

Douglas and Sarah Allison Center for National Security

"The American tradition has always been that once our troops are committed to battle, the full power and means of the nation should be mobilized and dedicated to fight for victory—not for stalemate or compromise."

—General Douglas MacArthur, U.S. Army

Introduction

The United States is at a unique strategic inflection point. Our nation is simultaneously taking stock of the mixed legacy and unintended consequences of its wars in Afghanistan and Iraq, and the global war on terrorism more broadly, while also thinking through what the return of great-power competition and possible high-intensity war with the People's Republic of China (PRC) might mean. As the United States strengthens its deterrence against China's aggressive actions in the Indo-Pacific and beyond, it is also examining how it would fight the PRC if deterrence failed.

Much of the discussion about a potential war with the PRC concerns matters of quantity (e.g., how many ships, missiles, or bullets) and quality (e.g., exquisite weapon systems), but a broader discussion about how the United States traditionally fights its wars is also needed. The United States must also consider carefully when to employ force. Policymakers and elected officials must avoid costly and damaging strategic distractions while they concentrate on deterring and, if necessary, defeating threats to America's core national security interests. The United States should especially seek to avoid nation-building projects that drain American resources and lack war-termination conditions. Finally, as the United States reorients to the Indo-Pacific as the primary theater of overseas operation and focuses its efforts on deterring aggressive Chinese actions, it must apply the central lessons of past combat experiences.

In short, the United States should not engage in specious military actions that serve only to distract policymakers and elected officials from pursuing and securing core national interests—and waste precious blood and treasure in the process. Nor should the United States retreat into a "fortress America" mindset. There are times when America should—and must—exert military power to protect the Republic, defend the rights of American citizens, aid allies, or even (in limited instances) support American ideals, but it must exert this force sparingly, with judiciousness and decisiveness, and always in pursuit of American national interests.

Legacy and Renewal

The legacies of the U.S. interventions in Afghanistan and Iraq serve as cautionary lessons about the limits of U.S. power and must inform contemporary strategic decision-making and thinking. Poorly conceived initial war plans, unclear or nonexistent conditions for successful conflict termination, an incomplete understanding of the cultures and requirements for long-term stability in both nations, and the failure of military and civilian institutions to adapt to the unique requirements of counterinsurgency led to disastrous long-term occupations and strategic mission creep. The costs of these interventions in terms of casualties, readiness, and lost opportunities, and as distractions from the rise of strategic competitors, have created significant challenges for the U.S. Department of War (DOW) as it confronts the realities and implications of great-power competition. The U.S. government's decision to engage in these protracted conflicts also undermined the public's trust in its leaders and

hastened the end of America's unipolar moment after victory in the Cold War, leaving the U.S. forced to operate in a far less stable security environment.

Both conflicts were also instructive in terms of other aspects of the American way of war and provide useful insights into how civil–military institutions function in a wartime environment as well as the broader methods of how the United States wages war. In many respects, the U.S. tends to fight long wars with short-term strategies, often throws resources at problems in place of institutional design considerations, has separate civil–military approaches, focuses on actions in capitals versus the countryside, embraces high-technology instead of mixed high-tech/low-tech solutions, and initially misconceptualizes conflicts but eventually learns how to fight them more effectively. These characteristics have been central to the American way of war during the past 25 years but are not always considered when discussions of great-power competition turn to issues of strategy and resource allocation.

To be competitive against China and Russia, the United States must understand these shortcomings and overcome them. It must renew itself if it is to survive the threats posed by China and Russia over the next half-century.

Historical Foundations of American Military Power

Since its founding in 1776, the United States has used its military forces for a broad spectrum of activities in the service of its political objectives. As the U.S. has expanded across the North American continent and grown to become a regional, hemispheric, and then global power, the use of its military has been driven by several key imperatives.

The central driver of U.S. war aims has been the security of the Republic, its people, and its institutions. Whether it is the depredations of frontier raiding parties, the preservation of the Union during the Civil War, attacks by Imperial Japan during World War II, or the attacks by al-Qaeda terrorists on September 11, the United States has often—but not always—used its military to protect the nation. For every employment of the Army to secure America's southern border from attacks by Mexican bandits in the run-up to the First World War, there is a peace-keeping or humanitarian operation in Somalia based on an ideological pursuit that is unrelated to America's vital national security interests.

America's armed forces are also used to advance other interests such as market access (e.g., Commodore Matthew Perry's opening of Japan's ports to American trade); diplomatic and political goals such as the support of key allies and partners (e.g., support of Great Britain during World War II); narrowly defined political objectives to protect the homeland and American citizens (e.g., interdiction of illegal drug shipments or suppressive efforts against Pancho Villa); and support for overseas forces as they fight against America's mortal opponents (e.g., support for anti-Communist forces in Latin America or Southeast Asia during the Cold War).

A third justification for the use of military force is protection of America's rights as a nation. Examples include (among others) the U.S. response to British impressment efforts against U.S. sailors leading up to the War of 1812 and, more recently, freedom of navigation missions around Taiwan.

Finally, there are wars of choice in the pursuit of ideological goals, including humanitarian interventions and wars to spread democracy. This is perhaps the most potentially dangerous justification for employing force, as the pursuit of an ideal can be and frequently is a task that never ends. Using the military for the forcible promotion of democracy and human rights in regions and among cultures that have little to no tradition of either is a questionable and potentially costly reason to employ force. Historically, elements of all of these motives have influenced U.S. decisions about when to use military force, how to use it, and what proper political objectives the Republic should pursue.

The means by which the United States utilizes its military forces are also elements of the American way of war. The Republic's strength grew from its founding as economic growth expanded U.S. power and influence. Over decades, local militias evolved into volunteer forces and from there into sustained regular military forces and then large-scale professional forces. With this evolution, the ability of the United States to wage war improved and expanded. Similarly, as U.S. industrial capacity grew, the defense industrial base grew as well. This growth enhanced both America's capacity to meet its military objectives and the scope of U.S. power globally. As the U.S. Department of Defense (now Department of War) grew during the latter half of the 20th century, its abilities strengthened U.S. political and diplomatic power and, in conjunction

with American economic and cultural dominance, enabled the United States to become the preeminent and, by 1989, unchallenged world power.

U.S. civil–military structures similarly evolved as the Republic grew, military capabilities expanded, Americans gained experience with war, and allied military planning efforts were initiated. The interaction between civilian political leaders and uniformed military leaders advising and eventually leading military forces in the service of political decisions is also central to an understanding of the American way of war.

The establishment of the Joint Chiefs of Staff system, in part an outgrowth of allied planning with the British during World War II, and its legal codification in the National Security Act of 1947 and the act's 1949 amendments, which created the Chairman of the Joint Chiefs of Staff position, greatly influenced U.S. military strategic planning and the implementation of military objectives. The promotion of integrated operations, development of the Joint Force, and increases in appropriations, in addition to a large and sustained military planning capability and bureaucracy, influenced American military performance. Planning became more thorough, the combined effects of the various services became better coordinated and integrated, and the ability to conduct sustained operations increased thanks to a large, standing military force as opposed to the temporary growth of forces in prior conflicts.

Subsequent reforms, such as the U.S. Department of Defense Reorganization Act of 1958, removed the Joint Chiefs of Staff from the chain of command and created modern civilian control of the military. The 1986 Goldwater–Nichols Act advanced service integration, codified and expanded the unified combatant command system, bolstered the organizational capabilities of the Joint Chiefs, and created a Vice Chairman of the Joint Chiefs of Staff position. These reforms influenced the relationship between civilian and military leaders by providing a more professional and joint force, better planning, and greater, sustained resources for power projection, but they also narrowed the range of military advice to civilian leaders by taking the Joint Chiefs of Staff out of the chain of command.

Additionally, as outlined in the Federalist Papers, the U.S. Congress serves as a check on military power (e.g., control of funding, appointments, promotions, and investigations), which in turn affects how the U.S. military is used. The legislature is entitled to the unvarnished advice of the uniformed military and can compel—through investigations, hearings, funding decisions, and amplification of issues through the shaping of public opinion—changes in military strategy and the means by which it is implemented.

An additional consideration—and one that is universally a factor in military decision-making—is that initial military objectives can change as deeper knowledge of the enemy leads to adjustments in strategy and shifts in domestic political opinion. Also, although the U.S. military is well organized to fight conventional wars, it is not well designed to combat insurgencies and implement counterinsurgency strategies. The inherently political nature of these types of conflicts and poor understanding of this type of warfare can easily lead to a mismatch between the tools used to implement strategy (i.e., conventional) and what is required (i.e., unconventional/counterinsurgency). This disconnect between means and objectives or strategy and structure is frequently driven by civilian political leaders, but it is also true that military advice can be unknowingly misguided and seen through the prism of military careerism or a conventional military lens, all of which can complicate more pragmatic considerations of national interest and security.

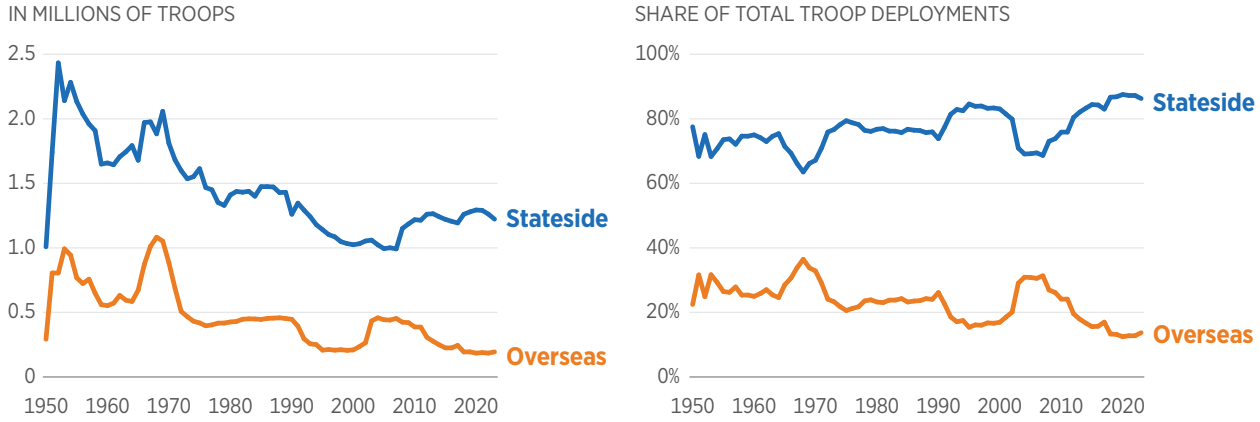
Finally, a sense of crisis engendered by an event like the 9/11 terrorist attacks can override a more deliberate approach to strategy, causing a country's initial strategy to be changed even though the war has commenced and the strategy is supported politically. Such revised strategies are often insufficiently thought out and prove unsuccessful in the end. In these and similar situations, how quickly military bureaucracies can adapt to change, often driven by enemy violence, can dictate success or failure. The need to cultivate well-defined political objectives that will then influence the military means by which they are implemented is central to success. Profound mismatches between them, frequently driven by political decisions and poor understanding of the problem, can easily lead to prolonged and unsuccessful military campaigns.

Neither "Empire" nor "Fortress America"

The United States emerged from the Cold War with the world's most powerful military by a wide margin. American forces enjoyed clear if

CHART 1

U.S. Troop Deployments, Stateside vs. Overseas, 1950–2023



SOURCE: The American Lyceum, USTroopDeployments.com, "U.S. Troop Deployments," https://www.ustroopdeployments.com/ (accessed January 29, 2026).

heritage.org

not decisive advantages in key theaters and were expected to be able to defeat multiple adversaries simultaneously.

That is no longer the case. After decades of war and mismanagement, U.S. forces are stretched thin around the world. Many of them suffer from readiness challenges—including recruiting shortfalls, weapons shortages, and maintenance backlogs—and delayed modernization. As a result, the American military no longer enjoys many of the advantages that it enjoyed when the Soviet Union fell. Today, for instance, the United States has a very strong interest in preventing China from dominating the Indo-Pacific, but it is no longer clear that the United States will be able to deter Beijing. Worse still, if deterrence fails, there is a real chance that China will be able to defeat the United States in a war, particularly one that begins over Taiwan.

After more than a decade of decline, the American military is sized to fight and win only one major war at a time. Consequently, if U.S. forces went to war in one theater, our opponents might use this as an opportunity for aggression in other theaters, whether in coordination with one another or on their own initiative. This would be less troubling if allies and partners could reliably fill in for U.S. forces, but decades of underinvestment have left many of them unable to do so. Although this trend is now being reversed in both Europe and Asia, our allies in those regions have a significant way to go before they can rebuild long-dormant military capabilities. As a result, if the United States was drawn into a major conflict, there would be significant risk of cascading escalation across theaters, potentially culminating in a third world war.

The American homeland is also increasingly vulnerable. As tensions rise abroad, there is increased risk of enemy nuclear use against the United States. The risk of enemy non-nuclear missile strikes or destructive cyberattacks against U.S. targets is also rising. Meanwhile, America's borders have faced overwhelming flows of migrants and narcotics, including foreign nationals who could threaten U.S. national security and drugs that are responsible for tens of thousands of American deaths each year.

These are difficult times, to be sure—but the future is not yet written. The United States has overcome periods of great danger before, and it can do so again. But until the United States and its allies in Asia and Europe can rebuild sufficient military force to credibly deter—and, if necessary, defeat—multiple adversaries in multiple theaters simultaneously as part of a two-war force construct, this will require *prioritizing*. Therefore, the United States must deploy its military forces where they are needed most, consistent with America's interests, while

strengthening allied and partner burden-sharing in other areas.

In practical terms, the United States must focus U.S. forces on defending the American homeland and denying China's imperial ambitions, most urgently by deterring Beijing from invading Taiwan. Moreover, credible options must be presented to the President if deterrence fails. These are the most important missions the military must accomplish to preserve Americans' security, prosperity, and freedom. Consequently, they must be America's top defense priorities.

This does *not* mean that the United States should abandon other theaters or allies: far from it. Instead, the United States must find ways to defend its interests in those theaters without jeopardizing the ability of U.S. forces to defend the homeland and deny China's imperial ambitions. To that end, Washington should empower allies and partners to lead efforts to defend against Russia, Iran, and North Korea with critical but more limited U.S. support. This would allow the U.S. to avoid cascading escalation by ensuring that allies and partners can deter opportunistic aggression even if key U.S. forces are drawn away from their respective regions. It also would leave U.S. alliances and partnerships far stronger than they have been at any time in the post–Cold War era.

The United States must resist the temptation to get drawn into strategic distractions through the application of military power to carry out missions that are not tied directly to American national security interests (such as peacekeeping operations in far-flung parts of the world or nation-building efforts in non-critical theaters). Far too often, such operations expend precious resources for little to no gain for the American people. At the same time, however, the United States must recognize that its interests also lie beyond the American homeland. American well-being must be secured both at home *and* in East Asia and Europe. Navigating a path between "Empire" and "Fortress America" may not be easy, but it is absolutely vital if our nation is to secure its core national security interests both at home and abroad without depleting American blood and treasure.

The *2026 Index of U.S. Military Strength* therefore suggests that the United States pursue military modernization through a lens of "Restoring Peace Through Strength." To do so, we must learn what worked during—and why we failed in—past military operations.

America's Wars: Learning from Success

The three decisions of (1) whether to go to war, (2) what the war's political goals are, and (3) how best to use the military to meet the political objectives of civilian political leaders have influenced every campaign undertaken by the United States. While it has officially declared war five times (the War of 1812, Mexican–American War, Spanish–American War, World War I, and World War II), the United States has used force for a multitude of reasons, employing a variety of means, over nearly two-and-a-half centuries. In addition to conventional wars like World Wars I and II, missions other than conventional war have included deterrence patrols (U.S. military activity off the coast of Taiwan during the Eisenhower presidency); shows of force (U.S. Navy ships off the coast of Venezuela); limited regime change (removal of Manuel Noriega from Panama or Nicolas Maduro in Venezuela); degradation of military capabilities (limited strikes on Iranian nuclear infrastructure); unconventional warfare (the invasion of Afghanistan after 9/11); and counterinsurgency (the Iraq and Afghanistan campaigns).

With respect to large-scale, conventional warfare, at least five best practices have facilitated U.S. success and should be considered as military and civilian leaders contemplate deterrent and war plans in response to current threats.

- **Clear Political Objectives.** Military action should be taken only in the service of clear political objectives as enumerated by the President and informed by the U.S. Congress using the advice of the uniformed military. A clear goal clarifies strategic choices, forces resource decisions, helps responsible leaders to balance competing priorities, and defines success or failure. As learning takes places against an enemy and some political goals shift, it is also imperative that political clarity is maintained as combat continues.

- **Sustained Lethality.** Although the outbreak of war is never perfectly predicted, a conventional war based on attrition must entail sustained lethality in a combined manner that is

dynamic, prolonged, and quickly mobilized for effect. This approach requires both a current force that can quickly address a conventional opponent and the ability to sustain operations until total military victory is achieved. This in turn requires both robust warfighting capabilities (large armies, navies, air forces, etc.) and deep stores of munitions in addition to a focus on destroying the enemy's military fighting ability.

- **Mobilization of the Economy and the Defense Industrial Base.** The ability to fully marshal the resources and people of the United States for conventional war has served as a vital strength of U.S. warfighting efforts. The industrial might of the U.S. and size of its population have long served as the decisive components of victory in conventional war. The ability to overwhelm the capabilities and sustainability of enemy strategies has given the U.S. an incomparable advantage in sustained combat.

- **Allies and Partners.** While planning for sustained operations against a conventional warfare opponent is prudent, the United States has often been successful working in concert with allies and partners. Cultivating relationships before conflict takes place is essential for sustained support once conflict begins. Allies and partners can provide not just needed manpower and warfighting capabilities, but also economic, political, and diplomatic support for sustained success.

- **Sustainable Peace.** A unique aspect of the American way of war is the ability of U.S. leaders to eschew short-term power considerations and see the long-term development of defeated opponents as future partners. This has often led to a "just peace," such as the occupation of Germany and Japan after World War II. Both countries are now among America's most important allies.

Other factors such as strategy, the will to fight, and political systems also clearly contribute to U.S. military success in conventional war, but these five key attributes have often served the U.S. as the central drivers of victory. As the United States reviews its experiences in the military campaigns of Afghanistan and Iraq and focuses its strategic attention on the challenge of the People's Republic of China, it must take account of these factors and prioritize those that deter China's aggressive military instincts most effectively—and avoid those actions that have led to costly and bloody failures or strategic distractions.

Peace Through Strength

As the assessments, analysis, and recommendations of the *2026 Index of U.S. Military Strength* make clear, a return to strategic clarity necessitates prioritization of those military capabilities that can be most effective in deterring and defeating aggression. However, deterrence works only if a viable "war winning" strategy and set of capabilities also exist; one cannot endure without the other. A strategy of "Peace Through Strength" requires clear thinking about U.S. security concerns, interests, and rights set against the capabilities of the Joint Force today and what can be mobilized in the future. It requires soberly evaluating U.S. interests, both short-term and long-term, and ruthlessly prioritizing U.S. resource decisions so that we employ those that deter the strategies of our opponents most effectively. As the *2024 Index* made clear, a decade of decline in these capabilities and strategic thinking, in part as a result of our focus on the conflicts in Afghanistan and Iraq, has left the United States—and the U.S. Department of War in particular—in a difficult strategic position.

The United States is trying to deter Chinese aggression while also grappling with the reality that it could face a kinetic conflict with the People's Republic of China (and possibly with Russia, Iran, and North Korea as well) as it rushes to build the capabilities and capacity it needs to prevail. While past efforts to refocus the department on the threat posed by China never reached fruition, the first Trump Administration (2017–2021) eventually altered the strategic priorities of the Department of War and the U.S. government more broadly as it focused on the Indo-Pacific. This has led to a more determined focus on the region and China, but changing priorities, resource choices, leadership, and doctrine require a determined effort.

Enactment of the One Big Beautiful Bill Act has started the process of reallocating resources to

promote peace through strength, but more must be done to achieve the strategic priorities of the *National Defense Strategy*. The theme of this year's *Index*—"Restoring Peace Through Strength"—indicates that the United States is starting to turn the tide to meet the requirements of strategic sanity and clarity, but it also reflects the reality that after a decade of decline, this mission requires additional effort and sustained attention.

The U.S. Defense Industrial Base

Jim Fein

Introduction

The U.S. defense industrial base (DIB) does not have the capacity to meet the worst threat environment since World War II. During the Second World War, the United States was the arsenal of democracy, supplying Allied forces with massive amounts of military equipment. From its entry into the war in 1941 until the war's end in 1945, the United States produced 17 fleet carriers, 300,000 planes, and 50,000 Sherman tanks.[1] The defense industrial base moved quickly, developing the first operational U.S. jet fighter in just 143 days.[2]

Today, the DIB has the capacity to produce 156 F-35s and "1.2 to 1.3" *Virginia*-class submarines per year.[3] In 2023, 125 Standard-6 missiles were produced per year, and production is projected to increase "to 200 per year by FY 2028."[4] Shipbuilding programs are behind schedule by as much as three years,[5] and The Heritage Foundation reported in July 2024 that "[t]he Los Alamos National Lab [would] begin to produce plutonium pits at a small scale in late 2024—14 years after the modernization program began—and the Savannah River site's ability to produce plutonium pits in any meaningful quantity is approximately a decade away."[6]

Decline of the Defense Industrial Base

No one factor explains the decline of the U.S. defense industrial base. During the Cold War, the DIB was healthy. While output was less than it was in World War II—which is to be expected because mass mobilization of commercial resources for defense production was an emergency measure—it was still a robust military resource capability. Despite huge leaps in technological complexity during the Cold War, production of aircraft, ships, and munitions during the Cold War continued at a higher rate than is the case today.

The United States produced over 1,000 nuclear weapons per year annually into the 1970s.[7] The U.S. only recently certified production of the first nuclear pit, a crucial element in building new nuclear weapons, in October of 2024—14 years after the start of the nuclear modernization plan in 2010.[8]

Between 1976 and 1996, American shipyards built an average of more than three *Los Angeles*-class attack submarines per year.[9] Its replacement, the *Virginia*-class submarine, has a production rate of just 1.2–1.3 submarines per year.[10]

It took an average of five years to build a *Nimitz*-class aircraft carrier during the Cold War.[11] Construction on the second *Gerald R. Ford*–class aircraft carrier, the *Nimitz*-class's successor, began in 2011.[12] Scheduled for delivery in 2024, it has yet to be delivered.

When the end of the Cold War ushered in a so-called peace dividend, military resources were reduced and often repurposed to domestic spending. Output declined in parallel with reductions in defense spending, especially spending on procurement.[13] Simultaneously, defense producers went through a series of mergers that the Department of Defense (DOD, now the Department of War) believed were necessary in light of decreased spending. At a 1993 dinner, now known as "The Last Supper," Secretary of Defense Les Aspin and Deputy Secretary of Defense William J. Perry advised defense industry leaders, whose companies derived most of their revenue from the DOD rather than from a combination of government and private-sector spending, that defense spending was going to decline and that defense producers should merge and consolidate in order to survive

in a market that was no longer large enough to sustain them all.[14]

During the 1990s, defense contractors followed this advice. Through a series of mergers over the past three decades, 51 defense producers consolidated into five.[15] The munitions market is now dominated by just three companies (Raytheon, Lockheed Martin, and Boeing) versus 13 in 1990.[16] Currently, only two companies are building surface combatant ships versus eight in 1990, and the U.S. can call upon three companies that build fixed-wing aircraft rather than the eight that were available in 1990.[17]

In 2025, the United States no longer faces the same threat environment that it faced in the immediate aftermath of the Cold War. Since the conclusion of the global war on terrorism, the primary challenge has been sustained great-power competition rather than counterinsurgency; the U.S. defense industrial base must evolve again to meet this new reality.

Revitalizing the Defense Industrial Base

In evaluating the challenges facing the U.S. defense industrial base, it is first necessary to define what constitutes a healthy DIB and how it can be measured. A strong defense industrial base is characterized by sufficient infrastructure and workforce capacity to generate the output necessary to equip our warfighters, an acquisitions and procurement process that aids in efficient production, and secure and resilient supply chains. By this standard, the current U.S. defense industrial base falls dramatically short. It lacks sufficient infrastructure and suffers from an inadequate workforce, a slow and cumbersome procurement process, and highly vulnerable supply chains. These shortcomings stem from several interrelated causes, including inconsistent demand signals, insufficient capital investment, adverse macroeconomic conditions and overregulation, cumbersome acquisition rules and practices, and a persistent failure to align resources with national strategy.

Inadequate Infrastructure. Infrastructure underpins the entirety of the defense industrial base. In order to make complex military equipment, production facilities need to be built and equipped with complex tooling. This requires high levels of upfront cost and capital expenditure, especially to build facilities with higher degrees of automation.

To justify that capital investment, defense producers and their suppliers need a sustained demand signal above their current capacity so that profits from production are greater than the cost of capital investment. Put simply, contracts and orders dictate capacity. As historian Arthur Herman has put it, "[a]ll you had to do was put in the orders, finance the plant expansion, then stand back and let things happen."[18]

The two categories of obstacles holding back higher order quantities are limited resources for procurement and high costs. Intuitively, the more money the U.S. Department of War has, the more ships, planes, munitions, and other defense equipment it can order. With topline defense spending relatively flat until the One Big Beautiful Bill Act (OBBBA),[19] demand signals have been declining for more than a decade.

This is especially true of procurement spending. During the 1980s, procurement spending was roughly 2.5 times higher than funding for research, development, test, and evaluation (RDT&E).[20] In 2025, RDT&E enacted funding was approximately $141.2 billion[21] versus approximately $174.2 billion for procurement.[22] This is a multiple of roughly 1.2 and a ratio less than half of the level at the height of the Cold War. Because procurement funding constitutes orders, its decline relative to funding for RDT&E has contributed to the lack of DIB infrastructure investment.

Foreign military sales (FMS), on the other hand, have grown in recent years. In 2021 and 2022, foreign procurement from U.S. industry averaged $45 billion. In fiscal year (FY) 2023, FMS jumped to almost $81 billion, and in FY 2024 leaped to almost $118 billion,[23] increasing orders by more than 50 percent of the $204 billion that would be spent on U.S. procurement in 2025.[24] These FMS sales resulted in a jump in new capacity, further illustrating the connection between capacity and orders. Lockheed Martin, for example, cited increased demand as an explanation for investment in new Patriot Advanced Capability-3 Missile Segment Enhancement (PAC-3 MSE) production.[25] Similarly, roughly 40 percent of the $1.5 billion in funding for production lots 39 and 40 announced in April 2025 and dedicated to advanced medium-range air-to-air missile (AMRAAM) production is devoted to FMS.[26] Considering that U.S. AMRAAM procurement is flat, the new capacity is directly attributable to FMS.

Examples also extend beyond munitions. Domestic capacity for F-35 production stands at 156 jets in large part because of FMS. U.S. military procurements stood at 86 and 74 jets, respectively, in 2024 and 2025,[27] which is approximately half of capacity.

While FMS has been increasing, the process itself is cumbersome with a bureaucratic structure that goes beyond what is mandated by statute. The Arms Export Control Act (AECA)[28] created the International Traffic in Arms Regulations (ITAR), which in turn created the bureaucratic structure that currently governs FMS. That structure includes input from the U.S. Department of State and multiple components of the U.S. Department of War (the Defense Security Cooperation Agency, Defense Technology Security Administration, and service branches, among others), all of which can either formally or de facto delay or block sales. Congress may also be involved, depending on the value of the sale.

The AECA does not specify that each Department of War component that currently takes part of the FMS process must do so; it mandates only that the State Department, Department of War, and (sometimes) Congress take part. Executive branch revisions can therefore help to speed up the process without legislative action—something that is in fact occurring. On April 9, 2025, the Trump Administration issued Executive Order 14268, which calls for reorganization of the FMS process to prioritize speed and efficiency.[29] Increasing procurement spending by shifting money within the Department of War budget and increasing FMS are ways to increase resources and therefore procurement quantities.

A second approach to increasing order quantities is to cut unit costs so that procurement dollars buy more units. In addition to inflationary challenges brought about by the Biden Administration, there are several government policies that increase costs, including the permitting process and other regulatory mandates.

During the Biden Administration, inflation accelerated beyond ~2 percent per year, reaching more than 8 percent in 2022.[30] The National Defense Industrial Association (NDIA) calculated the deadly impact: $42 billion in reduced buying power attributable to inflation from FY 2022 to FY 2023 as represented by a combination of the Gross Domestic Product: Chain-type Price Index (GDPCTPI) and Consumer Price Index for All Urban Consumers (CPI-U). From 2021 to 2023, the cumulative loss in buying power as a result of inflation stood at an even more staggering $110 billion.[31]

Anecdotal reports from defense producers that link inflation to higher costs further support the assertion that inflation particularly impacts procurement. For example, Northrop Grumman reported $1.56 billion in losses, mostly attributable to inflation, in costs associated with the B-21 program.[32] Likewise, the Navy requested $1.95 billion for two *Virginia*-class submarines in addition to its original request as an adjustment for inflation, primarily for labor costs; Huntington Ingalls, one of the most important naval shipbuilders in the U.S., deemed it to be not enough.[33]

Beyond its direct impact on prices, inflation provided a reason for the Federal Reserve to raise interest rates. Starting at 0.08 percent in February 2022, the Federal Reserve increased the benchmark rate to 5.33 percent in September 2023. As of September 2025, the federal funds rate remained above 4 percent, a level last seen in 2008.[34] Higher interest rates make it more expensive to borrow money—a necessity for high-dollar capital expenditure on new facilities. Higher interest rates therefore have an adverse impact on efforts to build additional DIB capacity, especially for smaller defense firms that lenders consider riskier.[35] The end result of Biden-era inflation and Federal Reserve interest rate hikes was the same: degraded DOD buying power.

Another obstacle facing both the defense industrial base and the broader economy is the permitting process. Building nuclear-powered aircraft carriers is difficult, but it is made even more difficult by the regulatory barriers that accompany it, most notably the permitting process. Federal permitting can involve dealing with more than a dozen agencies before construction can begin, and the process can be confusing, expensive, and time-consuming.[36] Compliance with the National Environmental Policy Act (NEPA) requirement for major projects to have approved Environmental Impact Statements (EIS) took an average of 2.2 years in 2024.[37] It is often far worse for the most critical projects.

In 2021, environmental groups filed a lawsuit to hold up construction at the Savannah River nuclear site, arguing that the National Nuclear Security Administration was in violation of NEPA. A judge ruled in January 2025 that a newer and more

comprehensive EIS was needed and should be completed within 2.5 years—more than six years after the lawsuit was filed. Further down in the supply chain, as of July 2025, the Resolution Copper Mine in Arizona had yet to be approved—almost 10 years after the permitting process began. This case has even attracted the attention of President Trump.[38]

Recent legislative efforts, such as the 2025 budget reconciliation bill,[39] are designed to reduce federal NEPA process timelines. However, companies are still vulnerable to lawsuits, and it is unclear how much of an impact such efforts will have in practice.[40] They also do not address other permitting requirements such as the National Historic Preservation Act and state-level requirements such as the California Environmental Quality Act (CEQA). Other executive orders, such as Executive Order 14154, "Unleashing American Energy," have similarly attempted to expedite the permitting process, but they are also vulnerable to litigation and changes in Administration unless codified in law.[41]

Labor Shortages. The defense industrial base as a whole faces severe labor shortages in key categories of workers. An NDIA study reported shortages in skilled trade workers, STEM workers, and workers with clearances across small, medium, and large defense producers.[42] Naval architects and welders have long been cited as categories with significant worker shortages.[43] The shortage also extends beyond quantity and into quality. After the COVID-19 pandemic, many skilled tradesmen retired, leaving behind a less experienced labor force that is more prone to mistakes.[44]

The most frequently cited reason for the labor shortages is uncompetitive wages. In March 2025, expert testimony before the House Armed Services Committee revealed that the wages of some welders working in shipyards were comparable to those of fast-food workers.[45]

The impact of uncompetitive wage regulations is exacerbated by inconsistency. Because employment is linked with procurement, inconsistent procurement means that industry does not maintain a stable workforce, instead hiring and laying off workers based on the contracts companies receive.[46] Working on programs with high degrees of employment uncertainty is less attractive than working in the commercial sector where one's livelihood is less dependent on Congress's year-to-year appropriations.

The defense industrial base is not alone in facing a workforce shortage. It also affects the broader industrial base. A cultural change that increased the cultural value of a four-year college degree at the expense of other education choices is partially to blame, but government policy is also responsible. For example, Tax-Preferred 529 College Savings Plans are limited to funding college degrees and may not be used for other post-secondary educational pathways. By making it relatively easier to afford a college degree in comparison to other in-demand educational options, bias introduced by the federal government has had a direct impact on America's ability to arm itself.

Acquisition Rules and Practices. The congressional appropriations process and the Department of War's antiquated requirements process also degrade the U.S. defense industrial base. Because Congress appropriates funds on a year-to-year basis, program funding is subject to continual uncertainty. Procurement funding for a given program can change significantly from one year to another, making it unclear whether new capacity—if it is ever built—will be utilized. This is most apparent in naval shipbuilding where, despite more available funding, calls for a larger Navy, and tens of billions of dollars in capital expenditures on shipyards and suppliers by the Navy, the service is requesting fewer warships in 2026 than in 2025.

In turn, the inconsistency (or lack) of orders makes it hard for businesses to justify investment in new capacity through private capital markets, especially for small and medium-size businesses in a prime contractor's supply chain. As a result, Congress must often resort to direct investment by, for example, funding a contractor to build and equip a facility or providing a pool of funds to support suppliers, attempting to solve the capacity problem by paying for it directly—the approach taken in the OBBBA. For highly complicated end-items, direct investment also does not necessarily account for the corresponding supply chain, which requires an additional pool of funds for supply chain investment.[47] This direct investment can solve capacity issues if done at a large enough scale, but it also puts the risk of low utilization onto taxpayers, avoiding the underlying issue of inadequate or inconsistent orders and the procurement and contracting process.

Fixing the underlying problem means lowering the cost of investment while putting in consistent

orders—something Congress is doing increasingly through multi-year procurement (MYP).[48] MYP authority allows the War Department to sign procurement contracts that last from two to five years rather than just one.[49] By including a cancellation penalty that covers defense producer's fixed-costs,[50] the War Department reduces investment risks caused by demand uncertainty. It also has been shown to save as much as 15 percent relative to year-to-year appropriations,[51] thereby providing additional benefits to taxpayers.

The Department of War's requirements procedure worsens the impact of the congressional appropriations process on the defense industrial base. The requirements process has led to delays and cancellations in prominent and important major acquisition programs. For example:

- In the early 2000s, the U.S. Army's Future Combat Systems program resulted in $20 billion wasted without any significant systems produced before it was cancelled in 2009.[52]

- When first conceived, the M10 Booker was supposed to be an easily transportable, air-droppable infantry fighting vehicle. It ended up as a not-air-droppable light tank that weighed nearly as much as a Russian T-90 Main Battle Tank.[53]

- The *Constellation*-class frigate was supposed to be 85 percent similar to the European multi-purpose frigate (FREMM), its parent design, but is now only 15 percent similar, the Navy having changed the frigate's platform requirements after construction began.[54] The problem is so severe that, according to Senator Roger Wicker (R–MS), Chairman of the Senate Armed Services Committee, "[a]lmost 70 percent of the requirements have changed since the Navy signed a contract."[55] Moreover, changes in functional and capabilities requirements involve more than second-order impacts beyond cost overruns and delays; adding capabilities can add weight to a ship, thereby impacting performance in other areas and requiring even more design changes.

Every program that has delays as a result of the requirements process reduces defense industrial base output. Inherently, when development is longer than it needs to be and changes need to be made after construction begins, output is lower than it otherwise would be. Cancelled programs that result in minimal or no output drain on time and funding that could be used to increase output for successful programs.

Problems with the requirements process have been broadly identified. The *Constellation*-class frigate program, which is among the most poorly managed major acquisitions programs, resulted in a widely read GAO report that excoriated the Navy for not using leading shipbuilding practices.[56] The Air Force, on the other hand, has shown that changes can do more than make sense on paper; they can work in practice. The B-21 program is on schedule and on budget[57] despite its immense complexity. Not coincidently, it is a stable design: The only person who can change program requirements is the Chief of Staff of the Air Force.[58]

The Pentagon's procurement problems are worsened by its contracting processes, which are far too slow and cumbersome. An NDIA survey of defense contractors found that 64 percent of respondents believe the procurement and contracting process is one of the biggest issues facing the defense industrial base.[59] After "unclear or changing requirements" (58 percent), respondents cited "burden of acquisition process and paperwork" (57 percent) and "inflexible contract vehicles" (45 percent) as reasons why the procurement and contracting process is inefficient.[60] It does not take long to find why this is so.

- According to the GAO, from FY 2019–FY 2022, the median time from contract solicitation to award for "definitive contracts and orders" valued at from $50 million to less than $250 million was 213 days, and the median time for contracts valued at $250 million or more was 322 days.[61]

- For Major Defense Acquisition Systems, it takes an average of roughly 12 years to get initial capability.[62] By the time a program is complete, parts may be obsolete.

- Defense producers often must set up a War Department–compliant accounting system that they would not otherwise use in order

to contract with the department on cost-plus contracts.

- The labyrinth of documents governing acquisitions includes a 1,462-page *Defense Federal Acquisitions Regulation* that imposes significant costs on businesses seeking to navigate the contracting process.[63]

Each time the contracting process is unnecessarily burdensome, it costs firms and taxpayers time and money, but it also reduces competition. Relatively small or new firms lack the resources of larger or more established companies and cannot afford to wait for hundreds of days (or longer) to find out whether they have won a contract while also expending resources on regulatory compliance in case they do win.

Supply Chains. The defense industrial base exists to supply American warfighters with the equipment they need to fight and win. The ability to produce that equipment rests on elaborate supply chains that are brittle, opaque, and vulnerable.

Many components are "sole source" with only a single manufacturer able to supply the part. For example, *Virginia*-class submarines have more than 16,000 suppliers, and the Congressional Research Service reports that "70% of the critical suppliers are sole-source suppliers."[64] Sole-source suppliers increase cost by eliminating competition and are a single point of failure in completion of the end-item.

The general trend remains negative with continued decline or at best stagnation in supplier count. A 2022 DOD report on the state of competition within the defense industrial base found that the number of small businesses in the DIB had "shrunk by over 40%" over the preceding decade.[65] According to the U.S. Small Business Administration, the number of small businesses contracting directly with DOD between 2022 and 2024 continued to decline, but at a slower rate.[66]

While single points of failure are bad, the defense industrial base's reliance on China is even worse. Research from the commercial supply chain analytics firm Govini determined that roughly one of every 10 first-tier suppliers is Chinese,[67] and Raytheon's CEO has stated that Raytheon has thousands of Chinese suppliers.[68] Moreover, even though defense procurement rules are written to prevent the inclusion of *some* Chinese parts and ban procurement of some U.S. defense gear from *some* Chinese Communist Party sources,[69] procurement of significant amounts of resources, especially for non-critical parts and raw materials, is still allowed.

There are a number of critical minerals for which China either is the sole source or has an overwhelming market share. For example, China controls just under 100 percent of global gallium production and possesses 90 percent of the world's rare-earth mineral processing capacity,[70] making it indispensable in the rare-earth supply chain, which is vital to the production of all major weapons systems and semiconductors. Until domestic sources are found and processing capacity is built, the U.S. faces a bad choice: Buy from China or don't build.

Chinese control of key elements is to blame for some of the supply chain's weakness, but so is opacity. Making final products often requires suppliers that are both broad and deep. An F-35 is constructed from multiple components, and those components are made of other components, and so on. Prime contractors do not have full visibility of their supply chains, which are often five suppliers deep or more.[71] This presents a real danger: Lockheed Martin was unaware of Chinese-origin alloy used in magnets in its engines until Honeywell (which was also not aware) informed it, causing delays.[72]

The executive branch and Congress have led several efforts to strengthen supply chains through increased domestic content[73] requirements and direct funding to support suppliers.[74] A rule enacted in 2022 raised the domestic content requirement from 60 percent at the time of passage to 65 percent in 2024 and 75 percent in 2029. Congress also has passed the OBBBA, which includes billions of dollars in funding to strengthen supply chains.[75]

Policy Recommendations

- **Increase the ratio of procurement spending to RDT&E in the budget.** In 1983, procurement funding equaled more than 250 percent of RDT&E funding. Now procurement is barely more than RDT&E. This reflects an imbalance in priorities between the two that affects the amount of money available for the generation of defined, useful output from the industrial base: Fewer dollars for procurement means lower procurement quantities, which in turn disincentivizes investment in

new production capacity. Moving money from RDT&E into procurement can help to give the DIB a larger demand signal to increase production capacity.

- **Reform ITAR.** The International Traffic in Arms Regulations (ITAR) process currently serves as a significant barrier to entry for companies trying to break into defense contracting for the first time. The process is both byzantine and expensive. In order to comply, DIB producers must hire expensive law firms and consultants and dedicate huge numbers of working hours to navigating the process, which must be done before contracting. The U.S. should streamline the bureaucracy involved in the ITAR process, especially at the Department of War, by reducing the number of parties involved in the approval process. In addition, Congress should amend the Arms Export Control Act to enable the executive branch to enter into conditioned mutual recognition agreements with allies: If allies adopt export and security protections equivalent to those in the U.S., the U.S. should treat trusted allied producers as having complied with U.S. regulations.

- **Expand the use of block buys and multi-year procurement.** Block buys and multi-year procurement increase certainty by creating a resourced demand signal. DIB producers see their production level uncertainty reduced, and this decreases the risk of investing in production capacity. Block buys and MYP can also lead to lower costs by creating economies of scale. According to the Congressional Research Service, programs proposed for MYP can reduce weapon procurement costs by as much as 15 percent. By enabling contractor optimization of workforce and production facilities and enabling economic order quantity (EOQ) purchases of long lead-time components, MYP allows manufacturers to take advantage of economies of scale.

- **Implement permitting reforms.** An enormous headwind facing manufacturers, especially defense-related manufacturers, is the federal permitting process. Prospective manufacturers must navigate the NEPA process through more than a dozen federal agencies and must navigate through the processes of state agencies as well, all of which imposes tremendous costs on producers. The U.S. could decrease costs and increase efficiency for defense manufacturers by creating a streamlined permitting process that provides a one-stop-shop process in which one agency would shepherd a permitting application through the system. By narrowly defining what constitutes adverse impact, the streamlined process would ensure that this process is expedited with a firm and short timeline and protection from frivolous lawsuits. In the event of government failure to meet the requirements of this expedited process, the default response to a permit application should be approval.

- **Reduce the number of requirements and reform the contracting process.** The Department of War requirements process is costly and cumbersome. Some of these requirements pertain not only to function, but also to micromanagement of that function's construction. Other requirements are unnecessary, and limit production flexibility. The Department of War should limit requirements to functionality while increasing its use of Other Transactions Authority (OTA).

- **Increase the utilization of dual-use technologies.** One of the most impactful ways to leverage the commercial sector is to increase the use of dual-use technology in military procurement. When delivered defense articles use defense-specific components that are not used in commercial end products, the production of those parts depends solely on the War Department. This has several adverse impacts. Because production capacity is based solely on the department's needs, companies have no ability to shift parts from commercial use to defense use, creating surge capacity.

  Second, increasing the utilization of dual-use technology reduces single points of failure. When a defense end product's components utilize defense-specific components, there is often only one supplier; there is limited demand,

so there is not much market desire to compete for that demand. When dual-use technology is incorporated into end products, there generally are multiple commercial off-the-shelf products that can fulfill component needs. Thus, if one company goes out of business, another exists that can supply the necessary component. This also implies competition, which limits the potential for cost inflation. Mil-spec components should be used where necessary, but the Department of War should look to maximize the inclusion of commercial off-the-shelf components and technology wherever it does not affect functionality.

Conclusion

The current U.S. defense industrial base lacks the capacity needed to meet the demands of 21st century great-power competition and possible war. Since the end of the Cold War, decreased procurement expenditures have led to industry consolidation, a reduction of competition, and a decrease in capacity. Broader economic trends, including a decrease in the number of workers in manufacturing, and a tax code that punishes manufacturers have exacerbated the issue. Failure to provide stable requirements to industry, in combination with the frequent use of cost-plus contracting, has resulted in cost overruns and frequent delays. Supply chains lack transparency and are brittle, and cooperation with allies is unnecessarily difficult.

These difficulties must be remedied if the U.S. wants to retain a dominant military force capable of securing its national interests. Structural reform of the acquisitions process, workforce development, and economic incentive structures will be required to maintain American security over peer and near-peer competitors. Most important, fixing these issues requires a commitment to the better alignment of budget with strategy. To increase capacity, industry must receive orders for more ships, planes, and munitions than are currently authorized by Congress and the Pentagon. Without large and consistent orders of the right military equipment, significant improvement of the defense industrial base is not possible, and the U.S. government will be unable to equip our troops with the platforms and munitions they need to win in the 21st century.

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A Conservative Defense Budget

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The Constitutional Foundation

In the Preamble to the Constitution of the United States, the Founders stated that the government has the responsibility to "provide for the common defence."[2] This is restated in Article 1, Section 8, as one of Congress's enumerated powers.[3] The Heritage Foundation's *Guide to the Constitution* calls this purpose "obvious—after all, it was by this means the United States came into being."[4] The question for Congress, the executive branch, and ultimately the American people, is how to right-size the defense budget to match the national security needs of the American people, an exercise best done by aligning the defense budget with the defense strategy of the United States so that the American military is equipped with the troops and weapon systems it needs to meet the challenges of each era.

Aligning the Defense Budget with Defense Strategy

Defense spending should be closely aligned with defense strategy with the capabilities and commands most relevant to the primary national security objectives of the United States receiving more funding than secondary or tertiary capabilities and commands. A conservative defense budget should reflect the realization that some degree of prioritization is necessary within strategic planning and that defense spending should flow from strategy. While being mindful of the multitude of threats America faces, in accordance with the past two *National Defense Strategies* (NDS),[5] the defense budget should recognize China as the primary challenge to the United States and allocate resources accordingly.

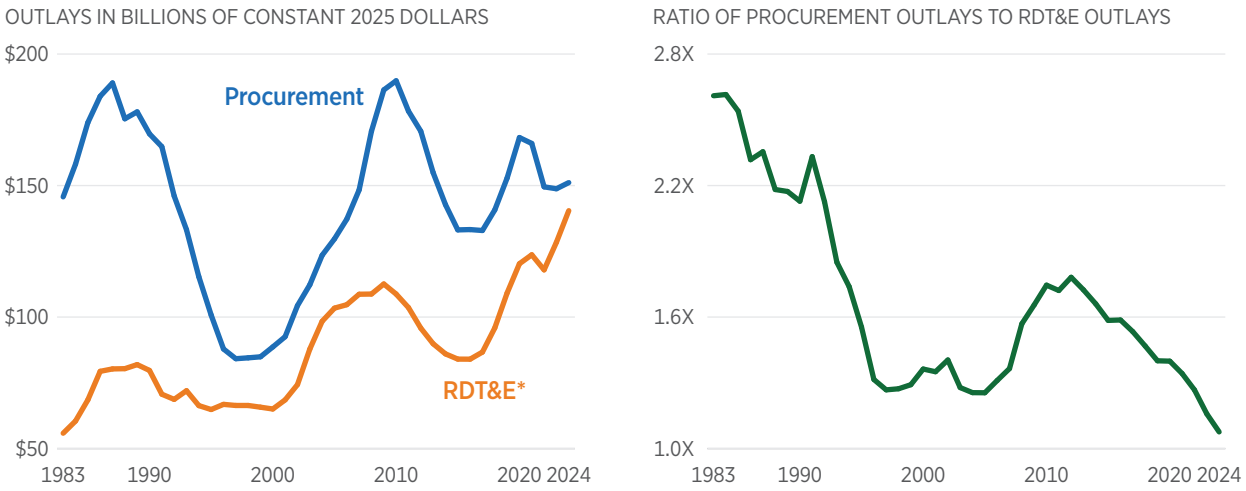
As public servants, Department of War officials have a duty to the American public to spend their money wisely. The department should be aggressive in cutting and reallocating waste and inefficiencies both because it is its duty and because waste and inefficiency limit the military's ability to achieve its prime objective: being a lethal fighting force capable of defending the American people and their interests. The intent is for more military spending to be directed more to the warfighter and less toward the defense agencies' bloated bureaucracies. Policymakers should be aggressive in identifying efficiencies and searching for reforms to ensure that taxpayer dollars are being spent wisely and the military is getting the best product at the best cost in a timely manner.

Ships, aircraft, and munitions are the basis of real military capacity that potential adversaries are prioritizing, and they need to be similarly prioritized within the U.S. defense budget. When faced with budget constraints, the services invariably cut procurement. In the official fiscal year (FY) 2025 budget request, for example, the Navy chose to cut a *Virginia*-class submarine, and the Air Force chose to cut its procurement of F-35 fighter jets. Meanwhile, the Air Force increased its research, development, test, and evaluation (RDT&E) budgets, and the Navy proposed hiring an additional 2,000 civilian employees.

But procurement of critical capabilities, such as ships and aircraft, should be the *last* place the War Department chooses to cut when faced with budget constraints, particularly under current circumstances. Ideally, the department should cut bloat, waste, and non-military spending within the budget to pay for necessary procurement. Within RDT&E, the department must focus spending on the projects that are most likely to produce real military capacity, like the Next Generation Air Dominance

CHART 2

Department of War Outlays



* Research, Development, Test, and Evaluation.

SOURCE: Table 6-11, "Department of Defense Outlays by Public Law Title," in U.S. Department of Defense, Office of the Under Secretary of Defense (Comptroller), *National Defense Budget Estimates for FY 2025*, April 2024, pp. 162–169, https://comptroller.defense.gov/Portals/45/Documents/defbudget/FY2025/fy25_Green_Book.pdf (accessed January 21, 2026).

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(NGAD) platform. Generalized RDT&E projects, or RDT&E projects of secondary importance, must be cut and reallocated to the procurement of ships, planes, and munitions.

Over the years, procurement spending as a percentage of total defense spending has decreased with money lost in the higher costs associated with personnel, the Operations and Maintenance "death spiral" caused by insufficient procurement of new systems, and what The Heritage Foundation and others have argued is a significant imbalance between procurement and RDT&E. During the Cold War, the ratio of RDT&E fluctuated, but for much of the period, it was around 1:3. Throughout the Cold War, the procurement and fielding of sufficient quantities of military hardware were given funding priority. During this period of procurement prioritization, era-defining technological breakthroughs ranging from stealth technology to the Global Positioning System (GPS) emerged from the defense industrial base.

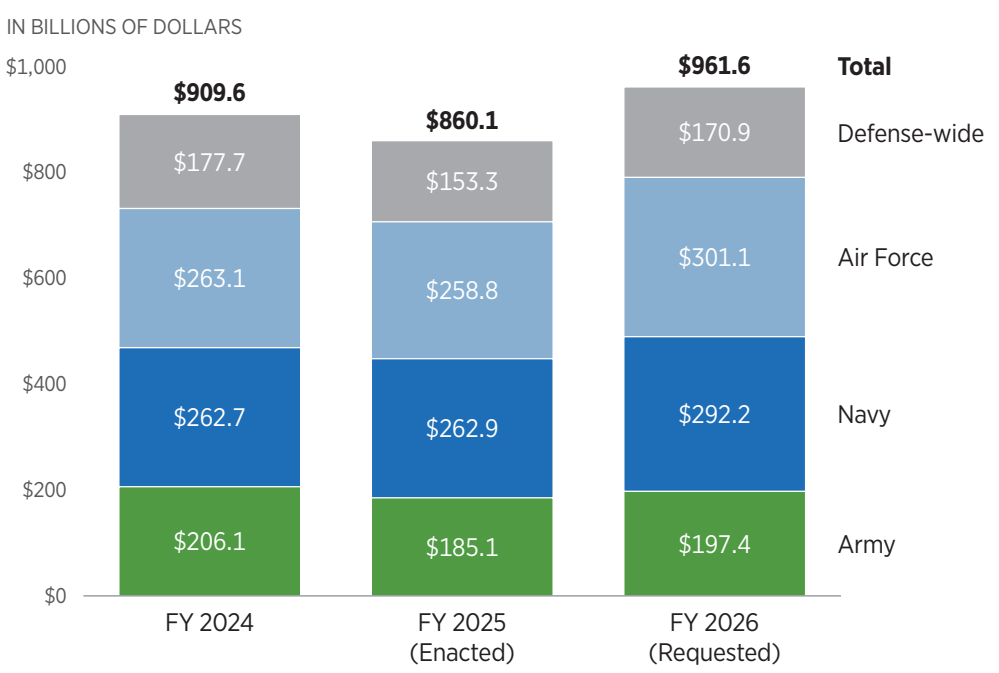
Since the end of the Cold War, the ratio has changed and is now approaching 1:1 in the latest defense budgets, with RDT&E at approximately $143 billion and procurement at $167 billion.[6] These numbers are imbalanced. It is, of course, important to invest in the future of the force, but not at so high a level that it detracts from the military's ability to field equipment and munitions that already exist for the security concerns of the present.

Understanding the Defense Budget

When discussing the defense budget, one should always begin by defining the terms being used. Depending on who is talking about the defense budget and the message that is being highlighted, different numbers can be used. In many cases, the choices being offered depend on how the specific institutions define the terms, and the implications are not immediately obvious.[7] Even within the executive branch, the Office of Management and Budget (OMB) and the Department of War have different concepts of the "defense budget." Congress has still another definition because it is organized by committees and focuses its attention on the different appropriations and authorization bills.

CHART 3

Department of War Total Budget by Military Department



SOURCE: Table A-2, "DoD Total (Discretionary + Supplemental + Mandatory Reconciliation) Budget by Military Department ($ in millions)," in U.S. Department of Defense, Office of the Under Secretary of Defense (Comptroller)/Chief Financial Officer, *United States Department of Defense Fiscal Year 2026 Budget Request: Defense Budget Overview*, July 2025, p. A-2, https://comptroller.defense.gov/Portals/45/Documents/defbudget/FY2026/FY2026_Budget_Request_Overview_Book.pdf (accessed January 29, 2026).

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There is an initial division between discretionary and mandatory spending in the defense budget just as there is in the overall federal budget. Discretionary spending is the element of the budget that is annually debated and appropriated by Congress. Mandatory spending, on the other hand, is not debated annually and is defined largely by formulas that govern the various benefit programs operated by the federal government such as Social Security and Medicare. The defense budget includes both mandatory and discretionary funding, but most defense dollars are classified as discretionary.

Realistically, the defense budget for FY 2024, for instance, could be said to have been as low as $842 billion if you focus just on discretionary spending controlled by the Department of Defense or as high as $1.2 trillion if you include Veterans Affairs and other possible mandatory spending.

Of the many possible ways to consider the defense budget, it is important to highlight a few of the ones that are commonly used in the executive branch. The first one, known as 050, encompasses the War Department, Atomic Energy Defense Activities within the Department of Energy,[8] and other defense-related activities. This category was utilized in the Budget Control Act of 2011 to cap discretionary spending. It was also used in the legislation that raised the debt ceiling in 2024. Another important category, known as 051, is the War Department's portion of the national defense budget within OMB tables. It constitutes the major portion of 050 but is usually discussed and debated separately from the other functions within the category and is often referenced as the "defense budget."

Within the War Department itself, different sets of numbers are used to define the defense budget. The first is the 051 category because these are the funds under the department's control and include both mandatory and discretionary spending. Category 051 numbers can be described as the defense budget, and in many reports and news stories, these are the numbers that are most often used.

One additional set of numbers that is commonly discussed and characterized as the "defense budget" is the funding appropriated by Congress. Because the Constitution specifies that Congress must appropriate every dollar that is withdrawn from the Treasury, appropriations bills are among the most crucial pieces of legislation that are passed in any fiscal year.

The Department of War receives resources mainly through two distinct appropriations bills: Defense Appropriations and Military Construction, Veterans Affairs, and Related Agencies Appropriations. This division reflects the different public law titles and the characteristics of appropriated dollars that compose the defense budget.

The defense appropriations bill includes military personnel; operations and maintenance; procurement; RDT&E; and revolving funds. Military construction appropriations include mainly military construction funds and family housing.

Beyond the appropriations bill, the same resources that the War Department receives are also authorized by the National Defense Authorization Act (NDAA), a bill that has been passed and has grown in length for more than 60 consecutive years. The War Department is one of the very few federal departments that reliably has its funding both authorized and appropriated.[9] The NDAA is sometimes referred to as a defense policy bill because it does not actually appropriate dollars to the War Department; it sets policy and establishes limitations on how the appropriated dollars will be used through the fiscal year. The NDAA includes important measures that have both financial and practical implications for how the nation provides for the common defense.

Altogether, there are several ways to discuss and represent the defense budget. Foremost, an informed reader should understand who is communicating so that he or she can understand what one means by "the defense budget."

It is also important to know that defense is not the biggest item in the federal budget; entitlements constitute a much larger category.[10] Defense spending is not the primary factor driving the nation's financial problems, especially the explosive growth in public debt and the annual federal budget deficit. In addition, current plans have the relative burden of defense decreasing over time as the economy grows. Understanding the broader context of the federal budget is therefore very important when considering the defense budget.

The Burden of Defense on the Federal Budget

As in all things related to the budget, it is important to understand the burden of any financial expense relative to the available resources and the importance associated with the tasks that are being resourced. When commentators focus narrowly on discretionary spending, defense is usually noted as commanding a huge share of the budget. However, when one looks at the whole of the federal budget, the picture is quite different.

In the context of the whole federal budget, in FY 2025, for example, national defense as defined by the OMB consumed roughly 13 percent of the federal budget.[11] This is by no means an insignificant amount, but it is dwarfed by other federal expenditures, including health care insurance and provision, income security, and many other governmental functions for which Washington is currently responsible.

Medicare, Medicaid, and other health care spending accounts together comprise the biggest portion of the budget: 27 percent. Social Security constitutes the second biggest element at 19 percent. Income Security—a collection of programs such as Civil Service Retirement and Disability, Earned Income and Child Tax Credits, the Supplemental Nutrition Assistance Program, and Housing Assistance—follows closely at 18 percent. The 12 percent representing the broader national defense enterprise is followed closely by net interest on our debt, which currently stands at 8 percent, although the burden of servicing our national debt through interest payments is likely to increase as interest rates in the United States rise.[12] Every other function of the federal government, from the administration of justice to the collection of taxes, accounts for the remaining 16 percent. It is important to keep in mind how the government truly allocates taxpayers' dollars when considering the defense budget.

It is also important to understand the size of the federal government's obligation when compared to the nation's gross domestic product (GDP). Much of the nation's GDP is consumed by three different categories of federal spending that include both mandatory and discretionary spending: defense, non-defense, and interest on our national debt. This conveys two important messages:

- The relative burden of our national defense has declined steadily over the past 60 years.

- The portion of government resources allocated to the provision of non-defense services and goods has increased substantially over time.

All in all, the relative burden of defense has gone down over the past 60 years. Put another way, defense has become more affordable for the country. As noted above, regardless of what the defense budget's topline figure is, as public servants, War Department officials have a duty to the American public to spend their money wisely. The department should be aggressive in cutting and reallocating waste and inefficiencies both because it is the responsible thing to do with the public's money and because waste and inefficiency limit the military's ability to achieve its prime objective: being a lethal fighting force capable of defending the American people and their interests.

Trajectory of the Defense Budget

The Department of War organizes and reports on its budget in multiple categories and with multiple ways of displaying the information in a yearly document, the *National Defense Budget Estimates,* commonly known as the "Green Book" because of its seafoam green cover pages.[13] Many of its tables contain data from as far back as FY 1948. Many also contain estimates for the coming four fiscal years.

The Green Book also provides three different categories of resources: budget authority (BA); total obligational authority (TOA); and outlays. The simplest differentiation of these is that budget authority includes the new yearly resources that the department can obligate; total obligational authority counts resources appropriated in previous years that can be obligated in a different fiscal year; and outlays are actual disbursements made by the Department of the Treasury on behalf of the War Department. Of these, budget authority is the term used most frequently in public debate because it reflects the resources appropriated in the current fiscal year.

There is another differentiator that is relevant to understanding the data provided by the War Department: current versus constant dollars. Current dollars represent the face value of an item in the present, as if you are spending money today to buy that item. When people reminisce about a bottle of Coke in the 1950s costing less than a dollar, they are talking about current dollars. Constant dollars, on the other hand, represent a price relative to a past price in a given base year, usually the current year—for example, the price of a bullet in 1978 adjusted to be in 2024 dollars—thus accounting for the effect of inflation over time. Currently, there is a broader appreciation of this difference because of the recent spikes in the inflation experienced by the public.

There have been four distinct peaks and troughs in the defense budget during the past 70 years: the Korean War, the Vietnam War, the Reagan military buildup, and the global war on terrorism. These increases reflect different periods in our recent history when there was a renewed attention and commitment to the military that was driven by both internal and external events. In these periods, the nation allocated more resources to its military. All are followed by reductions in defense spending, reflecting the nation's sense that a danger had passed and it could invest less in its military.

Each of these waves reflects a combination of geopolitical pressures and internal politics. It is worth noting that the Korean War generates a more abrupt peak and trough, while the other peaks are smoother and take longer both to materialize and to dissipate. In the end, the defense budget is the product of political debate and considerations and thus reflects the political environment and how the leadership interprets and reacts to it.

During the Korean War, there was a quick spike that peaked in FY 1952 with $844 billion allocated to the Department of Defense. It is followed by the end of the war and a sharp drop in FY 1955 to $479 billion. It is worth noting that the data start in FY 1948 during the post–World War II era when military expenditures were severely reduced. Between FY 1948 and FY 1950, the DOD's budget fluctuated at around $238 billion a year—a low point even when compared to the aftermath of the Korean War.

The next peak comes in FY 1968 during the Vietnam War when the Department of Defense had a $719 billion budget. After that peak, there was a slow and consistent decline until FY 1975 when the department's budget reached a trough of $489 billion. This decline lasted for about five fiscal years. Then, in FY 1980, the department's budget began an upswing that peaked in FY 1985 at $775 billion, largely under the Reagan Administration's military

buildup. Between FY 1986 and FY 1998, the defense budget once again consistently declined, reaching a low of $502 billion in FY 1998.

After FY 1998, the defense budget started to climb again—a climb that was accelerated by the September 11, 2001, terrorist attacks and the nation's subsequent response to them with wars in Afghanistan and Iraq. It peaked in FY 2008 with $971 billion allocated to the DOD. Interestingly, there was a quick drop in FY 2009 to $944 billion, which was followed by an increase in FY 2010 to $966 billion before another sustained decline that lasted until FY 2015 when the defense budget reached $733 billion.

Since FY 2016, there has been some increase in the defense budget, but it is still far from either a peak or a trough. In the past eight years, there have been slight increases and slight decreases with an annual average of $828 billion. There is not enough direction or time to serve as the basis for a concrete determination about the trend of the defense budget in recent years.

Fundamentally, the defense budget's increase in constant dollars reflects our nation's changed expectations of what the Department of War should do, how it should do it, and the availability of technology. In the decades since 1947 when the department was created, its mission has expanded significantly. Today, the department not only prepares and fights wars, but also runs recruiting stations spread out across the country as well as schools, supermarket chains, and medical facilities. It purchases billions of dollars of services and goods every year. Even small military bases provide multiple services from small sandwich shops to facilities that maintain extra-large airplanes.

Today, the War Department is expected to be able to mobilize within a moment's notice and deploy almost anywhere in the world. Maintaining this level of preparedness and planning takes a substantial number of resources, both in manpower and in material. America's armed forces have prepositioned stocks in strategic locations around the world, which allows the United States to forward deploy forces rapidly into theater.[14]

The department also has unique requirements both in terms of security and in terms of material conditions that are fundamentally different from those of the commercial sector. Any War Department information technology system will have to handle access by at least three different types of users—military, civilian, and contractors—with different levels of access to information, even if they are accessing only unclassified information. The infrastructure required by our armed forces is incredibly detailed and prescriptive because they deal with matters of life or death. It goes hand in hand with our society's expectation that our armed forces will value the lives of our servicemembers and the individuals who interact with them. The drive for higher levels of commercial off-the-shelf systems is laudable and will no doubt result in savings in certain defense activities, but certain systems will continue to be bespoke military products.

The Defense Budget and the Military Departments

The Department of War is composed of three military departments—Army, Navy, and Air Force—and multiple agencies and field activities that are grouped under a budgetary category called defense-wide. Each of the five military services resides within one specific military department:

- The Department of the Army oversees the U.S. Army;
- The Department of the Navy oversees the U.S. Navy and U.S. Marine Corps; and
- The Department of the Air Force oversees the U.S. Air Force and U.S. Space Force.

The agencies and activities provide support functions to all of the military departments and services. Examples include the Defense Logistics Agency, the Defense Financial and Accounting Service, and a majority of the medical care expenses and many of the intelligence functions within the department.[15]

These organizations collectively are known as the "fourth estate," and most of their efforts represent attempts to consolidate and standardize some support activities that are common to all military departments. Each of these organizations within the War Department receives a portion of the defense budget.

There are many public discussions about the share of the budget that each of the military departments receives and whether such distribution

should be equitable. However, the portion of the budget that each receives is *not* equal to the shares that others receive and has fluctuated greatly over time.[16] Depending on the technological developments of the time and the external threats to which the armed forces were responding, the share received by each of the services has ebbed and flowed to account for the different challenges. The Army, for example, received a higher proportion of defense dollars in the years following the September 11, 2001, terrorist attacks because of the land wars in Iraq and Afghanistan, and the Air Force received a substantially larger share when it was establishing itself and there was an emphasis on air power and nuclear weapons under President Dwight Eisenhower.

Over the past several years, as the return to great-power competition with China and Russia has become the widely agreed upon national security strategy of the United States, the allocation between the services has started to shift with a higher percentage of the budget going to the Navy and the Air Force and the Army's budget remaining generally stagnant. This shift is in recognition of the outsized role that the Navy and Air Force would play in an Indo-Pacific conflict.

Another aspect of the budget that deserves attention is the growth of defense-wide accounts that are associated with defense agencies outside of the military departments. They started as a few individual programs that were later centralized and as specific business functions that were made uniform and since then have expanded, progressively consuming a larger portion of the budget. These accounts have grown from a low of 0.7 percent of the defense budget in FY 1952 to a peak of close to 21 percent in FY 2022. The Heritage Foundation has argued for a decrease in funding allotted to the defense agencies and a reallocation of funding back to the services, in line with Secretary of War Pete Hegseth's prioritization of warfighting capabilities and efforts to reduce the number of civilians working for the department.[17]

Changing Nature of the Defense Budget

Since the end of World War II, the decrease in the number of members of the armed forces and the increased presence and complexity of technology have forced a substantial change in how defense resources are allocated. The number of total active military personnel decreased substantially from a peak of 3.6 million in FY 1952 to a low of 1.37 million in FY 2015. The last time the United States had 2 million individuals in its armed forces was in FY 1991. The U.S. has been reducing the active members of its armed forces since FY 1987.

The data also reveal how a higher proportion of defense resources has been invested in the category of non-pay items, which in this instance amounts to operations and investment—in other words, what it costs to equip and operate the force. In simplified terms, pay is the cost of establishing the force and non-pay is the cost of using that force.

This is consistent with the technological evolution that the United States has experienced as a society over the past 70 years as the tools of war have become increasingly capable, complex, and costly. Every tool and machine that we have at our disposal today is undoubtedly more capable than those that our parents and grandparents had at their disposal. This is also true in the military where the information technology revolution has influenced everything from how people communicate to how weapon systems operate. These systems and support services are more complex, more capable, and more expensive to maintain and operate.

When it comes to pay, the decrease in the size of the force has not been matched by a proportional decrease in the amount dedicated to pay. In other words, as a practical matter, the level of resources allocated per servicemember has increased over time. This reflects the amount that is spent on salaries and benefits as well as other services provided to servicemembers that are not funded with resources labeled as pay.

As Americans generally and servicemembers in particular have become more educated and productive, especially with the consistent introduction of new technologies, they have commanded higher wages in the market, and this is reflected in the relative increase of pay within the War Department. Rightfully, Congress consistently votes in favor of pay raises for the troops in recognition of the invaluable service they provide to the nation.

The Defense Budget as Lagging Indicator

The defense budget is built through a unique process that has come under much criticism over the years, although substantial efforts have been made to reform the process recently. Both the War

Department and the Defense Department before it have long utilized a system called Planning, Programming, Budgeting and Execution (PPBE) to build and execute the defense budget. This system was developed in the 1960s and is showing some cracks.[18] Within the PPBE process, development of the services' budgets starts at least two years before the fiscal year that they are intended to fund. This guarantees that the budget will present a projection of the future that is tied to past projections and assumptions. Thus, incorporation of a relevant innovation that was developed during the period between composition of the budget and the start of the fiscal year has been a challenging exercise.

Modifying resources that were programmed years in advance is equally challenging because these resources represent real costs that would be incurred by a program or organization. Whether for good or ill, this makes the defense budget quite inflexible, and large movements of funds and changes in programming take several fiscal years to become fully apparent. It is common for new Administrations to say that it will take a few budget cycles to implement the changes desired at the Pentagon.[19] Thus, the defense budget will always be a lagging indicator of the ongoing challenges being faced by our military. The PPBE system makes budgetary decisions very "sticky" and is inherently biased toward maintaining the status quo.

Further, because the budget is about allocating taxpayers' dollars, the decisions that are made both inside and outside the department are ultimately political in nature. The final resolution of the defense budget rests with Congress, an inherently political body. However, politics also permeates the other levels of decisions involved in making the defense budget. The leaders who manage internal department programs will often base their actions on their expectation of what the services will do with their budget submissions, and the services will often base their actions on what they think the Office of the Secretary of War will do. In turn, the Secretary of War will anticipate and respond to the actions of the Office of Management and Budget, the President, and Congress. These interactions occur several times a day during all phases of the budget process.

There should always be continuous process improvement in the allocation of precious defense dollars. One such effort currently underway is the congressionally established Commission on Planning, Programming, Budgeting, and Execution Reform (PPBE Commission). Established by the FY 2022 NDAA and composed of 14 commissioners appointed by congressional leaders and the Secretary of Defense,[20] it has conducted a variety of sessions to engage with the different individuals and organizations that participate in the PPBE process.[21] The commission submitted its final report in 2024 and recommended replacing the PPBE process with a new Defense Resourcing System (DRS) that would strengthen "the connection between strategy and resource allocation while creating a more flexible and agile execution process," aiming to alleviate many of the problems identified within the PPBE process.[22] The commission recommended improvements in five critical areas:

- Improving the alignment of budgets to strategy,
- Fostering innovation and adaptability,
- Strengthening relationships between the department and Congress,
- Modernizing business systems and data analytics, and
- Strengthening the workforce.[23]

Conclusion

Defense spending should flow from strategy and should be focused on military capacity and lethality. Non-defense spending, politicized initiatives within the Department of War, and unfocused spending all distract from the military's core mission of defending the American people. Given the dramatic expansion of China's military capabilities in recent years, U.S. defense spending must focus on capabilities—especially air and naval platforms and precision-guided munitions—that are relevant to deterring China in the Indo-Pacific.

Endnotes

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Global Operating Environment

Assessing the Global Operating Environment

Military operations do not exist in a vacuum. They require capable combat and sustainment forces, a dedicated source of human capital, but also an environment in which they can operate. That physical environment includes not only free and open air and maritime lanes, but landmasses under the sovereign control of national actors. Those actors can provide overflight rights, basing rights, access through sea lanes or ground lines of communication, or important sustainment and logistics hubs. Allies enable the employment of force by providing many of the above requirements—just as adversaries can contest the ability of the United States and its allies to employ force.

The global operating environment in many ways underpins the ability of the United States to deter and, if necessary, defeat adversary aggression. Long-term basing rights with allies and interoperability of hardware, to include platforms and munitions, enable both the United States and its allies to achieve decisive effect on the battlefield. The long-term political stability of the allies, coupled with overlapping shared national interests, ensures that these relationships endure across administrations and host nation political changes. Many of these relationships have endured for decades and in many cases more than half a century.

At the same time, the global operating environment is under increased pressure as the free and open world order that has benefited the United States for more than eight decades is under increased strain. But not all is doom and gloom. Narco-terrorists in Latin America seek to export poison to the American homeland and destabilize and weaken the United States through human migration—but the United States finally is taking decisive action to counteract such threats. China's aggression and coercion against its neighbors in Taiwan, the Philippines, Japan, and elsewhere have caused renewed interest among America's Pacific allies and partners in expanding their militaries. Russia's ill-fated invasion of Ukraine has caused immense damage to the country and people of Ukraine even as it has finally spurred action on the part of our allies in Europe to rearm and take seriously the threat posed by Moscow. Iran's attempts to orchestrate the destruction of Israel have had dire consequences for the Mullahs in Tehran. And North Korea's continued nuclear buildup and coercive threats against its neighbors and the United States have caused the United States, Japan, and South Korea to work in closer partnership.

Within the first year of the second Trump Administration, we are already seeing things change. The Administration has renewed efforts in the Western Hemisphere to mitigate illegal immigration as well as the flow of illicit narcotics. It also has focused on addressing the destabilizing efforts of the government in Venezuela through targeted anti-drug smuggling activities as well as by putting pressure on Venezuela's government, most notably by removing President Nicolás Maduro. It also has invested greater resources in targeting drug cartels in the region, particularly in Mexico, and has focused on reducing the destabilizing effects of the People's Republic of China's activities in the region. These efforts are consistent with the National Defense Strategy's emphasis on activities in the Western Hemisphere.

Additionally, the Trump Administration's actions aimed at destroying the Iranian regime's nuclear weapons infrastructure and capabilities have eliminated a persistent threat to the Middle East and, along with the military campaign against Hamas and Hezbollah following the attacks in Israel on October 7, 2023, have significantly improved security conditions in the region. Additional diplomatic efforts to recognize Israel's existence in the

region pursuant to the Abraham Accords also have reduced military tensions.

The global expansion of the People's Republic of China and its destabilizing and malign influence is evident in the global operating environment within which the U.S. operates. Beijing's aggressive pursuit of military basing, dual-use facilities, predatory economic practices, and key control of or influence on infrastructure such as the Panama Canal has created complications for U.S. forces and those of its allies and partners. There is a growing recognition of these trends, and many countries are beginning to develop countermeasures and commensurate military capabilities to deter aggressive PRC military actions.

Operating conditions evolve from one year to the next and from one security setting to the next in ways that affect the ease or difficulty of conducting U.S. military operations. The following section informs our ability to assess whether or not the U.S. military can successfully deter or, if necessary, defeat adversary aggression in the prioritized theaters of operation: the Western Hemisphere, Asia, Europe, the Middle East, and Africa.

Latin America and the Caribbean

Andrés Martínez-Fernández

Regional Overview

With President Donald Trump's return to the White House in 2025, few issues have risen to prominence on Washington's agenda as rapidly and dramatically as U.S. policy toward Latin America and the Caribbean. This shift marks a major break with Washington's long-standing lack of attention to the nations with the most geographic proximity to the United States. President Trump has laid out and pursued a vision of U.S. national security that appropriately raises the prominence of the Western Hemisphere's stability. Decades of disengagement have had dramatic consequences for both the U.S. and the hemisphere, facilitating the proliferation of narco-terrorism and narco-dictatorships, the uncontested surging presence of actors like China and Russia, and destabilizing waves of mass migration, but during 2025 and early 2026, the Trump Administration has demonstrated the game-changing effects of concerted U.S. effort andd attention to these challenges.

Latin America and the Caribbean have a contradictory identity: They are a region of long-standing peace and at the same time of deep and entrenched violence. For more than 30 years, Latin America has been free of the outbreak of interstate war, but its homicide rate eclipses those of other regions of the world with some countries seeing more violence than nations at war see.

The driving factor behind this regional reality is the prevalence of armed non-state actors, including transnational criminal organizations and foreign terrorist organizations. Countries across Latin America are plagued by many of the world's deadliest and most powerful transnational criminal organizations. Fueled by revenue from drug trafficking, human trafficking, and nearly every other imaginable illicit activity, these armed criminal organizations are equipped with military-grade equipment and resources that surpass those of many of the world's armed forces. Just one of Brazil's multiple drug trafficking gangs, for example, is reported to have more members than Portugal has active-duty military personnel.[1]

Geographic and economic realities, among others, leave the United States uniquely exposed to security threats from Latin America and the Caribbean. The illicit and violent actions of armed groups in the Americas dramatically affect both the well-being of the American people and the overall security, strength, and prosperity of the United States. Mexico's powerful drug cartels kill tens of thousands of Americans each year through their deadly fentanyl trade. Gangs and human trafficking organizations cause and accelerate mass illegal migration that destabilizes U.S. cities. Regional authoritarian regimes such as those of Cuba, Nicaragua, and Venezuela threaten U.S. security directly, amplifying these criminal threats through direct support while empowering U.S. adversaries around the world.

Additionally, despite its long absence, the specter of interstate military conflict now looms over Latin America. For example, increasingly bellicose rhetoric and actions from Venezuela's narco-dictatorship against neighboring Guyana showcase the ongoing and rising threat of war in the Western Hemisphere. Less overtly, interstate conflict in the Americas rapidly grows more realistic with the growing encroachment and influence of America's extra-hemispheric adversaries. The presence of such countries as China, Russia, and Iran has surged in the Western Hemisphere and includes clear strategic and military components, including the establishment of dual-use infrastructure and

intelligence facilities, all of which threaten to draw Latin American nations, however unwittingly, into larger potential armed conflicts.

Recognizing the severity and implications of these security threats in Latin America, the United States has long engaged with regional governments to support their security efforts. However, these partnerships and regional efforts are more and more being eclipsed by the deadly threat of transnational organized crime, anti-American authoritarian regimes, and hostile extra-hemispheric powers.

Quality of Armed Forces in Latin America

There is significant variation in the strength and capacity of Latin America's militaries: Some countries like Costa Rica and Panama simply lack traditional militaries. Historical, economic, and political realities drive the often stark contrasts in regional military capacities and roles. Daunting security threats across the Americas are pressing more governments to reevaluate the role of their militaries with an eye to increasing their power and responsibilities, but regional governments and military leaders generally face an uphill battle when it comes to restoring the effectiveness of their militaries.

The role of military forces varies significantly across the region when it comes to domestic security threats like organized crime. The legal frameworks governing Latin American militaries have developed and diverged over time in response to differing domestic circumstances, including the severity of security threats and in some cases the past presence of a military dictatorship. For example, countries like Chile, Uruguay, and Argentina have placed significant legal restrictions on the role of their militaries domestically in favor of civilian security forces; militaries in Colombia, Peru, and Mexico, on the other hand, play a substantial, even leading role in combatting their countries' powerful organized criminal threats.

However, there is a recent and clear trend among Latin American governments of expanding the domestic roles of their militaries. In countries like Mexico, Argentina, and Ecuador, for example, this shift toward the military has generally been prompted by the increasingly deadly organized criminal threats across the region, including the expansion of powerful drug trafficking gangs into previously stable parts of Latin America, which has overwhelmed civilian security forces.

Generally, Latin America's underlying economic realities, including generally stagnant growth and limited fiscal resources, undermine funding and the quality of regional armed forces. Even when accounting for the divided role between regional militaries and security forces, overall funding levels in Latin America are lower than they are in the rest of the world.

Support and funding for regional militaries have also become political and ideological issues in parts of Latin America, in some cases tying military capacity directly to electoral shifts. Under the modern Peronist movement, the political left in Argentina significantly and purposefully restricted funding for the military as well as the scope of its responsibilities in the realm of security.[2] Colombia, under far-left President Gustavo Petro, has similarly restricted the military even as armed criminal organizations gain in strength. During the late 2000s, Ecuador's far-left former President Rafael Correa also targeted and punished the military, in part because of its working partnerships with the United States against narco-trafficking threats.

While political support for militaries at times falls along consistent ideological lines, in some countries, this is not the case. For example, the rise of the leftist Morena party in Mexico has brought about unprecedented expansion of power and funding for the Mexican military. Notably, regional authoritarian regimes in Cuba and Venezuela have coopted their militaries instead of merely marginalizing them. These militaries face significant resource limitations because of their regimes' failed economic models, but they are nonetheless prioritized and empowered as core pillars of authoritarian support.

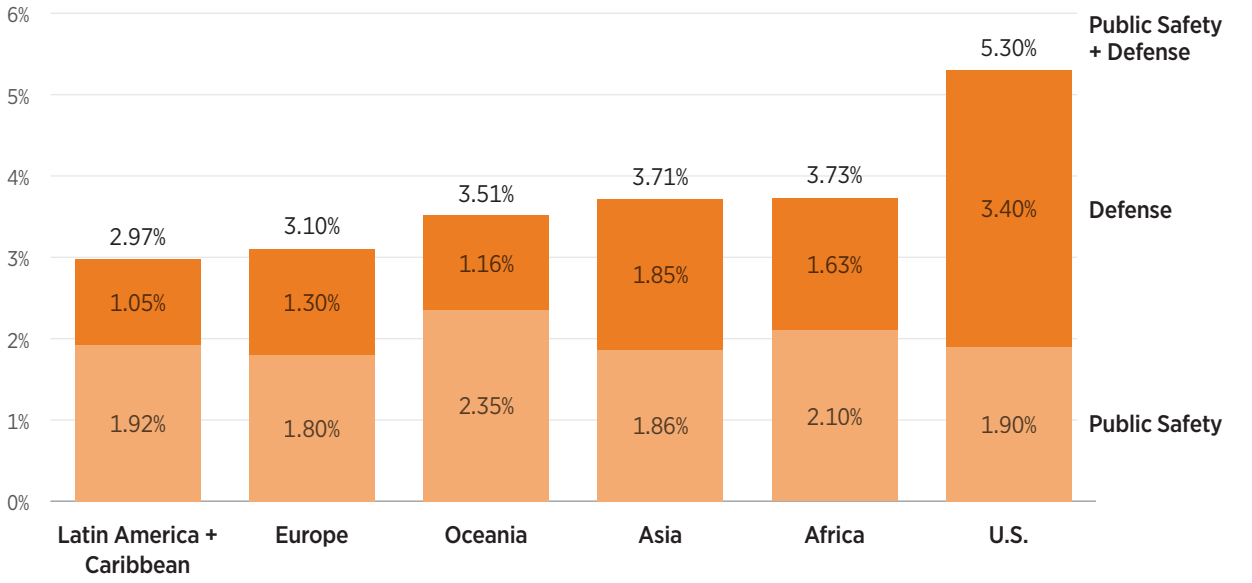
Corruption is another major impediment to the quality and effectiveness of Latin America's armed forces. From the top leadership of some regional militaries to local police officers and deployed soldiers, the corrupting influence of drug traffickers and criminal organizations continues to dull and undermine regional security forces. For authoritarian regimes in particular, criminality and corruption are features of their militaries. This is most clearly exemplified in the Venezuelan military's direct and well-substantiated role in narco-trafficking activity.

A general sense that there is an absence of credible threats of interstate war has left many regional militaries inadequately resourced, particularly with

CHART 4

Spending on Defense and Public Safety

AS A PERCENTAGE OF GDP



SOURCE: Santiago M. Perez-Vincent et al., *The Costs of Crime and Violence: Expansion and Update of Estimates for Latin America and the Caribbean*, Inter-American Development Bank, 2024, https://publications.iadb.org/es/publications/english/viewer/The-Costs-of-Crime-and--and-Violence-Expansion-and-Update-of-Estimates-for-Latin-America-and-the-Caribbean.pdf (accessed January 21, 2026).

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respect to their capacity to defend against hostile state threats. A worrying dynamic is that regional anti-American dictatorships are the militaries that have put more significant resources into bolstering their capacities to wage war against a foreign military. Weak military control by regional democracies creates a growing asymmetry not only relative to regional authoritarian regimes, but also against growing threats to sovereign control against extra-hemispheric powers. It is unclear, for example, whether the Peruvian military would be capable of retaking control of its dual-use mega-infrastructure projects that are controlled by China.

Finally, historical U.S. support and cooperation have proven to be a determinative factor in the quality of regional militaries. This is exemplified by the superior capacity of the armed forces of Colombia, among other top U.S. security partners. However, the steady reduction of and increasing restrictions on U.S. military training of and support for Latin American militaries have degraded regional military capacities and limited recent efforts by some nations to rebuild their military capacities in the face of very serious security threats.

U.S. Military Presence in Latin America

The 1990s marked a substantial, broad-based reduction of the U.S. military presence in Latin America and the Caribbean and a steady shift away from core security—particularly military—cooperation. Pushed forward by the rise of anti-American leaders in the region and disengagement by Washington, this reduced U.S. security presence contributed to the resurgence of narco-trafficking threats and increased strategic positioning of China and other hostile powers within the Western Hemisphere.

Actions by the Trump Administration have shown an intent to reverse this general shift, and the Administration appears poised to restore a more substantial focus on core security cooperation

and confronting narco-threats in the Americas. President Trump has taken several steps to restore the central role of U.S. military and security operations in America's regional policy. This has included a renewed central role for the U.S. military in border security and planning as well as preparation for potential direct U.S. military action against Mexican cartels.[3] Nonetheless, reversing the long-standing decline both in funding and in operational focus on hemispheric security threats presents a daunting task.

In 2025, the Trump Administration shifted substantial U.S. military assets and personnel into the Western Hemisphere. These assets included numerous military aircraft such as F-22 and F-35 jets and a U.S. carrier strike group that was redeployed to the Caribbean. Through Operation Southern Spear, these assets have targeted narco-terrorist threats at sea and confronted the criminal activity of the former Maduro regime, among other threats, particularly in the Caribbean and northern Pacific.[4]

In this process of refocusing U.S. military assets against threats within the Western Hemisphere and working with regional partners, the Trump Administration will have to contend with the challenging consequences of a decades-long decline of U.S. military engagement in the Western Hemisphere. This engagement is particularly low compared to our engagement in other parts of the world. The U.S. military has more active-duty forces stationed in Greece, for example, than it has on the entire continent of South America.[5] Until recently, the United States has had only two military bases across Latin America and the Caribbean: the U.S. Naval Base in Guantanamo Bay, Cuba, and the Soto Cano Air Base in Honduras. A third, the recently reactivated Roosevelt Roads Naval Station in Puerto Rico, has been crucial in recently surging operations in the Caribbean. There are no U.S. military bases on the continent of South America. In the past, the U.S. military has had a much more robust presence across the Americas, but it ceded this presence because of regional pushback and Washington's growing focus on the Middle East in the 2000s.

The United States generally followed Latin America's post–Cold War trend of reducing the role of the military in the region in favor of civilian law enforcement. At times, regional political decisions forced the exit of the United States military. The wave of anti-American far-left leadership during the 2000s made the U.S. military a prime populist target with leaders such as Venezuela's Hugo Chávez and Ecuador's Rafael Correa ending cooperation agreements with the U.S. military. In 2004, for instance, Chávez evicted U.S. military personnel from liaison offices on Venezuelan bases; in 2005, he ended a 35-year military exchange program with the United States. In 2009, Correa withdrew the lease for the U.S. military's Manta Air Base, which had focused on counternarcotics operations; the U.S. withdrew from the base in September.[6]

Anti-American leaders succeeded in expelling the U.S. military from multiple Latin American nations, and in many cases, these actions have outlasted the regional leaders that implemented them: The U.S. military presence and security cooperation have not yet returned to a significant degree. More broadly, the ousting of the U.S. military reinforced a parallel shift in U.S. foreign policy emphasizing civilian law enforcement cooperation and economic development aid in Latin America.

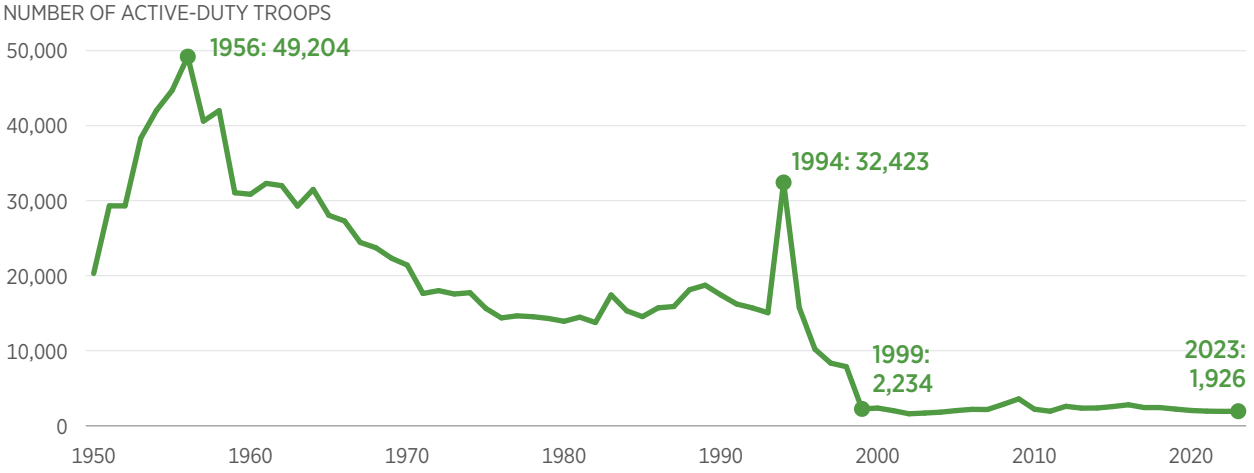
The shuttering of U.S. military bases in Panama in 1999, Puerto Rico in 2004, and Ecuador in 2009, among others, marked the substantial decline of the U.S. military presence in our own hemisphere. This has left Guantanamo Bay and Soto Cano as America's only main operating bases in the region, and even the future of these two bases has been brought into question by recent political developments. As President Trump took office in January 2025, Honduran President Xiomara Castro issued a thinly veiled threat to oust the U.S. military from Soto Cano Air Base because of U.S. deportation efforts.[7]

Through diplomatic agreements and engagement, the U.S. military has secured non-permanent access to roughly 75 cooperative service locations, strategic facilities, and other sites in regional partner nations. Facilities conditionally available to the U.S. military include airfields, radar sites, military training centers, military offices, and cooperative security locations in Latin America and the Caribbean.[8] Geographically, these bases are heavily concentrated in Central America, Colombia, and Peru; U.S. military access is far more limited in Mexico and much of South America. These facilities typically support training activities, counternarcotics, disaster response, and intelligence-related activities.[9]

The U.S. and regional militaries also conduct a series of recurring military exercises to improve

CHART 5

U.S. Troop Deployments in Latin America



SOURCE: U.S. Department of Defense, Defense Manpower Data Center, "DoD Personnel, Workforce Reports & Publications: Military and Civilian Personnel by Service/Agency by State/Country (Updated Quarterly)," https://dwp.dmdc.osd.mil/dwp/app/dod-data-reports/workforce-reports (accessed January 22, 2026).

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cooperation. Outside of Mexico, U.S. Southern Command (SOUTHCOM) has a central role in the U.S. military's regional presence across 31 countries. SOUTHCOM deploys its three main joint task forces to occupy accessible bases and coordinate with militaries in the region. At the same time, many of these exercises are geared toward humanitarian and disaster relief operations.

As indicated above, the principal U.S. military bases in Latin America and the Caribbean are:

- **Soto Cano Air Base, Honduras.** Soto Cano is the U.S. military's only main operating base in Central and South America. Located some 60 miles from the Honduran capital, Tegucigalpa, Soto Cano houses SOUTHCOM's Joint Task Force–Bravo, whose operations are focused on transnational organized crime, humanitarian assistance, and partner capacity-building.[10] The 612th Air Base Squadron maintains Soto Cano's airfield, which includes a 24-hour C-5 Galaxy–capable runway and serves as a critical strategic airlift hub for the U.S. military.[11] Soto Cano also hosts the Honduran Air Force Academy.

- **Guantanamo Bay Naval Station, Cuba.** Naval Station Guantanamo Bay in southeastern Cuba is the United States' oldest overseas military installation, dating back to 1903, and operates pursuant to a permanent lease signed with the Republic of Cuba. The Naval Station serves as a crucial forward operating base for the U.S. military as well as an operational and logistical hub for maritime security, humanitarian assistance, and joint regional operations. The base includes a facility that has been used to detain U.S. military prisoners, including some captured during the global war on terrorism. The Trump Administration is also using and expanding these facilities to manage the criminal migration threat in the United States, particularly by temporarily holding members of criminal and terrorist groups like Tren de Aragua.

- **Roosevelt Roads Naval Station, Puerto Rico.** Roosevelt Roads encapsulates the Trump Administration's refocus on the Western Hemisphere after decades of U.S. disengagement. Located on Puerto Rico's eastern coast, Roosevelt Roads operated for decades

as one of the largest U.S. naval facilities in the Caribbean and served as a major support hub for Atlantic Fleet operations. It functioned as a base during World War II and was redesignated as a naval station in 1957. Local protests led to the base's closure in March 2004 as interest on the part of the U.S. military waned. The facilities and land remained largely abandoned until President Trump's 2025 surge of U.S. military forces to the Caribbean and off the coast of Venezuela on a sustained counternarcotics mission. Since then, Roosevelt Roads has been fully reactivated and now hosts Navy carrier strike groups, F-35 and F-22 jets, Marine Corps helicopters, and C-5 Galaxy and C-17 cargo aircraft.[12] Roosevelt Roads now serves as a crucial base of operations for the U.S. military's newly prioritized Caribbean operations, supporting military strikes against narco-terrorist targets at sea as well as operations focused on Venezuela, including the capture of narco-dictator Maduro in January 2026 by U.S. forces.

General U.S. military engagement with and support for the region has similarly declined over the past several years. Landmark U.S. security initiatives in the region, such as the Merida Initiative with Mexico, have been abandoned by regional leaders while others such as Plan Colombia and the Caribbean Basin Security Initiative have wound down or been starved of resources despite the persistence and even growth of regional security threats.

The decline in U.S. military presence and resources in Latin America raises particularly pressing concerns in a period of growing threats to U.S. national security from within the Western Hemisphere that include fentanyl trafficking networks, weaponized mass migration, and China's dual-use infrastructure and powerful drug trafficking organizations. Efforts by the Trump Administration to revitalize hemispheric security initiatives offer a path to confronting these daunting threats. At the same time, regional attitudes toward the U.S. and the military appear to create a more welcoming environment for this shift in Washington.

Spiking violence and insecurity in Latin America have also led to new calls, including calls from regional leaders, for renewed engagement by the U.S. military. Ecuador's President Daniel Noboa has called publicly for the reestablishment of a U.S. military base as his country struggles to combat surging narco-violence.[13] Similarly, there have been serious discussions in Washington about possible U.S. military action against the Mexican drug cartels as their illicit activities cause record overdose deaths and instability in the United States. Even the newly bolstered role of the U.S. military at the U.S.–Mexico border sparks little controversy given the severity of the illegal migration and narcotrafficking threats.

Primary Security Threats

The lines between public security and defense have long been blurred in Latin America, not only because of the domestic role of some regional militaries, but also because of the nature of the region's security threats. Hostile foreign powers leverage Latin America's transnational organized criminal and terrorist organizations as tools of asymmetric warfare against the United States and its partners. Tren de Aragua's numerous direct links to Venezuela's narco-dictatorship, dating back to Chávez's rule, have provided material support to Colombian narco-terrorist organizations.[14] Similarly, illicit fentanyl produced and managed by Mexican cartels is fueled directly and purposefully by China and the Chinese Communist Party (CCP).[15] Access to massive illicit resources and state backing have empowered Latin America's criminal and terrorist organizations to rival and surpass the capacities of regional security forces and militaries.

With few exceptions, resurgent security threats in Latin America and the Caribbean are a growing threat to U.S. national security. Existing transnational criminal organizations like the Mexican cartels are rapidly extending their footprint into new countries, and illicit drug production in Colombia is surging to unprecedented levels as armed groups reassert control of ungoverned spaces and bring about new waves of political violence that are reminiscent of the 1980s. At the same time, new criminal groups are spreading like wildfire with new gangs from Venezuela, Ecuador, and elsewhere growing to be dominant criminal forces.

The Venezuelan Regime. Under Nicolás Maduro's leadership, Venezuela posed a dynamic and multifaceted threat to hemispheric and U.S. national security by acting as a militaristic threat to its neighbors, embracing and weaponizing transnational criminal threats and migration, and offering

a staging ground for malign extra-hemispheric powers. From a security perspective, Venezuela is best understood as a criminal-military dictatorship under which the armed forces have been turned largely into tools of social control, propaganda, and organized criminal activity.

Recognizing the nature of this threat, President Trump began a concerted pressure campaign against Venezuela in 2025, and in January 2026, a highly targeted U.S. military operation captured Maduro for trial in the United States. On January 3, Operation Absolute Resolve directed U.S. military aircraft and forces into Venezuelan territory with ground operations led by Delta Force and coordinated strikes launched against Venezuelan air defense systems.[16] Within a matter of hours, U.S. forces had captured Maduro and withdrawn him from Venezuelan territory without suffering a single casualty. This highly successful operation showcased not only the capabilities of the U.S. military, but also the deep weakness and incapacities of the Venezuelan military.[17]

By removing Maduro and maintaining pressure against the remnants of his regime, President Trump aims for a stable and sustainable transition in Venezuela—a prospect that is more realistic today than it has been at any other point since the regime's rise under Hugo Chávez. Nonetheless, the remnants of the Maduro regime, including its corrupt military leadership, remain in place for the moment, leaving remaining challenges to be addressed in such a transition.

Despite Venezuela's long-standing economic crisis, its military remains a significant force by regional standards. With a reported 150,000 active-duty forces, the Venezuelan military is a central pillar of the dictatorship's regime. To consolidate and maintain control of Venezuela, the regime shifted much of the military's operational focus to maintaining domestic control, primarily through violence against domestic actors and displays of public-facing propaganda against supposed external threats.

Venezuela's armed forces are fundamentally different from those of other military dictatorships in that the Maduro regime has converted the military into an extension of its criminal activities and networks. Numerous indictments and investigations have shown that Hugo Chávez and now Nicolás Maduro have put Venezuela's military and other institutions to the explicit task of flooding the United States with illegal drugs and otherwise cooperating with narco-trafficking organizations.[18] Over time, the Venezuelan military has developed direct and deepening involvement in the drug trade, securing illicit enrichment for its top leaders, the so-called Cartel de los Soles. This has included direct partnerships with Colombian narco-guerrilla groups and trafficking gangs like Tren de Aragua, as well as the military's own direct involvement in a range of transnational criminal activities. These illicit gains have bolstered the military and help to sustain its allegiance to the Maduro regime even during Venezuela's deep socioeconomic crisis.

The past several years have seen the Venezuelan military deployed most often against public protests and demonstrations while targeting opposition political figures. This is done in active cooperation with local armed groups and actors that serve as part of the military's repressive apparatus against the public. The regime also dedicates some attention to defense against imagined foreign military intervention, although these initiatives appear to be primarily propagandistic with underlying capacity and resources clearly deteriorating. Venezuela's high-profile and televised Bolivarian Shield exercises, for example, are nationwide military–police exercises ostensibly to secure "borders, towns, coasts, cities and vital elements of the country."[19]

In capacity and equipment, Venezuela's armed forces are noted for their capabilities in aviation, anti-missile systems, and tank squadrons.[20] However, because of the economic crisis and international sanctions, access to new equipment is so limited that the military is forced to rely increasingly on partial repairs of aging Soviet-era equipment.[21]

Venezuela's military has exhibited significant deficiencies in its operational readiness and capacity. In an embarrassing 2020 incident, a Venezuelan naval ship capsized during a confrontation with a cruise ship that supposedly encroached on Venezuelan waters.[22] The uncontrolled rise of armed criminal organizations and illicit activity in Venezuela is also revelatory with respect to the degraded operational capacity of the country's military.

Venezuela's regime has long coordinated proactively with such criminal organizations as Colombian narco-guerrillas as a way to enhance its power and secure illicit financial revenue.[23] In recent years, however, the military reportedly has lost control of surging unsanctioned criminal activity within its

borders, including illegal mining, the presence of rival Colombian drug trafficking organizations, and widespread border smuggling. Concerted operations by the Venezuelan military to control growing illegal mining activity in the Amazonas region, for example, have reportedly failed and left the regime cut off from this stream of illicit revenue.[24]

Venezuela's top military and security partners are Russia and China, which provide inconstant access to military equipment, training, and resources. Notably, Russian and Chinese air-defense systems were easily bypassed and disabled by U.S. forces during the operation to capture Maduro. This highlights the limited capacities of the Venezuelan military even with Russian and Chinese military technology. The success of the U.S. operation also adds further support to the long-standing view that the benefits of aid to the military from Beijing and Moscow may be more symbolic than operational.

The Cuban dictatorship has also played a central role in Venezuela's security apparatus, deploying thousands of intelligence officers to monitor and ensure the Venezuelan military's loyalty to the regime. In Operation Absolute Resolve, U.S. forces were confronted directly by Cuban agents who played a primary role in protecting Maduro; U.S. forces dispatched these Cuban agents, leaving 32 Cuban casualties in Caracas.[25]

Cuba. At its core, Cuba's Communist dictatorship is also a military dictatorship. Raul Castro led the armed forces for nearly 50 years, strengthening its position of privilege in Cuba relative to other institutions in the dictatorship. Today, the Cuban military remains the most powerful and well-resourced entity within the regime, maintaining control of key industries. Like Cuba itself, however, the Cuban military has degraded dramatically under the Castro regime.

Today, the Cuban Revolutionary Armed Forces (FAR) include an estimated 49,000 active personnel and 39,000 reserve personnel, representing only a fraction of the fighting strength they possessed in the 1980s. The Cuban military suffers from its reliance on outdated Soviet equipment, underinvestment, and an increasingly amorphous mission.

The loss of Soviet funding following the end of the Cold War also cut Cuba off from weapons and equipment as well as strategic support, which in turn drove an increasingly sharp decline in operational capacity. Even with Venezuela's patronage, there appears to have been little investment in the Cuban military's warfighting capabilities since the conclusion of the Cold War. Because of poor maintenance, of the hundreds of aircraft the Cuban Air Force received during the Cold War, including fleets of Russian MIGs, fewer than 50 are thought to be operational, and the lack of pilot training has further reduced Cuba's aerial capacity.

This underinvestment in the Cuban military belies the reality that the military sits on substantial wealth, derived through its direct control of tourism and nearly any other profitable industry in Cuba. Leaked documents indicate that the Cuban military-run umbrella subsidiary, Grupo de Administración Empresarial S.A. (GAESA), has accumulated as much as $18 billion in reserves.[26] This substantial wealth appears to be directed primarily toward enriching Cuba's military leadership and reinvesting in GAESA's business ventures rather than supporting military readiness.

Despite degraded military capabilities, Cuba remains a national security threat to the United States and hemispheric security more broadly. The regime's efforts to prop up destabilizing forces beyond its borders, acting as a key pillar of strategic support for Venezuela's narco-dictatorship, underscore these efforts. At the same time, Cuba continues to serve as a proactive partner for U.S. adversaries seeking to bolster their strategic presence in the Western Hemisphere. Cuba's housing of Chinese intelligence facilities and reception of Russian warships as recently as last year showcase this hostile posture, echoing the regime's willingness to receive Soviet nuclear missiles during the Cold War.[27]

Transnational Organized Crime. Transnational organized crime is a long-standing threat to U.S. and hemispheric security, making it easy for some to dismiss it as a manageable or foreign challenge. However, the criminal threat across the Americas is far from static and instead is growing and multiplying at a rapid pace as a wide array of criminal organizations seize and create illicit economies and networks that stretch around the globe. As transnational criminal organizations experience nearly unrestricted growth in the Americas, their impact on U.S. national security and the safety of the American people quickly grows to intolerable levels.

Mexican Drug Cartels. In many ways, Mexico's drug cartels present the most significant and urgent threat to U.S. national security from within Latin

America, claiming the lives of some 100,000 Americans each year through the fentanyl trade.[28] Additionally, Mexican cartels are intimately involved in driving mass migration to the United States through human smuggling activity.[29] For too long, however, the need to confront the drug cartel threat has not received the attention it deserves as one of Washington's urgent priorities. This has facilitated the dangerous decline and dilution of the U.S.–Mexico security relationship.

Despite long-standing efforts by the United States and Mexico to combat drug cartels, these criminal networks have grown steadily in power and influence. Driving this illicit growth is the ability of the cartels to tap into massive illicit revenue streams from drug trafficking while also diversifying into extortion and human trafficking, among other criminal activities. Mexico's drug cartels annually generate an estimated $30 billion in illicit revenue, rivaling the gross domestic products (GDPs) of multiple European economies, including those of Albania and Georgia. Drug cartels are also one of Mexico's largest employers. According to one study, "by 2022 cartels [had] between 160,000 and 185,000 units"—far more than the estimated number of combatants for groups like Hezbollah and even ISIS at its peak.[30] Mexico's cartels are also equipped with military-grade weaponry and equipment that allows them to rival Mexican security forces, bringing to bear armored vehicles, anti-aircraft weapons, and such advanced technologies as drones.[31]

Complicating the challenge, these cartels are far from a monolithic threat. As recently as 2019, the Mexican government had identified as many as 37 distinct drug cartels operating throughout the country.[32] These criminal organizations engage in open conflict among themselves as they compete for illicit routes and resources across Mexico.

Another key factor driving the growth of the cartels is their ability to operate with impunity in Mexico amid the collapse of U.S.–Mexico security cooperation. For more than a decade, the Mexican government has shifted away from efforts to confront the cartels as corruption and resignation increasingly define the country's security institutions. A testament to the growth of Mexico's drug cartels under these conditions is their expanded global footprint further south. This includes increasing violence and trafficking activity in Guatemala, Colombia, and once-peaceful Ecuador as Mexican criminal organizations consolidate their control of global illicit supply routes.[33]

The rise of synthetic drugs and the fentanyl crisis have seen an exponential increase in the deadliness of the cartel threat to the American people. U.S. opioid overdose deaths in 2023 alone eclipsed the number of U.S. casualties seen during the entire Vietnam War.

Surging drug deaths in the United States and record high levels of homicides in Mexico demonstrate the dangerous consequences of tacitly accepting the permanence of the cartel threat. New actions by the Trump Administration to bolster the U.S. military's presence at the border and press the Mexican government to take action against the cartels demonstrate renewed efforts to confront this dire threat.

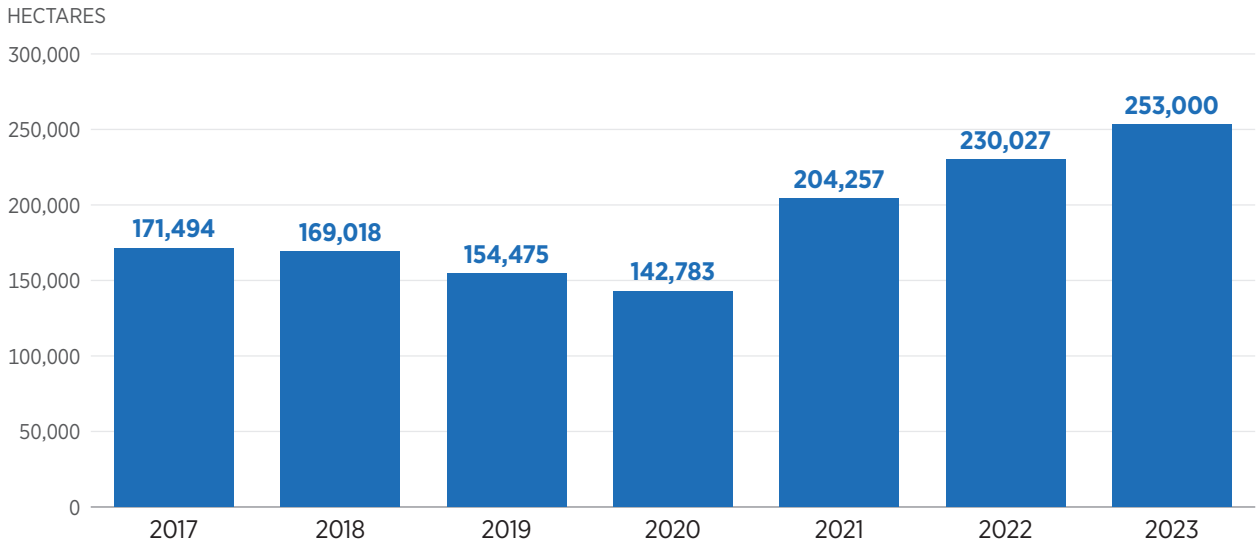
Colombian Drug-Trafficking Organizations. Colombia's guerrilla groups have deeply political origins as Marxist movements seeking to overthrow the government, but they have largely left these motivations behind to focus instead on maximizing their criminal enterprises, including drug trafficking and illegal mining.

Following the Colombian government's highly successful offensive during the 2000sof the Colombian government, with support from the U.S. through Plan Colombia, the country's narco-guerrilla threat was greatly reduced, marginalizing these armed groups to a primarily criminal threat rather than a military one. Nonetheless, this criminal threat remains dramatic, with record drug production and profits bolstering the criminal landscape in Colombia. To preserve their existence and operations, Colombia's criminal groups have taken advantage of the country's complex and large geography, including remote mountainous and jungle regions where the government struggles to project its presence.

Venezuela's narco-dictatorship has also acted as a crucial lifeline to Colombia's guerrilla groups and criminal threats. Under Hugo Chávez and then Nicolás Maduro, Venezuela's government actively supported Colombian guerrilla groups like the Revolutionary Armed Forces of Colombia–People's Army (FARC) and the National Liberation Army (ELN), offering them safe haven from Colombian security forces and providing material support through partnership in the drug trade. At the same

CHART 6

Colombia Coca Cultivation



SOURCE: Press release, "Colombia: Potential Cocaine Production Increased by 53 per Cent in 2023, According to New UNODC Survey," United Nations Office on Drugs and Crime, October 18, 2024, https://www.unodc.org/unodc/en/press/releases/2024/October/colombia_-potential-cocaine-production-increased-by-53-per-cent-in-2023--according-to-new-unodc-survey.html (accessed January 21, 2026).

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time, the broader criminal environment across the Andean region has been accelerated by instability and lawlessness in Venezuelan territory.

Under the presidency of Gustavo Petro, the Colombian government has greatly reduced efforts to confront Colombian guerrilla groups militarily. This has greatly expanded the ability of criminal organizations to operate within territory previously denied by security forces. This has led to an expansion of violence and drug trafficking activity within Colombia as well as in neighboring Ecuador.[34]

Brazilian Drug Gangs. Brazil's deadly narco-trafficking gangs such as the First Capitol Command, Red Command, and Family of the North are a less prominent but still highly powerful criminal threat. These organizations have seized control of the lucrative criminal landscape in Latin America's largest nation and economy, thereby accelerating the hemispheric spread of organized crime and instability. Brazilian gangs not only drive violence and criminality in Brazil, but also have grown to become the driving force behind the European drug trade.[35]

Within Brazil, gangs liberally employ violence against each other and the public, managing sophisticated drug trafficking, extortion networks, kidnapping, and organized theft rings. They also engage in domestic drug trafficking and dealing, targeting Brazil's large and increasingly wealthy population.

Despite the prominence and power of Brazilian criminal organizations, geography and economic realities have limited their direct criminal linkages to the United States. Brazil's distance from and limited trade flows with the United States offer fewer opportunities to conceal clandestine drug shipments among legal exports to North America. Brazil's more substantial economic ties with Europe, which represents nearly twice as much of Brazil's exports than the United States does, have driven the bulk of Brazilian drug trafficking activity to Europe.

Nonetheless, the rapid expansion of Brazilian gangs has made them some of the world's largest non-state armed groups, empowering organized criminal networks across the Western Hemisphere and beyond. For instance, linkages with

Brazilian gangs have fueled illicit drug production in neighboring Bolivia and Peru, contributing to the growth and resilience of these neighboring criminal landscapes.

Tren de Aragua. Tren de Aragua's exponential growth in recent years is a testament to the surging rise of transnational organized crime. In less than a decade, Tren de Aragua has grown from a minor prison gang in Venezuela to become one of the Western Hemisphere's largest and most expansive transnational criminal organizations—a criminal organization with a substantial foothold across major U.S. cities.

Tren de Aragua's growth was undeniably accelerated by the migration crisis and open-border policies of the Biden Administration, which bolstered the profitability and criminal opportunities that flow from tapping into human trafficking, migrant smuggling, and other related illicit activity. By exploiting the mass migration crisis through human and drug trafficking activity, Tren de Aragua gained access to substantial illicit revenue while weak border policies, both in the United States and across the region, also allowed members of the gang to establish a presence spanning the Western Hemisphere. Another undeniable driving force behind the spread of Tren de Aragua has been the Venezuelan narco-dictatorship, which has weaponized migration against the United States and the broader hemisphere.[36] Politically motivated assassinations carried out by Tren de Aragua outside of Venezuela have been directly linked to the Venezuelan dictatorship.[37]

With Tren de Aragua's rapid growth, law enforcement agencies in the United States and across Latin America have struggled to respond rapidly to this new criminal threat; however, renewed action and coordination have begun to take effect.[38]

Malign Extra-Hemispheric Powers

Recognizing the geopolitical importance of a presence in the Western Hemisphere, top global U.S. adversaries including China, Russia, and Iran have increased their regional engagement and positioning. Seizing on a lack of attention and engagement from the United States, they have accomplished this by means of dual-use infrastructure, political influence, economic power, criminal activity, and military-to-military relations.

Over the past two decades, China has made a particularly aggressive push into the Western Hemisphere, taking advantage of its economic power to build political influence and secure Chinese control of Latin American maritime ports, telecommunications networks, and other critical infrastructure throughout the region. This engagement has spilled into the military realm as well.

China's weaponization of fentanyl in collaboration with Mexico's cartels is the most destructive and dangerous means of Beijing's hemispheric encroachment. China's facilitating of the flow of precursor chemicals to Mexican cartels has driven the fentanyl crisis to its deadly current levels.[39] Chinese businesses, brokers, and criminal organizations all play critical and active roles in illegal fentanyl trafficking to the United States, while Chinese entities and financial systems also facilitate laundering of the profits to evade U.S. detection. Through subsidies and non-enforcement, the CCP tacitly supports China's central role in the fentanyl crisis.

Additionally, China engages in broader threatening positioning within the Western Hemisphere through its economic influence and investments. Among the most concerning developments is China's accumulated control of critical infrastructure such as ports and energy production plants. Beyond the political influence that this investment provides Beijing over regional governments, much of this infrastructure has a worrying potential for weaponization to destabilize the United States and the region. Dual-use infrastructure such as China's new deep-water megaport in Chancay, Peru, and its deep space base in Southern Argentina exemplify the military component of China's nominally economic projects. The deep-water megaport in Peru, for example, is completely controlled by China's COSCO shipping company, and the facilities are uniquely capable of receiving Chinese warships.[40]

China's presence around critical trade infrastructure such as the Panama Canal also raises urgent concerns about its ability to disrupt these vital trade routes, which could destabilize the U.S. economy and the U.S. military's ability to reposition maritime assets in a conflict situation. Chinese illegal fishing activity also tests the boundaries and capacities of maritime territory while accelerating criminality and instability in the Western Hemisphere.

Although less developed, China's military-to-military relations in Latin America have also notably increased in recent years. As the United States has reduced funding and placed increased restrictions

on U.S. training exchanges and weapons sales for Latin American security forces, Beijing has offered more of this engagement, even developing joint exercises with Western Hemisphere countries.

The growing influence and presence of these extra-hemispheric powers increases the risk of interstate conflict's returning to Latin America. On one hand, their military and financial support for authoritarian regimes like Venezuela's encourages the belligerence of those regimes toward neighboring democracies. On the other hand, China's control of critical infrastructure, including dual-use ports that are capable of receiving warships, threatens to bring any potential armed conflict between the United States and China into the Western Hemisphere.

Like China, Iran also leverages the Western Hemisphere's criminal networks as a strategic tool. This centers on the engagement of Iranian proxies, particularly Hezbollah, in narco-trafficking, counterfeiting, and money laundering activity in South America. Much of this presence and engagement centers around the Brazil–Argentina–Paraguay tri-border area, which is home to a substantial Lebanese diaspora. There are also concerning reports and examples of an increasingly operational Hezbollah presence beyond the tri-border region that includes intelligence collection and targeted assassinations.

Russia's significant presence in the Western Hemisphere continues the Soviet-era prioritization of Latin America as a strategic region. However, without Beijing's economic heft to buy influence, Russia's engagement strategy generally leverages high-level political support and military-to-military relations, including weapons sales. Russia has generally approached Latin America with a prioritized emphasis on anti-American leadership. This has led to a significant Russian presence in Cuba, Venezuela, and Nicaragua. Beyond these anti-American regional dictatorships, Russia also built up significant and enduring ties to democratic nations like Ecuador and Argentina during the 2000s when their leadership was hostile to U.S. influence.

Important Alliances and Bilateral Relations

Cooperation with partner nations in Latin America and the Caribbean is fundamental to U.S. national security. In the absence of direct U.S. military and law enforcement action, regional partners have made great sacrifices to confront deadly narco-trafficking groups and other shared security threats. However, political shifts in regional leadership and inconstant U.S. engagement have taken a toll on the effectiveness of U.S. security relationships in Latin America in meeting core security threats.

Argentina. The relevance and importance of Argentina and its military are raised by geopolitical realities, including the deepening of the U.S.–Argentina relationship under the two countries' current administrations. At the same time, China's accumulated influence in Argentina makes this a strategically important relationship for both the United States and Beijing.

The recent sale of American-made F-16 fighter jets to Argentina's Air Force marked a major turning point as the Argentine military turned down China's offering of its JF-17 aircraft.[41] President Javier Milei continues to prioritize engagement with the United States, particularly as his administration seeks to restore the capacity of its armed forces. Discussions of future defense acquisitions and even co-production of equipment like Stryker armored vehicles and drones are ongoing.[42]

In recent decades, Argentina's military has suffered from the country's broader financial crisis and the political stigmatizing of the armed forces because of the military dictatorship of the 1970s and 1980s. This has generally starved Argentina's armed forces of funding while political leadership from the left has reduced the military's responsibilities in the realm of security.

Antarctic security is another issue that enhances Argentina's strategic importance. As China's ambitions in the Antarctic region increase, Argentina's positioning and facilities like its naval base in Ushuaia become more operationally vital.[43]

Despite the Milei government's clear preference for partnership with the United States, China's substantial financial and economic influence in Argentina continue to pose a challenge. Additionally, past concessions to China by the administration of Cristina Kirchner have granted Beijing a worrying military presence in Argentina that includes the shadowy deep space station in Neuquén province.[44]

Brazil. Despite its distance from the United States, Brazil's strategic importance both hemispherically and globally is driven in large part by its size and economic weight. Brazil is not only the largest country in Latin America, but also the

world's seventh-largest country in terms of population and fifth-largest in terms of geographic territory. A top 10 global economy, Brazil also has the region's most developed defense industrial base, particularly its aerospace industry. Brazil's size also makes it an important hub for drug trafficking activity and transnational criminal organizations. The Brazilian military shares responsibility for domestic security with civilian police forces.

Brazil's military spending is roughly 1.1 percent of GDP and supports approximately 360,000 active-duty armed forces personnel, making Brazil's military the second-largest in the Western Hemisphere.[45] Brazil's recent defense budgets hover around $25 billion, which significantly exceeds the defense budgets of Colombia ($10.2 billion), Chile ($5.6 billion), and Argentina ($4.7 billion) in 2024. One of the military's apparent strategic priorities is advancement of Brazil's positioning as a leading global actor.[46] Much of this is reflected in the development of Brazil's military–industrial base and procurement as the government pursues a proposed $11 billion public investment program for production of nuclear submarines, frigates, and new armored vehicles among other systems.[47] As a result of these initiatives, Brazil recently commissioned production of its two first Centauro II BR armored combat vehicles.[48]

Brazil is not a major drug-producing country, but it is the second-largest consumer of cocaine and a transit hotspot for illicit drugs. Criminal organizations like Red Command and First Capital Command have increased their transnational operations in Brazil and beyond. In response, the government has expanded Brazil's security presence along the harsh 9,767-mile border that it shares with 10 other countries. Brazil deploys security forces and equipment like unmanned aerial vehicles to monitor illicit activity along borders and in the Amazon.

In 2018, the U.S. and Brazil launched the Permanent Forum on Security with the aim of fostering bilateral cooperation on security challenges including arms and drug trafficking, cybercrime, financial crimes, and terrorism.[49] The designation of Brazil as a major non-NATO ally in 2019 under President Trump offered Brazil access to U.S. defense industry and increased joint military exchanges, exercises, and training.[50]

Overall, security cooperation between the U.S. and Brazil is substantial, particularly with reference to narco-trafficking threats. However, this relationship is increasingly being undermined by divergent political alignment under the administration of Lula da Silva.

Colombia. The Republic of Colombia is the closest and most successful U.S. security partner in the Western Hemisphere. U.S. partnership and capacity-building during the 1990s and 2000s empowered Colombia's efforts to retake the country from its existential narco-terrorist threats. Nevertheless, surging narco-trafficking and the increasingly destabilizing activities of Venezuela's authoritarian regime continue to pose serious threats to Colombia's security.

By 2001, Colombia had lost control of roughly 40 percent of its territory to narco-guerrilla insurgents and was on the brink of becoming a failed state. However, a surge in U.S. intelligence and military support for and cooperation with Colombia's security forces has restored general stability. Threats from narco-guerillas were pushed to the margins, although substantial security challenges persist.

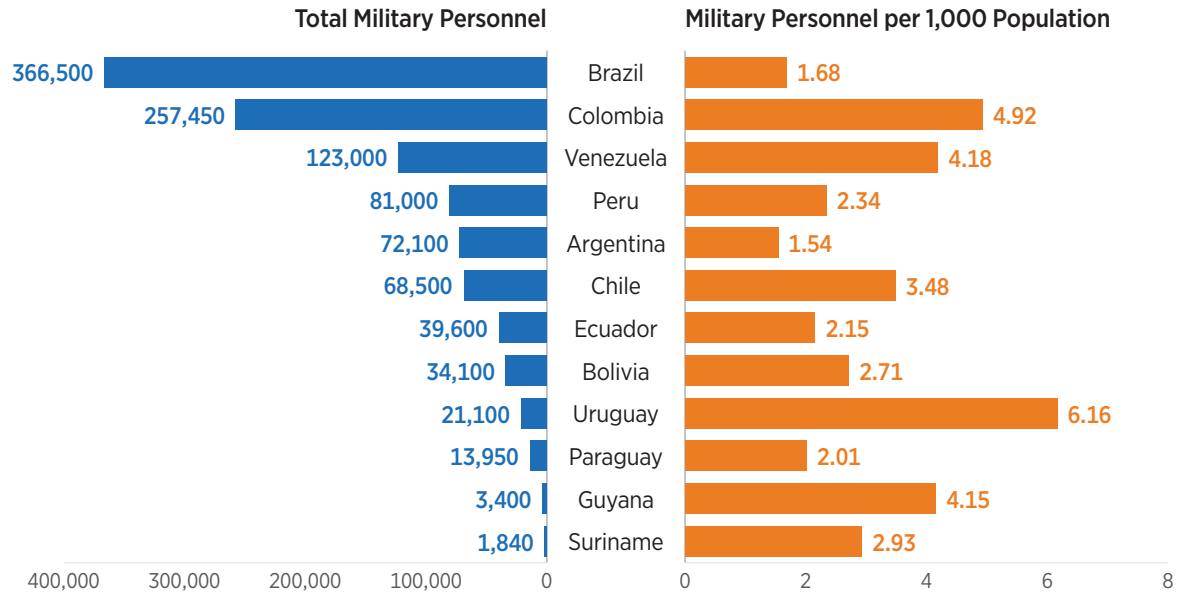
Beyond its historical security ties with the U.S., extensive experience combatting guerrilla threats has helped Colombia's military to become one of the world's and one of the region's most capable. Colombia has some 300,000 active-duty military personnel and an additional 150,000 national police.[51] On a per-capita basis, Colombia maintains one of the world's largest active-duty security forces. However, although its armed forces are highly capable and effective, limited access to new technological capabilities such as drones complicates efforts to confront resilient and well-resourced narco-trafficking threats.

As a core U.S. security partner, Colombia has generally taken a proactive approach in confronting narco-trafficking activity, but security policies have shifted under the administration of President Gustavo Petro. Since taking office in 2022, Petro has blasted the so-called drug war and delivered punishing reductions to military funding while liberally using permissive ceasefire agreements with Colombia's narco-trafficking groups. These policies are bringing about a dramatic regression of the country's hard-fought security gains and have led to a period of resurgence for Colombia's armed groups.

In the final months of President Petro's mandate, the government has adjusted its approach somewhat, ending its permissive ceasefires, but

CHART 7

Comparison of Militaries in Latin America



SOURCES: International Institute for Strategic Studies, *The Military Balance 2025* (London: Routledge, 2025), and population data from World Bank Group DataBank, "Population Estimates and Projections," https://databank.worldbank.org/source/population-estimates-and-projections (accessed January 21, 2026).

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the resurgence of armed groups requires a more aggressive recommitment to the military's efforts to confront these threats. Even though guerrilla groups and narco-traffickers no longer credibly threaten the existence of the state, violence continues to plague ungoverned spaces in Colombia, and illicit coca production continues at record high levels. At the same time, new illicit activities such as illegal mining have proliferated, offering new revenue streams for Colombia's transnational criminal organizations.

A key factor driving the persistent armed threat in Colombia is the Venezuelan narco-regime which shares a roughly 1,400-mile border with Colombia. For the United States, Colombia is also strategically important when it comes to confronting Venezuela's regional criminal destabilization. However, as with narco-trafficking, Colombia's approach to Venezuela under the Petro administration has frequently been counterproductive. Looming elections in 2026 are likely to bring a return to Colombia's more traditional security policies, but confronting the increasingly empowered criminal threat in the country will require redoubled efforts from both the United States and Colombia.

Dominican Republic. In many ways, the Dominican Republic is the linchpin of U.S. counternarcotics cooperation in the Caribbean. It is the largest Caribbean nation and, with some 50,000 active-duty forces, has the region's the largest military. The Dominican Republic is therefore a crucial U.S. partner in maritime interdiction operations against drug smuggling activity and illegal migration, as well as in countering the encroachment of China and other hostile powers into the Caribbean. As narco-trafficking and geopolitical threats increase, they are further amplified and complicated by the deepening crisis in Haiti.

Under President Luis Abinader, the U.S.–Dominican Republic security relationship has solidified and grown through active partnership.[52] The Trump Administration has taken important steps

to further this engagement; the Dominican Republic, for example, was part of Secretary of State Marco Rubio's first trips abroad.[53]

The Dominican Republic's role in countering flows of narcotics may become even more crucial with the shift in hemispheric security dynamics. The porous U.S.–Mexico border has been an attractive route for much of the drug trafficking to the United States, particularly the fentanyl trade. However, increasingly successful actions to secure the border and confront the Mexican cartels are likely to push more of the drug trade through Caribbean smuggling routes.

With both nations located on the island of Hispaniola, the deepening crisis in Haiti also raises increasingly dire security threats to the Dominican Republic and regional stability. The near-total collapse of the Haitian government has left much of Haiti's territory, including most of the capital, Port-au-Prince, under the exclusive control of violent drug gangs.[54] The crisis has also led to massive population displacement as Haitians flee—primarily to the Dominican Republic—to escape attacks by violent gangs. Cognizant of the significant threat to the Dominican Republic that this collapse represents, the U.S. has not intervened directly; instead, it has focused on ramping up border security measures and seeking international action to stabilize Haiti.

Guatemala. Guatemala's geographic position and extensive border make it a strategically important Central American security partner for the United States as it seeks to combat the flow of illegal drugs and mass migration, among other threats. Latin America's narco-trafficking and illegal mass migration networks pass directly through Guatemala on their way to the United States.

In 2025, Mexico's cartels saw a period of growth within Mexico, aided by their lucrative fentanyl and human smuggling activity as well as by limited pressure from the Mexican state. This has led to an increased cartel presence in Guatemala and elsewhere in Central America. The cartels' expanded outreach has grown with the inclusion of illicit fentanyl and drug trafficking as well as migrant smuggling networks.[55]

As security partners, the U.S. and Guatemala have developed a substantial relationship around border security, counternarcotics, and migration. However, the security relationship has also been subject to political shifts, including from the United States. Under the Biden Administration, the U.S. withheld substantial law enforcement and security cooperation resources from the bilateral relationship during the term of Guatemala's conservative president.[56] U.S. prioritization of development aid and so-called root-causes approaches to crime and insecurity have failed to deliver substantive progress in combatting these criminal threats, and limiting the resources for core security cooperation has negatively affected the government's ability to deal with them effectively.[57]

Nonetheless, the Guatemalan government has taken commendable action to confront narco-migration threats more aggressively. This includes recently enhanced patrols by Guatemala along its borders with Mexico, Honduras, and El Salvador. Renewed deployments to the border and increased funding for the police helped to drive a tripling of drug seizures from 2023 to 2024.[58] Nevertheless, Guatemala struggles to confront the Western Hemisphere's surging narco-threats passing through its territory. Efforts to secure the country's 200-nautical-mile economic zone against drug trafficking, for example, are undermined by the country's limited naval and air force capabilities.[59]

Mexico. Mexico is the top U.S. trading partner, is the second-largest country in Latin America, and shares a 2,000-mile border with the United States. Its importance for U.S. national security therefore cannot be overstated. Nonetheless, the threats posed by drug cartels and illegal migration networks in Mexico have surged in recent years as security cooperation between the United States and Mexico has largely collapsed.

With nearly 300,000 active-duty personnel, Mexico's military is likely the most important and well-resourced regional security institution. This is due in no small part to its leading role in Mexican defense and security, including domestic operations against drug cartels. Successive Mexican administrations have shifted law enforcement responsibilities and resources to the military. President Andrés Manuel López Obrador (2018–2024) took unprecedented action to empower the Mexican military, both politically and economically, while shielding it from oversight.

Corruption is a determinative reality in Mexico's security landscape and has long cast a shadow on U.S.–Mexico security cooperation. Narco-corruption in particular has compromised Mexico's public

security institutions, particularly local and civilian police forces. This reality has pushed the Mexican military into a more prominent role in domestic security against the cartel threat. However, Mexico's armed forces, including senior leaders, have not been immune to the cartels' corrupting influence. In a 2020 incident, for example, the Mexican government responded to U.S. law enforcement's arrest of a then-former Defense Minister by dramatically escalating diplomatic threats against the United States. Upon securing his release, the Mexican government pursued no criminal action against the former senior defense official.

This incident and broader corruption challenges mixed with political dynamics in Mexico have reinforced the trend of restricting U.S.–Mexico security cooperation, particularly during the administration of President López Obrador. This ultimately led to Mexico's 2021 decision to end the Merida Initiative, which had long served as the framework for Mexico's bilateral security relationship with the United States. Since then, cooperation between U.S. and Mexican security forces has been minimal despite surging levels of fentanyl deaths, violence, and illegal migration.

In an attempt to end the status quo, the Trump Administration has strengthened the U.S. military presence at the border while bringing economic and political pressure to bear to persuade the Mexican government to take effective action against the cartels. With the threat of direct U.S. military action against the cartels looming, Mexico under the leadership of President Claudia Sheinbaum faces unprecedented pressure to act.

Peru. The United States and Peru have a long-standing security relationship centered around shared challenges that include narco-trafficking and guerrilla activity. As a top global producer of critical minerals and cocaine as well as one of the largest territories in Latin America, Peru has significant strategic importance as a U.S. security partner. Additionally, Peru has become a focal point for geopolitical competition between Beijing and Washington, and China's presence in the Andean nation, especially with respect to critical dual-use infrastructure, has surged in recent years.

During the 1990s and 2000s, the U.S.–Peru security relationship was a significant source of support for Peru's efforts to confront the Shining Path narco-guerrilla threat; today, Shining Path is all but eliminated. However, Peru's narco-trafficking threats persist as varied drug-trafficking organizations continue to operate. Additionally, criminal activity in the mining sector, particularly by transnational criminal organizations, has increased to a notable extent with the advent of illegal wildcat mining in Peru. The violence and organized criminal activity that the spread of illegal mining has brought with it has created an increasingly daunting security challenge.

The U.S.–Peru security relationship has faced notable limiting challenges, many of which have stemmed from U.S. human rights concerns. In 2001, in response to an incident in which the Peruvian military mistakenly targeted a civilian aircraft, the United States responded by ending its Air Bridge Denial Program. This denied the Peruvian government the intelligence and equipment that it needed to combat the widespread use of drug smuggling flights by narco-traffickers. In 2024, the U.S. and Peru reached an agreement that restored some U.S. support against drug flights in Peru. However, the U.S. maintains a prohibition on Peru's ability to use lethal force against drug flights despite rising narco-threats across the hemisphere.

The inauguration of a Chinese megaport in Chancay in 2024 has reemphasized the global geopolitical dimensions of U.S.–Peru relations.[60] The potentially dual-use port is uniquely suited to receive Chinese warships, and China's COSCO shipping company has been granted abnormally exclusive control of the facilities. The dangers of this arrangement are exacerbated by concerns about Peru's inability to provide proper oversight on critical infrastructure. The importance of this issue is indicated by the pervasive narco-trafficking and criminal activity that passes through such facilities. At the same time, the increasingly substantial political influence that China enjoys in Peru as a result of its investments and political engagement has enhanced Beijing's increasingly opaque regional presence.

Conclusion

The Trump Administration has rightly identified Latin America and the Caribbean as regions of outsized interest for the United States. Geography and connectedness leave the American people and U.S. national security substantially vulnerable to the impact of these realities within our hemisphere. In

recent years, both regions have become more dangerous as surging instability, the resurgence of narco-terrorism, and destabilizing mass migration have led to the drug deaths of hundreds of thousands of Americans, assaults on the U.S. border, and instability across U.S. cities. Additionally, adversaries have capitalized on their ability to threaten the United States from within our hemisphere by increasing their presence and control of critical dual-use infrastructure and developing malign influence with both regional rogue regimes and democratic states.

These dangerous realities are the result of decades of neglect and disengagement by Washington and the U.S. military in our own hemisphere. The drawing down of operational presence in the region and the watering down of our cooperation and engagement laid the groundwork for criminal groups to make a dramatic comeback and created an opening for U.S. adversaries to buy influence through corruption and false promises.

However, President Trump's reengagement with the Western Hemisphere is already having a serious impact. Deployments to the Caribbean have secured what was once a primary narco-trafficking route to the United States, and the U.S. military operation that successfully captured Nicolás Maduro has opened the door to ending what has been a dramatic threat to hemispheric security and stability. Continued and deepened efforts—efforts that are based on a strong U.S. commitment and partnerships with regional leadership that is increasingly aligned with the United States against these threats—will be needed to fully undo the damage of past decades.

Scoring the Latin America/Caribbean Operating Environment

As noted at the beginning of this section, various regional considerations facilitate or inhibit the ability of the U.S. to conduct military operations to defend its vital national interests against threats. Our assessment of the operating environment uses a five-point scale that ranges from "very poor" to "excellent" conditions and covers four regional characteristics of greatest relevance to the conduct of military operations:

1. **Very Poor.** Significant hurdles exist for military operations. Physical infrastructure is insufficient or nonexistent, and the region is politically unstable. The U.S. military is poorly placed or absent, and alliances are nonexistent or diffuse.

2. **Unfavorable.** A challenging operating environment for military operations is marked by inadequate infrastructure, weak alliances, and recurring political instability. The U.S. military is inadequately placed in the region.

3. **Moderate.** A neutral to moderately favorable operating environment is characterized by adequate infrastructure, a moderate alliance structure, and acceptable levels of regional political stability. The U.S. military is adequately placed.

4. **Favorable.** A favorable operating environment includes adequate infrastructure, strong alliances, and a stable political environment. The U.S. military is well placed for future operations.

5. **Excellent.** An extremely favorable operating environment includes well-established and well-maintained infrastructure, strong and capable allies, and a stable political environment. The U.S. military is well placed to defend U.S. interests.

The key regional characteristics consist of:

a. **Alliances/Partnerships.** Alliances are important for interoperability and collective defense, as allies are more likely to lend support to U.S. military operations. Indicators that provide insight into the strength or health of an alliance include whether the U.S. trains regularly with countries in the region, has good interoperability with the forces of an ally, and shares intelligence with nations in the region.

b. **Political Stability.** Political stability brings predictability for military planners when considering such things as transit, basing, and overflight rights for U.S. military operations.

Operating Environment: Latin America

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances				✓	
Political Stability			✓		
U.S. Military Posture		✓			
Infrastructure			✓		
OVERALL			✓		

The overall degree of political stability indicates whether U.S. military actions would be hindered or enabled and reflects, for example, whether transfers of power are generally peaceful and whether there have been any recent instances of political instability in the region.

c. **U.S. Military Positioning.** Having military forces based or equipment and supplies staged in a region greatly facilitates the ability of the United States to respond to crises and presumably to achieve success in critical "first battles" more quickly. Being routinely present in a region also helps the U.S. to remain familiar with its characteristics and the various actors that might either support or try to thwart U.S. actions. With this in mind, we assessed whether or not the U.S. military was well positioned in the region. Again, indicators included bases, troop presence, prepositioned equipment, and recent examples of military operations (including training and humanitarian) launched from the region.

d. **Infrastructure.** Modern, reliable, and suitable infrastructure is essential to military operations. Airfields, ports, rail lines, canals, and paved roads enable the U.S. to stage, launch, and logistically sustain combat operations. We combined expert knowledge of regions with publicly available information on critical infrastructure to arrive at our overall assessment of this metric.

Overall, the U.S. enjoys limited military-to-military relationships with many Latin American and Caribbean countries; for the past several years, for example, much U.S. cooperation has been focused on humanitarian relief and related activities rather than operational counternarcotics efforts. With pro-U.S. leadership winning elections across the region, many regional governments could be more disposed to act as pro-active partners in confronting shared security threats such as narco-trafficking, but these partnerships need to be reinvigorated after decades of declining U.S. engagement.

Substantial political shifts are commonplace in much of Latin America and the Caribbean and have led to the rise of anti-American populists in the past. Electoral and regional trends suggest that the wave of anti-Americanism has largely dissipated with the failures of socialist leaders in Venezuela, Argentina, and beyond. Nonetheless, these underlying risks can still impede progress.

The redeployment of substantial U.S. military assets to the Caribbean during 2025 brought a surge in positioning to the Western Hemisphere, but beyond the Caribbean, the long-standing U.S. trend of regional disengagement has left the military with a very limited network of facilities and bases in Latin America and the Caribbean. Notably, there is no U.S. base in the entire continent of South America. This reality will complicate efforts to broaden and deepen U.S. security cooperation across the hemisphere.

The region's infrastructure suffers from complex geography and limited financing and development for large-scale projects such as ports. Nevertheless, in most populated areas, infrastructure receives more substantial funding and attention, and this provides more reliability.

With these considerations in mind, we arrived at these average scores for Latin America and the Caribbean (rounded to the nearest whole number):

- Alliances/Partnerships: **4—Favorable.**
- Political Stability: **3—Moderate.**
- U.S. Military Positioning: **2—Unfavorable.**
- Infrastructure: **3—Moderate.**

  Aggregating to a regional score of: **Moderate.**

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Asia

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Regional Overview

Asia has always been vital to the protection and advancement of America's economic and security interests. Since the 19th century, it has been U.S. policy to prevent the rise of an antagonistic regional hegemon in Asia, whether it was Imperial Japan, the Soviet Union, or China itself.

In the 21st century, Asia's importance to the United States has only grown. Asia is a key source of trade and natural resources and plays a crucial role in countless global supply chains. The sea lines of communication that run through the Pacific and Indian Oceans host the vast majority of seaborne global trade. As of February 2025, half of America's top 12 trading partners, including China, Japan, South Korea, Vietnam, India, and Taiwan, were found in Asia.[1]

The U.S. also has several key security interests in Asia: a variety of treaty allies and important security partners. The region has several of the world's largest and most capable militaries, including those of China, India, Japan, Russia, Pakistan, and North and South Korea. Five Asian states—China, North Korea, India, Pakistan, and Russia—also possess nuclear weapons.

The region is a core American security focus because:

- It is home to America's top external security threat—China.
- It is home to several critical trading and treaty allies as well as India, potentially a major geostrategic partner.
- It is characterized by several military flash points that could escalate to a nuclear exchange, numerous territorial and maritime disputes, and long-standing rivalries.

China's rapid military modernization and technological development, along with its air and sea incursions around Taiwan, have generated increased concern about the potential for military conflict in the Taiwan Strait. The situation on the Korean Peninsula remains perpetually tense as Pyongyang expands its missile arsenal and tests its increasingly capable long-range missiles. China's growing and increasingly potent naval capabilities, enhanced by a massive maritime militia, are also generating alarm in Washington and among numerous treaty allies and security partners. The disputed China–India border has grown considerably more volatile since a series of violent and deadly confrontations in 2020. And in May 2025, Pakistan's terrorist attack into India nearly triggered a war.

Attempts to build a united security architecture among allies in the region are complicated by the lack of a robust NATO-like political–security organization. Instead, the Asian security landscape for the United States is shaped by a combination of bilateral alliances. In recent years, these core aspects of the regional security architecture have been supported by "minilateral" security partnerships: the U.S.–Japan–Australia and India–Japan–Australia trilaterals; the U.S.–Japan–Australia–India quadrilateral dialogue (popularly known as the Quad); the Australia–United Kingdom–United States (AUKUS) agreement; and growing U.S.–Japan–South Korea trilateral cooperation. These efforts have often been stymied by limited shared interests, disagreement on appropriate measures to counter the China threat, and historical animosities between nations (e.g., Japan and South Korea).

The Association of Southeast Asian Nations (ASEAN) is a loose agglomeration of disparate states that has succeeded in expanding economic linkages among themselves over the past 50 years through a range of economic agreements like the ASEAN Free Trade Area (AFTA). ASEAN also serves as the convening force behind the patchwork regional diplomatic and security architecture like the ASEAN Regional Forum (ARF) and ASEAN Defense Ministers Meeting-Plus (ADMM-Plus). The South Asia Association of Regional Cooperation (SAARC), which includes Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, and Sri Lanka, has been less effective because of the lack of regional economic integration and the historical rivalry between India and Pakistan.

As noted, Asia is not undergirded by any significant economic architecture. Despite substantial trade and expanding value chains among the various Asian states, formal economic integration is limited. There are, however, many trade agreements among the nations of the region and among these nations and countries outside of Asia. The most prominent are the 15-nation Regional Comprehensive Economic Partnership (RCEP) and the 11-nation Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), neither of which includes the U.S. or India.

Important Alliances and Bilateral Relations in Asia

The keys to a robust U.S. security presence in the Western Pacific are America's alliances with Japan, the Republic of Korea (ROK or South Korea), the Philippines, Thailand, and Australia. These formal alliances are supplemented by close security relationships with New Zealand and Singapore, an emerging strategic partnership with India, and evolving relationships with Southeast Asian partners like Vietnam, Malaysia, and Indonesia. The United States also has a robust unofficial security and economic relationship with Taiwan.

The U.S. improves interoperability by sharing common weapons and systems with many of its allies, many of which field F-15, F-16, and F-35 combat aircraft and employ LINK-16 data links among their naval forces. Australia, Japan, and South Korea are partners in production of the F-35 Joint Strike Fighter, and all three countries have taken delivery of the aircraft. Partners like India and Australia operate American-made P-8 maritime surveillance aircraft and C-17 transport aircraft.

In addition, several "foundational" military agreements with regional partners and allies allow for the sharing of encrypted communications data and equipment, access to each other's military facilities, and the ability to refuel each other's air and naval vessels in theater utilizing Acquisition and Cross-Servicing Agreements (ACSAs). In the event of conflict, a patchwork of intelligence-sharing agreements enables the sharing of information in such key areas as air defense and maritime domain awareness. This advantage is enhanced by the ongoing range of bilateral and multilateral exercises that acclimate various forces to operating together and familiarize American and local commanders with each other's standard operating procedures (SOPs) as well as training, tactics, and (in some cases) war plans.

While it does not constitute a formal alliance, in November 2017, Australia, Japan, India, and the United States reconstituted the Quad,[2] a forum for the four countries to meet at various levels and in venues to discuss ways to strengthen strategic cooperation and combat common threats. In 2019, the group held its first meeting at the ministerial level and added a counterterrorism tabletop exercise to its agenda.[3] In 2020, officials from the four countries participated in a series of conference calls to discuss responses to the COVID-19 pandemic that also included government representatives from New Zealand, South Korea, and Vietnam.[4] In March 2021, the leaders of the four nations held their first virtual summit, marking a new level of interaction.[5] In September 2021, the four leaders held the first in-person Quad summit, which was followed by a second in-person summit in 2022.[6] Quad engagement has remained a leading component of U.S. engagement in Asia. In January 2025, Secretary of State Marco Rubio met with his Quad counterparts as one of his first official acts on his first day in office.[7]

Japan. The U.S.–Japan defense relationship is the cornerstone of America's network of relations in the Western Pacific. The U.S.–Japan Treaty of Mutual Cooperation and Security, signed in 1960, provides for a deep alliance between two of the world's largest economies and most sophisticated military establishments.

The United States maintains "approximately 60,000 military personnel" and "7,000 Department of Defense [now Department of War] civilian and contractor employees" in Japan under the rubric of U.S. Forces Japan (USFJ).[8] These forces include, among other things, a forward-deployed carrier battle group centered on the USS *Ronald Reagan*, an amphibious group at Sasebo centered on the LHA-6 *America*, an aviation-optimized amphibious assault ship, and the bulk of the Third Marine Expeditionary Force (III MEF) on Okinawa. U.S. forces exercise regularly with their Japanese counterparts, and this collaboration has expanded in recent years to include joint amphibious exercises as well as air and naval exercises.

The American presence is supported by a substantial American defense infrastructure throughout Japan, including Okinawa. These bases provide key logistical and communications support for U.S. operations throughout the Western Pacific, cutting travel time substantially compared with deployments from Hawaii or the U.S. West Coast. They also provide key listening posts for the monitoring of Russian, Chinese, and North Korean military operations. This capability is enhanced by Japan's growing array of space systems including new reconnaissance satellites.

During bilateral Special Measures Agreement negotiations, the first Trump Administration sought a 400 percent increase in Japanese contributions for the cost of stationing U.S. troops in Japan. Late in 2021, it was reported that Japan had agreed to "ramp up its annual host-nation support for U.S. forces stationed in Japan."[9]

Despite developing a formidable military force, Japan still relies heavily on the United States and Washington's extended deterrence guarantee of nuclear, conventional, and missile defense forces for its security. In March 2025, Japan established a Joint Operations Command to unify command of its ground, naval, and air forces.[10] Previously, the Self-Defense Forces were stovepiped with insufficient ability to communicate, plan, or operate across services. Japan's inability to conduct joint operations across its own military services inhibited its capacity for combined operations with U.S. forces. By designating a single joint commanding general, Japan is now able to coordinate more effectively with U.S. Indo-Pacific Command (USINDOPACOM) combatant commander counterparts.

In addition to growing concerns about China, Russia's invasion of Ukraine in February 2022 caused a significant shift in the Japanese public's perception of their country's threat environment. The Japanese had been aware of the growing Chinese and North Korean threats, but Vladimir Putin's invasion made clear that their perception of a "post–Cold War world" was an illusion and that large-scale military conflicts between major powers remained a genuine threat. The Russian invasion of Ukraine crystallized Japanese fears of a possible Chinese conflict over Taiwan and called attention to the need for a stronger military posture.[11]

Before the war in Ukraine, the Japanese populace had feared that loosening any restrictions on Japan's military risked an inexorable return to the country's militaristic past. The war in Ukraine seemingly caused an overnight sea change in Japanese perceptions. Public opinion polls show strong majorities favoring greater defense spending and a counterstrike capability.[12] Prime Minister Shinzo Abe's 2015 policy of collective self-defense led to fierce debates in the national legislature and large public protests. By contrast, bold security steps announced by the Kishida administration in December 2022 elicited strong public support but did not spark any protests.

Japan responded to the deteriorating Indo-Pacific security environment by vowing to augment its defense capabilities significantly, strengthen defense cooperation with the United States, and expand defense collaboration with like-minded democracies in the Indo-Pacific. National security documents from December 2022 delineated extensive defense reforms to develop new military capabilities and bolster Japan's ability to assume greater responsibility for its own and collective defense.[13] In particular, Tokyo's announcement of its intent to develop long-range missile counterstrike capabilities was a dramatic shift from the past. Citing expanding Chinese and North Korean missile arsenals, Tokyo declared that relying solely on Japanese missile defenses or U.S. strike capabilities to defend against missile threats had become increasingly untenable. The government acknowledged that it must add capabilities to mount effective counterstrikes against adversaries to prevent potential attacks on Japanese soil.

Tokyo also broke with long-standing precedent by pledging to raise Japanese defense spending

by 2027 to 2 percent of current GDP, doubling the self-imposed limit of 1 percent that Tokyo had maintained for decades.[14] The government emphasized that implementation of a rapid and extensive defense buildup could not be achieved by a temporary increase in spending. Instead, a sustained level of elevated expenditures would be required.

In recent years, Japan has taken steps to improve its defensive weapons, command, intelligence, and logistical systems:

- Integrated air and missile defenses;
- Unmanned vehicles (drones);
- Cross-domain operations including cyber, space, and electromagnetic spectrums;
- Integrated command, control, and intelligence;
- Sea-lift and air-lift capabilities;
- Expanded stocks of ammunition, missiles, fuel, and spare parts.[15]

Japan has become increasingly alarmed by China's surging defense expenditures, rapidly expanding and modernizing military capabilities, and escalating aerial and maritime incursions into Japanese territorial waters. Tokyo is also deeply apprehensive about being drawn into a conflict over Taiwan, which is only 70 miles from Japan's southwest islands at their closest point. In December 2024, Foreign Minister Takeshi Iwaya noted that:

> Personally, I do not like the phrase "Taiwan emergency." Taiwan should be "safe," not "in emergency." Taiwan is an important and close friend to Japan. However, we will consistently adhere to the spirit of the joint statement made at the time of the normalization of diplomatic relations between Japan and China, and I am convinced that issues between Taiwan and the mainland should be resolved peacefully through dialogue. Taiwan must be "safe."[16]

Beginning in 2014, Japan began to reorient its forces and augment defenses to the southwest so that it could counter the Chinese threat more effectively. The Japanese Self-Defense Forces expanded existing units, created an amphibious rapid-deployment brigade, and enhanced their rapid-response capabilities. Japan also changed its strategy to improve its ability to monitor and deter Chinese incursions and, if necessary, retake islands by force. Additionally, Tokyo has deployed new radar sites, as well as surface-to-ship and surface-to-air missile units, and has increased its intelligence-gathering and security units on the islands to protect maritime choke points.

Recently, the growing potential for a Taiwan crisis has led senior Japanese officials to issue increasingly bold public statements of support for Taipei and align Japan's national interests more directly with the protection of Taiwan's security. However, there have been no declared policy changes, and Japan has not pledged to intervene directly in a military conflict to defend Taiwan or even to allow U.S. defense of Taiwan from bases in Japan. A Japanese decision to intervene in a Taiwan crisis would be subject to constitutional, legal, and political constraints. Deliberations would depend heavily on the circumstances of the situation and the political will to intervene. Potential factors include whether Taiwan is being attacked or blockaded, whether Japan's southwest islands were threatened, and the extent of international support for Taiwan's defense. However, many experts believe that Japan would be compelled to intervene militarily even without intervention by the U.S.

Republic of Korea. The United States and South Korea signed their Mutual Defense Treaty in 1953. That treaty codified the relationship that had grown from the Korean War when the United States dispatched troops to help South Korea defend itself against invasion by Communist North Korea. Since then, the two states have forged an enduring alliance supplemented by a substantial trade and economic relationship that includes a free trade agreement.[17]

South Korea has fought alongside the United States in nearly every significant conflict since the Korean War. Seoul sent 300,000 troops to fight in Vietnam, some 5,000 of whom were killed. South Korea also has conducted anti-piracy operations off the coast of Somalia and has participated in peacekeeping operations in Afghanistan and East Timor. In spite of its support for multinational crisis response, however, South Korea's defense planning is focused primarily on threats from North Korea. In

recent years, both privately and publicly, South Korean defense officials have acknowledged the need for South Korea to expand the scope of its foreign and security policies to include threats from China.

In response to Pyongyang's expanding nuclear arsenal, South Korea created a defense strategy comprised of Kill Chain (preemptive attack); the Korea Air and Missile Defense (KAMD) system; and the Korea Massive Punishment and Retaliation (KMPR) system.[18] Taken together, these concepts integrate air and missile defenses, long-range precision fires, cruise missile attacks, and air-launched attacks on North Korea's missile and nuclear capabilities and its political and military leadership.

The South Korean military is a sizeable force with advanced weapons and innovative military education and training. South Korea's military spending has increased over the past 10 years from $36.57 billion in 2015 to $44.7 billion in 2025, and further increases are planned.[19] Seoul also appears to be procuring the right mix of capabilities, to include long-range fires, fifth-generation aircraft, modern missile defenses, and an armor-heavy ground force.[20] U.S.–South Korean interoperability has improved, partly as a result of Seoul's continued purchases of U.S. weapons systems and its own healthy and modern defense industrial base.

After several decades of slow decline, the American presence on the Korean Peninsula has stabilized during the past decade. In the early 1970s, President Richard Nixon withdrew the 7th Infantry Division, leaving only the 2nd Infantry Division on the peninsula. Those forces have been positioned farther back from North Korea so that few Americans are now deployed on the Demilitarized Zone (DMZ). The U.S. currently maintains 28,500 troops on the peninsula, centered mainly on the U.S. 2nd Infantry Division, rotating brigade combat teams, and a significant number of combat aircraft.[21]

The U.S.–ROK defense relationship involves one of the more integrated and complex command-and-control structures. A United Nations Command (UNC) established in 1950 was the basis for the American intervention and remained in place after the armistice was signed in 1953. UNC has access to seven bases in Japan to support U.N. forces in Korea. Although the 1953 armistice ended the most intense fighting, sporadic armed clashes between the two sides have continued for decades.

Due to the ongoing hostilities, UNC retained operational control (OPCON) of South Korean forces until 1978 when it was transferred to the newly established Combined Forces Command (CFC). Headed by the American Commander of U.S. Forces Korea (USFK), who is also Commander, U.N. Command, CFC reflects an unparalleled degree of U.S.–South Korean military integration. CFC returned peacetime operational control of South Korean forces to Seoul in 1994. If war became imminent, South Korean forces would become subordinate to the CFC commander, who in turn remains subordinate to both countries' national command authorities.[22]

In 2007, then-President Roh Moo-hyun requested that the United States return wartime OPCON of South Korean forces to Seoul.[23] Under the plan, the CFC commander would be a South Korean general with a U.S. general as deputy commander. The U.S. general would continue to serve as commander of UNC and USFK. The CFC commander, regardless of nationality, would always remain under the direction and guidance of U.S. and South Korean political and military national command authorities.[24] OPCON transfer has been delayed several times at Seoul's request. Late in 2014, Washington and Seoul agreed to postpone the scheduled wartime OPCON transfer and instead adopted a conditions-based rather than timeline-based policy.[25]

In the late 2010s, President Moon Jae-in advocated for an expedited OPCON transition during his administration, but critical conditions, including improvement in South Korean forces and a decrease in North Korea's nuclear program, had not been met.[26] Moon's successor, Yoon Suk Yeol, criticized his push for a premature return of wartime OPCON before Seoul had fulfilled the agreed-upon conditions.[27] As this book was being prepared, and almost two decades after the initial proposal, the transfer had still not been made.

The ROK's government provides substantial resources to defray the costs of U.S. Forces Korea. The bilateral, cost-sharing Special Measures Agreement has offset the non-personnel costs of stationing U.S. forces in South Korea since 1991 and is renegotiated every five years.[28] Korea spends 2.6 percent of its gross domestic product (GDP) on defense and has pledged to reach the NATO minimum standard of 3.5 percent in core defense spending.[29] Seoul also absorbs costs not covered in the cost-sharing

agreement, including 91 percent ($10.7 billion) of the cost of constructing Camp Humphreys, the largest U.S. base on foreign soil.[30]

Traditionally, U.S. military forces have engaged regularly in major exercises with their ROK counterparts, including the Key Resolve and Foal Eagle series, both of which involved the deployment of substantial numbers of U.S. forces to the Korean Peninsula. Several large-scale exercises were cancelled during the first Trump Administration in 2018 but were resumed in 2022 along with the rotational deployment of U.S. strategic assets—bombers, aircraft carriers, and dual-capable aircraft.[31] U.S. and South Korean forces concluded their annual combined, joint, all-domain military exercise, Ulchi Freedom Shield 25, in August 2025.[32]

Japan–Korea–U.S. Trilateral Cooperation. Contentious historical issues related to Japan's 1910–1945 occupation of the Korean Peninsula have repeatedly constrained efforts to induce the two countries to cooperate more closely on defense. South Korean–Japanese relations took a downturn in 2018 when the South Korean Supreme Court ruled that Japanese companies could be forced to pay reparations for forced labor.[33] A December 2018 incident involving a South Korean naval ship and a Japanese air force plane further exacerbated tensions and led in turn to trade restrictions between the two countries.

To counter the growing North Korean threat, the United States, South Korea, and Japan resumed trilateral military exercises in 2022 after a five-year hiatus. The three countries engaged in anti-submarine and ballistic missile exercises to enhance security coordination. Since then, the three militaries have expanded the scope, scale, and complexity of trilateral military exercises. In March 2025, U.S., South Korean, and Japanese forces conducted a trilateral naval exercise. The joint effort was followed by another trilateral air and naval exercise, Freedom Edge, in September 2025.[34]

Elected in March 2022, President Yoon Suk Youl took a bold and politically risky step in March 2023 to improve bilateral relations with Japan. Yoon announced that Korean rather than Japanese companies would provide compensation to Korean victims of forced labor.[35] His decision led to the cancellation of Japanese export restrictions, progress toward enhancing economic trade, and discussion of possibly expanding military cooperation against the common North Korean threat.

During the August 2023 Camp David summit, the United States, South Korea, and Japan committed to institutionalizing trilateral security progress and creating a framework for greater cooperation against the North Korean and Chinese threats.[36] The three countries agreed to a structured multi-year plan of annual named, large-scale, multi-domain combined military exercises near the Korean Peninsula.[37] In 2024, the three countries activated a new mechanism for exchanging information on North Korean missile launches in real time to improve cooperation on ballistic missile defense.

During the February 2025 U.S.–Japan summit, President Donald Trump and Prime Minister Shigeru Ishiba affirmed the importance of Japan–South Korea–United States trilateral partnership against the North Korean threat.[38] In an April 2025 meeting with his South Korean and Japanese counterparts, Secretary of State Marco Rubio pledged to "strengthen trilateral cooperation in advancing the safety, security, and prosperity of our three countries and the broader Indo-Pacific region, while upholding shared principles including the rule of law."[39]

The Philippines. In addition to being America's defense ally longer than any other nation in Asia, the Philippines shares a close and complex relationship with the United States. After more than 300 years of colonial rule, Spain ceded the Philippines to the United States at the conclusion of the Spanish–American War in 1898. Over the next four decades, the United States gradually established democratic institutions and provided for increased autonomy, which culminated in full independence in 1946.

From 1941–1945, Filipinos and Americans fought side by side against the Japanese and their occupation of the Philippines. The bond forged during the war has persisted into the 21st century. Recent polls show that more than 70 percent of Filipinos view the United States favorably—a greater share than is reported by some other U.S. defense treaty allies in the Indo-Pacific.[40]

In the wake of World War II, the U.S. and the Philippines signed a Mutual Defense Treaty in 1951 that strengthened their bilateral security ties. The Philippines was also home to some of the largest American bases in the Pacific during the Cold War. The 1947 U.S.–Philippines basing agreement allowed multiple U.S. bases in the country, the

largest of which were Clark Air Base and Subic Bay Naval Base.[41]

Subic Bay and the complex of airfields that developed around Clark Field (later Clark Air Base) provided unparalleled replenishment and repair facilities in addition to substantially extended deployment periods throughout the East Asian littoral. These bases, while controversial reminders to some Filipinos of the colonial era, generated economic activity and provided substantial lease payments to the government of the Philippines. In 1991, the United States decided to abandon Clark Air Base after it sustained significant damage from a volcanic eruption.[42] At that time, the U.S. also offered the Philippines a reduced payment for the continued use of Subic Bay alone.[43] The Philippines rejected the offer, thereby compelling the closure of U.S. Naval Base Subic Bay.[44]

Despite the base closures, U.S.–Philippine military relations remained close, and assistance began to increase again after 9/11. American forces supported Philippine efforts to counter Islamic terrorist groups, including the Abu Sayyaf Group (ASG), in the south of the Philippine archipelago. From 2002–2015, the U.S. rotated 500–600 special operations forces regularly through the Philippines to assist in counterterrorism operations. That operation, Joint Special Operations Task Force–Philippines (JSOTF–P), ended during the first part of 2015.[45]

The U.S. presence in Mindanao continued at a reduced level until the Trump Administration. Alarmed by the terrorist threat there, the U.S. began Operation Pacific Eagle–Philippines (OPE–P) in 2017. The presence of 200–300 American advisers proved valuable to the Philippines in its 2017 battle against Islamist insurgents in Marawi.[46]

Despite a period of instability in 2020 and 2021 when then-Philippine President Rodrigo Duterte considered abrogating the 1998 U.S.–Philippines Visiting Forces Agreement, U.S.–Philippine defense ties have maintained positive momentum in recent years under the administration of President Ferdinand Marcos Jr. In April 2023, the two countries designated additional sites under the Enhanced Defense Cooperation Agreement (EDCA). The EDCA, signed in 2014, authorizes the rotational deployment of U.S. forces and prepositioning of matériel at agreed locations in the Philippines for security cooperation, joint training, and humanitarian assistance and disaster relief.[47] The four new sites brought the total of agreed locations to nine. Two of the newly announced locations are adjacent to the South China Sea, and two are located in areas of the Philippines that are geographically near Taiwan.[48]

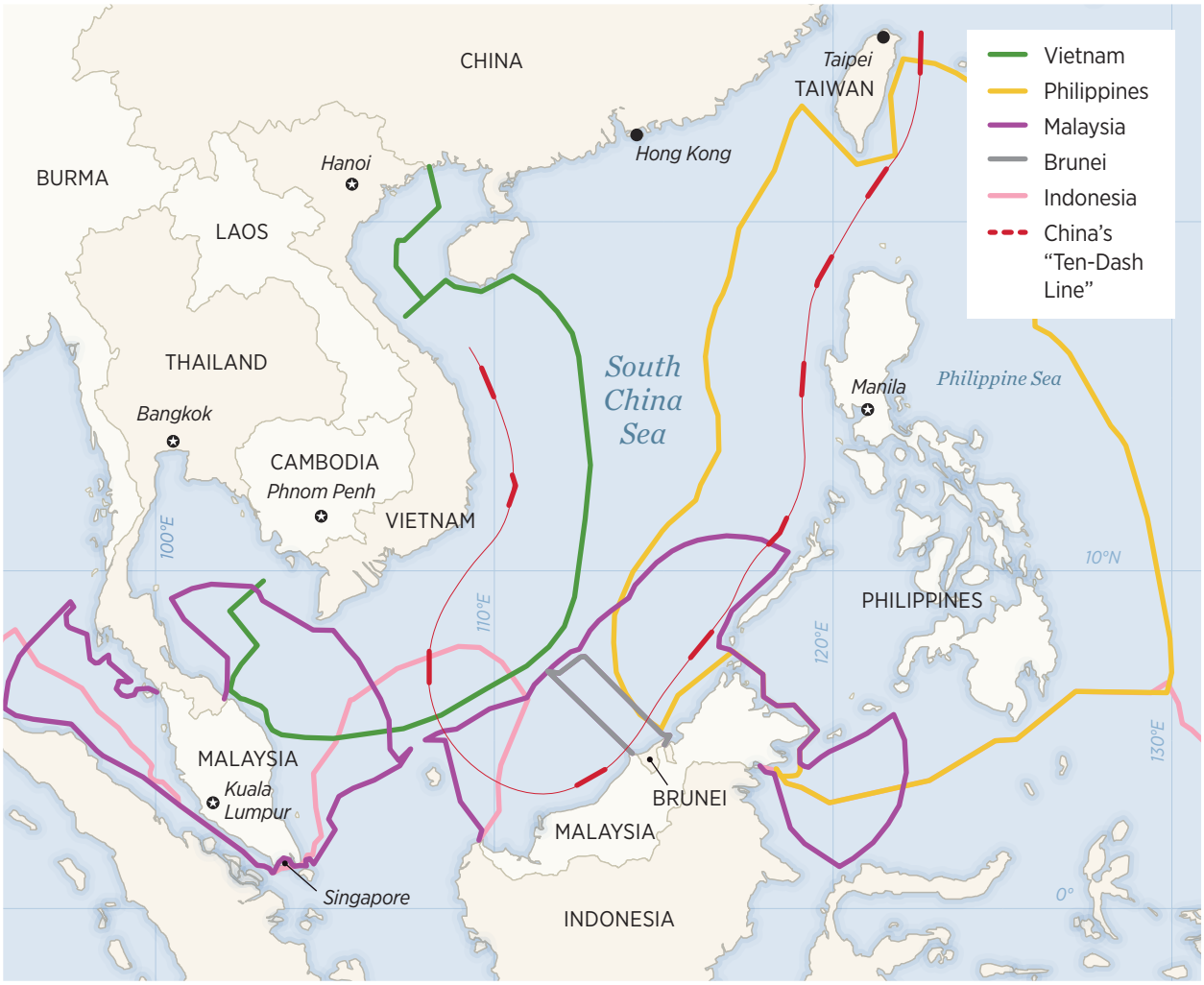
America's presence and capabilities in the Philippines have continued to deepen. In 2024, the U.S. Army deployed the Mid-Range Capability missile system, later renamed Typhon, to the Philippines for the first time.[49] The missile batteries, capable of long-range strikes and able to engage sea and air targets, remained in the Philippines as of early 2025.[50]

Despite a landmark 2016 United Nations Convention on the Law of the Sea (UNCLOS) arbitration ruling that China's claims over large areas of the Philippines' Exclusive Economic Zone (EEZ) are illegal and invalid, Chinese maritime aggression toward the Philippines in the South China Sea has escalated significantly.[51] Filipino efforts to resupply the *Sierra Madre*—a deliberately grounded World War II–era naval vessel that doubles as a military outpost at Second Thomas Shoal—have faced relentless interference from the Chinese Coast Guard as part of China's effort to intimidate Manila and erode the legitimacy of its territorial claims.[52] These provocative measures are often carried out on gray-hull warships retrofitted for "Coast Guard" activities, continuously challenging the Philippines' sovereignty and right to freedom of navigation in its own waters. In one particularly egregious incident in 2024, a Filipino sailor was severely injured when Chinese personnel armed with bladed weapons rammed, boarded, and attempted to scuttle Filipino vessels.[53] In August 2025, a Chinese naval destroyer collided with a Chinese Coast Guard cutter, killing two sailors as they were harassing a Filipino vessel operating in international waters.[54]

In recent years, the U.S. government has reiterated that any attack on the Philippines' armed forces, including in disputed territory, would be covered under the U.S.–Philippine Mutual Defense Treaty and would trigger U.S. intervention in defense of the Philippines.[55] In March 2025, Secretary of War Pete Hegseth reaffirmed this commitment, specifying that such an attack anywhere in the South China Sea would invoke U.S. mutual defense commitments.[56] Emboldened by this pledge to uphold the U.S.–Philippine Mutual Defense Treaty amid rising tensions with the PRC, Philippine Defense Secretary Gilberto Teodoro cited China's hostilities as an existential threat to his country's stability and

MAP 1

Exclusive Economic Zone (EEZ) Claims in the South China Sea



NOTE: Locations are approximate.
SOURCES: Center for Strategic and International Studies, Asia Maritime Transparency Initiative, "Maritime Claims of the Indo-Pacific," https://amti.csis.org/maritime-claims-map/ (accessed January 21, 2026), and *The Sankei Shimbun*. JAPAN Forward, "The 2023 Version of China's Map of Its Territory," 2023, https://japan-forward.com/wp-content/uploads/2023/09/The-2023-Version-of-Chinas-Map-of-Its-Territory-2.jpg (accessed January 21, 2026).

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the region at large. His remarks followed a surge in reckless aerial maneuvers by the People's Liberation Army Navy that buttressed his claims.[57]

During a trip to India in August 2025, Philippine President Marcos stated that the Philippines would inevitably become involved in any conflict over Taiwan. "There is no way that the Philippines can stay out [of a war] simply because of our physical geographic location," he told reporters. "If there is an all-out war, then we will be drawn into it."[58]

Thailand. The U.S.–Thai defense alliance is built on the 1954 Manila Pact, which established the now-defunct Southeast Asia Treaty Organization (SEATO), and the 1962 Thanat–Rusk agreement.[59] These were supplemented by the Joint Vision Statements for the Thai–U.S. Defense Alliance of 2012

and 2020.[60] In addition, Thailand gained improved access to American arms sales in 2003 when it was designated a "major, non-NATO ally."

Thailand's strategic location in Southeast Asia has made it an important part of America's network of alliances in Asia. During the Vietnam War, U.S. aircraft based in Thailand ranged from fighter-bombers and B-52s to reconnaissance aircraft. In the first Gulf War and again in the Iraq War, some of those same air bases were essential for the rapid deployment of American forces to the Persian Gulf. Access to these bases remains critical to U.S. global operations.

In July 2025, recurring tensions along the Thai–Cambodian border escalated into open conflict with Cambodian rocket attacks on Thai territory resulting in Thai civilian casualties and airstrikes on Cambodian military positions using American F-16 fighter and Swedish Gripen fighter aircraft. A cease-fire was negotiated thanks to the efforts of President Trump, but significant tensions remain.[61] Cambodia maintains close security cooperation with China, most prominently by allowing China to develop dual-use naval facilities at Ream Naval Base in Cambodia.

U.S. and Thai forces exercise together regularly. Their collaboration in the annual Cobra Gold exercises, which were initiated in 1982, builds on a partnership that began with the dispatch of Thai forces to the Korean War, during which Thailand's approximately 12,000 troops suffered more than 1,200 casualties.[62] Cobra Gold is the world's longest-running international military exercise and one of its largest.[63] A recent Cobra Gold, held from February 25 to March 7, 2025, involved more than 3,200 U.S. personnel with 30 partner nations participating either directly or as observers in the exercise.[64] In past years, a small number of Chinese personnel also participated, but only in humanitarian assistance drills.[65]

While U.S.–Thai security cooperation remains strong, U.S. relations with Thailand overall have been marred by persistent strain and acute crises in recent years that are idiosyncratic among U.S. treaty allies. Military coups in 2006 and 2014 limited military-to-military relations for more than a decade. This was due partly to standing U.S. law prohibiting assistance to regimes that result from coups against democratically elected governments and partly to U.S. government policy choices.

In 2017, Thailand adopted a junta-drafted constitution that institutionalized elements of military rule. Nonetheless, the United States welcomed Thailand's first general elections under this constitution in 2019 as "positive signs for a return to a democratic government that reflects the will of the people."[66] Since then, bilateral military engagement has rebounded with high-level engagement and arms transfers to the Thai military of major systems like Stryker armored vehicles and Black Hawk helicopters. However, the United States denied Thailand's requests to acquire F-35 fighter jets because of concerns that the Thai military was not capable of operating the aircraft.[67]

Thailand is the only Southeast Asian country that was never colonized and has long pursued a hedging strategy that seeks to maintain good relations among competing powers.[68] In the post–Cold War era, this tradition has contributed to Thailand's geopolitical drift away from the United States and toward China—a trend that has been further encouraged by the suppression of democratic institutions in Thailand, resulting tensions in U.S.–Thai bilateral relations, China's amenability to anti-democratic regimes, and expanding Chinese–Thai economic relations. The United States and Thailand have differing threat perceptions concerning China, and this has undermined the U.S.–Thai alliance's clarity of purpose.

Relations between the Thai and Chinese militaries have improved steadily over the years. The two military forces have engaged in joint naval exercises since 2005, joint counterterrorism exercises since 2007, and joint marine exercises since 2010 and conducted their first joint air force exercises in 2015.[69] The Thais conduct more bilateral military exercises with China than any other military in Southeast Asia. President Barack Obama's sanctioning of the military junta that took power in 2014 was out of sync with historical precedent in the bilateral relationship and opened the path to this enhanced Chinese military relationship.

Thailand has purchased Chinese military equipment for many years. As of August 2025, its purchase of a Chinese diesel submarine appeared to be progressing after years of inaction; other purchases in recent years have included significant buys of battle tanks and armored personnel carriers.[70] According to the Stockholm International Peace Research Institute (SIPRI), from 2006 to 2022, China

supplied significantly more military equipment to Thailand than was supplied by the U.S.[71]

These deals, however, have not been without difficulty. Thailand's 2017 acquisition of Chinese submarines, for example, has been stalled first by a combination of budget restraints, the priority of COVID-19 response, and public protest and more recently by Germany's refusal to allow export of the engines that the boats require; Thailand decided to move ahead with the purchase of Chinese submarines with Chinese engines in 2025.[72] Submarines could be particularly critical to Sino–Thai relations because their attendant training and maintenance would require a greater Chinese military presence at Thai military facilities.

Federated States of Micronesia, Republic of the Marshall Islands, and Republic of Palau. In the South Pacific, the Federated States of Micronesia (FSM), Republic of the Marshall Islands (RMI), and Republic of Palau, known collectively as the Freely Associated States, enjoy a unique defense partnership with the United States.[73] During World War II, these Pacific Islands were vitally important as the U.S. fought to gain a foothold in the Pacific theater in its campaign against Imperial Japan. After World War II, the Trust Territory of the Pacific Islands was administered by the United States and often used for nuclear testing; the 1954 Castle Bravo test, for example, which involved the largest U.S. bomb ever tested, was conducted at Bikini Atoll in the Marshall Islands.[74] As the FSM, RMI, and Palau gained independence, they elected to enter a special association with the United States: the Compact of Free Association (CoFA).

About every 20 years, each of the Freely Associated States negotiates a renewal of the CoFA with the U.S. that governs its defense, economic, and immigration affairs. The CoFAs grant the U.S. control of all FAS defense matters and the power to veto any presence of third-party nations in the Compacts. The United States exclusively operates armed forces and bases throughout the FAS while being responsible for their protection, and CoFA citizens serve in the U.S. armed forces. Some restrictions apply: The United States cannot employ nuclear weapons in Palauan territory and can store them in the FSM or RMI only during war or emergency.[75]

The United States also has the right of strategic denial. Strategic denial allows the U.S. to determine unilaterally which militaries are authorized to enter FAS territories.[76] As China's influence and operations throughout the Pacific Islands grow, including most recently in the Solomon Islands, the right to strategic denial becomes increasingly important.[77]

All of the Freely Associated States have a "shiprider" agreement that allows U.S. Coast Guard (USCG) personnel and law enforcement to work with local maritime law enforcement to protect regional resources.[78] Due to limited cutter availability, the Navy often has provided a platform for this program, which has suffered as naval warships have become less available. The USCG opened the Commander Carlton S. Skinner Building, located at USCG Forces Micronesia/Sector Guam, in 2022.[79] In 2021, the U.S. signed an agreement to build a new military base in the FSM.[80] The RMI hosts U.S. Army Garrison Kwajalein Atoll, the country's second-largest employer, and the Ronald Reagan Ballistic Missile Defense Test Site.[81]

With respect to Palau, its "[e]ligible...citizens are able to serve in the U.S. armed forces, and do so at a higher rate per capita than any U.S. state."[82] In 2020, Palau requested that the Pentagon build permanent military bases.[83] It is expected that a $118 million foundational installation to support the first Tactical Mobile Over-the-Horizon Radar will be operational by 2026 with one site along the northern isthmus of Babeldaob and another on Angaur.[84] In 2020, the 17th Field Artillery Brigade maneuvered from Guam to Palau as part of the Defense Pacific 20 exercise with a High Mobility Artillery Rocket System.[85] In 2021, Secretary of Defense Lloyd Austin hosted Palauan President Surangel Whipps Jr. to discuss defense-related matters.[86] In 2022, the 1st Air Defense Artillery Battalion, based out of Okinawa, held its first Patriot live-fire exercise in Palau.[87]

Australia. Australia is one of America's most important Indo-Pacific allies. U.S.–Australia security ties date back to World War I. They deepened during World War II when, as Japanese forces attacked the East Indies and secured Singapore, Australia turned to the United States to strengthen its defenses and American and Australian forces cooperated closely in the Pacific War. Those ties and America's role as the main external supporter of Australian security were codified in the Australia–New Zealand–U.S. (ANZUS) pact of 1951.

Today, the two nations' chief defense and foreign policy officials meet annually in the Australia–United States Ministerial (AUSMIN) process to address

such issues of mutual concern as security developments in the Asia–Pacific region, global security and development, and bilateral security cooperation.[88] Australia also has long granted the United States access to several joint facilities including space surveillance facilities at Pine Gap, which has been characterized as "arguably the most significant American intelligence-gathering facility outside the United States," and naval communications facilities on the North West Cape of Australia.[89]

In 2011, U.S. access was expanded with the U.S. Force Posture Initiatives (USFPI), which included Marine Rotational Force–Darwin and Enhanced Air Cooperation. The rotation of as many as 2,500 U.S. Marines for a set of six-month exercises near Darwin began in 2012. The current rotation is comprised of 2,500 Marines that participate in multiple live-fire and joint exercises.[90] In the past, these forces have deployed with assets that include an MV-22 Osprey squadron, UH-1Y Venom utility and AH-1Z Viper attack helicopters, and RQ-21A Blackjack drones.

The USFPI's Enhanced Air Cooperation component began in 2017, building on preexisting schedules of activity. New activities include "fifth generation integration, aircraft maintenance integration, aeromedical evacuation (AME) integration, refueling certification, and combined technical skills and logistics training."[91] Enhanced Air Cooperation has been accompanied by the buildout of related infrastructure at Australian bases including a massive fuel storage facility in Darwin.[92] Other improvements are underway at training areas and ranges in Australia's Northern Territories.[93]

In 2021, the United States, Australia, and the United Kingdom, which already enjoyed close security cooperation, inaugurated a new Australia–United Kingdom–United States initiative. A key component of this partnership is support for Australia's acquisition of "a conventionally armed, nuclear powered submarine capability at the earliest possible date, while upholding the highest non-proliferation standards."[94] Among other things, the partnership also focuses on improving cooperation in undersea robotic autonomous systems, long-range sensors, and hypersonic capabilities.[95]

On March 13, 2023, the AUKUS partners announced an arrangement under which Australia will acquire nuclear submarines, to be known as SSN-AUKUS, featuring U.K. submarine design and advanced U.S. technology. The next major milestone on this "optimum pathway" will be the arrival in 2027 of the first nuclear-powered U.S. submarine to be rotationally based in HMAS Stirling.[96]

Both Australia and the United Kingdom will deploy SSN-AUKUS, and both intend to begin domestic production before 2030. The U.K. plans to deliver its first SSN-AUKUS in the late 2030s, and Australia plans to deliver its first submarine in the early 2040s. The U.S. intends to sell three and as many as five *Virginia*-class submarines to Australia in the early 2030s. The agreement also includes increases in funding, training, port and personnel visits, rotations, and infrastructure projects.[97] Although maintaining political support for the decades-long commitments may prove challenging, the envisioned pathway should unleash a new era of AUKUS partnership and security in the Indo-Pacific.

This new cutting-edge cooperation under the USFPI and AUKUS comes on top of long-standing joint U.S.–Australia training, the most prominent example of which is Talisman Saber, a series of biannual exercises that involve U.S. Army, Navy, Air Force, and Marines as well as almost two-dozen ships, multiple civilian agencies, and participants embedded from other partner countries.[98]

In April 2023, the government of Prime Minister Anthony Albanese released what it described as "the most ambitious review of Defence's posture and structure since the Second World War."[99] This *Defence Strategic Review* assesses that the United States is no longer the "unipolar leader of the Indo-Pacific" and recommends that Australia adopt a strategy of denial with a focused force structure that prioritizes the "most significant military risks."[100] China's strategic intentions, demonstrated by its military buildups and provocative actions in the South China Sea and Pacific Islands, are assessed as likely to have a negative impact on Australian interests.[101] The Albanese government either agreed or agreed in principle to adopt or implement all of the review's 62 recommendations.[102]

In early August 2024, the United States and Australia announced plans to increase the rotational presence of U.S. forces in Australia by boosting maritime patrol, reconnaissance, and bomber aircraft capabilities.[103] At the same time, Australia signed a defense cooperation agreement with Indonesia to tighten intermilitary coordination and joint exercises.[104] Australia's precision-strike capabilities

and industrial-operational linkage with the United States were further bolstered early in 2025 by progress on a joint endeavor to co-manufacture Guided Multiple Launch Rocket Systems (GMLRS).[105] In addition, existing mineral refining facilities in Henderson, Australia, are being upgraded with Japanese investment to process rare earth minerals, mitigating the death grip China currently holds over the world in processing these critically important minerals for high-tech weaponry.

Singapore. The island state of Singapore is arguably America's closest non-ally partner in the Western Pacific. The agreements that support this security relationship are the 2015 U.S.–Singapore Enhanced Defense Cooperation Agreement (DCA), an update of a similar 2005 agreement, and the 1990 Memorandum of Understanding Regarding United States Use of Facilities in Singapore, which was renewed in 2019 for another 15 years.[106] The city-state also has ongoing defense ties to China and conducted a bilateral maritime drill in the South China Sea in May 2025.[107]

Pursuant to these agreements and other understandings, Singapore hosts U.S. naval ships and aircraft as well as Logistics Group Western Pacific, principal logistics command unit for the U.S. Seventh Fleet.[108] U.S. Navy P-8 Poseidon maritime patrol aircraft began rotational deployments to Singapore in 2015, and Littoral Combat Ships have deployed to Singapore since 2016.[109] The U.S. Air Force began rotational deployments of RQ-4 Global Hawk unmanned aircraft to Singapore in 2023.[110] Notably, the Changi Naval Base is capable of hosting U.S. aircraft carriers, which visit regularly; the USS *Carl Vinson* conducted the most recent port call in June 2025 .[111]

According to the U.S. Department of State, "[t]he United States has $8.38 billion in active government-to-government sales cases with Singapore under the Foreign Military Sales (FMS) system" and "[f]rom 2019 through 2021…authorized the permanent export of over $26.3 billion in defense articles to Singapore via Direct Commercial Sales (DCS)."[112] In addition, "more than 1,000 Singaporean military personnel participate in training, exercises, and Professional Military Education in the United States," and "Singapore has operated advanced fighter jet detachments in the continental United States for 27 years."[113]

In January 2020, it was announced that Singapore had been "formally approved to become the next customer of the F-35 Joint Strike Fighter, paving the way for a future sale."[114] Like others of its assets, the four F-35s were to be housed at training facilities in the U.S. and perhaps on Guam under an agreement reached in 2019.[115] In February 2024, it was reported that "Singapore's Defence Ministry plans to order eight more F-35A jets, which would bring the country's Joint Strike Fighter fleet to 20."[116]

New Zealand. New Zealand has been a U.S. ally since the 1951 ANZUS treaty. For much of the Cold War, U.S. defense ties with New Zealand were similar to those between America and Australia. In 1986, New Zealand was suspended from the ANZUS treaty for pursuing a "nuclear free zone" and barring nuclear-powered vessels from entering its 12-nautical-mile territorial sea.[117] The Kiwi government has become increasingly concerned about Chinese influence in the region, and the country's spy chief issued a warning about this influence in March 2025.[118] In February 2025, Wellington was shocked when Cook Islands, which New Zealand provides with security and financial support through a free association agreement, concluded a wide-reaching deal with China.[119]

Defense relations improved in the early 21st century as New Zealand committed forces to Afghanistan and dispatched an engineering detachment to assist the United States during the Iraq War. The 2010 Wellington Declaration and 2012 Washington Declaration, while not restoring full security ties, allowed the two nations to resume high-level defense dialogues.[120] As part of this warming of relations, New Zealand rejoined the multinational U.S.-led RIMPAC (Rim of the Pacific) naval exercise in 2012 and has participated in each iteration since then.

In 2013, Washington and Wellington announced the resumption of military-to-military cooperation, and in July 2016, the United States accepted an invitation from New Zealand to make a single port call, reportedly with no change in U.S. policy to confirm or deny the presence of nuclear weapons on the ship.[121] At the time of the visit in November 2016, both sides claimed to have satisfied their respective legal requirements.[122] Prime Minister John Key expressed confidence that the vessel was not nuclear-powered and did not possess nuclear armaments; the U.S. neither confirmed nor denied this.

The November 2016 visit occurred in a unique context, including an international naval review and a relief response to the Kaikoura earthquake.

Since then, there have been several other visits by U.S. Coast Guard vessels. In 2017, New Zealand lent one of its naval frigates to the U.S. Seventh Fleet following a deadly collision between the destroyer USS *Fitzgerald* and a Philippine container ship that killed seven American sailors.[123] In November 2021, the guided-missile destroyer USS *Howard* made a port call in New Zealand.[124]

In April and May 2024, a New Zealand Royal P-8A Poseidon conducted 11 missions to detect and deter evasions of United Nations Security Council resolutions with a particular focus on North Korea's testing of ballistic missiles.[125] In mid-summer 2024, the Royal New Zealand Navy maritime sustainment vessel arrived in Pearl Harbor to participate in RIMPAC 24.[126]

Prime Minister Christopher Luxon, elected in 2023, has ushered in a new era of responsible national security policy for New Zealand in a notable departure from the China-friendly policies of his predecessor, Jacinda Ardern. Luxon declared in a speech in August 2024 that New Zealand "can't achieve prosperity without security" and would need to increase its defense spending and work with other militaries in the region, especially traditional partners like Australia, Britain, NATO, and the United States.[127]

New Zealand is a member of the Five Eyes intelligence alliance with the U.S., Canada, Australia, and the United Kingdom[128] After a period of record attrition in the New Zealand Defence Force that led to the idling of three naval vessels and early retirement of the country's P-3 Orion fleet, New Zealand is reportedly considering "the possibility of... becoming a non-nuclear partner of AUKUS" and increasing overall resources allocated to defense.[129] Luxon's 2025 Defense Capability Plan aims to increase New Zealand's defense spending to 2 percent of GDP over the next eight years with significant investments in increased strike capabilities in recognition of the fact that New Zealand faces "its most challenging and dangerous strategic environment [in] decades."[130]

Taiwan. When the United States shifted its recognition of the government of China from the Republic of China (Taiwan) to the People's Republic of China (PRC) in 1979, it also declared certain commitments to Taiwan's security. These commitments are embodied in the Taiwan Relations Act (TRA) and the subsequent "Six Assurances."[131] In a critical move, key documents declassified late in the first Trump Administration further specified that sustained provision of weapons to Taiwan will be a function of China's threat to take military action.[132]

The TRA is an American law, not a treaty. Under the TRA, the United States maintains programs, transactions, and other relations with Taiwan through the American Institute in Taiwan (AIT). Except for the Sino–U.S. Mutual Defense Treaty, which had governed U.S. security relations with Taiwan and was terminated by President Jimmy Carter following the shift in recognition to the PRC, all other treaties and international agreements made between the Republic of China and the United States remain in force.

The TRA requires the United States "to provide Taiwan with arms of a defensive character."[133] It also states that the U.S. "will make available to Taiwan such defense articles and services in such quantity as may be necessary to enable Taiwan to maintain a sufficient self-defense capability."[134] The U.S. has implemented these provisions of the act through sales of weapons to Taiwan.

The TRA states that it is also U.S. policy both "to consider any effort to determine the future of Taiwan by other than peaceful means, including by boycotts or embargoes, a threat to the peace and security of the Western Pacific area and of grave concern to the United States" and "to maintain the capacity of the United States to resist any resort to force or other forms of coercion that would jeopardize the security, or the social or economic system, of the people on Taiwan."[135] To this end:

> The President is directed to inform the Congress promptly of any threat to the security or the social or economic system of the people on Taiwan and any danger to the interests of the United States arising therefrom. The President and the Congress shall determine, in accordance with constitutional processes, appropriate action by the United States in response to any such danger.[136]

Supplementing the TRA are the "Six Assurances" issued by President Ronald Reagan in a secret July 1982 memo and later publicly released and the subject of hearings held by the Senate Committee on Foreign Relations and the House Committee on Foreign Affairs in August 1982.[137] These assurances,

which were intended to moderate the third Sino–American communiqué, itself generally seen as one of the "Three Communiqués" that form the foundation of U.S.–PRC relations, specified that:

In negotiating the third Joint Communiqué with the PRC, the United States:

1. *has not agreed to set a date for ending arms sales to Taiwan;*
2. *has not agreed to hold prior consultations with the PRC on arms sales to Taiwan;*
3. *will not play any mediation role between Taipei and Beijing;*
4. *has not agreed to revise the Taiwan Relations Act;*
5. *has not altered its position regarding sovereignty over Taiwan;*
6. *will not exert pressure on Taiwan to negotiate with the PRC.*[138]

Although the United States sells Taiwan a variety of military equipment, provides limited training to Taiwanese military personnel, and sends observers to Taiwan's major annual exercises, it does not engage in joint exercises with Taiwan's armed forces. Some Taiwan military officers attend professional military education institutions in the United States, and there are regular high-level meetings between senior U.S. and Taiwan defense officials, both uniformed and civilian.

The United States does not maintain any military bases on Taiwan. However, in late 2021, after reports of an uptick in the number of U.S. military advisers in Taiwan, President Tsai Ing-wen acknowledged that they had been present at least since 2008.[139] In April 2024, a U.S. congressional report put the number of these advisers at 41, but media reports indicate that there could be as many as 200.[140] Most will continue to focus on training Taiwanese soldiers to use U.S.-sourced military equipment and to carry out military maneuvers with a view to defending Taiwan against a hypothetical attack by China.

In October 2024, the United States approved a $2 billion arms sale to Taiwan that featured the delivery of three National Advanced Surface-to-Air Missile Systems (NASAMS) along with radar systems valued at $828 million.[141] As announced by the Pentagon's Defense Security Cooperation Agency, the sale also included coveted Advanced AMRAAM Extended Range surface-to-air missiles. In December 2025, the Trump Administration announced an $11.1 billion arms sale package to Taiwan that included HIMARS rocket systems, howitzers, Javelin anti-tank missiles, and drones.

In 2024 and 2025, China continued to intensify its military activities around the island nation with the People's Liberation Army Air Force (PLAAF) and People's Liberation Army Navy (PLAN) constantly testing Taiwan's detection and defenses. The October 2024 Joint Sword 2024B exercise deployed 111 PLAAF aircraft that engaged in daily incursions into Taiwanese airspace and a nearly constant naval presence.[142] These gray-zone tactics make clear China's intent to desensitize the world to its constant military presence around the island and prepare for real-world combat scenarios. Taiwan responded to this increased aggression by announcing a 7.7 percent increase in its 2024 defense budget to roughly $19 billion and approximately 2.5 percent of GDP.[143]

President Lai Ching-te announced major defense increases in 2025 with Taiwan set to reach 3.32 percent of GDP by 2026 and 5 percent of GDP by 2030. President Lai announced the 5 percent increase in a speech at a Taiwanese naval base, stating that the increase "not only demonstrates our country's determination to safeguard national security and protect democracy, freedom and human rights," but also "shows our willingness to stand shoulder-to-shoulder with the international community to jointly exert deterrent power and maintain peace and stability in the Indo-Pacific region."[144]

Vietnam, Malaysia, and Indonesia. In Southeast Asia, the U.S. has two major ongoing defense-related initiatives to expand its relationships and diversify the geographical spread of its forces:

- The Maritime Security Initiative, which is intended to improve the security capacity of U.S. partners, and
- The Pacific Deterrence Initiative (PDI), which bolsters America's military presence and makes it more accountable.

Among the most important of the bilateral partnerships in this effort are those with Vietnam, Malaysia, and Indonesia. None of these relationships is as extensive and formal as America's relationship with Singapore, India, and U.S. treaty allies, but all are of growing significance.

Vietnam. After decades without diplomatic relations following the Vietnam War, improved bilateral relations in recent years have led to Vietnam's emergence as a nascent U.S. security partner. Relations have been strengthened by U.S. efforts to assist Vietnam in mitigating continued dangers from Vietnam War–era unexploded ordnance (UXO) as well as bilateral efforts to address other war-related issues. Since 1993, for example, "the U.S. government [has] contributed more than $230 million for UXO efforts," and "UXO assistance continues to be a foundational element of U.S.–Vietnam relations."[145]

Diplomatic relations between the United States and Vietnam were normalized in 1995. Since then, the two countries also have gradually improved their defense relationship, codified in 2011 with a Memorandum of Understanding (MOU) Advancing Bilateral Defense Cooperation.[146] In 2015, the MOU was updated by the Joint Vision Statement on Defense Cooperation, which includes references to such issues as "defense technology exchange" and was implemented under a three-year 2018–2020 Plan of Action for United States–Viet Nam Defense Cooperation that was agreed upon in 2017.[147]

In 2022, the two sides updated their defense MOU, and in 2023, they upgraded the bilateral relationship to a Comprehensive Strategic Partnership that provides an "overarching framework" for relations that "have become increasingly cooperative and comprehensive, evolving into a flourishing partnership that spans political, economic, security, and people-to-people ties."[148] Nevertheless, significant limits on the U.S.–Vietnam security relationship persist, including a Vietnamese defense establishment that is very cautious in its selection of defense partners; ties between the Communist Party of Vietnam (CPV) and the Chinese Communist Party (CCP); and a Vietnamese foreign policy that seeks to balance relationships with all major powers.

The most significant development with respect to security ties over the past several years has been relaxation of the U.S. ban on sales of arms to Vietnam. The U.S. lifted the embargo on maritime security–related equipment in the fall of 2014 and then ended the embargo on arms sales completely in 2016. The embargo had long served as a psychological obstacle to Vietnamese cooperation on security issues, but lifting it has not changed the nature of the articles that are likely to be sold.

Most transfers have been to the Vietnamese Coast Guard and include provision under the Excess Defense Articles (EDA) program of three decommissioned *Hamilton*-class cutters and 24 Metal Shark patrol boats as well as infrastructure support.[149] Vietnam is scheduled to take delivery of six Insitu ScanEagle unmanned aerial system (UAS) drones for its Coast Guard.[150] The U.S. is also providing T-6 turboprop trainer aircraft.[151] Agreement has yet to be reached with respect to sales of bigger-ticket items like refurbished P-3 maritime patrol aircraft, but they have been discussed.

The U.S.–Vietnam Cooperative Humanitarian and Medical Storage Initiative (CHAMSI) is designed to enhance cooperation on humanitarian assistance and disaster relief by, among other things, prepositioning related American equipment in Da Nang, Vietnam.[152] This is a sensitive issue for Vietnam and is not often referenced publicly, but it was emphasized during Vietnamese Prime Minister Nguyen Xuan Phuc's visit to Washington in 2017 and again during Secretary of Defense James Mattis's visit to Vietnam in 2018. In the same year, Vietnam participated in RIMPAC for the first time.

There have been three high-profile port calls to Vietnam since 2018. Early that year, the USS *Carl Vinson* and its escort ships visited Da Nang in the first port call by a U.S. aircraft carrier since the Vietnam War.[153] Another carrier, USS *Theodore Roosevelt*, visited Da Nang in March 2020, and the *USS Ronald Reagan* and two guided-missile cruiser escorts visited Da Nang in 2023.[154] These are significant signals from Vietnam about its receptivity to partnership with the U.S. military—messages underscored very subtly in Vietnam's *2019 Viet Nam National Defence* white paper.[155] The U.S., like others among Vietnam's security partners, remains officially restricted to one port call a year with an additional one to two calls on Vietnamese bases being negotiable.

Vietnam maintains close ties to China, especially economically, but China's nine-dash line claims against Vietnamese-claimed features in the South China Sea are a consistent source of dispute that

have boiled over in the past. In 2014, a state-owned Chinese oil company placed a deep-sea drilling rig in disputed waters and dispatched 80 ships (including seven military vessels) to support the rig. When Vietnam sent ships to disrupt the operation, China turned water cannons on the Vietnamese ships and rammed several of them, leaving Vietnamese sailors injured and damaging the vessels.[156] The incident caused anti-Chinese riots in Vietnam.[157]

Malaysia. The United States and Malaysia, despite occasional political differences, "have maintained steady defense cooperation since the 1990s." Examples of this cooperation have included Malaysian assistance in the reconstruction of Afghanistan and involvement in antipiracy operations "near the Malacca Strait and, as part of the international anti-piracy coalition, off the Horn of Africa" as well as "jungle warfare training at a Malaysian facility, bilateral exercises like Kris Strike, and multilateral exercises like Cobra Gold, which is held in Thailand and involves thousands of personnel from several Asian countries plus the United States."[158] The U.S. has occasionally flown P-3 and/or P-8 patrol aircraft out of Malaysian bases in Borneo.

In addition to cooperation on counterterrorism, the United States is focused on helping Malaysia to ensure maritime domain awareness. In 2020, then-Deputy Assistant Secretary of Defense for South and Southeast Asia Reed B. Werner summarized recent U.S. assistance in this area:

> [M]aritime domain awareness is important for Malaysia, given where it sits geographically. Since 2017, we have provided nearly US$200 million (RM853 million) in grant assistance to the Malaysian Armed Forces to enhance maritime domain awareness, and that includes ScanEagle unmanned aerial vehicles (UAV), maritime surveillance upgrades, and long-range air defence radar.[159]

Malaysia has also been upgrading its fleet of fighter aircraft. In February 2023, Malaysia awarded a $920 million contract to Korea Aerospace Industries for 18 FA-50 light attack aircraft, the first of which is to be delivered in 2026.[160]

South China Sea territorial disputes continue to strain diplomatic ties between China and Malaysia. China's "2023 Standard Map," which Malaysia and other regional parties rejected, shows claims to the Luconia Shoals, which Malaysia considers to be part of its EEZ.[161] Chinese Coast Guard incursions near Malaysian oil and gas operations have likewise fomented consternation in Kuala Lumpur. Tensions were particularly elevated during a 2020 maritime incident involving a standoff with the Petronas-contracted West Capella vessel.[162] By early 2024, increased Chinese activity at Luconia Shoals had prompted the deployment of additional Malaysian naval resources.[163]

Malaysia has improved security relations with the United States and Japan in recent years partly because of concerns about China's designs on the South China Sea. In April 2024, Malaysia and Japan conducted joint drills in the South China Sea that featured the Japan Maritime Self-Defense Force.[164] Nevertheless, China and Malaysia signed a five-year trade agreement during a June 2024 visit by Chinese Premier Li Qiang.[165]

Indonesia. The U.S.–Indonesia defense relationship was revived in 2005 following a period of estrangement caused by American concerns about the Indonesian government's violations of human rights. It now includes regular joint exercises, port calls, and sales of weaponry. Because of their impact on the operating environment in and around Indonesia, as well as the setting of priorities in the U.S.–Indonesia relationship, the United States has also worked closely with Indonesia's defense establishment to reform Indonesia's strategic defense planning processes.

Indonesia has an active territorial dispute with China in the South China Sea, particularly around the Natuna Islands.[166] Tensions have grown over the past several years as a result of repeated incursions by Chinese fishing vessels and coast guard ships into Indonesian waters. In October 2024, Indonesian patrol ships expelled a Chinese coast guard ship that had disrupted a survey by an Indonesian state-owned energy company.[167] As a result, Indonesian military modernization has accelerated along with long-standing and long-stalled ASEAN efforts to negotiate a code of conduct for the South China Sea with China.[168]

Indonesia's traditional policy of balancing alignment among multiple powers continues under President Prabowo Subianto, who assumed office in October 2024. In November 2024, true to its "free and active" foreign policy doctrine, Indonesia held its first bilateral naval exercise with Russia, Orruda

2024, in the Java Sea near Surabaya. The exercise involved four Russian warships and included a submarine visit.[169]

U.S.–Indonesia military cooperation is governed by the 2010 Framework Arrangement on Cooperative Activities in the Field of Defense, the 2015 Joint Statement on Comprehensive Defense Cooperation, and the 2010 Comprehensive Partnership.[170] These agreements have encompassed "more than 200 bilateral military engagements a year" and cooperation in six areas: "maritime security and domain awareness; defense procurement and joint research and development; peacekeeping operations and training; professionalization; HA/DR [Humanitarian Assistance/Disaster Relief]; and countering transnational threats such as terrorism and piracy."[171]

In 2021, the agreements framed new progress in the relationship that included breaking ground on a new coast guard training base, inauguration of a new Strategic Dialogue, and the largest-ever U.S.–Indonesia army exercise.[172] In 2022, this exercise, Garuda Shield, involved "more than 4,000 combined forces from 14 countries."[173] As of January 2025, the U.S. "ha[d] $1.88 billion in active government-to-government sales cases with Indonesia under the Foreign Military Sales (FMS) system."[174] In February 2022, the U.S. agreed to sell Indonesia "up to 36" F-15s and related equipment and munitions worth $14 billion.[175] In 2024, it was reported that Indonesia had negotiated an agreement with Boeing to purchase 24 F-15EX jets.[176] In June 2024, the U.S. and Indonesia conducted Exercise Cooperation Afloat Readiness Training (CARAT) Indonesia, marking the 30th iteration of the exercise and commemorating 75 years of diplomatic relations.[177]

The United States and Indonesia also have signed two of the four foundational information-sharing agreements that the U.S. maintains with its closest partners: the General Security of Military Information Agreement (GSOMIA) and Communications Interoperability and Security Memorandum of Agreement (CISMOA).

Afghanistan. On October 7, 2001, U.S. forces invaded Afghanistan in response to the September 11, 2001, terrorist attacks on the United States. This was the beginning of Operation Enduring Freedom to combat al-Qaeda and its Taliban supporters. The U.S., in alliance with the U.K. and anti-Taliban Afghan Northern Alliance forces, ousted the Taliban from power in December 2001. Most Taliban and al-Qaeda leaders fled across the border into Pakistan's Federally Administered Tribal Areas where they regrouped and in 2003 initiated an insurgency in Afghanistan that would endure for 20 years.

In 2018, U.S. Special Envoy Zalmay Khalilzad initiated talks with the Taliban in Doha, Qatar, in an attempt to find a political solution to the conflict and encourage the group to negotiate with the Afghan government.[178] In April 2021, remarking that America's "reasons for remaining in Afghanistan are becoming increasingly unclear," President Joseph Biden announced that the U.S. would be withdrawing its remaining 2,500 soldiers by September 11, 2021.[179]

As the final contingent of U.S. forces was leaving Afghanistan in August 2021, the Taliban launched a rapid offensive across the country, seizing provincial capitals and eventually the national capital, Kabul, in a matter of weeks. During the Taliban offensive, Afghan President Ashraf Ghani fled the country for the United Arab Emirates (UAE), and the Afghan National Defense and Security Forces (ANDSF) largely abandoned their posts.[180] Amid the chaos, a suicide bombing attack on the airport perimeter on August 26 killed 13 U.S. military personnel and nearly 200 Afghans. Islamic State of Iraq and ash-Sham–Khorasan (ISIS-K), the local branch of ISIS, claimed responsibility for the attack, and the Biden Administration subsequently launched drone strikes on two ISIS-K targets.[181]

The last U.S. forces were withdrawn on August 30, 2021, and the Taliban soon formed a new government comprised almost entirely of hard-line elements of the Taliban and Haqqani Network, including several individuals on the U.S. government's Specially Designated Global Terrorists list.[182] Since seizing power, the Taliban government has hunted down and executed hundreds of former government officials and members of the ANDSF. It also has cracked down on Afghanistan's free press, banned education for girls beyond sixth grade while the daughters of several Taliban leaders attend school in Pakistan and the UAE, and curtailed the rights of women and minorities. Under Taliban rule, the Afghan economy has collapsed.

The United States and most other countries have refused to offer the new Taliban government diplomatic recognition. Analysts believe al-Qaeda and ISIS-K are still operating in Afghanistan and

intend to conduct terrorist attacks abroad, including attacks against the U.S.[183] In August 2022, a U.S. drone strike killed al-Qaeda leader Ayman al Zawahari, who was discovered residing in a safehouse in Kabul.[184] The U.S. government claimed the Taliban had violated its agreement with the U.S., reached at Doha, in which it pledged not to host al-Qaeda and other international terrorist groups.[185]

Most ambassadors still stay away from Kabul, but the same cannot be said for Russia and China. In July 2025, Russia became the first country to recognize the Taliban government, giving rise to discussions about potential joint investment projects.[186] In 2024, CCP General Secretary Xi Jinping accepted the Taliban ambassador's credentials, and in 2025, China's foreign minister visited the country to discuss whether Kabul might possibly join the Belt and Road Initiative (BRI).[187]

The Taliban–Haqqani government has been the target of attacks, violence, and assassinations from ISIS-K. The Islamist extremist group has been competing with the Taliban–Haqqani Network alliance for territory and recruits ever since its emergence in 2015. Meanwhile, the Pakistani Taliban, allies of the Afghan Taliban and Haqqani Network, have escalated attacks against neighboring Pakistan since the withdrawal of U.S. forces from Afghanistan, straining relations between Islamabad and Kabul. In late 2024 and early 2025, the Taliban government itself became divided by a sharpening rift between the Haqqani Network and the Afghan Taliban leadership based in Kandahar.[188]

Pakistan. After decades of tactical collaboration during the Cold War, Pakistan and the United States developed an often troubled relationship after the U.S. invasion of Afghanistan in 2001. During the early stages of the war, the U.S. and NATO relied heavily on logistical supply lines running through Pakistan to resupply anti-Taliban coalition forces. For roughly the first decade of the war, approximately 80 percent of U.S. and NATO supplies traveled through Pakistani territory. Those amounts decreased progressively as the U.S. and allied troop presence decreased.

In the late 2000s, tensions emerged in the relationship when the United States alleged that Pakistan was providing a safe haven to the Taliban and its allies as they intensified their insurgency in Afghanistan. The Taliban's leadership council was located in Quetta, the capital of Pakistan's Baluchistan province. U.S.–Pakistan relations suffered an acrimonious rupture in 2011 when U.S. special forces conducted a raid on Osama bin Laden's hideout in Abbottabad less than a mile from a prominent Pakistani military academy.[189]

Since 2015, U.S. Administrations have refused to certify that Pakistan has met requirements to crack down on the Haqqani Network, an Afghan terrorist group with known links to Pakistan's Inter-Services Intelligence Agency.[190] Relations deteriorated further in 2017 when President Trump suspended billions of dollars of U.S. military assistance to Pakistan and declared that "[w]e can no longer be silent about Pakistan's safe havens for terrorist organizations, the Taliban, and other groups that pose a threat to the region and beyond."[191]

Despite harboring and supporting a variety of known terrorist groups that operate in Afghanistan and Kashmir, Pakistan has been subject to terrorism from anti-state extremist groups, including the Pakistani Taliban (TTP). In the late 2000s and early 2010s, the TTP engaged in a bloody campaign of terrorism against the Pakistani state; from 2008–2013, approximately 2,000 civilians were killed in terrorist attacks each year. The Pakistan military launched a series of operations against these groups in 2014 and succeeded in progressively reducing terrorist violence in the years that followed.[192]

However, after the Afghan Taliban assumed power in Kabul, the number of attacks on Pakistan civilian and military targets spiked dramatically.[193] Islamabad has repeatedly accused the Taliban government in Kabul of harboring the TTP and ISIS-K—the two groups that took credit for most of these attacks—or failing to rein in their activities. Tensions reached a tipping point in April 2022 when the Taliban accused Pakistan of launching cross-border raids into Afghanistan to target these groups and causing dozens of civilian casualties in the process.[194]

The Pakistani government's peace negotiations with the TTP have produced a cycle of temporary cease-fires punctuated by cycles of violence and terrorism against civilians and Pakistani security personnel. Pakistan claims that the Taliban-led government in Kabul is either collaborating with the Pakistani Taliban or tacitly permitting them to use Afghan soil to launch attacks inside Pakistan. "With Taliban acquiescence, and at times support, TTP has intensified attacks inside Pakistan," a U.N.

Security Council Committee reported in 2024, including attacks on Chinese nationals that have strained ties between Islamabad and Beijing.[195]

Pakistan–U.S. relations improved modestly from 2018–2021 as Pakistan involved itself in bringing the Afghan Taliban to the negotiating table in Doha, but they have been notably strained since the U.S. withdrawal from Afghanistan. President Biden reportedly refused to engage in direct communications with his Pakistani counterpart, and Deputy Secretary of State Wendy Sherman visited Pakistan in October 2021 to discuss "the importance of holding the Taliban accountable to the commitments they have made." Days earlier, she noted that "[w]e don't see ourselves building a broad relationship with Pakistan. And we have no interest in returning to the days of hyphenated India–Pakistan."[196]

In a shocking revelation in December 2024, a senior White House official said that Pakistan was developing intercontinental ballistic missile capabilities that would allow it to "strike targets well beyond South Asia, including the United States."[197] Given that Pakistan's only real geopolitical rival—India—is already covered by its short-range and medium-range arsenal, Deputy National Security Adviser Jon Finer admitted that "it's hard for us to see Pakistan's actions as anything other than an emerging threat to the United States."[198] The revelation was paired with the announcement of unprecedented new sanctions on Pakistan's state-run ballistic missile program.[199]

In addition to a deteriorating security situation and relationship with the United States, Pakistan has been subject to paralyzing economic and political crises in recent years. Prime Minister Imran Khan was ousted from power in April 2022 after losing a no-confidence vote in parliament and was later barred from running for office for five years based on charges that he insists are politically motivated. Khan's arrest on corruption charges in May 2023 was followed by widespread protests.[200] However, by month's end, Khan was released, the protests abated, and several members of his political party defected.[201] He was arrested again in August 2023 on corruption charges and since then has remained in prison facing charges in over 100 court cases.

In 2024, Khan was sentenced to 24 years in prison for selling state gifts and leaking state secrets. Those sentences were suspended months later, but in January 2025, Khan was sentenced to 14 years in prison in a separate corruption case.[202] Former Prime Minister Shahbaz Sharif cobbled together a patchwork coalition to govern the country following national elections in February 2024.

Pakistan has pursued relations with China over the past decade. The South Asian nation is one of the top recipients of Chinese BRI investment, including investment in the port of Gwadar, which could serve Chinese naval vessels.[203] Pakistan has also received substantial security assistance from China; according to one estimate, as much as 80 percent of Pakistan's weaponry used during the 2025 India–Pakistan War came from China.[204]

Pakistan's economy is teetering on the verge of collapse with skyrocketing inflation, dwindling foreign exchange reserves, and a growing and unsustainable mountain of government debt. These problems were made even worse by devastating floods in 2022 that killed thousands and affected millions. The Pakistani government is seeking billions of dollars in aid simply to meet its growing debt obligations but has found multilateral lenders like the International Monetary Fund and traditional patrons like Saudi Arabia and China increasingly unwilling to provide relief on favorable terms.

Pakistan's Nuclear Weapons Stockpile. In September 2021, the *Bulletin of the Atomic Scientists* estimated that Pakistan "now has a nuclear weapons stockpile of approximately 165 warheads." The report added that "[w]ith several new delivery systems in development, four plutonium production reactors, and an expanding uranium enrichment infrastructure, however, Pakistan's stockpile... could grow."[205] It is therefore highly possible that approximately 200 warheads could be in Pakistan's arsenal by the end of 2025.

The possibility that terrorists could gain effective access to Pakistani nuclear weapons is contingent on a complex chain of circumstances. Concern about the safety and security of Pakistan's nuclear weapons increases when India–Pakistan tensions increase. If Pakistan were to move its nuclear assets or (worse) take steps to mate weapons with delivery systems, the likelihood of theft or infiltration by terrorists could well increase.

Increased reliance on non-strategic nuclear weapons is of particular concern because launch authorities for such weapons are typically delegated to lower-tier field commanders far from the central authority in Islamabad. This could give these

commanders the ability to launch nuclear weapons on their own authority in times of acute crisis or conflict. Another concern is that miscalculations could lead to regional nuclear war if India's leaders were to lose confidence that nuclear weapons in Pakistan are under government control or were to assume that they were under Pakistani government control after they had ceased to be. In this sense, either side could trigger a preemptive or surprise nuclear strike on the other with little to no tactical warning.

There are additional concerns that Islamist extremist groups with links to the Pakistan security establishment could exploit those links to gain access to nuclear weapons technology, facilities, and/or materials. The realization that Osama bin Laden stayed for six years within a mile of Pakistan's premier defense academy has fueled concern that al-Qaeda can operate relatively freely in parts of Pakistan. The Nuclear Threat Initiative (NTI) ranked Pakistan's weapons-grade materials as 19th least secure in 2023 with only Iran's and North Korea's ranked as less secure at 21st and 22nd, respectively.[206] In its 2020 report, the NTI assessed that the "[m]ost improved among countries with materials in 2020 is Pakistan, which was credited with adopting new on-site physical protection and cybersecurity regulations, improving insider threat prevention measures, and more."[207] In 2023, however, it reported that "[e]ight countries—France, India, Iran, Israel, North Korea, Pakistan, Russia, and the United Kingdom—have increased their stocks of weapons-usable nuclear materials, in some cases by thousands of kilograms per year, undermining minimization and elimination efforts and increasing the risk of theft."[208]

There is the additional (though less likely) scenario of extremists gaining access as the state collapses. Although Pakistan remains unstable because of its weak economy, regular terrorist attacks, sectarian violence, civil–military tensions, and the growing influence of religious extremist groups, a total collapse of the Pakistani state is highly improbable. The country's most powerful institution, the 550,000-strong army that has ruled for almost half of Pakistan's existence, would almost certainly intervene and reassume control if the political situation began to unravel. The potential breakup of the Pakistani state would have to be preceded by the disintegration of the army, which currently is not likely to happen.

Pakistan–India Conflict. India and Pakistan have fought four wars since partition in 1947, including conflicts in 1947, 1965, 1971, and 1999. Deadly border skirmishes across the Line of Control (LoC) in Kashmir, a disputed territory claimed in full by both India and Pakistan, are common occurrences.

With terrorist groups operating relatively freely in Pakistan and maintaining links to its military and intelligence services, there is a moderate risk that the two countries might eventually engage in another conflict. Pakistan's recent focus on incorporating tactical nuclear weapons into its warfighting doctrine has also raised concern that conflict now involves a higher risk of nuclear exchange. Early in 2019, Pakistan conducted several tests of its nuclear-capable, short-range NASR ballistic missiles.[209]

On December 25, 2015, Indian Prime Minister Narendra Modi made an impromptu visit to Lahore—the first visit to Pakistan by an Indian leader in 12 years—to meet with Prime Minister Nawaz Sharif. The visit created goodwill between the two countries and raised hope that official dialogue would soon resume. As happened frequently in the past, however, violence marred and undermined the diplomatic opening. One week after the meeting, terrorists attacked an Indian airbase at Pathankot, killing seven Indian security personnel.[210] Ever since then, a comprehensive India–Pakistan dialogue has remained frozen, although the two governments still communicate regularly through various channels.

Despite New Delhi's insistence that Pakistan take concrete, verifiable steps to crack down on terrorist groups before a comprehensive dialogue covering all outstanding issues—including the Kashmir dispute—can resume, the past few years have been marred by occasional terrorist attacks and cross-border shelling. In addition to the January 2016 attack on the Indian airbase at Pathankot, the Pakistan-based Jaish-e-Mohammed (JeM) terrorist group was responsible for a February 2018 attack on an Indian army camp in Kashmir and a February 2019 attack on Indian security forces in Kashmir—the deadliest single terrorist attack in the disputed region since the eruption of an insurgency in 1989.[211]

Following the 2019 attack, India launched an even more daring cross-border raid. For the first time since the Third India–Pakistan War of 1971, the Indian air force crossed the LoC and dropped

ordnance inside Pakistan proper (as opposed to disputed Kashmir), targeting several JeM training camps in Khyber Pakhtunkhwa province.[212] Delhi stressed that the "non-military" operation was designed to avoid civilian casualties and was preemptive in nature because India had credible intelligence that JeM was attempting other suicide attacks in the country.

In response, Pakistan launched fighter jets to conduct their own strike on targets located on India's side of the LoC in Kashmir, prompting a dogfight that resulted in the downing of an Indian MiG-21. Pakistan released the captured MiG-21 pilot days later, ending the brief but dangerous crisis.[213] Skirmishes at the LoC continued through 2020, but by early 2021, India and Pakistan were experiencing at least a partial diplomatic thaw as both countries dealt with the global COVID-19 pandemic. That February, both countries agreed to observe a strict cease-fire along the LoC, and in March, Pakistan's Chief of Army Staff, General Qamar Javed Bajwa, declared in a speech that "it is time to bury the past and move forward."[214]

In March 2022, India accidentally fired a cruise missile into Pakistan. The unarmed missile flew roughly 100 kilometers into Pakistan and crashed harmlessly without casualties. The Indian government blamed a "technical malfunction" during "routine maintenance."[215] Pakistan called the launch irresponsible and demanded a "joint probe to accurately establish the facts" in a response that one correspondent characterized as "measured."[216]

In January 2023, India notified Pakistan that it was seeking modification of the more than six-decade-old Indus Water Treaty, which governs water-sharing arrangements between the two countries, after Pakistan objected to the construction of an Indian dam on the Chenab river.[217] India sent another notification in September 2024 requesting that the terms of the treaty be renegotiated, but to no avail.

In a March 2025 interview, Indian Prime Minister Modi showed little appetite for a grand rapprochement with Pakistan, noting that "every noble attempt at fostering peace was met with hostility and betrayal" and urging Pakistan to "abandon the path of terrorism."[218] In April 2025, India accused Pakistan of backing the terrorists who committed the Pahalgam terrorist attack in Indian-administered Jammu and Kashmir. In May 2025, in the wake of the terrorist attack, India and Pakistan engaged in a brief military conflict in which they exchanged air, missile, and drone strikes. After four days, both sides announced a cease-fire, which thus far has lasted.[219]

India. During the Cold War, U.S.–India military cooperation was minimal except for a brief period during and after the China–India border war in 1962 when the U.S. provided India with supplies, arms, and ammunition. The rapprochement was short-lived, and the U.S. suspended arms and aid to India following the second Indo–Pakistan war in 1965.

The relationship was largely characterized by mistrust in the 1970s under the Nixon Administration, and America's ties with India hit a low point during the third Indo–Pakistan war in 1971 when the United States deployed the aircraft carrier USS *Enterprise* toward the Bay of Bengal in a show of support for Pakistani forces. Months earlier, India had signed a major defense treaty with the Soviet Union. India's close defense ties to Russia and America's close defense ties to Pakistan left the two countries estranged for the duration of the Cold War.

Military ties between the United States and India began to improve dramatically under the George W. Bush Administration following the 9/11 terrorist attacks in 2001 and the signing of a 10-year defense partnership and landmark civil nuclear deal in 2005.[220] More recently, the two sides have established a robust strategic partnership based on mutual concerns about China's increasingly belligerent behavior and converging interests in countering regional terrorism and promoting a "free and open Indo-Pacific."[221] The U.S. has supplied India with more than $25 billion worth of U.S. military equipment since 2008, including C-130J and C-17 transport aircraft, P-8 maritime surveillance aircraft, Chinook airlift helicopters, Apache attack helicopters, artillery batteries, drones, and Firefinder radar.[222] The two countries also have several information-sharing and intelligence-sharing agreements in place, including one that covers commercial shipping in the Indian Ocean.[223]

Defense ties have advanced at an accelerated rate since the election of Prime Minister Modi in 2014. In 2015, the U.S. and India agreed to renew and upgrade their 10-year Defense Framework Agreement. In 2016, the two governments finalized

the text of a Logistics Exchange Memorandum of Agreement (LEMOA) that allows each country to access the other's military supplies and refueling capabilities through ports and military bases, and the U.S. designated India a "major defense partner," a designation unique to India that is intended to facilitate its access to American defense technology.[224] Since then, Indian and U.S. warships have begun to offer each other refueling and resupply services at sea.[225] In October 2020, U.S. P-8 maritime surveillance aircraft were refueled for the first time at an Indian military base in the Andaman and Nicobar Islands near the mouth of the Strait of Malacca.[226]

America's strategic and defense ties with India advanced in several important ways during the first Trump Administration. In 2018, India was granted STA-1 status, which eases controls on exports of advanced defense technology.[227] India is the third Asian country after Japan and South Korea to be granted STA-1 status. In the same year, India established a permanent naval attaché representative to U.S. Central Command in Bahrain, fulfilling a long-standing request from New Delhi.

In 2018, the two countries also signed the Communications Compatibility and Security Agreement (COMCASA), which will allow the U.S. to sell India encrypted communications equipment and create secure channels for communication between the Indian and U.S. militaries.[228] In 2020, the U.S. and India signed the Basic Exchange Cooperation Agreement (BECA), which creates a framework for the sharing of geospatial intelligence.[229]

Beyond these "foundational" or "enabling" military agreements, the two countries have signed an agreement on Helicopter Operations from Ships Other Than Aircraft Carriers (HOSTAC) and an Industrial Security Annex (ISA) that allows the U.S. to share classified information with private Indian defense firms.[230] The two countries also have initiated a new 2+2 defense and foreign ministers dialogue while reviving the Quad grouping, which joins India and the U.S. with Australia and Japan.[231] In 2020, the four countries held the first Quad naval exercise since 2007. When a deadly crisis erupted at the China–India border in 2020, the Trump Administration provided India with two advanced surveillance drones and cold-weather gear for Indian soldiers.

In recent years, India has made additional purchases of U.S. military hardware, including C-17 transport aircraft, Apache attack helicopters, MH-60R Seahawk multi-mission helicopters, Sig Sauer assault rifles, and M777 ultralight howitzer artillery guns.[232] It also is reportedly considering the purchase of 30 armed MQ-9 reaper drones (10 each for the three branches of its military) for $3 billion and a half-dozen highly capable P-8I maritime aircraft (to supplement the dozen currently in operation) for nearly $2 billion.[233]

New Delhi and Washington regularly hold joint annual military exercises across all services. They include the Yudh Abhyas army exercises, Red Flag air force exercises, and Malabar naval exercise, which added Japan and Australia as permanent participants in 2012 and 2020, respectively. In late 2019, India and the U.S. held their first tri-service military exercise, Tiger Triumph.[234] In February 2022, the U.S. Navy participated for the first time in the MILAN naval exercise, a multilateral exercise in the Bay of Bengal that was led by the Indian navy and involved the navies of more than a dozen countries.

At the April 2022 India–U.S. 2+2 Ministerial Dialogue in Washington, the two sides signed "a Space Situational Awareness arrangement" and "agreed to launch an inaugural Defense Artificial Intelligence Dialogue."[235] They also committed to exploring the coproduction of Air-Launched Unmanned Aerial Vehicles under the Defense Trade and Technology Initiative (DTTI). In addition, India agreed "to join the Combined Maritime Forces Task Force…to expand multilateral cooperation in the Indian Ocean," and the two sides agreed to "explore possibilities of utilizing Indian shipyards for repair and maintenance of ships of the U.S. Maritime Sealift Command to support mid-voyage repair of U.S. naval ships."[236] The U.S. Department of Defense assessed that these initiatives "will allow the U.S. and Indian militaries to work more seamlessly together across all domains of potential conflict" and "jointly meet the challenges of this century."[237]

In October 2022, the U.S. Army conducted joint exercises with the Indian army in the Himalayas roughly 50 miles from the disputed China–India border. During a visit to India earlier in 2022, "the US Army's Pacific Commanding General Charles Flynn described China's military build-up near the disputed border as 'alarming.'"[238]

In February 2023, the Biden Administration revealed that it was considering an application from General Electric for joint production of F414 jet engines for fighter aircraft that are produced in India.

The Administration committed to an "expeditious review" of the application.[239] Jet engine technology is among the United States' most advanced, valuable, and sensitive military secrets; any technology transfer arrangement that included adequate safeguards would therefore mark a qualitative evolution of the India–U.S. defense partnership to exceed even some of America's legacy treaty alliances.

In May 2024, the two sides conducted their first space defense tabletop exercise. In August 2024, they signed a Security of Supply Arrangement (SOSA), enhancing the mutual supply of defense goods and services.[240] In October 2024, India agreed to purchase 31 U.S. MQ-9B drones for all three Indian services for roughly $3.8 billion.[241] Recent years also have seen the first demonstration of the Javelin and Stryker systems in India and deployment of the first Indian Liaison Office to U.S. Special Operations Command.

During Prime Minister Modi's February 2025 visit to Washington, President Trump for the first time offered to sell India the advanced U.S. fifth-generation F-35 fighter. During that visit, the two sides announced a range of new cooperative initiatives that included an Autonomous Systems Industry Alliance (ASIA); a new Catalyzing Opportunities for Military Partnership, Accelerated Commerce and Technology for the 21st Century (COMPACT) initiative; a Transforming the Relationship Utilizing Strategic Technology (TRUST) initiative; a new India–U.S. Strategic Mineral Recovery Initiative; and a U.S.–India AI infrastructure road map. Indian and U.S. private-sector firms also announced that they jointly produce sonobuoys and would collaborate on AI-driven maritime systems capable of enhancing undersea warfare and drone-swarming capabilities. Finally, they agreed to enhance cooperation on nuclear energy including small modular reactors. Micron Technology, an American semiconductor firm, also pledged to spend more than $2.75 billion on construction of an assembly and test facility in India. In 2025, the U.S. National Aeronautics and Space Administration and India's space agency for the first time will jointly conduct scientific research onboard the International Space Station.

During the May 2025 India–Pakistan conflict, the Indian armed forces achieved mixed results. Indian missile strikes successfully targeted multiple Pakistani targets, the defenders of which had only limited success at intercepting them, while India's integrated air and missile defenses were able to intercept Pakistani strikes. However, Pakistan used Chinese-provided jets to down from one to three Indian jets. The United States did not directly mediate the talks but nevertheless played a critical role in talking to both sides to facilitate a cease-fire.[242]

Quality of Key Allied or Partner Armed Forces in Asia

Because Asia lacks an integrated, regional security architecture along the lines of NATO, the United States partners with most of the region's nations on a bilateral basis. This means that there is no single standard to which all of the local militaries aspire; instead, capabilities are influenced by local threat perceptions, institutional interests, physical conditions, historical factors, and budgetary considerations.

Moreover, most Asian militaries have limited combat experience, particularly experience in high-intensity air or naval combat. Some, like Malaysia, have not fought an external war since gaining independence in the mid-20th century. The Indochina wars—the most recent high-intensity conflicts—are now more than 50 years in the past. It is therefore unclear how well Asia's militaries have trained for future warfare and whether their doctrines will meet the exigencies of wartime realities.

Based on examinations of equipment, we assess that several Asian allies and friends have potential military capabilities that are both substantial and supported by robust defense industries and significant defense spending. The defense budgets of Japan, South Korea, and Australia are estimated to be among the world's 15 largest, and the three countries' military forces field some of the world's most advanced weapons, including F-35s in the militaries of all three countries; airborne early warning (AEW) platforms; Aegis-capable surface combatants and modern diesel-electric submarines; and third-generation main battle tanks. As noted, all three nations are also involved in the production of F-35 fighters.

At this point, both the Japanese and Korean militaries arguably are more capable than most European militaries, at least in terms of conventional forces. Japan's Self Defense Forces and South Korea's military field more tanks, principal surface combatants, and combat-capable aircraft than are fielded by their European counterparts.

Both South Korea and Japan are also increasingly interested in developing missile defense capabilities, including joint development and coproduction in the case of Japan. After much negotiation and indecision, South Korea deployed America's Terminal High Altitude Area Defense (THAAD) missile defense system on the peninsula in 2017.[243] South Korea also has the Korea Air and Missile Defense system, which is comprised of Patriot Advanced Capacity-3 (PAC-3) and indigenous Chunggung medium-range missile interceptors, and is developing a long-range missile defense system in pursuit of an indigenous missile defense capability.

Japan's Aegis-class destroyers are equipped with SM-3 missiles, and the government decided in 2017 to install the Aegis Ashore missile defense system to supplement its Patriot missile batteries.[244] In June 2020, citing the potential for the interceptor missile's first-stage booster to fall onto populated areas, Tokyo unexpectedly cancelled plans to build two Aegis Ashore missile defense sites. Other likely factors in the decision include the program's overall cost, inept handling of the site-selection process, and government unwillingness to press national objectives against local resistance.[245] Currently, Tokyo plans to build an additional two Aegis-capable ships to compensate for cancellation of the Aegis Ashore project.

India now has the world's fourth largest military budget (approximately $75 billion in 2025) and second largest military (approximately 1.5 million personnel).[246] The Indian navy is one of the few in the world to operate indigenously developed aircraft carriers and nuclear submarines; it commissioned its first indigenously built aircraft carrier in September 2022 and is now operating a refitted Russian carrier. Both conventional (non-nuclear) carriers are around 45,000 tons; a second, 65,000-ton conventional indigenous carrier is under construction and expected to enter service in the early 2030s. India also operates 17 diesel electric submarines and one nuclear-powered ballistic missile submarine, the *Arihant*, and has negotiated deals for the leasing of three Russian *Akula*-class submarines for 10 years each, the first in 1988, the second in 2012, and the third in 2019.[247]

The Indian air force operates several world-class platforms, including American-built P-8 Poseidon surveillance aircraft and Apache attack helicopters, as well as C-130J and C-17 heavy transport aircraft. Its combat aircraft fleet is comprised of European, Russian, and Indian platforms with the most advanced being the Sukhoi Su-30MKI.

The Indian army deploys a large fleet of Russian-origin tanks, advanced missile defense systems like the S-400, and the U.S.-origin M777 light howitzer. India also hosts advanced ballistic and cruise missile capabilities that include indigenously developed, long-range, nuclear-capable ICBMs and the supersonic, nuclear-capable BrahMos cruise missile developed jointly with Russia.

Although its small population and physical borders limit the size of its military, Singapore fields some of the region's highest-quality forces. Its ground forces can deploy third-generation Leopard II main battle tanks, and its fleet includes four conventional submarines (to be replaced by four new, more capable submarines from Germany)[248] and six frigates and eight missile-armed corvettes. Its air force has F-15E Strike Eagles and F-16s as well as one of Southeast Asia's largest fleets of airborne early warning and control aircraft (G550-AEW aircraft) and two squadrons of aerial refuelers, one comprised of KC-130 tankers and the second of Airbus A330 Multi Role Tanker Transport aircraft, that can help to extend range or time on station.[249]

In January 2020, the U.S. Department of State cleared Singapore to purchase "four short-take-off-and-vertical-landing F-35 variants with an option for eight more of the 'B' models." Delivery is scheduled to begin in 2026.[250] In February 2024, Singapore announced plans to purchase eight F-35A fighter jets, which will bring its total F-35 fleet to 20 by the 2030s.[251]

Australia's very capable armed forces are smaller than NATO militaries but have major operational experience, having deployed to Iraq and Afghanistan as well as to help the Philippines with its southern insurgency. The Australian military deploys advanced surveillance aircraft and AWACS, advanced diesel-electric submarines, F-18 and F-35 fighter aircraft, and modern frigates and destroyers. Under the AUKUS arrangement, Australia will purchase three U.S. *Virginia*-class nuclear-powered submarines by the early 2030s, after which Australia and the U.K. will jointly develop a new class of nuclear-powered submarines to be based on U.S. designs and delivered in the late 2030s to early 2040s.[252]

At the other extreme, the Armed Forces of the Philippines are among the region's weakest military

forces. Having long focused on waging counterinsurgency campaigns while relying on the United States for its external security, the Philippines spent only 1.4 percent of GDP on its military in 2022.[253] The Philippine navy's most modern ships are three former U.S. *Hamilton*-class Coast Guard cutters. The Philippine navy has taken delivery of new South Korean–built frigates and is set to buy several other South Korean–built naval vessels.[254] The Philippines also has purchased 12 light attack fighter aircraft from South Korea and has been cleared to acquire 12 new American F-16s.[255] In January 2022, the Philippines signed a deal worth more than $374 million to acquire BrahMos supersonic cruise missiles.[256]

Though not a formal ally, Taiwan is also vitally important to U.S. interests, and its military preparedness has been a growing concern for U.S. policymakers. Taiwan has a strong professional military, but it is vastly outnumbered by China's. Taiwan's conscription program has gradually deteriorated in recent decades. Administrations from both of Taiwan's main political parties gradually decreased the length of mandatory conscription from over two years in 2000 to just four months in 2013 with a goal of eventually transitioning to all-volunteer armed forces.[257] With cross-Strait tensions surging, the government reimplemented one full year of conscription for able-bodied men starting in 2024.[258] While Washington welcomed this much-needed course correction, training of Taiwan's conscripts remains insufficient, and a "substitute service" scheme continues to allow many able-bodied young men to forego military service in favor of alternative activities that often do little to strengthen the island's security.

Taiwan also faces criticism in Washington for not spending enough on its military. Although Taiwan consistently spends more money on defense than many formal U.S. allies spend and plans to increase its spending to 3 percent of GDP in 2025, this is not perceived as enough to counter the threat from China; and while Taiwan spends a higher proportion of its total government budget on defense than is spent even by the U.S., it is still not enough to support acquisition of the equipment, technology, and talent necessary to compete with a military as large and technologically advanced as China's.

Some in Washington's policy community openly call for Taipei to spend 10 percent of its GDP on defense, but such a percentage is not possible given the island's political and social circumstances.[259] Adding to the difficulty, the arms and equipment Taiwan purchases from the U.S. are consistently delayed, and this has led to a $21.5 billion backlog as of February 2025.[260] This not only impedes Taiwan's military preparedness; it also strengthens political arguments in Taiwan against spending more on defense.[261]

The armed forces of American allies from outside the region, particularly those of France and the United Kingdom, should also be mentioned. France has overseas bases in New Caledonia and the South Pacific, locally based assets, and 4,150 personnel in the region.[262] It also conducts multiple naval deployments each year out of Metropolitan France. The U.K. is similarly active in the region and, given its unparalleled integration with U.S. forces, can employ its capability directly in pursuit of shared objectives. It has a naval logistics facility in Singapore and Royal Gurkhas stationed in Brunei and has been an integral part of a U.S.-led mission to monitor seaborne evasions.

Relationships with the People's Republic of China and Russia

China. The People's Republic of China is the U.S.'s most powerful and capable adversary. Its power, both military and economic, relative to that of the United States outstrips the threat posed by the Soviets at the height of their power. Much of what the United States does today in the Indo-Pacific is aimed at deterring and, if necessary, defeating Chinese aggression.

China enjoys a broad range of relationships in the Indo-Pacific, and in most cases, its presence in regional capitals, both diplomatic and economic, has been expanding steadily for more than two decades. China is the top trading partner for most Indo-Pacific nations, including U.S. partners and allies like Japan, South Korea, and India. (It is also America's top trading partner outside of North America.) On balance, the majority of trade by these partners and allies is with Western nations, which underscores the importance of coordination in economic statecraft.

China's economic reach was further enhanced by its Belt and Road Initiative, through which Beijing spent over $100 billion investing in infrastructure projects across the Eurasian landmass and beyond

between 2015 and 2025. The BRI has begun to fizzle out in recent years as China's slowing economy has shrunk the amount of capital available for frontier infrastructure investments and as several of China's BRI investments have petered out, proven to be unprofitable, or generated a backlash in the host country. Nonetheless, the economic and diplomatic foothold China established in many countries through the BRI has endured.

In addition to being the top trading and investment partner for many Asian nations, China is expanding its influence through technology investments. Chinese infrastructure giants like Huawei are building out telecommunications networks across Asia even as security and espionage-related concerns have limited their reach inside the West and select countries like India and Japan.

China is also a much more active diplomatic partner than are many of its Western counterparts, generally sending high-level representation to regional diplomatic gatherings to which the U.S. government sends lower-level representation—if it attends at all. For many regional capitals, China's simply "showing up" counts for a great deal. Yet Beijing's often heavy-handed diplomatic tone has worked against what otherwise would have been successes. The Chinese government also spends significant capital and energy on its courting of Asian elites, offering all-expenses-paid trips to China and lucrative financial opportunities. The large ethnic Chinese diaspora in countries like Indonesia, Thailand, Malaysia, and Singapore offers additional linkages to Southeast Asia.

Even though China's economic and diplomatic reach is expansive and growing, its political relationships across Asia reflect a more mixed picture with security concerns about China at elevated or rising levels across much of the region. China's geopolitical relationships span a broad spectrum and include veritable Chinese client states like Cambodia and Laos; intimate defense partners like Russia, Pakistan, Iran, and North Korea; a large group of relative "neutrals" like Indonesia and Malaysia in Southeast Asia, Nepal and Bangladesh in South Asia, or the "Stans" of Central Asia (Kazakhstan, Tajikistan, Turkmenistan, Uzbekistan, and Kyrgyzstan); countries with more elevated levels of friction with China over historical issues or their closeness to the U.S. like Vietnam, Singapore, Australia, South Korea, or the Pacific Islands; and countries like Japan, India, the Philippines, and the self-governing island of Taiwan that are engaged in active territorial disputes with China that cause their relations with Beijing to be fairly antagonistic.

Thus, while China enjoys broad economic relations across the Indo-Pacific and relatively positive relations with most capitals including the large number of "neutrals," it is worth noting that the handful of countries that are more openly antagonistic to Beijing, while small in number, are disproportionately large and powerful. The U.S. economy ($29.2 trillion) is still larger than China's ($18.8 trillion) in nominal GDP terms, and the disparity grows larger when partners and allies are included. China and its close strategic partners—Russia, Iran, North Korea, and Pakistan—enjoy a combined GDP of $21.8 trillion. The Quad nations, the Philippines, and Taiwan combined roughly double that figure to $42 trillion in nominal GDP. If European allies are added, the figure surpasses $60 trillion.

Russia. Russia's political and economic ties across the Indo-Pacific are far less expansive than China's. This is partly a byproduct of their disparity in size: China's economy is nearly 10 times larger than Russia's. It is also a product of geography as Russia's population centers and historical orientation historically have been Western-facing. Over 75 percent of Russia's population lives in "European Russia" west of the Urals despite its being only 25 percent of Russia's landmass.

Russia began "looking east" much more vigorously only after its 2014 invasion of Crimea and the resulting wave of Western sanctions and isolation led Moscow to conclude that its future lies in a closer strategic and energy partnership with China. Since that time, the China–Russia tactical partnership has evolved into a much deeper and broader comprehensive strategic partnership. China is now Russia's closest ally in Asia and likely its closest ally overall, save for veritable client states like Belarus.

Russia still exerts extraordinary influence over the former Soviet Republics of Central Asia—Kazakhstan, Tajikistan, Turkmenistan, Uzbekistan, and Kyrgyzstan—but what was once Russia's exclusive domain is now a more open playing field as China has slowly become a top economic and diplomatic partner of choice for many of these five countries. Russia's reach into South, Southeast, and East Asia is much more limited, although it does maintain robust defense ties with a number of countries

weaned onto Soviet military hardware during the Cold War. In 2024, the top three destinations for Russian arms exports were China, India, and Kazakhstan. These arms exports have shrunk substantially by volume since Russia's invasion of Ukraine in 2022, but other countries like Burma, Vietnam, and Egypt remain large importers of Russian arms.

The Russian military has also sustained a robust naval presence in the Indo-Pacific. In recent years, it has taken part in increasingly sophisticated military exercises with China, deployments of naval forces that have provocatively circumnavigated Japan and operated near sensitive undersea cables near Taiwan. Russia also has one active territorial dispute in the region: a dispute with Japan over the Kuril Islands, four islands occupied by the Soviet Union in 1945 following Japan's surrender at the end of World War II. Technically, Japan and Russia have yet to sign a peace treaty, and ongoing talks to that end were suspended after Japan imposed sanctions on Russia following its invasion of Ukraine.

U.S. Force Presence and Infrastructure: U.S. Indo-Pacific Command

Established in 1947 as U.S. Pacific Command, U.S. Indo-Pacific Command (USINDOPACOM) is the oldest and largest of America's unified commands. According to its website:

> USINDOPACOM protects and defends, in concert with other U.S. Government agencies, the territory of the United States, its people, and its interests. With allies and partners, USINDOPACOM is committed to enhancing stability in the Asia–Pacific region by promoting security cooperation, encouraging peaceful development, responding to contingencies, deterring aggression, and, when necessary, fighting to win. This approach is based on partnership, presence, and military readiness.[263]

USINDOPACOM's area of responsibility (AOR) "encompasses about half the earth's surface, stretching from the waters off the west coast of the U.S. to the western border of India, and from Antarctica to the North Pole." Its 38 countries represent "more than 50 percent of the world's population" and include two of the world's three largest economies and 10 of the 14 smallest as well as "the most populous nation in the world [India], the largest democracy [also India], and the largest Muslim-majority nation [Indonesia]. More than one third of Asia-Pacific nations are smaller, island nations that include the smallest republic in the world [Nauru] and the smallest nation in Asia [Maldives]."[264] By any meaningful measure, the Indo-Pacific is also the world's most militarized region, with "seven of the world's ten largest standing militaries" and "five of the world's declared nuclear nations" in addition to "five countries allied with the United States through mutual defense treaties."[265]

USINDOPACOM's 11 component commands include:[266]

- **U.S. Army Pacific.** USARPAC is the Army's component command in the Pacific. Headquartered in Hawaii and with "more than 107,000 Soldiers and Civilians," it supplies Army forces as necessary for various global contingencies. The command lists 19 subordinate units: 8th Army (South Korea); I Corps (Washington); 25th Infantry Division (Hawaii); 11th Airborne Division (Alaska); 94th Air & Missile Defense Command (Hawaii); 8th Theater Sustainment Command (Hawaii); 7th Infantry Division (Washington); 2nd Infantry Division (Washington); 5th Security Force Assistance Brigade (Washington); 1st Multi-Domain Task Force (Washington); 3rd Multi-Domain Task Force (Hawaii); 196th Infantry Brigade (Hawaii); 18th Medical Command (Hawaii); 311th Signal Command (Hawaii); U.S. Army Japan (Japan); 351st Civil Affairs Command (Hawaii); 9th Mission Support Command (Hawaii); 5th Battlefield Coordination Detachment (Hawaii); and 500th Military Intelligence Brigade (Hawaii).[267]

- **U.S. Pacific Air Forces.** With 46,000 servicemembers, PACAF is responsible for planning and conducting defensive and offensive air operations in the Asia–Pacific region.[268] It has three numbered air forces under its command: 5th Air Force (Japan); 7th Air Force (Korea); and 11th Air Force (Alaska).[269] The 5th Air Force includes the 374th Airlift Wing, 18th Wing, and 35th Fighter Wing. The wings maintain C-130 aircrews, C-12s, UH-1s, F-15s, F-16s, KC-135 refuelers, E-3 Airborne Warning and Control (AWACS) System aircraft,

and HH-60G Pave Hawk rescue helicopters. The 7th Air Force operates out of Osan Air Base and Kunsan Air Base, which host the 51st Fighter Wing and 8th Fighter Wing. The wings are made up of three squadrons that include F-16s: the 35th Fighter Squadron, 36th Fighter Squadron, and 80th Fighter Squadron. The 11th Air Force is headquartered in Joint Base Elmendorf–Richardson and is the force provider for Alaskan Command. Other forces that regularly come under PACAF command include B-52, B-1, and B-2 bombers. The 11th Air Force's 354th Fighter Wing at Eielson Air Force Base completed the integration of 54 "combat-coded" F-35A aircraft in April 2022, increasing the number of squadrons to four.[270]

- **U.S. Pacific Fleet.** PACFLT normally controls all U.S. naval forces committed to the Pacific. Composed of 11 subordinate commands and approximately 200 ships, 1,500 aircraft, and 150,000 military and civilian personnel,[271] PACFLT is organized into the Seventh Fleet, headquartered in Japan, and the Third Fleet, headquartered in California. The Seventh Fleet includes 50–70 ships and submarines, 150 aircraft, and more than 27,000 sailors and Marines, including the only American carrier strike group (CTF-70, ported at Yokosuka, Japan) and amphibious group (CTF-76, ported at Sasebo, Japan) that are home-ported abroad.[272] The Third Fleet's AOR extends from the West Coast of the United States to the International Date Line and includes the Alaskan coastline and parts of the Arctic.[273] Third Fleet component units include four carrier strike groups (CSGs). Since 2015, the conduct of Freedom of Navigation Operations (FONOPS) that challenge excessive maritime claims (a part of the Navy's mission since 1979) has assumed a higher profile because of several well-publicized operations in the South China Sea. Both the Trump and Biden Administrations have maintained a high frequency of these operations.

- **U.S. Marine Forces Pacific.** With its headquarters in Hawaii, MARFORPAC "is the largest operational command in the Marine Corps" and "comprises two-thirds of the Marine Corps' active-duty combat forces."[274] Specifically, the I Marine Expeditionary Force (I MEF) is headquartered at Camp Pendleton, California, and centered on the 1st Marine Division, 3rd Marine Air Wing, and 1st Marine Logistics Group, and the III Marine Expeditionary Force (III MEF) is headquartered on Okinawa and centered on the 3rd Marine Division, 1st Marine Air Wing, and 3rd Marine Logistics Group. The 1st Marine Division "provides fully trained units and personnel in support of Marine Rotational Force–Darwin, Marine Expeditionary Units, and the Unit Deployment Program to Okinawa, Japan."[275] The 3rd Marine Division "operates as a Stand-In Force in the first island chain to secure, seize, or defend key maritime terrain in order to deny and disrupt adversary actions in support of the Fleet, the Joint Force, and partnered and allied forces."[276]

- **U.S. Special Operations Command Pacific.** SOCPAC "is a sub-unified command of USSOCOM [U.S. Special Operations Command] under the operational control [of] U.S. Indo-Pacific Command and serves as the functional component for all special operations missions deployed throughout the Indo-Asia-Pacific region." Its "area of focus covers 36 countries and encompasses half of the Earth's surface."[277] Among the special operations forces under SOCPAC's control are Navy SEALs; Naval Special Warfare units; Army Special Forces (Green Berets); and Special Operations Aviation units in the Pacific region, including elements in Japan and South Korea. Its core activities include (among others) counterinsurgency and unconventional warfare, hostage rescue and recovery, training of foreign security forces, and support for "DOD humanitarian activities conducted outside the US and its territories to relieve or reduce human suffering, disease, hunger, or privation."[278]

- **U.S. Forces Korea.** USFK's "mission is to deter aggression and if necessary, defend the Republic of Korea to maintain stability in Northeast Asia."[279] It is responsible for organizing, training, and equipping U.S. forces on the Korean Peninsula as directed by USINDOPACOM in support of the U.S.–South Korean Combined

Forces Command (CFC) and United Nations Command (UNC). USFK's components include U.S. Eighth Army; U.S. Seventh Air Force; Commander, U.S. Naval Forces Korea (CNFK); Marine Corps Forces Korea (MARFOR-K); and Special Operations Forces Korea (SOCKOR).[280]

- **U.S. Forces Japan.** Operating with approximately 60,000 U.S. Army, Marine Corps, Navy, Air Force, and Space Force Corps personnel, USFJ "serves to strengthen the US–Japan Alliance to help deter and, if necessary, defeat threats against Japan." It is "transforming into a Joint Force Headquarters, aiming to strengthen the alliance and enhance integrated operational capabilities."[281]

- **Joint Interagency Task Force West.** JIATF-W, "in coordination with U.S. law enforcement, interagency and partner nations, combats, disrupts and dismantles drug trafficking and transnational criminal organizations, to protect U.S. lives, interests, and regional stability in the Indo-Pacific."[282] Its "top priority is supporting law enforcement in their efforts to reduce the illicit flow of fentanyl, methamphetamine, Amphetamine-Type Stimulants and precursors intended for U.S. markets."[283]

- **U.S. Space Forces–Indo-Pacific.** USSPACEFOR-INDOPAC "enhances stability in the Indo-Pacific region by promoting interoperability and integration from planning and programming through fielding and execution to respond to contingencies, deter aggression, and maintain space superiority in pursuit of a free and open Indo-Pacific."[284] Its three commands include Combat Forces Command (CFC), Petersen Space Force Base, Colorado; Space Systems Command (SSC), Los Angeles, California; and Space Training and Readiness Command (STARCOM), Patrick Space Force Base, Florida.[285]

- **U.S. Coast Guard Pacific Area.** USCG-PACIFIC AREA has a "74 million square mile operational area" and "more than 13,000 active duty, reserve, civilian and volunteer employees" with 11 statutory missions: "preserve the global supply chain, protect our fragile marine ecosystems, ensure U.S. sovereignty in the Polar regions, combat transnational organized crime, support global humanitarian response operations and preserve the U.S. as a free and enduring nation." Its four regional commands—the 11th, 13th, 14th, and 17th Districts—cover "much of the Pacific Ocean, North America and South America."[286]

- **Center for Excellence in Disaster Management & Humanitarian Assistance.** CFE-DM "builds crisis response capacity in US, Allies and Partner militaries across the Indo-Pacific to save lives before, during and after emergencies."[287] Its Humanitarian Assistance Response Training (HART) programs prepare trainees "to respond more effectively during civilian-led humanitarian assistance and foreign disaster response missions" and to "support[], and when necessary, conduct[] humanitarian assistance before, during, and after combat operations."[288] Its Applied Research and Information Sharing (ARIS) Academic Partnership Program (APP) "endeavors to foster capacity through research into emerging issues in the sphere of civil-military coordination, preparedness and response for disaster management and humanitarian assistance (DMHA)."[289]

Key Infrastructure That Enables Expeditionary Warfighting Capabilities

Any planning for operations in the Pacific will inevitably be dominated by the "tyranny of distance." Because of the extensive distances that must be traversed, even Air Force units will take one or more days to deploy, and ships measure steaming time in weeks. A ship sailing at 20 knots, for instance, requires nearly five days to get from San Diego to Hawaii. From there, it takes seven more days to get to Guam; seven days to Yokosuka, Japan; and eight days to Okinawa—assuming that ships encounter no interference along the way.[290]

China's growing anti-access/area denial (A2/AD) capabilities, which range from an expanding fleet of modern submarines to anti-ship ballistic and cruise missiles, increase the operational risk for deployment of U.S. forces in the event of conflict. China's capabilities jeopardize American combat forces that would flow into the theater for initial combat and would continue to threaten the logistical

MAP 2

Steam Times in the Pacific



NOTE: Steam times are based on an average speed of 15 knots over the distances between the South China Sea operating area and select ports.
SOURCE: Heritage Foundation research.

heritage.org

support needed to sustain American combat power in the ensuing days, weeks, and months.

American basing structure in the Indo-Pacific region, including access to key allied facilities, is therefore both necessary and increasingly at risk.

American Facilities

Hawaii. Much as it was in the 20th century, Hawaii remains the linchpin of America's ability to support its position in the Western Pacific. If the United States cannot preserve its facilities in Hawaii, both combat power and sustainability become moot. The United States maintains air and naval bases, communications infrastructure, and logistical support on Oahu and elsewhere in the Hawaiian Islands. Hawaii is also a key site for undersea cables that carry much of the world's communications and data, as well as for satellite ground stations.

Guam. The American territory of Guam is located 4,600 miles farther west. Obtained from Spain as a result of the Spanish–American War, Guam became a key coaling station for U.S. Navy ships. It was seized by Japan in World War II, was liberated by U.S. forces in 1944, and after the war

became an unincorporated, organized territory of the United States.

Key U.S. military facilities on Guam include U.S. Naval Base Guam, which houses several attack submarines and possibly a new aircraft carrier berth, and Andersen Air Force Base, one of a handful of facilities that can house B-2 bombers. U.S. task forces can stage out of Apra Harbor, drawing weapons from the Ordnance Annex in the island's South Central Highlands. On January 26, 2023, the Marine Corps reopened Marine Corps Base Camp Blaz, which will host 5,000 Marines comprising various aviation, ground combat, combat support, logistics, and headquarters units in the coming years.[291] There is also a communications and data relay facility on the island.

Guam's facilities have improved steadily over the past 20 years. B-2 bombers, for example, began to operate from Andersen Air Force Base in March 2005.[292] These improvements have been accelerated and expanded even as China's A2/AD capabilities have raised doubts about America's ability to sustain operations in the Asian littoral. The concentration of air and naval assets as well as logistical infrastructure on Guam would make the island an attractive target in the event of conflict, and the increasing reach of Chinese and North Korean ballistic missiles only adds to this growing vulnerability.

Saipan. The U.S. military has noncombatant maritime prepositioning ships (MPS), which contain large amounts of military equipment and supplies, in strategic locations from which they can reach areas of conflict relatively quickly as associated U.S. Army or Marine Corps units located elsewhere arrive in those areas. U.S. Navy units in Saipan, Commonwealth of the Northern Marianas, support prepositioning ships that can supply Army or Marine Corps units that are deployed for contingency operations in Asia.

Allied and Other Friendly Facilities

Access to bases in Asia has long been a vital part of America's ability to support military operations in the region. This includes, in the cases of Japan and South Korea, substantial Host Nation Support to cover the cost of labor, maintenance, and repairs of platforms based in these nations. Even with the extensive aerial refueling and replenishment skills of the U.S. Air Force and U.S. Navy, it is still essential that the United States retain access to resupply and replenishment facilities, at least in peacetime. The ability of those facilities to survive and function will directly influence the course of any conflict in the Western Pacific. Moreover, a variety of support functions, including communications, intelligence, and space support, cannot be accomplished without facilities in the region.

Today, maintaining maritime domain awareness or space situational awareness would be extraordinarily difficult without access to facilities in the Asia–Pacific region. The American alliance network is therefore a matter both of political partnership and of access to key facilities on allied soil.

Six U.S. EEZs that are rich in fish and untapped natural resources are located in an arc that stretches over 1,400 miles from Wake Island to Johnston Atoll and south 1,900 miles to American Samoa. To focus resources and enable better regional coordination, the U.S. Coast Guard Pacific Area Command and U.S. Indo-Pacific Command should establish a detachment in American Samoa. Its mission would be to identify and execute needed maritime training and infrastructure projects supporting a sustained maritime security presence while synchronizing operational (e.g., the Coast Guard's Operation Blue Pacific) and capacity-building activities with regional partners.[293] This region would be of strategic importance in moving military forces and sustaining them in any Asian conflict.

Finally, the United States is granted access to a number of facilities in Asian states on a contingency or crisis basis. Thus, U.S. Air Force units transited Thailand's U-Tapao Air Base and Sattahip Naval Base during the first Gulf War and during the Iraq War, but they do not maintain a permanent presence there. Additionally, the U.S. Navy conducts hundreds of port calls throughout the region.

Diego Garcia. The American facilities on the British territory of Diego Garcia are vital to U.S. operations in the Indian Ocean and Afghanistan and provide essential support for operations in the Middle East and East Asia. The island is home to the Military Sealift Command's Maritime Prepositioning Squadron-2 (MPSRON-2), which works with Maritime Prepositioning Squadron-3 (MPSRON-3) "to deliver a strategic power-projection capability for the Marine Corps, Army and Air Force, known as the Maritime Prepositioning Force (MPF)."[294] Specifically, "MPF ships deliver a forward presence and rapid crisis response capability by

pre-positioning equipment and supplies to various locations at sea."[295]

Several elements of the U.S. global space surveillance and communications infrastructure, as well as basing facilities for the B-2 bomber, are also located on the island. More recently, critical military forces staged operations directly and in support of the successful attacks on Iran's nuclear weapons infrastructure during the June 2025 Midnight Hammer operation.

It should also be noted that the United Kingdom is seeking to transfer sovereignty of the Chagos Islands to Mauritius. This is problematic on many fronts in that Mauritius has close ties to China, which could impede the ability of the U.S. and U.K. to generate combat operations from Diego Garcia. Mauritius is also a party to the Treaty of Pelindaba, which prohibits the stationing of nuclear weapons in nations that are a party to the treaty. If the United States should wish to generate nuclear bombing missions out of Diego Garcia, it would be legally prohibited from doing so if the islands were transferred to Mauritius. Finally, according to some reporting, even if Diego Garcia was to be used as a bomber base by American or U.K. forces, the U.K. government would be required to inform Mauritius if any bombing missions generated on Diego Garcia would target a third party. This, to say the least, would undermine operational security or even mission effectiveness if the United States or the United Kingdom actually tried to use Diego Garcia as a military base.

Conclusion

The military balance in the Indo-Pacific is shifting. The unchallenged military superiority the U.S. enjoyed in the region for roughly eight decades has come to an end.

The U.S. has not had a military peer in Asia since the defeat of Japan in World War II. The Soviet Union was a military peer, but the overwhelming majority of its conventional military strength was Europe-facing; it was never more than a marginal player in the Indo-Pacific. As a result, the security order in Asia was effectively unipolar for nearly a century.

That order served Asia well. Despite being a region with unparalleled size and population—replete with numerous active territorial disputes, significant historical animosities, and the world's largest and fastest-growing powers rising quickly—Asia has enjoyed a period of remarkable peace since the 1980s.

That peace fostered a phenomenal bout of regional prosperity: The economic growth witnessed across Asia in recent decades from India to China, Korea to Japan, and throughout ASEAN has no historical precedent. Virtually every country has benefitted from the stability and prosperity delivered by this order—perhaps none more than China, which is why it is ironic that China is seeking to challenge or overturn that order.

In recent years, China has grown demonstrably more aggressive abroad and repressive at home. Under Communist Party Chairman Xi Jinping, China's designs on Taiwan, military intimidation of its neighbors, predatory economic practices, and challenges to America's position in Asia have grown increasingly brazen as Beijing has begun to close key gaps in capabilities between it and the U.S.

To be sure, America still enjoys considerable strengths and assets in the region, particularly when combined with close allies and likely participants in any conflict with China, including Japan, Australia, the Philippines, and Taiwan (as well as key partners like India and South Korea), and China has fewer reliable friends on which to depend. Moreover, Russia's ability to project force into the Western Pacific is extremely limited. The same is true of Iran, whose economy and military capabilities have been so degraded that it now struggles to project power in its own backyard. North Korea has consequential military capabilities, but its involvement in any China–U.S. conflict would almost certainly invite intervention by South Korea, which on balance would likely be a net negative for China.

Even without powerful allies, the U.S. military in many respects is still in a class of its own. It still fields an unparalleled fleet of aircraft carriers, nuclear submarines, fifth-generation fighters, missile defense systems, stealth technology, and airlift capabilities. America's missile, space, cyber, and long-range logistics capabilities are still world class. But the United States confronts large and growing challenges vis-à-vis China, not least (as noted previously) the tyranny of distance, and the most likely scenarios for a China–U.S. conflict are nearly all in the Western Pacific. As far as the security of the homeland and the American people is concerned, that is a good thing, but it also means that virtually all of the plausible conflict scenarios have battles

unfolding in China's backyard where it enjoys considerable asymmetric advantages. Moreover, how a large-scale conflict between the world's two superpowers, both of which are armed with nuclear weapons, would play out is unknown. Accordingly, any China–U.S. conflict has the potential to become a third world war—and in such a scenario, the American homeland might no longer be a sanctuary.

The reach of the U.S. military is unparalleled: It can do things in distant corners of the globe that the Chinese military could never dream of doing. Its "horizontal" reach is still generations ahead of China's. But vertically, in the Indo-Pacific, those advantages dwindle. It could take U.S. assets days or weeks to reach a battlefield that China can reinforce in a matter of hours. Close to its shores, China can lean more easily on an expansive network of land-based military bases, artificial islands, and short-range to medium-range missiles.

Nor are distance and geography the only problems confronting the United States. America's defense industrial base has been hollowed out by neglect. Its stockpiles of ammunition and fuel, as well as its sealift and airlift capabilities, may prove woefully inadequate for a protracted major-power conflict with China. The U.S. government has finally begun to take steps to revitalize its defense industrial base, but they are slow and uneven.

Moreover, it is still unclear how new technologies like drone swarms and artificial intelligence would be deployed by China and impact the battlespace. The conflict in Ukraine is offering glimpses into the future of warfare, but it is not indicative of what a major-power war between the United States and China—one likely to unfold largely in the air, at sea, and in cyberspace—would look like.

China also enjoys other advantages. Through major hacking and espionage efforts, including Salt and Volt Typhoon, Chinese agents have embedded themselves in America's financial system, telecommunications networks, and vital infrastructure. Their ability to cause economic harm, if not entire systems failures, should not be underestimated even though the United States likely has capabilities that would enable it to cause considerable damage and mischief within China if Beijing were maliciously inclined.

In sum, the military gap with China—*in China's backyard*—has narrowed significantly, and the outcome of a conflict is more uncertain than ever. On the other hand, at least for the moment, China's leadership seems to recognize and fear that uncertainty: A "coin toss" is not great odds when your survival is potentially on the line.

Perhaps the most important dynamic keeping the peace in the Indo-Pacific today is Xi Jinping's well-deserved anxiety about the outcome of a conflict with the U.S. Losing a war to the United States, especially over Taiwan, could threaten not only his rule and his life, but Communist Party rule as well. With China in the middle of the most shocking high-level purge of PLA commanders in generations, it is incumbent on Washington to ensure that war with America remains an unacceptably risky proposition for China's leaders. That will require maintaining and enhancing deterrence against an increasingly powerful, irascible, and ambitious adversary.

Deterrence is built on two foundations: capability and will. Anything that diminishes U.S. capability and will in the Indo-Pacific—or perceptions of U.S. capability and will—actually risks inviting Chinese aggression. Any perceived weakening of the U.S. commitment to the region or to its allies and close security partners actually raises the likelihood of a catastrophic conflict. At the same time, continuing to underprioritize and inadequately resource the Indo-Pacific relative to other theaters does more than heighten the risk of war: It heightens the probability of a costly defeat.

Scoring the Asia Operating Environment

As with the operating environments of Europe, the Middle East, Latin America, and Africa, we assessed the characteristics of Asia as they could be expected to facilitate or inhibit America's ability to conduct military operations to defend its vital national interests against threats. Our assessment of the operating environment utilized a five-point scale that ranges from "very poor" to "excellent" conditions and covers four regional characteristics of greatest relevance to the conduct of military operations:

Operating Environment: Asia

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances				✓	
Political Stability				✓	
U.S. Military Posture		✓			
Infrastructure			✓		
OVERALL			✓		

1. **Very Poor.** Significant hurdles exist for military operations. Physical infrastructure is insufficient or nonexistent, and the region is politically unstable. The U.S. military is poorly placed or absent, and alliances are nonexistent or diffuse.

2. **Unfavorable.** A challenging operating environment is marked by inadequate infrastructure, weak alliances, and recurring political instability. The U.S. military is inadequately placed in the region.

3. **Moderate.** A neutral to moderately favorable operating environment is characterized by adequate infrastructure, a moderate alliance structure, and acceptable levels of regional political stability. The U.S. military is adequately placed.

4. **Favorable.** A favorable operating environment includes good infrastructure, strong alliances, and a stable political environment. The U.S. military is well placed for future operations.

5. **Excellent.** An extremely favorable operating environment includes well-established and well-maintained infrastructure, strong and capable allies, and a stable political environment. The U.S. military is exceptionally well placed to defend U.S. interests.

The key regional characteristics consist of:

a. **Alliances.** Alliances are important for interoperability and collective defense, as allies would be more likely to lend support to U.S. military operations. Indicators that provide insight into the strength or health of an alliance include whether the U.S. trains regularly with countries in the region, has good interoperability with the forces of an ally, and shares intelligence with nations in the region.

b. **Political Stability.** Political stability brings predictability for military planners when considering such things as transit, basing, and overflight rights for U.S. military operations. The overall degree of political stability indicates whether U.S. military actions would be hindered or enabled and reflects, for example, whether transfers of power are generally peaceful and whether there have been any recent instances of political instability in the region.

c. **U.S. Military Positioning.** Having military forces based or equipment and supplies staged in a region greatly facilitates America's ability to respond to crises and presumably achieve success in critical "first battles" more quickly. Being routinely present also helps the United States to maintain familiarity with a region's characteristics and the various actors that might act to assist or thwart U.S. actions. With this in mind, we assessed whether or not the U.S. military was well positioned in the region. Again, indicators included bases, troop presence, prepositioned equipment, and recent examples of military operations (including training and humanitarian) launched from the region.

d. **Infrastructure.** Modern, reliable, and suitable infrastructure is essential to military operations. Airfields, ports, rail lines, canals, and

paved roads enable the U.S. to stage, launch, and logistically sustain combat operations. We combined expert knowledge of regions with publicly available information on critical infrastructure to arrive at our overall assessment of this metric.[296]

For Asia, we arrived at these average scores (rounded to the nearest whole number):

- Alliances: **4—Favorable.**
- Political Stability: **4—Favorable.**
- U.S. Military Positioning: **2—Unfavorable.**
- Infrastructure: **3—Moderate.**

Aggregating to a regional score of: **Moderate.**

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Europe

Jordan Embree

Europe has been the central pillar of America's alliance network since World War II. Under American leadership and through American financial, political, and military support, Europe rebuilt itself and became a bastion of freedom opposing Communist tyrants. As Americans watched the Berlin Wall crumble and the Iron Curtain fall, they rejoiced, welcoming millions more to freedom, and sought by example and material support to speed their embrace of democracy, free speech, and national sovereignty.

The transatlantic relationship has endured and grown over the past eight decades on the foundation of those shared interests. The standout historical moments of the past 80 years—from President John F. Kennedy's *Ich bin ein Berliner* address to President Ronald Reagan's demand that "Mr. Gorbachev tear down this wall" to the many North Atlantic Treaty Organization (NATO) allies standing alongside America to fight terrorism after 9/11—revolve around those interests.

Yet as the 20th century faded into the 21st, this historical foundation wore thin, and the transatlantic community's unity wobbled. Cracks appeared soon after the initial unified response to 9/11 as then-Secretary of Defense Donald Rumsfeld spoke of "new Europe" and "old Europe" while contrasting allied support for the U.S.-led war in Iraq in Eastern Europe with allied opposition in Western Europe.[1] Perhaps even more important, the Soviet Union's collapse lulled leaders on both sides of the Atlantic, but particularly in Europe, into thinking traditional military power unnecessary given the much-hyped "end of history" heralding the triumph of liberal values worldwide.

As a result, throughout the 2010s, most NATO countries failed to meet their defense spending promises despite repeated entreaties by American Presidents and defense officials. Germany even built the Nord Stream 2 gas pipeline to funnel Russian gas to German businesses despite Moscow's record of weaponizing energy resources.[2] American lawmakers reacted forcefully against this strategic blunder, which breached a fundamental NATO principle of "keep[ing] the [Russians] out," by sanctioning companies involved with the pipeline.[3] Nord Stream 2 was finally foreclosed by Russia's full-scale invasion of Ukraine in February 2022 (and subsequent sabotage).[4] In addition, Ukraine has declined to renew its gas transshipment deal with the Russian Federation during wartime,[5] thereby at least temporarily re-establishing a transatlantic energy posture that is less reliant on Russia.

Recently, NATO has trended in an even more positive direction. Consistent pressure from President Donald Trump in both of his Administrations in concert with Russia's invasion of Ukraine finally convinced European NATO members to meet their 2 percent of GDP spending target in 2025.[6] The June 2025 NATO summit in The Hague built on this initial step through a modernized minimum defense spending level of 5 percent of GDP. The spending level was divided between 3.5 percent outlays for core defense spending and an additional 1.5 percent for critical national security infrastructure. NATO Secretary General Mark Rutte credited President Trump, and President Trump again reaffirmed his commitment to Article 5 of the North Atlantic Treaty, NATO's founding document, which "provides that if a NATO Ally is the victim of an armed attack, each and every other member of the Alliance will consider this act of violence as an armed attack against all members and will take the actions it deems necessary to assist the Ally attacked."[7]

Germany epitomizes this policy renewal through its commitment to a renewed defense role. Germany is NATO's second-largest national economy by GDP,[8] and its rearmament is critical for NATO deterrence. Germany's *Zeitenwende,* a sea change in German thinking on national security, resulted in defense spending that brought expenditures to 2 percent of GDP in 2024.[9] The coalition government under Chancellor Friedrich Merz supports continuing this rebuild and aims to reach the 3.5 percent goal by 2029, well ahead of schedule.[10] As its rearmament proceeds, Germany should focus on deterring the Russians through steps like armored deployments, air defense improvements, and deep-strike missile procurement. By so doing, Germany will help to rebalance transatlantic burden-sharing and revitalize deterrence ahead of Russia's reconstitution by taking its place as a leader in European conventional deterrence.[11]

For its part, America remains central to NATO's deterrence at the strategic and tactical levels.[12] This is not likely to change anytime soon, and support for the NATO Alliance remains high, both among Americans generally and among Members of Congress.[13] Europe still holds a special place in American esteem as the birthplace of Western civilization, as a genealogical origin point for millions of Americans, and as the modern proving ground for national sovereignty during the Cold War. On top of these connections, trade flows between Europe and the United States are nearly $1 trillion a year.[14]

Yet discord has emerged in recent years over transatlantic values. While acknowledging different political systems and historical contexts, Washington is increasingly worried by perceived moves against free speech, especially those characterized as necessary to fight disinformation. Americans deeply believe that the solution to problematic speech is not censorship but an open marketplace of ideas in which the truth will win out. However, both domestically and abroad, anti-disinformation measures have twisted from presenting facts to propping up governmental narratives. At the same time, both America and its transatlantic allies have confronted massive migratory inflows in a frontal assault on national sovereignty. These have included adversary efforts to weaponize migration to destabilize European societies.[15] To ensure that the transatlantic Alliance endures for the next 75 years, both America and its partners across the Atlantic must recommit to the fundamental values of freedom of religion, assembly, and speech and belief enshrined in the Helsinki Final Act[16] and other transatlantic statements from across the 20th century.

To revitalize transatlantic ties in the 21st century, America, Canada, and their European partners must also take stock of today's alarming threat environment. Russia's invasion of Ukraine returned active warfare to Europe and highlighted broader global fissures. First, of course, is Russia and China's no-limits partnership, which has been an invaluable source of dual-purpose goods to fuel the Russian war machine even as some limits do exist beneath the rhetorical surface.[17] Additionally, the Chinese Communist Party continues to undertake threatening military actions, such as a massive nuclear buildup, and undercut global peace and stability through regular hostile activities menacing Taiwan and Taiwanese commerce.[18]

Elsewhere, Iran's ruling elite retains an abiding hatred for the West and remains unwilling to curb its nuclear program even following devastating strikes on Iran's nuclear and command-and-control infrastructure by the United States and Israel. Faced by this recalcitrance, America and its European partners must remain wary of Iran's efforts to double down on its support for proxies across the Middle East from Hezbollah to the Houthis in ways that directly harm European commerce and economic stability.[19]

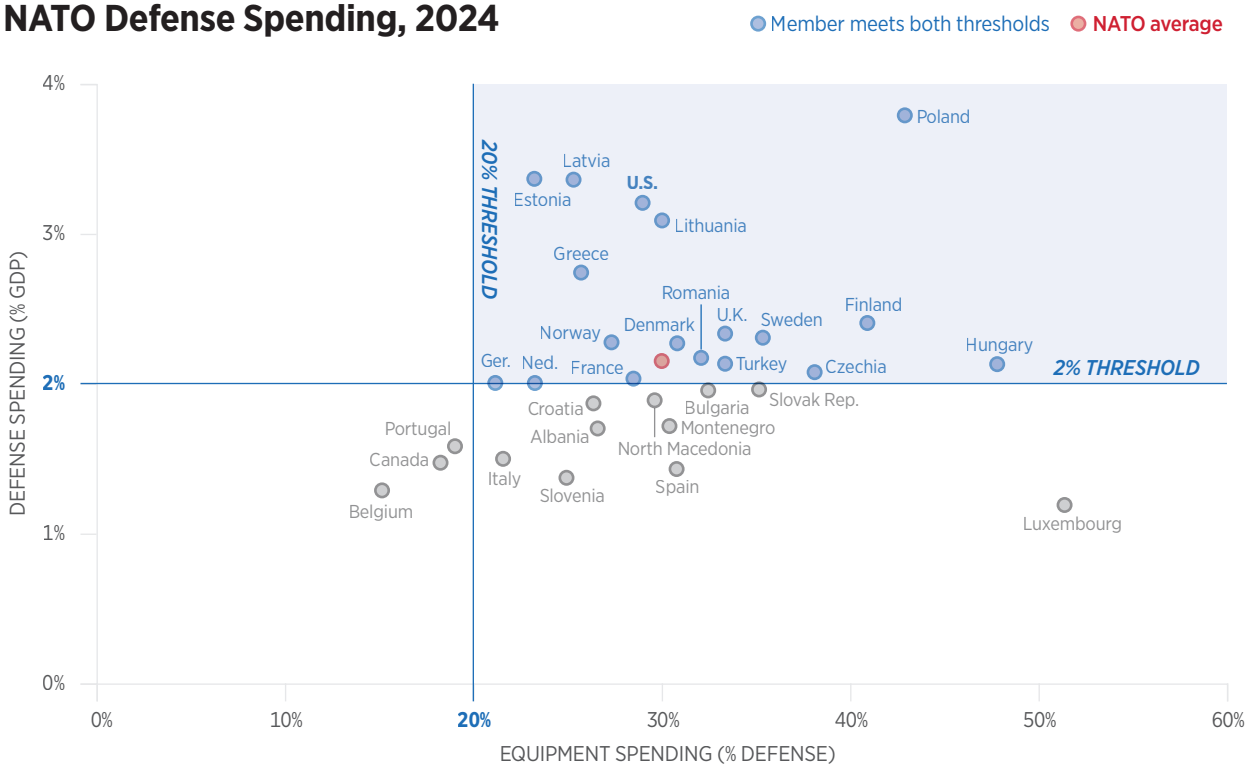
Despite these challenges, the NATO Alliance remains a force for deterrence and stability. With a formidable concentration of military power and a history of interoperability and joint operations, NATO can continue to ensure the transatlantic region's security and stability, provided that European nations fund defense capabilities and recommit themselves to upholding the defining values of the transatlantic community.

U.S. Security Alliances in Europe: NATO as Primary Security Actor

Founded in Washington, DC, on April 4, 1949, NATO has served for 77 years as the principal transatlantic security guarantor in defense of "the principles of democracy, individual liberty and the rule of law."[20] Intensive consultations across the decades have led allies to "develop their individual and collective capacity to resist armed attack" to undergird their agreement that "an armed attack

CHART 8

NATO Defense Spending, 2024



NOTES: Figures are estimates. NATO averages exclude Iceland because it has no military. Equipment expenditures include major equipment expenditures and R&D devoted to major equipment.
SOURCE: Press release, "Defence Expenditure of NATO Countries (2014–2025)," North Atlantic Treaty Organization, cutoff date for information used June 3, 2025, https://www.nato.int/content/dam/nato/webready/documents/finance/def-exp-2025-en.pdf (accessed January 29, 2026).

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against one or more of them in Europe or North America shall be considered an attack against them all."[21] Courtesy of NATO, the United States' security posture in Europe is intertwined with these allies for interoperability and planning purposes. Despite premature declarations of NATO's demise,[22] the organization is still the most effective Euro-Atlantic security institution.

NATO Spending Shortfalls Since Wales. When reviewing NATO's defense spending over the past decade, the data paint a stark picture of drastically unequal investments in collective defense. Despite the 2014 Wales Summit's commitment to spending at least 2 percent of GDP on defense, most members failed to hit this target. Although NATO members finally reached 2 percent in 2025, the average NATO member averaged just 1.59 percent over the past decade.[23] However, careful analysis reveals striking geographic disparities. While Eastern European nations—particularly Poland and the Baltic States—have prioritized defense spending in Hresponse Hto Russia's aggression, Western European countries continue to lag behind despite the clear indicators and warnings since Russia's 2014 annexation of Crimea.[24] With the Ukraine war's fourth anniversary now past, NATO allies must step up and fund critical capabilities.

Overall, from 2014 to 2024, NATO allies missed the 2 percent defense spending targets by $827.91 billion (adjusted to 2024 dollars).[25] This cumulative shortfall nearly equals the United States' annual defense budget.[26] NATO's collective equipment deficit since 2014 stands at roughly $70 billion when adjusted for the 2 percent minimum. This funding

gap led to critical shortfalls in armored formations, long-range artillery, air defense, ammunition stockpiles, and logistics infrastructure—all of which are key to NATO's deterrence architecture. Encouragingly, European NATO allies are increasing their defense spending, but capability gaps remain. As NATO refines its Regional Defense Plans—the planning for how to protect Alliance territory from attack in specific regions across the Alliance in a range of contexts from full-scale war to a limited incursion—NATO allies should concentrate on expanding their capabilities to deter Russia with a focus on national advantages.[27]

Active NATO Operations. Aligned with NATO's force planning are multiple ongoing operations and initiatives in the land, air, and sea domains alongside several multinational support initiatives. The longest active NATO operation is the Kosovo Force (KFOR), which began in June 1999 pursuant to United Nations Security Council Resolution 1244 following NATO air operations against the Federal Republic of Yugoslavia.[28] Kosovo declared its independence in 2008, but it has not been recognized by Serbia and remains the major divide in their bilateral relations. In 2023, increased tensions in Kosovo resulted in injuries to 25 KFOR soldiers;[29] the result was a temporary increase in KFOR troops that remains in place. At present, KFOR has deployed approximately 5,249 soldiers (of which 690 are American) from 33 nations to Kosovo.[30] KFOR is the third responder after the Kosovo Police and the European Union (EU) Rule of Law Mission in Kosovo (EULEX).

NATO Integrated Air and Missile Defense (IAMD) provides the framework for all airspace operations split into the ongoing NATO Air Policing and NATO Ballistic Missile Defense (BMD) missions. It is commanded by the Supreme Allied Commander Europe (SACEUR), who is always from the United States and is currently General Alexus G. Grynkewich. NATO IAMD covers the airspace of all 81 million square kilometers of the Alliance using financial support and assets from across the Alliance.[31] NATO's Allied Air Command, headquartered at Ramstein Air Force Base, oversees NATO IAMD missions and is always led by a U.S. Air Force General.[32] The current commander of NATO's Allied Air Command, U.S. Air Forces in Europe, and U.S. Air Forces in Africa (which is now a three-star position) is Lieutenant General Jason Hinds.[33]

NATO's Air Policing mission has two Combined Air Operations Centres to coordinate airspace monitoring: one at Torrejón, Spain (for southern Europe), and one in Uedem, Germany (for northern Europe).[34] NATO Air Policing houses five regional missions with varying ratios of American and other Allied forces beyond the monitoring headquarters. These missions are the Baltic States, Enhanced Air Policing on NATO's eastern flank, the Eastern Adriatic and Western Balkans, Iceland, and the Benelux countries.

Begun in 2004 to ensure airspace security for Alliance members that lacked sufficient independent forces,[35] Baltic Air Policing serves as a frontline defense and deterrence operation that frequently intercepts Russian Federation aircraft that are not following communications and safety protocols. Given the Baltic nations' position between Russia and Kaliningrad, combined with Russian tensions, NATO air forces scrambled jets more than 300 times in 2024 in support of this mission.[36] Backed by rotational air forces from NATO members based in Lithuania and Estonia, Baltic Air Policing is carried out by the Italian, French, and Dutch air forces.[37]

Enhanced Air Policing was part of NATO's 2014 Assurance Measures to boost deterrence along the eastern flank in response to Russia's claimed annexation of Crimea.[38] This included a second detachment of forces in Estonia and provided additional voluntary national detachments to support the Romanian and Bulgarian governments' national air policing missions. At the moment, Spain is the main supporter of NATO's Enhanced Air Policing mission in Romanian airspace, and Sweden deployed a Gripen fighter squadron to Poland in June 2025 to support Enhanced Air Policing there.[39] The mission in Poland received intense media attention in September 2025 after it downed Russian drones that had flown deep into Polish territory.[40]

The remaining air missions in the Eastern Adriatic and Western Balkans, Iceland, and the Benelux countries operate in a calmer environment to secure airspace and maintain interoperability. NATO's Air Policing mission over the Eastern Adriatic and the Western Balkans secures Allied airspace with minimal air assets and is covered jointly by the Italian, Greek, and Hungarian air forces.[41] Though staffed for decades by U.S. forces, the Icelandic Air Policing mission now consists of deploying fighters from NATO members for three to four weeks three

times a year.[42] Since Iceland has no military, this is the only way to ensure air surveillance. The Benelux Air Policing mission is a pooling of assets among the air forces of Belgium, the Netherlands, and Luxembourg to provide economies of scale in airspace security by pooling air assets and responsibilities.[43]

Conceived during the first George W. Bush Administration and agreed to in principle under the second Bush Administration, NATO's final permanent mission in the air is Ballistic Missile Defense, which is carried out with U.S. assets funded for deployment to bases across NATO.[44] NATO BMD relies on a combination of radar and interceptor assets including BMD-capable naval assets deployed to Rota, Spain; Aegis Ashore sites in Romania and Poland; and radar and command and control in Turkey and Germany as built out by America's European Phased Adaptive Approach.[45] NATO BMD declared initial operational capability at the 2016 Warsaw Summit and enhanced operational capability at the 2024 Washington Summit, although full operational capability remains in the uncertain future as new and existing BMD assets including national Patriot and SAMP/T batteries are networked with the system.[46] Thus, despite all of the above missions, air defense remains an area characterized by critical NATO capability gaps.

NATO has several active naval operations that are overseen by the Allied Maritime Command (MARCOM) in Northwood, United Kingdom, including Operation Baltic Sentry, Operation Sea Guardian, and maritime support in the Aegean Sea.[47] In January 2025, Operation Baltic Sentry deployed frigates and maritime patrol aircraft to the Baltic Sea in response to critical infrastructure and shipping safety concerns with forces provided primarily by littoral states.[48] Launched in November 2016 as the successor to Operation Active Endeavor, Operation Sea Guardian performs maritime security, domain awareness, and counterterrorism missions in the Mediterranean Sea. It conducts "five to six focused operations in specific areas of interest in the Mediterranean" each year with a combination of direct support assets under NATO command and associated support assets that remain under national commands.[49] Since 2016, NATO has utilized rotations of ships from Standing NATO Maritime Group 2 to provide enhanced domain awareness and support to Greece, Turkey, and Frontex (the EU's border enforcement agency) for out-of-area migration flows across the Aegean. This support provides enhanced awareness and coordination for national partners to address the humanitarian and security concerns posed by mass migration.[50] Finally, NATO maintains two Standing NATO Maritime Groups (SNMG1 and SNMG2) to provide on-call rapid reaction naval forces under NATO command to deal with unexpected evolutions of the strategic environment as well as two Standing NATO Mine Countermeasures Groups (SNMCMG1 and SNMCMG2) to perform explosive ordnance disposal to secure open sea lanes.[51]

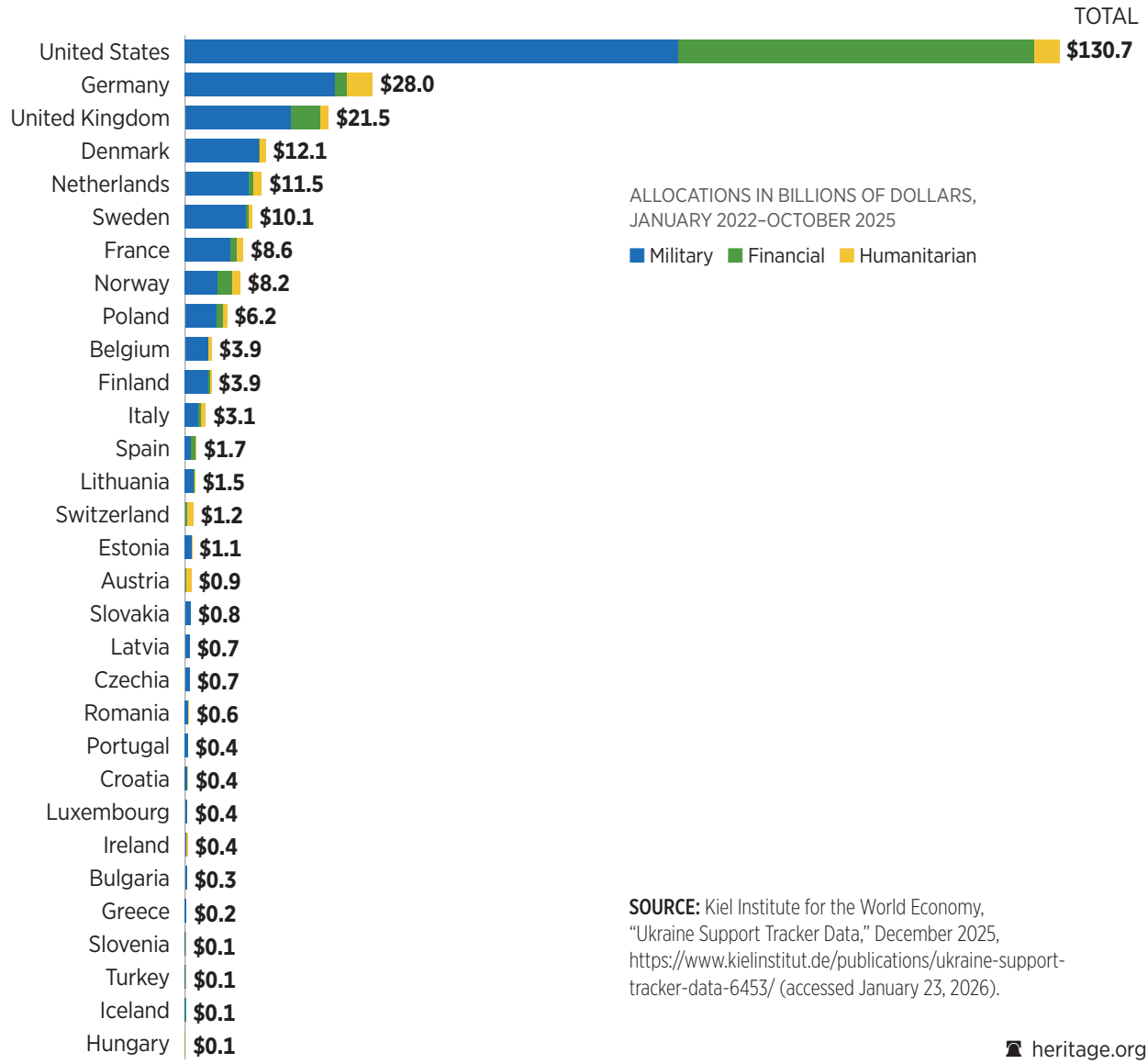
NATO's remaining ongoing operations concern out-of-area cooperation in Iraq and with the African Union (AU). NATO Mission Iraq started in October 2018 following an Iraqi government request to train Iraqi security forces. Focused initially on the military, it subsequently expanded to include Iraqi law enforcement agencies. NATO soldiers' training activities are entirely non-combat and advisory, limited to those that are requested and permitted by the Iraqi government.[52]

The NATO–AU relationship has developed over time since initial assistance requests in 2005. Their cooperation in 2025 focused on operational support, training support, and structural assistance, all underpinned by liaison work. Operational support related to strategic airlift and sealift provided to the AU's mission in Somalia; training support included access to training at NATO institutions and a mobile training delegation in Africa, upon request; structural assistance consisted of advisors provided by request to the AU on an annual basis with a recurring focus on improving the AU's African Standby Force Concept.[53]

Finally, NATO has expansive ongoing efforts to support Ukraine in its fight against Russia with a particular focus on arms provision, training, and general funding organized under the framework of the Comprehensive Assistance Package (CAP) for Ukraine.[54] Chart 9 breaks down funding to Ukraine by the United States and each European ally with a further delineation among types of aid; much of the NATO aid has been coordinated within CAP structures. While the United States has provided the largest single-nation share of support to Ukraine so far, ongoing balancing of the figures is occurring thanks to the NATO Prioritized Ukraine Requirements List (PURL) initiative launched after the June 2025 Hague Summit to establish an organized

CHART 9

U.S. and European National Support for Ukraine



SOURCE: Kiel Institute for the World Economy, "Ukraine Support Tracker Data," December 2025, https://www.kielinstitut.de/publications/ukraine-support-tracker-data-6453/ (accessed January 23, 2026).

heritage.org

pathway for European allies to support Ukraine by paying the United States for delivery of prioritized weapons systems and other capabilities.[55]

European Political Shifts

Recent European elections have featured political shifts. Voters turned to the right in the June 2024 European Parliament elections as the European People's Party finished in pole position, and the European Conservatives and Reformists and other conservative party groupings gained seats. German voters continued this trend in February 2025 as the Christian Democratic Union/Christian Social Union (CDU/CSU) won elections in Germany, heralding increased defense spending.[56]

However, while political change in Europe has been a constant, not all shifts have been toward the right or even toward functional government. In the United Kingdom (U.K.), Labour's Keir Starmer beat the incumbent Conservative Party in July 2024 elections, and France's snap elections settled into a deadlocked hung parliament with a progressive

alliance of parties taking first place despite the conservative National Rally having its best night ever.[57] This result presaged the fall of multiple French governing coalitions in 2025. Broadly, there is increased seriousness about defense capabilities and spending across Europe, but electoral tumult strengthens allied politicians' incentives to play to their domestic bases, which can result in decreased alignment with Washington's defense priorities.[58] The following sections analyze the military situations of European NATO allies within regional groupings, as geography often dictates threat and capabilities priorities.

Malign Chinese Influence in Europe

Regardless of geography, American policymakers are intent on curbing malign Chinese influence in Europe, which has risen over the past decades. With economic and trade ties in the hundreds of billions of euros annually, China is now a major trading partner for many European countries—and under investigation by the EU for unfair trade practices involving a variety of goods.[59]

The United States remains Europe's premier trading partner and investor, but Chinese investments continue to emerge across the continent. Encompassing sectors as diverse as ports, telecommunications, and car manufacturing, Chinese investment has penetrated a variety of critical sectors. The attractive financing terms have swayed some allies, as the true costs are hidden at the outset. An illustrative example is Poland's port in Gdynia, where Hong Kong–based Hutchison Port Holdings controls a container terminal that Hutchison leveraged to deny the U.S. Army equipment unloading rights because of a slight protrusion into their port zone.[60] With the extensive network of port investments and stakes detailed in Map 3, this raises concerning possibilities for wider problems if a conflict were to occur in Europe. Alternatively, with reference to telecommunications and cybersecurity, recent revelations that hackers linked to the Chinese government hit more than 80 countries should inspire vigilance.[61] Yet many European countries still allow Chinese providers to service their national telecommunications networks.

While China's malign activities are often covert, some have been more overt. Recent years have seen several high-profile Chinese espionage announcements, including charges of espionage involving a Huawei executive in Poland (2019); a warning of Chinese espionage targeting sensitive industries in the Netherlands (2024); espionage charges against two men in Britain (2024); and the September 2025 trial of a former aide to a member of the German Bundestag.[62] China's crowning subversive activity, however, is its support for Russia's war in Ukraine, for which Chinese drone parts undergird Russian drone production lines and with Western officials alleging Chinese support for Russian explosives manufacturing as well.[63] This all culminated in Chinese Foreign Minister Wang Yi's telling European officials that "Beijing can't accept Russia losing its war against Ukraine as this could allow the United States to turn its full attention to China."[64]

Nordic Allies: Denmark, Finland, Iceland, Norway, and Sweden. The Nordic nations are the northern bloc in NATO focused on Arctic, Baltic, and Russian border security. With Finland and Sweden now full members of the Alliance, NATO reaps the full benefit of their efforts. Finland's 2024 *Government Report on Finnish Foreign and Security Policy* lays out the case:

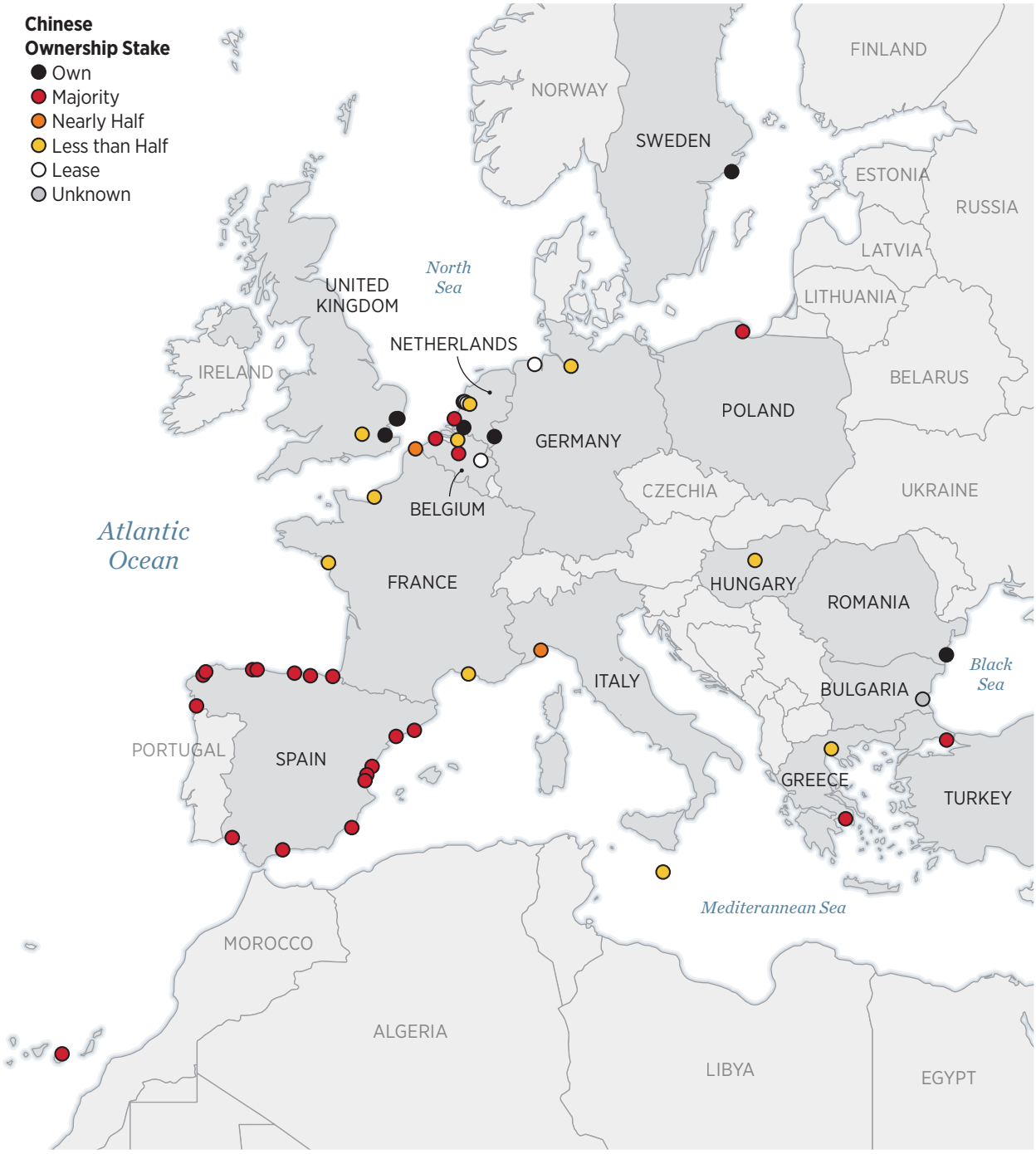
> Finland's and Sweden's NATO memberships and the increasingly close bilateral cooperation arrangements between the Nordic countries and the United States strengthens the stability and security in the Baltic Sea region and Northern Europe, reducing the risk of the use of military force in Finland's neighboring areas. The accession of Finland and Sweden to NATO also helps deepen the cooperation between the Nordic and Baltic countries.[65]

From coordinated Arctic Council actions to the Baltic Defender exercise and the Joint Expeditionary Force, America's Nordic allies set the standard for Allied interoperability.[66] In the air, Denmark, Finland, Norway, and Sweden have outlined a "Nordic Warfighting Concept for Joint Air Operations" to achieve unitary interoperability in the Nordic region.[67] On the ground, Denmark, Finland, Norway, and Sweden all rely on BAE Systems' Combat Vehicle 90 and are pursuing joint procurement for the next generation of infantry fighting vehicles to guarantee continued interoperability.[68] Their interoperability and integration across all military domains were further enhanced by their planning, hosting, and participation in NATO's Nordic

MAP 3

Chinese Stakes in Ports in Europe

The People's Republic of China and major Chinese companies subject to their strict national security laws hold stakes in dozens of ports across Europe, ranging from minority investments to full ownership.



NOTE: Locations are approximate.
SOURCE: Heritage Foundation research.

heritage.org

Response 2024 exercise in which more than 20,000 soldiers from 13 Allied nations conducted joint operations in Finland, Norway, and Sweden on land, in the air, and at sea.[69] Their extensive cooperation has been on display in Operation Baltic Sentry, conducted in response to repeated Russian and Chinese grey-zone warfare operations in the Baltic Sea.[70] Sweden is working to open a NATO base in northern Finland by 2026 to forward posture forces and joint command and control for deterrence along Finland's 830-mile border with Russia.[71]

Each nation (except Iceland) is also pursuing national efforts to strengthen its security capabilities with geographic concentrations: Denmark is recapitalizing its Arctic naval forces, Finland is securing its land border with Russia, Norway is concentrating on Arctic navigation and maritime domain awareness, and Sweden is focused on defending Gotland. Norway's effort is particularly significant, involving as it does a $13.5 billion contract signed with the U.K. to build five anti–submarine warfare (ASW) frigates.[72] Under this program, Norway intends to procure five to six new anti–submarine warfare frigates with anti-submarine helicopters integrated for full combat readiness to support its role in delivering maritime domain awareness and control in the Arctic, including the hunting of Russian submarines.[73]

Denmark. In February 2025, citing the Russian threat, the Danish government proposed a package to push its 2025 defense spending to more than 3 percent of GDP.[74] The Danish Defense Minister had announced a package of at least $1.5 billion in December 2024 to increase security assets in and around Greenland, increase staffing at Denmark's Arctic Command in Nuuk (Greenland's capital), and upgrade one of Greenland's civilian airports so that it could handle F-35 fighters.[75] This was followed in February 2025 by a political agreement focused on the Arctic and North Atlantic in Copenhagen dedicating 14 billion Danish kroner (roughly $2.2 billion) to "[c]apabilities such as three new Arctic naval vessels, further long-range drones and satellites...."[76] All of this was capped by a $4.2 billion increase in defense spending in October 2025 to secure additional capabilities for Arctic security.[77]

These three packages will enable Denmark to strengthen its protection of Greenland. All of these actions preceded Denmark's accession to the Arctic Council's chairmanship.[78] These investments were coupled with the Danish-led Arctic Light 2025 NATO exercise held in Greenland from September 9–19, 2025, with several NATO partners,[79] and the Arctic Endurance exercises that have begun in 2026.[80]

Iceland. Iceland is a founding member of NATO but does not have a military. Holding a key geographic position astride transatlantic transit routes and the Arctic, Iceland contributed 0.0624 percent of NATO's annual operating budget in 2024 per cost share arrangements, which works out to roughly €235.1 million ($254.5 million at average 2024 exchange rates) as its share of NATO's overall 2024 budget.[81] Since Iceland has no military forces, its coast guard interfaces with NATO forces operating in Iceland.[82] Iceland spent 6.7 billion Icelandic krona ($52.2 million) on its coast guard in 2024.[83]

Using its 2024 GDP figure of $32.2 billion,[84] Iceland spent roughly 0.156 percent of GDP on defense if all of the above figures are included. Not even half of the NATO target, this would make Iceland the lowest NATO defense spender if the government considered these figures defense expenditures and reported them to NATO. However, Iceland is in a critical position with respect to defense of the Atlantic Bridge line of operation and military domain awareness, so its provision of access provides value to NATO that is not captured by its low spending.[85] The U.K. leveraged this position in November 2025 when it deployed several P-8A Poseidon maritime patrol aircraft to Keflavik Air Base for patrols.[86] The U.S. seized the Russian Bella 1 oil tanker off the Icelandic coast in January 2026.[87]

Finland. Finland entered the Alliance as a model member in April 2023 and planned to spend €290 million ($334 million)—upwards of 2.5 percent of GDP—on defense in 2025.[88] With an 830-mile border with Russia and a security situation that could "deteriorate quickly...[and] drag on for years" according to Finnish Defense Minister Antti Häkkänen, Finland is committed to a modernized and expanded military. The Finnish Defense Forces have 24,000 active-duty personnel that can scale to 280,000 troops in wartime, supported by a reserve force of about 870,000 troops.[89]

Moreover, those troop levels are not just for show: Finland is taking on a leading regional role. For example, it was the first country to forcibly board an oil tanker suspected of deliberate sabotage of Baltic Sea cables, and although the tanker ship

Eagle S was eventually released, Finnish authorities detained several crew members until legal proceedings were complete.[90] Finland also has augmented security on land: closing its land border with Russia in late 2023, announcing a NATO brigade deployment and hosting Exercise Dynamic Front to practice live artillery fire command-and-control and interoperability with NATO partners in 2024, and announcing its withdrawal from the Ottawa Convention banning landmines to allow access to all necessary tools of defense.[91]

Norway. Norway hit the 2 percent NATO spending target in 2024 and planned to increase its defense spending to 2.16 percent in 2025 with funding for additional personnel, air platforms like the F-35, and officer training improvements.[92] Though now exceeding 2 percent of GDP on defense, Norway may fall short of rising targets as it aims to reach 3 percent by 2030.[93] Nevertheless, Norway announced a 50 billion Norwegian kroner (NOK) (approximately $5.1 billion) increase in its support for Ukraine for a total 2025 allocation of NOK 85 billion (approximately $8.7 billion) to buttress Ukrainian defense industry output.[94] From May 2023 to May 2025, Norway also chaired the Arctic Council, where it sought to promote Allied cooperation and sideline Russia because of the Ukraine war.[95] Unfortunately, these efforts largely failed to reduce conflict with the Russians, who accused Norway in March 2025 of militarizing the Svalbard Archipelago, a claim that Norway denied, noting its adherence to the 1920 treaty establishing Norwegian sovereignty there.[96]

Because of its border with Russia, Norway keeps a wary eye on Russia's main submarine bases, strategic bomber bases, and nuclear weapons storage sites in the Kola Peninsula, and it amended its Defense Cooperation Agreement with the United States in February 2024 to grant access to eight additional areas concentrated in the northern part of the country.[97] In furtherance of overall NATO cooperation, Norway hosted nine Allied nations for the Joint Viking 2025 Exercise in March 2025 to simulate a defense of Norway.[98] Tensions with allies, America in particular, arose in 2025. Unnamed officials challenged the security of intelligence-sharing with the United States, and a Norwegian bunker fuel supplier refused to supply a U.S. nuclear submarine, which had to turn around mid-transit.[99] Nevertheless, senior Norwegian officials publicly emphasize that their cooperation with the United States will continue.

Sweden. Sweden became a valuable addition to the NATO Alliance in March 2024 and has doubled down on its traditional seriousness about defense through a heightened military training tempo, increased capability development, and commitment to NATO integration. In October 2024, the government announced a Total Defense Bill for 2025 to 2030 that called for an increase of more than 170 billion Swedish kroner (more than $16 billion) above current military spending, which was already above 2 percent of GDP.[100] This seriousness is paralleled in the Swedish military's training, especially on the strategically vital island of Gotland in the middle of the Baltic Sea. Swedish forces run continual exercise rotations to prepare to repel an invasion and have constructed additional barracks.[101] The Swedish military has also ramped up its Arctic training program while training U.S. forces to operate in the Arctic's harsh conditions.[102]

As another part of NATO integration, Sweden has opened its Visdel Test Range, Europe's largest land proving ground, to partners. To commemorate Sweden's first anniversary as a member of NATO, American B-52H Stratofortresses escorted by Swedish JAS 39 Gripen fighter jets carried out practice drops of GBU-30 joint direct attack munitions at Visdel.[103] Additionally, Sweden has expanded the Esrange Space Center in its North as a unique launch facility for Europe and has begun to launch military communications satellites (the first was launched from California in August 2024).[104] Finally, Sweden has been a stalwart supporter of Ukraine and signed a letter of intent about cooperating on air capabilities as a first step toward a major deal for the export of Gripen fighters.[105]

Baltic Allies: Estonia, Latvia, and Lithuania. Russia presents a conventional military threat to Estonia, Latvia, and Lithuania that may be greater than the one it presents to any other NATO members. Accordingly, these three allied countries commit high percentages of their GDP to national defense (all are headed to 5 percent of GDP).[106] Their prioritization of capabilities central to defense against Russian invasion and grey-zone aggression is illustrated by joint construction of the Baltic Defensive Line: a set of 600 bunkers and fortified positions along their border with Russia to shape future invasion routes.[107] Purchases of relevant capabilities,

from High Mobility Artillery Rocket Systems to National Advanced Surface-to-Air Missile Systems to Naval Strike Missiles, all increase the Baltic forces' ability to impose significant costs on any potential Russian invasion in order to preserve battlespace for the inflow of allied reinforcements.[108]

Finally, the recent 2025 joint public announcement by the Baltic and Polish defense ministers recommending that their nations withdraw from the Ottawa Treaty (which prohibits the production, stockpiling, and deployment of anti-personnel landmines) in order to capitalize on their Baltic Defensive Line indicates a recognition of the realities of their threat environment.[109] Since the joint statement, Lithuania's Ministry of Defense has announced a three-layer defensive scheme encompassing areas from Lithuania's border with Russia to 50 kilometers inland. It is already under construction with minefields planned for the first layer.[110]

Due to rising Russian threats and a lack of strategic depth in the Baltic States, NATO has deployed multinational battlegroups as tripwire forces to each of these three countries and Poland since 2017. Each battlegroup is led by a framework nation: The United Kingdom leads in Estonia (battlegroup total: 1,350 soldiers); Canada leads in Latvia (battlegroup total: 2,450 soldiers); and Germany leads in Lithuania (battlegroup total: 1,800 soldiers).[111] Germany is continuing to expand its forces toward final deployment of its new 45th Armored Brigade by 2027.[112]

Eastern Flank Allies: Bulgaria, Hungary, Poland, Romania, and Slovakia. In March 2022, then-NATO Secretary General Jens Stoltenberg announced NATO's Enhanced Forward Presence (EFP) effort consisting of four new multinational NATO battlegroups deployed to Bulgaria, Hungary, Romania, and Slovakia (in addition to the existing four in the Baltic States and Poland).[113] The United States is the framework nation in Poland; the multinational battlegroup in Bulgaria is a combined command between Bulgaria and Italy; Hungarian forces lead in Hungary with support from Croatia, Italy, and Turkey; and France leads the battlegroup in Romania.[114] Personnel rotations are constant, but "battlegroups are not identical; their sizes and compositions are tailored to specific geographic factors and threats."[115]

Bulgaria. A member of NATO since 2004, Bulgaria continues to replace outdated Soviet gear with modern NATO standard equipment to enhance its military capabilities and interoperability. This process has slowed because of spending limitations over the past decade, although Bulgaria did spend more than 2 percent of GDP on defense in 2024.[116] Significant events in 2025 included the initial delivery in April of eight F-16 fighter jets to replace aging MiG-29s with another eight F-16s scheduled to arrive by the end of 2027.[117] In September 2025, Bulgaria enhanced readiness and NATO interoperability by hosting NATO's 20th civil emergency response exercise.[118] Regular emergency response exercises help to ensure smooth coordination in disaster and other emergency response, such as the NATO response to deadly earthquakes in Turkey.[119]

Hungary. Hungary became a member of NATO in 1999 and has marked its own path within NATO over the past year by embracing economic openness to Russia and China while also approving Sweden's accession to the NATO Alliance.[120] Hungary has met the 2014 NATO Wales Summit 2 percent spending target since 2023; by contrast, "while the majority of NATO members finally reached the threshold in 2024, NATO members over the past decade averaged only 1.59 percent."[121] Given these complicating factors and Hungary's position on NATO's eastern flank, Prime Minister Viktor Orbán's government sought freedom to limit Hungarian participation in all NATO actions outside the Alliance's territorial borders, which was granted in a deal whereby Hungary agreed not to block NATO support to Ukraine.[122] Despite these delineations, Budapest welcomed President Trump's re-election and coordinates closely with Washington on Russia sanctions policy as demonstrated by a January 2025 reversal of a threatened veto and a November 2025 sanctions carve-out for Hungary.[123]

Poland. Lauded by U.S. Secretary of War Pete Hegseth as a "model ally,"[124] Poland has taken the lead in Europe on securing credible deterrence capabilities in support of its NATO obligations. On track to reach 5 percent of GDP on defense spending, Poland has secured critical capabilities from American F-35 jets to South Korean K2 Tanks to increasing Polish 155mm artillery shell production. Polish defense spending has been concentrated on combat capabilities.[125] As a result, Poland has emerged as a bulwark of NATO deterrence.

Romania. Romania hit the 2 percent of GDP defense spending target for the third time in a decade

in 2025 and envisions serious additional spending as it expands the Mihail Kogălniceanu NATO military base to 3,000 hectares, which will make it the largest NATO base by 2030.[126] A key player in Black Sea security, Romania hosts an Aegis Ashore site as part of NATO's IAMD mission.[127] Romania's geography, spending, and basing assets will make it a significant player in NATO for the foreseeable future, but concerns exist because of its decision to annul a presidential election, citing Russian influence operations.[128]

Slovakia. Slovakia met the 2 percent NATO target in 2025 but has refused to commit to additional spending beyond "a slight increase of about a tenth of a percent."[129] Concerns about fiscal and strategic overextension also underpin Prime Minister Robert Fico's public opposition to Ukrainian NATO membership and to sanctions on Russia.[130] Another concern is that both Slovakia and Hungary continued to rely to a significant extent on Russian energy resources in 2025.[131] On a more positive note, Prime Minister Fico survived an assassination attempt in the summer of 2024 and has returned to health without civil unrest or government collapse.[132]

Balkan Allies: Albania, Croatia, Montenegro, North Macedonia, and Slovenia. All of NATO's Balkan members acceded to NATO in the 21st century after NATO interventions in Bosnia and Kosovo in the late 20th century, seeking to build trust and cooperation among historically fractious nations. The process has advanced NATO values and promoted regional cooperation, but the contributions of these nations to European security have been commensurate with their smaller relative size.

Decades of regional integration produced a Joint Declaration on Strengthening Defense Cooperation in 2025 by Croatia, Albania, and Kosovo (a non-NATO member with NATO KFOR still on the ground) that has drawn furious protests from Serbia, which still regards Kosovo as a breakaway province.[133] Croatia doubled down in August 2025 when it signed a defense agreement with Slovenia expanding their pre-existing ties to smooth joint production and exercises, which Serbia also strongly criticized.[134] The degree of implementation and the possible effects on strategic stability in the Balkans remain to be seen.

Southern Allies: Greece, Italy, Portugal, Spain, and Turkey. For Southern European NATO allies, instability in the Middle East and Africa and Russian meddling in their backyard are the most pressing security threats. Nevertheless, the Mediterranean countries have not invested sufficiently in the defense capabilities needed to meet this challenge, and several have spent significant time below the prior 2 percent spending threshold. The lackluster defense spending in Italy, Portugal, Spain, and even France (which only recently reached 2 percent of GDP) stand in stark contrast to spending by their northern NATO partners

Greece. Greece's commitment to defense spending has been steady, although this has been due largely to ongoing historic tensions with neighboring Turkey. These tensions came into the open in 2024 in disputes with Italy and France over defense deals with Turkey involving the air domain.[135] These disputes led Greece to pursue technology modernization initiatives that integrate artificial intelligence (AI) and drone technology into its air defense systems; this is an Allied capability gap, but Greece's plans currently remain focused on countering Turkey.[136]

The Greek navy has increased its activities, particularly in the Red Sea, with Rear Admiral Vasileios Gryparis assuming operational command of the EU's Operation Aspides, although he is hamstrung with only a handful of rotating frigates.[137] Adding to naval force generation concerns, Greece has stuck to "balanced relations with China"[138] in discordant counterpoint to the American approach. America, for example, has blacklisted China's COSCO Shipping, which runs Greece's Piraeus Port, and COSCO Shipping has refused to invest capital in the upgrading of Piraeus Port to meet modern standards.[139] However, a recent investment agreement in Greece with the United States Development Finance Corporation signals a positive move to diversify port infrastructure for security.[140]

Another threat is Russia's aggressive and growing presence in the Mediterranean. Russia's hypersonic missile tests in the eastern Mediterranean, provision of intelligence that helps Houthi terrorists to target commercial shipping in the Red Sea, and redeployment of forces from Syria to Libya are directly compounding instability and conflict.[141] Redoubled Greek force generation and capabilities will be essential to addressing these worrying trends.

Italy. Prime Minister Giorgia Meloni has one of the best relationships with President Trump among

NATO leaders,[142] but Italy seems to lack political will when it comes to spending on defense. Military leaders have declared that "our commitment to the security of the Red Sea and other crisis areas must fund support through additional funding that goes beyond the scope envisaged with the recent approval of the budget law."[143] Instead, Italian politicians have been content to commit minimal Italian troops to NATO operations and have Italy serve as host for Allied Joint Force Command Naples.[144]

Italy has been a leader in EU operations such as the anti-piracy Operation Atalanta off the Horn of Africa and Operation Irini, responsible for enforcing the United Nations arms embargo against Libya, but both operations strain under limited assets.[145] Ideally, Italian operations related to Libya can give NATO leverage to deny Russian forces a new basing foothold to replace their location in Syria. Scattered strategic commitments and insufficient defense resourcing, if continued, will complicate Article 3 commitments that lie at the heart of NATO's assurance of collective defense in the contested Mediterranean strategic environment.

Portugal. Portugal developed ties with the United States during World War II, when it granted America use of the Azores to move naval and air assets across the Atlantic, and after the war became a founding member of NATO.[146] However, it has lagged behind most other European allies by spending only 1.55 percent of GDP on defense in 2024 and reaching 2 percent only in 2025.[147] This is primarily the result of a disconnect between NATO's focus on securing the eastern flank against Russian aggression and Portugal's position on the far Western edge of Europe. However, as NATO Secretary General Rutte noted during his January 2025 visit to Portugal, NATO realizes it will need to deal with "challenges coming from the southern neighborhood," and Russian ships and aircraft still lurk nearby.[148]

Spain. Consistent with past practice, Spain spent only 1.43 percent of GDP on defense in 2024.[149] Prime Minister Pedro Sánchez has promised to accelerate defense spending—a potential boon to the Alliance as Spain is the eurozone's fourth-largest economy—but he faces political challenges from his hard-left coalition members.[150] Confronted by rising allied pressures, Spain has announced a €2.08 billion ($2.4 billion) increase in defense procurement and a €1 billion ($1.15 billion) military assistance package to Ukraine for 2025 (this helped Madrid reach 2 percent in 2025).[151] However, Spain has explicitly rejected the 5 percent defense spending target adopted at NATO's June 2025 Hague Summit in favor of social spending.[152] That lower budgets mean lower capabilities is perhaps best demonstrated in Spain's case by its decision not to buy F-35 jet fighters, instead holding out for the sixth-generation European Future Combat Air System, which will not be operational until 2045.[153]

Turkey. Turkey has been a pivotal ally for counterterrorism force projection by American and NATO forces into the Middle East but has clashed with NATO over Sweden's accession to the Alliance, cooperation with Russia, and historic grievances with Greece. In January 2024, Turkey became the final NATO ally to ratify Sweden's NATO accession, having used its leverage to force changes in Swedish anti-terrorism laws, compel extradition of wanted individuals to Turkey, and ensure new arms sales from Washington.[154] U.S.–Turkey relations have improved with a sale of the latest Block 70 F-16s, but Ankara's 2019 decision to purchase Russia's S-400 air defense system led the United States to expel Turkey from the F-35 fighter jet program.[155]

Tensions between Greece and Turkey have surged over the Greek government's plans for a Greece–Cyprus–Israel power link, which Turkey claims will violate its territorial waters.[156] Nevertheless, the fall of the Assad regime has raised the possibility of cooperation on security in Syria as Turkey seeks to establish stability on its southern border to permit the millions of Syrian refugees hosted by Ankara to return home.[157] This could also build on cooperation by Turkey, Romania, and Bulgaria in the framework of a joint counter-mine task force in the Black Sea to ensure safe shipping.[158] Despite significant pitfalls, if positive momentum can be sustained (or even expanded with a possible return of Russian S-400 systems[159]), NATO cohesion could improve, and threats from the Alliance's southern flank could be reduced.

Western and Central European Allies: Belgium, the Czech Republic, France, Germany, Luxembourg, the Netherlands, and the United Kingdom.

Belgium. Brussels is host to NATO's headquarters, but Belgium has failed to meet NATO spending targets for more than a decade, although Prime Minister Bart De Wever and Defense Minister Theo Francken did raise Belgian defense spending to the

Wales Summit goal of 2 percent in 2025.[160] Connected to this increase, Belgium's order of 34 F-35 jet fighters was scheduled to arrive in 2025, and the government is looking at new purchases of F-35s and an anti–submarine warfare frigate.[161] The F-35s will be put to use as Belgium leads NATO's Benelux Air Policing mission. Belgium also brings financial acumen to the Alliance as host to the Society for Worldwide Interbank Financial Telecommunications (SWIFT). SWIFT has been a critical part of coordinated Allied actions to punish Russia for aggression in Ukraine and is a keystone of Western economic leverage.[162] Belgium is also shifting to investment in European defense firms to expand the allied defense industrial base.[163]

The Czech Republic. The Czech Republic spent 2 percent of GDP on defense in 2024 and has announced plans to reach 3 percent of GDP by 2030.[164] This increased focus on national security follows an October 2023 "Defence Strategy of the Czech Republic" in which Minister of Defence Jana Černochová acknowledged "a highly deteriorated security situation" while criticizing past "political apathy and chronic underfunding."[165] The Czech Republic has a long history of successful weapons manufacturing with domestic arms makers such as Česká zbrojovka a.s. helping to modernize Czech military equipment.[166]

The government has backed its rhetoric on Ukraine with direct aid and coproduction support. The Czech ammunition initiative for Ukraine, for example, has won plaudits for delivering hundreds of thousands of 155 mm artillery rounds to Ukraine that it bought from world markets, and the initiative was extended into 2025.[167] The Czech Republic also has signed agreements with the Ukrainian defense industry to produce its NATO-standard rifles for Ukraine's soldiers in Ukraine, building up a long-term supply pipeline.[168]

France. France is a unique NATO ally with its Gaullist streak of independence, status as a secondary NATO nuclear power, and tradition of maintaining an expeditionary force. France became a nuclear power in the 1960s and today maintains a force of nuclear-capable Rafale jets to launch ASMP-A nuclear-armed cruise missiles and a fleet of three *Triomphant*-class ballistic missile submarines with a set of M-51 submarine-launched ballistic missiles (SLBMs) with multiple independently targetable re-entry vehicles (MIRVs).[169] France is not a member of NATO's Nuclear Planning Group, but its nuclear capabilities complicate adversary calculations, as does France's strategic ambiguity policy with respect to vital interests with European dimensions.[170]

The French military has long guarded an independent expeditionary capability but is now undergoing a transition to focus on high-intensity warfare against more equal adversaries.[171] Additionally, President Emmanuel Macron has proposed a force built from a coalition of the willing to monitor any ceasefire or peace deal in Ukraine pursuant to Washington's insistence that American troops will not deploy.[172] As part of its operational independence, the French navy retains a carrier group centered on the *Charles de Gaulle* aircraft carrier, which deploys worldwide, including to French territories in the Indo–Pacific.[173] However, despite the Red Sea's strategic importance in linking French territories, France declined to join America's Operation Prosperity Guardian, relying instead on the "lowest common denominator of agreement" represented by the purely defensive operations conducted as part of Operation Aspides, a European Union mission to accompany EU nations' vessels through the Red Sea.[174]

Germany. Germany will necessarily play a central role in deterring Russian conventional aggression against NATO allies in Europe. Its *Zeitenwende* fund and current relaxing of debt limits for defense are valuable steps to rectify massive defense underinvestment. Additionally, Germany is the second-biggest contributor of military aid to Ukraine behind the United States. Germany is set to deploy an armored brigade permanently to Lithuania; an estimated 500 of an eventual 5,000 soldiers of the 45th Armored Brigade were deployed there in 2025, and the rest were scheduled to deploy by the end of the year.[175]

Germany is leading the effort to close NATO air defense capability gaps through its Sky Shield initiative, which brings together 21 nations to procure and deploy short-range, medium-range, and long-range air defense systems to blunt missile threats from Russia as successfully demonstrated in Ukraine.[176] In 2024, Germany broke ground on Europe's first Patriot missile plant to ensure a steady supply of these critical air defense munitions.[177] The German military is also planning to purchase an updated version of the German-produced Taurus

long-range strike missiles to deepen alarmingly light precision munitions stockpiles in Europe.[178] If Germany continues to augment its defense investments, NATO security will improve in the years ahead.

Luxembourg. Among the world's smallest countries, Luxembourg has around 671,000 citizens though they are among the richest in the world at $132,800 per capita.[179] Its economic vitality and status as a NATO founding member have not translated into meeting NATO defense spending commitments: Luxembourg has spent below 2 percent of GDP on defense every year since 2014, when NATO agreed on that minimum, before hitting 2 percent in 2025.[180] Luxembourg has moved to modernize its armored vehicles for better joint operation of its 900-soldier army with Belgium, has joined the NATO SATCOM consortium to enhance secure satellite communications for the Alliance, and foresaw opportunities to strengthen NATO cybersecurity by leveraging private-sector expertise.[181]

The Netherlands. The Netherlands did not meet NATO's 2 percent of GDP defense spending guideline until 2024, but it occupies a vital place in U.S. strategy toward China through the compliance of ASML, a company that makes cutting-edge chip-manufacturing technology, with U.S. export restrictions on China.[182] The Netherlands was set to reach 2 percent in 2025, but the conservative People's Party for Freedom and Democracy (VVD) is having trouble convincing other political parties to agree to raise defense spending to 3.5 percent.[183] However, all Dutch parties that won seats in the October 2025 national election support raising defense spending to meet targets from the 2025 NATO summit in The Hague.[184] The government signed an agreement to buy four attack submarines from France to upgrade the current fleet and add cruise missile capability with Tomahawk missiles—a capability missing from the current submarine fleet but important to mission flexibility.[185] This investment in strengthening NATO defense of vital sea lanes complements the central importance of the Port of Rotterdam in NATO's defense planning for theater-level contingencies.

The United Kingdom. America has long had a special relationship with the United Kingdom. Like France, the U.K. is a secondary NATO nuclear power with a sea-based nuclear deterrent centered around the *Vanguard*-class submarine fleet with the future replacement *Dreadnought*-class submarine fleet under construction.[186] Through the Mutual Defense Agreement (MDA), which was set on an "enduring basis" in 2024, the United States works closely with the U.K. on nuclear deterrence.[187] In 2025, the U.K. and France issued the Northwood Declaration pledging joint coordination on nuclear weapons issues in an agreement between NATO's non-U.S. nuclear powers.[188]

In 2024, Prime Minister Keir Starmer initiated an independent "root and branch review of UK defence" led by former NATO Secretary General Lord Robertson "to ensure [that] Britain is secure at home and strong abroad."[189] Published on June 2, 2025, the *Strategic Defence Review* presented an extensive set of findings and recommendations stemming from an acknowledgement that "UK Armed Forces have begun the necessary process of change in response to this new reality. But progress has not been fast or radical enough."[190] Funding for recommended improvements will come from the promised rise to 2.5 percent of annual GDP spent on defense by April 2027 and an ambition to meet 3 percent of annual GDP sometime in the next parliament, although concerns remain about implementation hurdles sidelining reforms.[191]

The United Kingdom's two aircraft carriers, the Royal Navy's *HMS Queen Elizabeth* and *HMS Prince of Wales*, have faced technical and maintenance problems in recent years that have led to speculation about their potential scrapping.[192] Despite these concerns, both carriers have conducted up-tempo operations, and both were at sea in November 2024.[193] To maximize Alliance presence beyond American naval assets, the U.K. and France agreed in 2023 to coordinate aircraft carrier deployments to "protect our shared values and interests around the globe" in an example of force multiplication through allied coordination.[194] The U.K. is now Ukraine's third-ranked nation-state supporter after the U.S. and Germany with more than €14 billion (about $16.3 billion) in aid.[195] The U.K. also hosts the Allied Maritime Command (MARCOM), which oversees NATO maritime operations.[196]

There are two major concerns about the U.K.'s contribution to European security: declining force generation and an isolated defense industrial base. While a detailed breakdown of U.K. military forces and their structures is beyond the scope of this study, the difficulties in force generation, both on

the personnel side and on the technical side, are significant. Additionally, the European Union is set to place exclusionary hurdles in the way of U.K. arms manufacturers participating in the EU's largest program to expand the NATO defense industrial base in Europe.[197]

NATO Capability Gaps

European partners, finally awakening to a threatening global environment, are retooling their armed forces to deter Russia. The trend line is clear when one considers the more than 200 percent increase in arms imports from the United States from 2019 to 2023, nearly all NATO allies meeting 2 percent defense spending in 2025, and ongoing efforts across the continent to reopen shuttered production lines and build or expand production lines for such key capabilities as Patriot missiles.[198] However, without careful planning, strategic urgency could devolve into strategic panic rather than strategic success. This concern is strengthened by Supreme Allied Commander Transformation Admiral Pierre Vandier's statement indicating that "Allies are already 30% behind in delivering on existing capability targets."[199] It is therefore critical to focus on deterrence capabilities that lack sufficient bulk across the Alliance and often depend on American provision.

NATO has put significant effort into deterrence planning through implementation of the Deterrence and Defense of the Euro-Atlantic Area (DDA) Concept, but European NATO allies still lack numerous critical capabilities, some of which will likely not be available for years.[200] These gaps break down into several broad categories: precision-strike capabilities; integrated air-missile defense; command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR); next-generation capabilities; and logistics across domains.

Europe currently lacks American capacity in rocket artillery and precision strike. The American M270 Multiple Launch Rocket System (MLRS) and M142 High Mobility Artillery Rocket System (HIMARS), paired with the Guided Multiple Launch Rocket System (GMLRS) or MGM-140 Army Tactical Missile System (ATACMS), have been the traditional rocket artillery solution across NATO, but many European allies are moving away from these systems.[201] As a result, the United States' next-generation long-range precision-strike missile (PrSM), designed to be fired from the MLRS and HIMARS platforms, is not interoperable with all NATO systems despite performance leads on current non-U.S. long-range missiles like Storm Shadow and Scalp, and future Anglo–French and German missiles will not be arriving until the late 2020s.[202] To assure conventional deterrence against a potential Russian foe with active production lines focused on long-range strike missiles and drones, NATO must find ways to close the gap.

NATO allies in Europe are scrambling to procure sufficient air defense assets to counter short-range, medium-range, and long-range threats, but the capabilities gap is dire; as NATO Admiral Vandier has noted, "we can't even say today that we are protecting our deployed soldiers satisfactorily."[203] America's allies in Europe are concentrating on closing this gap through efforts like the European Sky Shield Initiative (21 nations led by Germany) that is pursuing air defense capabilities at each range. Germany has already signed contracts for the short-range Skyranger 30 system, the medium-range Infra-Red Imaging System-Tail/Thrust Vector Controlled (IRIS-T SLM), and Israel's range-agnostic Arrow 3 system and is opening a Patriot missile production facility with production scheduled to begin in 2027.[204] If all of the allies remain committed to procurement of air defense assets, this gap will likely begin to close for deployed forces before 2030.

U.S. assets have traditionally been the backbone of C4ISR systems within NATO, but global demands on these assets will require European partners to increase their contributions. On a positive note, NATO allies are now fielding F-35 Lightning II fifth-generation fighter aircraft with an expectation of more than 400 fighters across Europe by 2030, and the platforms' initial test runs in Europe by U.S. squadrons have sent very positive signals about the significant increase in aerial ISR capabilities that they provide.[205] Starlink has provided essential satellite communications and command-and-control (C2) capabilities to Ukraine in addition to supporting internet and communication access for civilian users independent of local power grids.[206]

Europe's dependence is similar, as no European capability can replace Starlink's communications infrastructure, although several systems from companies like Eutelsat, SES, and Hispasat offer satellite connectivity, and the EU is developing the

satellite constellation Infrastructure for Resilience, Interconnectivity and Security by Satellite (IRIS2) for government and military use with initial operational capability planned for 2031.[207] In the larger view, Europe is looking to expand its space-based capabilities through new spaceports from Portugal's Azores to Sweden's Esrange.[208] However, European competitors lag far behind American companies in the development of their rocket launch programs. A paradigmatic example occurred in March 2025 when a rocket, partially funded by NATO's Innovation Fund, blasted off from Norway's Andøya Space Center only to crash into the sea 30 seconds later.[209] It is therefore imperative that Allied collaboration be improved and enhanced European satellite intelligence capabilities be secured.[210]

"NATO has not changed for 30 years," Admiral Vandier has complained, and this is reflected in delayed adoption of technology with incentives slanted in favor of legacy platforms, a dynamic that delays artificial intelligence and drone integration.[211] Russia has surged drone production to around 1.4 million units a year since invading Ukraine and has integrated them into battlefield strategy, and Ukraine's unmanned systems commander, Colonel Vadym Sukharevskyi, has warned that NATO nations are not ready for the challenges of mass and AI integration posed by Russian drone tactics and production.[212] The United States has worked to increase its drone production, but concerns about effectiveness and production quantities persist.[213] With respect to effectiveness, in another frontier technology, the United States maintains a lead relative to its European partners on the development of AI models and quantum computing on the technological frontier.[214]

Finally, even if substantial gains are achieved in the above capabilities, as Senator Sam Nunn (D–GA) once observed, "at some point numbers do count,"[215] and European NATO allies face alarming shortfalls in strategic airlift and infrastructure to move forces and assets to the Alliance's borders. However, outstanding orders among Alliance members to procure A400M Transport Aircraft and A330 Multi-Role Tanker Transport planes will lend greater strategic airlift capacity.[216]

With respect to military mobility over ground infrastructure, the picture is significantly worse. Emblematic of the physical issues are the bureaucratic issues: The European Court of Auditors, for example, found that granting authorization to move forces across national borders would take up to 45 days for the majority of countries.[217] The "narrow roads, insufficient rail capacity, mismatched rail gauges, [and] limited data" that characterize Europe's underfunded physical transport networks are another major issue.[218]

U.S. Military Presence in Europe

U.S. military forces have access to many bases across Europe. With more than 20 American military bases on allied territory and numerous bilateral military access agreements in place, pure military access is not a problem for American forces in the European theater. Recent history, from the Gulf War to the wars in Afghanistan and Iraq to the withdrawal of U.S. and coalition forces from Afghanistan, demonstrates the value of access to military basing in Europe.[219] This supporting foundation is strengthened by prepositioned stocks of U.S. military assets in U.S. European Command (EUCOM) to safeguard deterrence credibility with Army, Air Force, and Marine stocks present in theater.[220] These stocks would come into play primarily after the initiation of hostilities with U.S. military forces already deployed to Europe engaging in initial combat activities.

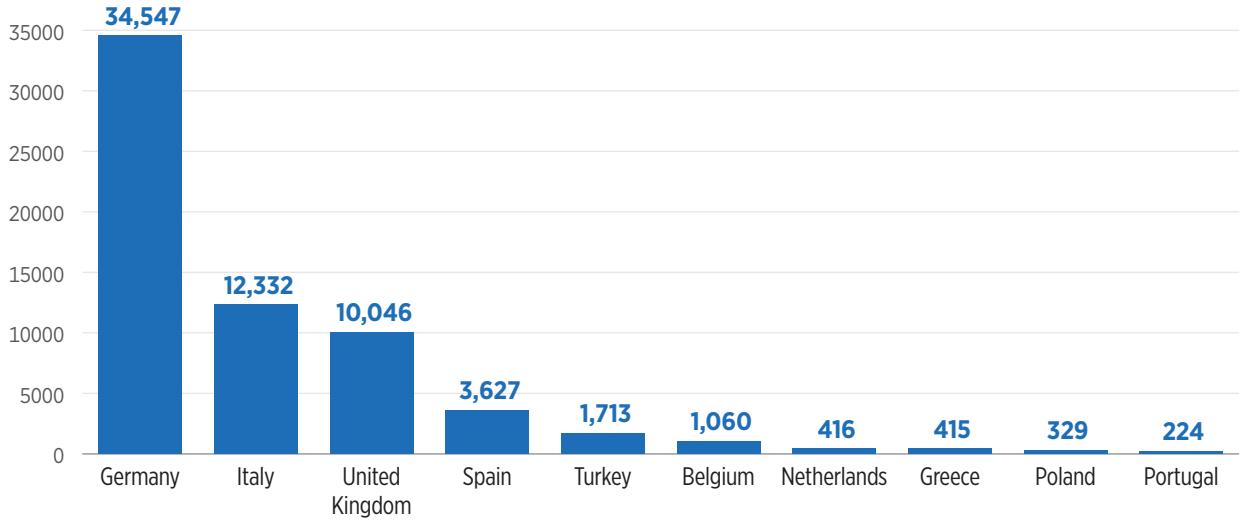
As of September 2025, the United States had just over 67,500 military personnel deployed to EUCOM countries with 67,847 active-duty and 1,742 National Guard and Reserve personnel.[221] Supplementing these permanently deployed forces since 2014 has been a steady flow of Operation Atlantic Resolve rotational forces to reassure European allies and build interoperability following Russia's seizure of Crimea.[222] Deployed sequentially in continuous replacement of the prior force, these military personnel span the branches and have been stationed primarily in Poland, although they have exercised and trained across NATO's eastern flank as well as in Germany.[223]

Critical U.S. Military Installations in Europe. American bases support EUCOM operations across the continent in addition to U.S. Africa Command (AFRICOM), but permanent forces are concentrated mostly in Germany, Italy, the United Kingdom, Spain, and Belgium.

Germany. Germany hosts numerous American military facilities, notably Ramstein Air Base; U.S. Army Garrison (USAG) Bavaria; USAG Stuttgart;

CHART 10

U.S. Troops in Europe, by Country



SOURCE: U.S. Department of Defense, Defense Manpower Data Center, "Military and Civilian Personnel by Service/Agency by State/Country (Updated Quarterly)," March 2025, https://dwp.dmdc.osd.mil/dwp/app/dod-data-reports/workforce-reports (accessed January 21, 2026).

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and USAG Rheinland-Pfalz (particularly Landstuhl). Ramstein Air Base is a linchpin for the American presence in EUCOM as the U.S. Air Force's European headquarters hosting critical airlift resources run by the 86th Airlift Wing, including C-21, C-37, and C-130J aircraft backed by the 521st Air Mobility Operations Wing's provision of command and control, maintenance, and air transportation services across the theater.[224]

USAG Bavaria hosts thousands of U.S. troops, but its operational impact is channeled through three subordinate facilities: the Grafenwoehr Training Area, Joint Multinational Readiness Center (JMRC), and NATO School. Run by the 7th Army Training Command, the Grafenwoehr Training Area enables live, virtual, and constructive training across the full suite of capabilities from small arms to close air support and is the largest U.S. Army permanent training area in Europe.[225] Also under 7th Army Training Command, the JMRC, located near Hohenfels, integrates multinational participation into every rotation of U.S. forces and can train groups as large as a Brigade Task Force across a 163 square km training ground where key NATO units have trained.[226] The NATO School falls within USAG Bavaria's remit and has been the key operational training facility for NATO since 1953, enhancing Alliance interoperability and cohesion.[227]

USAG Stuttgart houses two combatant commands across its five installations and also serves as the primary hub for military cargo in theater.[228] Headquartered at USAG Stuttgart's Patch Barracks, EUCOM is the combatant command for U.S. military forces in Europe who "protect and defend the U.S. and its NATO Allies and partners through deterrence, peacekeeping and military operations."[229] Headquartered at USAG Stuttgart's Kelley Barracks, AFRICOM is the combatant command for U.S. military forces in Africa and oversees a partner-focused strategy across an area of responsibility "of 53 African states, more than 800 ethnic groups, over 1,000 languages, vast natural resources, a land mass of 11.2 million square miles (three-and-a-half times the size of the U.S.), and nearly 19,000 miles of coastland."[230] Stuttgart Army Airfield in Filderstadt houses EUCOM's and AFRICOM's aviation arms and serves as the primary platform for military cargo, making it central to any in-theater operations.[231]

USAG Rheinland-Pfalz provides support services for U.S. forces in Europe, but its critical subordinate entity is the Landstuhl Regional Medical Center.[232] The only U.S. medical center in Europe, Landstuhl Regional Medical Center marked 70 years of successful operation in 2023 with a 99 percent survival rate for "wounded, injured and ill" troops.[233] Landstuhl, the only verified Level II Trauma Center outside America, is the evacuation and treatment center for four combatant commands across three continents and has treated thousands of beneficiaries a month with no ready alternative.[234] The critical operations occurring at these various facilities demonstrate why Germany has the highest U.S. troop deployments in EUCOM.

Italy. Italy hosts several U.S. military facilities, notably Naval Support Activity Naples and Naval Air Station (NAS) Sigonella. The Commander, U.S. Naval Forces Europe-Africa (NAVEUR-NAVAF), is headquartered at Naval Support Activity Naples, a crucial American military installation where the U.S. Navy Sixth Fleet is based.[235] U.S. Sixth Fleet operates "hundreds of ships, submarines and aircraft" alongside additional NAVEUR-NAVAF forces across an area of responsibility that "covers more than 20 million square nautical miles of ocean, touches three continents and encompasses more than 67 percent of the Earth's coastline, 30 percent of its landmass, and nearly 30 percent of the world's population."[236] These operations include highly complex joint exercise carrier deployments in the Mediterranean Sea.[237] Nicknamed the "Hub of the Med," NAS Sigonella is a core pillar for U.S. operations across the European, African, and Central combatant commands with growing demands that make it a "strategic center of the Mediterranean and Near East."[238] The Iranian threat and ongoing military activity around the Red Sea ensure that NAS Sigonella will remain important to U.S. defense and deterrence.

The United Kingdom. The United Kingdom hosts significant U.S. military presence at several facilities, notably Royal Air Force (RAF) Alconbury, RAF Croughton, and RAF Lakenheath. RAF Alconbury has a history of intelligence activity, including Air Force imagery intelligence (IMINT) units with ties to the U.K.'s Joint Aerial Reconnaissance Intelligence Centre (JARIC), but has faced repeated efforts to close the base and consolidate forces.[239] Following analysis in the early 2020s, the United States chose to retain forces at RAF Alconbury and "develop a master plan for long-term Joint Intelligence Analysis Center (JIAC) mission support" with intelligence and communications provisions worldwide and military support work across Europe, Africa, and the Middle East.[240]

RAF Croughton is the headquarters of the 422nd Air Base Group, which "delivers worldwide communications" with public recognition that those communications include "approximately a third of all U.S. military communications in Europe."[241] RAF Lakenheath hosts the U.S. Air Force's 48th Fighter Wing, which includes two F-15E Strike Eagle squadrons and two F-35 squadrons set to reach full operational capability in 2025.[242] Contracts have been awarded to build the facilities necessary to store U.S. nuclear weapons at RAF Lakenheath, a mission it last held during the Cold War[243] and one that would improve the security of NATO's strategic deterrent through diversity of positioning. These diverse missions support essential elements of American power protection and adversary deterrence in Europe.

Spain. Spain hosts two U.S. bases, the primary one being Naval Station Rota, which oversees critical naval radar ships dedicated to NATO's IAMD mission. Naval Station Rota is the headquarters of the Commander of Naval Activities Spain, who coordinates U.S. Navy activities across Spain and Portugal under NAVEUR-NAVAF direction from Naples.[244] Naval Station Rota provides cargo, fuel, and logistics support from the largest weapons and fuel facilities in Europe to units transiting the region in support of U.S. and NATO operations.[245] Four U.S. Navy *Arleigh Burke*–class destroyers equipped with Aegis Baseline 9 Ballistic Missile Defense systems are homeported in Rota as "a component of EUCOM's regional missile defense strategies."[246] Through these activities, U.S. forces based at Naval Station Rota undergird EUCOM operations across the theater.

Belgium. The central U.S. military facility that Belgium hosts is U.S. Army Garrison Benelux–Supreme Headquarters Allied Powers Europe (SHAPE), which is the headquarters of NATO Allied Command Operations.[247] SHAPE is the headquarters of the Supreme Allied Commander Europe (SACEUR) and his staff, who are responsible for all NATO operations including training and concepts and doctrine.[248] Traditionally, SACEUR has been dual-hatted as EUCOM Commander, and therefore

a U.S. military officer, and runs military planning, "including the identification of forces required for the mission," and "makes recommendations to NATO's political and military authorities on any military matter that may affect his ability to carry out his responsibilities."[249] These sweeping responsibilities and the integration with EUCOM forces make SACEUR a vital position for U.S. national interests and advocacy of increased allied contributions.[250]

U.S. Unique Capability Backing in Europe

Ballistic Missile Defense (BMD). American capabilities are essential to the functioning of NATO BMD.[251] The Alliance's BMD systems include the NATO BMD command center (hosted at Ramstein Air Base); BMD radar at Kürecik (U.S. radar); Aegis Ashore sites at Deveselu Air Base and Redzikowo military base (Aegis Ashore is a U.S.-provided system with American military operators); four BMD-capable Aegis ships at Rota (all U.S. ships); and additional air and missile defense systems and ships (including Patriot systems of U.S. design, manufacture, and provision).[252] Provision of these systems cost the United States approximately $2.3 billion from 2011 to 2023.[253] NATO BMD is a critical capability in view of the threat posed by Iran's ballistic missile program and nuclear enrichment efforts, but it features more limited allied buy-in than might be expected given its role in protecting European allies.

U.S. Nuclear Umbrella and Extended Deterrence. NATO has declared that "[a]s long as nuclear weapons exist, NATO will remain a nuclear alliance."[254] Three nuclear weapons states (France, the U.K., and the United States) are members of NATO, but the principal responsibility for the Alliance's nuclear deterrent falls to the United States because of its larger nuclear stockpile, willingness and capability to deploy nuclear weapons forward, and history of countering the Kremlin's nuclear designs in Europe.[255] The NATO Nuclear Planning Group (NNPG) coordinates the Alliance's nuclear deterrence missions and oversees the nuclear-sharing mission, which is divided into three separate but interconnected segments: storage of U.S. B-61 thermonuclear gravity bombs, hosting of Dual-Capable Aircraft (DCA) equipped to carry out a nuclear strike with B-61s, and the Conventional Support for Nuclear Operations (CSNO) mission (formerly SNOWCAT).[256]

The U.S. distributes tactical nuclear weapons at various bases throughout Europe. Poland has expressed a desire to join the NATO nuclear mission by hosting American nuclear weapons, which some U.S. experts think could strengthen NATO's nuclear posture.[257] However, no decision has been publicly announced.

Several U.S. allies that employ DCA are equipped to carry out a strike with B-61 nuclear bombs.[258] On June 24, 2025, the United Kingdom announced that it will purchase 12 F-35As and join NATO's DCA mission, building on the U.K.'s current submarine-only nuclear deterrent.[259] However, Turkey's purchase of a Russian S-400 air defense system led the U.S. to exclude it from the F-35 program, so Turkey will have no access to the most cutting-edge DCA platform. Notably, Poland has already received the first of 32 F-35 jet fighters that are on order, which would allow a smoother entry into nuclear-sharing arrangements.[260] The rollout of the fifth-generation F-35 is welcome news for nuclear deterrence in Europe, but the technical sufficiency of older platforms that still serve as the primary DCA fleet, including F-15s, F-16s, and Tornados, remains a matter of concern, especially because of life-cycle maintenance and air defense vulnerability issues.[261]

Conventional Support for Nuclear Operations, broadened from SNOWCAT to include a variety of support domains, is carried out by seven allies: the Czech Republic, Denmark, Greece, Hungary, Norway, Poland, and Romania.[262] Further details of this mission are not public because of its sensitivity and the no-acceptable-failure nature of its task, but it is possible that, in view of recent U.S.–Swedish escort missions displaying bilateral cooperation in the air, Sweden could join as a new ally.[263]

Ultimately, however, NATO's nuclear deterrent is dependent on America's provision of extended deterrence. It is settled U.S. Air Force doctrine that, "[r]egardless of how they are used, the employment of nuclear weapons yields effects at the strategic level," and "only the President can authorize strategic attack employing nuclear weapons."[264] With specific reference to NATO, Air Force doctrine is clear: "The sole authority to transfer US nuclear weapons for NATO employment remains with the US President."[265] This doctrine is reinforced by NATO structures and secured operationally by two requirements: The North Atlantic Council would have to

vote in favor of employing the B-61 bombs, provided by America, in a nuclear strike, and such a mission would be within the purview of the Supreme Allied Commander Europe, who is always a U.S. military officer partly for this reason.[266] Technically, all U.S. nuclear weapons are secured through Permissive Action Links (PALs) with redundant coded switch systems that render the weapons unusable without permissions provided by the U.S. President through nuclear command and control.[267]

Intelligence, Surveillance, and Reconnaissance (ISR). ISR is a multifaceted combination of numerous information sources that is used to provide a comprehensive battlefield picture and is most often carried out in the military domain through a mix of crewed and uncrewed aircraft coupled with satellite platforms. The United States dominates the provision of ISR within the Alliance. "[T]he bulk of the ISR employed [in Ukraine]," for example, "has been provided by the United States."[268]

NATO continues to depend on American ISR operations because of past low investment by European partners. Non-U.S. NATO countries, for example, have only 11 signals intelligence (SIGINT) aircraft in service, while the U.S. Air Force has an inventory of 17 "big wing" SIGINT aircraft. This reliance is further demonstrated by the NATO ISR Force's reliance on variants of U.S. company Northrop Grumman's Global Hawk unmanned aerial vehicle (UAV), American UAVs being the only low-observable variants within NATO.[269] Capping this capabilities gap is the military satellite constellations gap with 246 acknowledged U.S. military satellites in the sky compared to 49 for European NATO members as of May 2023.[270] European efforts are underway with European companies under contract to develop and procure comparable systems to shoulder part of the ISR burden, but those capabilities will not begin to arrive until later in this decade.

Strategic Air: Transport and Tanker Aircraft. NATO has affirmed the value of "strategic airlift capabilities that enable forces to be quickly deployed to wherever they are needed."[271] However, American assets play an outsized role in backstopping this central capability. As of 2025, the United States maintained an active fleet of 605 tanker aircraft (75 percent of worldwide share) and 918 transport aircraft (21 percent of worldwide share) for strategic air purposes.[272] NATO allies also possess tanker and transport aircraft, but the quantity possessed by the NATO ally with the second-highest number (France) is far lower: 16 tanker aircraft and 119 transport aircraft, and non-U.S. NATO allies account for less than 50 percent of the top 10 rankings in both categories.[273] Given current and projected requirements, the total fleet remains too small even though NATO's Support and Procurement Agency (NSPA) in June 2025 "announced the order of two additional Airbus A330 Multi Role Tanker Transport (MRTT) aircraft, bringing the total number in the multinational MRTT fleet (MMF) to 12."[274]

Long-Range Strike. With deeper missile stockpiles and more varied options, American long-range strike capabilities are currently the backbone of NATO capabilities as allies rush to catch up.[275] The tip of the spear in this area is the Army's 2nd Multi-Domain Task Force (MDTF). Activated in Wiesbaden, Germany, in 2021, the 2nd MDTF will start to deploy long-range fires capabilities in 2026 with an eye toward future permanent stationing of capabilities that include SM-6, Tomahawk, and hypersonic weapons.[276] Unfortunately, European NATO allies do not have access to similar national capabilities to reinforce the MDTF deployment's deterrent effect; the "bulk of the current European arsenal is provided by limited numbers of air-launched cruise missiles with maximum ranges of about 500 kilometers," and these allies so far are only signing letters of intent to develop a long-range strike missile, indicating a likely years-long gap.[277]

Conclusion

Overall, Europe is a well-developed operating environment for countering Russian forces, but Russia's security pressure on the continent casts light, directly and indirectly, on the need to close transatlantic capability gaps. Despite those gaps, however, the positive growth trajectory in defense spending should translate into enhanced military capabilities across domains. The next year will witness an effort—an effort without Cold War precedent—to craft a deterrence plan from the strategic level to the tactical level with resilient, redundant strategic enablers as the United States repostures its forces to confront problems in multiple theaters. For now, Russian forces are bogged down in Ukraine, and Ukraine's fight, supported by NATO's Prioritized Ukraine Requirements List (PURL) with Europeans taking the lead,[278] provides time to build and deploy credible forces in NATO territory.

NATO's seriousness about the threat is demonstrated by the swift creation and deployment of multinational force constructs in Operation Baltic Sentry and Operation Eastern Sentry, which has led to decreased Russian grey-zone aggression in those sub-regions. Nevertheless, when confronted by force, Moscow has continually pivoted into new hybrid warfare approaches whether it is in the cyber domain, in the air with drones and jamming, or through more traditional direct covert actions such as sabotage.[279] Simultaneously, American forces across the continent retain smooth access validated by NATO exercises from the north to the south with recently expanded access to Sweden's and Finland's territory now that the two countries are members of the Alliance.

European political divisions, from Spain's refusal to hike defense spending to EU efforts to develop independent capabilities against, rather than in concert with, U.S. efforts, do weaken deterrence credibility. Additionally, a cycle of frequent government collapses with inconclusive snap election results in many sharply divided societies has been repeated in recent years. This cycle, with its conflicting or absent political signals and budgeting delays, limits progress and coherence in rebuilding derelict military forces and defense industrial bases. By contrast, conservative governments with a transatlantic orientation have seen additional victories since publication of the *2024 Index*.

Scoring the European Operating Environment

Various considerations must be taken into account in assessing the regions within which the United States may have to conduct military operations to defend its vital national interests. Our assessment of the operating environment utilized a five-point scale ranging from "very poor" to "excellent" conditions and covering four regional characteristics of greatest relevance to the conduct of military operations:

1. **Very Poor.** Significant hurdles exist for military operations. Physical infrastructure is insufficient or nonexistent, and the region is politically unstable. The U.S. military is poorly placed or absent, and alliances are nonexistent or diffuse.

2. **Unfavorable.** A challenging operating environment for military operations is marked by inadequate infrastructure, weak alliances, and recurring political instability. The U.S. military is inadequately placed in the region.

3. **Moderate.** A neutral to moderately favorable operating environment is characterized by adequate infrastructure, a moderate alliance structure, and acceptable levels of regional political stability. The U.S. military is adequately placed.

4. **Favorable.** A favorable operating environment includes good infrastructure, strong alliances, and a stable political environment. The U.S. military is well placed in the region for future operations.

5. **Excellent.** An extremely favorable operating environment includes well-established and well-maintained infrastructure; strong, capable allies; and a stable political environment. The U.S. military is exceptionally well placed to defend U.S. interests.

The key regional characteristics consist of:

a. **Alliances.** Alliances are important for interoperability and collective defense, as allies are more likely to lend support to U.S. military operations. Various indicators provide insight into the strength or health of an alliance. These include whether the U.S. trains regularly with countries in the region, has good interoperability with the forces of an ally, and shares intelligence with nations in the region.

b. **Political Stability.** Political stability brings predictability for military planners when considering such indicators as transit, basing, and overflight rights for U.S. military operations. The overall degree of political stability indicates whether U.S. military actions would be hindered or enabled and considers such questions as whether transfers of power are

Operating Environment: Europe

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances					✓
Political Stability					✓
U.S. Military Posture				✓	
Infrastructure				✓	
OVERALL					✓

generally peaceful and whether there have been any recent instances of political instability in the region.

c. **U.S. Military Positioning.** Having military forces based or equipment and supplies staged in a region greatly enhances the ability of the United States to respond to crises and presumably achieve success in critical "first battles" more quickly. Being routinely present in a region also helps the U.S. to maintain familiarity with its characteristics and the various actors that might try to assist or thwart U.S. actions. With this in mind, we assessed whether the U.S. military was well positioned in the region. Again, indicators included bases, troop presence, prepositioned equipment, and recent examples of military operations (including training and humanitarian) launched from the region.

d. **Infrastructure.** Modern, reliable, and suitable infrastructure is essential to military operations. Airfields, ports, rail lines, canals, and paved roads enable the United States to stage, launch operations from, and logistically sustain combat operations. We combined expert knowledge of regions with publicly available information on critical infrastructure to arrive at our overall assessment of this metric.

For Europe, we arrived at these average scores (rounded to the nearest whole number):

- Alliances: **5—Excellent.**
- Political Stability: **5—Excellent.**
- U.S. Military Positioning: **4—Favorable.**
- Infrastructure: **4—Favorable.**
- Aggregating to a regional score of: **Excellent.**

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Middle East

Daniel Flesch

Regional Overview

The Middle East has long been an important focus of U.S. foreign and security policy. U.S. security relationships in this strategically important region at the intersection of Europe, Asia, and Africa are built on pragmatism, shared security concerns, and economic interests that include large sales of U.S. arms that enhance the ability of countries in the region to defend themselves. The United States also has a long-term interest that derives from the region's importance as the world's primary source of oil and gas and, increasingly, its role as a transit point for international trade between Asian and European markets.

The region is home to a wide array of cultures, religions, and ethnic groups: Arabs, Jews, Kurds, Persians, and Turks among others. It also is home to the three Abrahamic religions of Judaism, Christianity, and Islam as well as many smaller religions like the Bahá'í, Druze, Yazidi, and Zoroastrian faiths. The Middle East contains many predominantly Muslim countries as well as the world's only Jewish state.

The Middle East is deeply sectarian, characterized by long-standing divisions that in some cases are centuries old. Contemporary conflicts, however, have more to do with modern radical ideologies constantly vying for power and the fact that today's borders often do not reflect cultural, ethnic, or religious realities. Instead, they are often the results of decisions by Great Britain, France, and other powers during and soon after World War I as they dismantled the Ottoman Empire.[1]

However, viewing the Middle East's current geopolitics through the lens of a Sunni–Shia conflict does not reveal the full picture. For example, it does not explain why Iran—a Shia theocracy—is a primary benefactor of Hamas—a Sunni organization. Cultural and historical division between Arabs and Persians has reinforced the Sunni–Shia split. The mutual distrust between many Sunni Arab powers and Iran, the Persian Shia power, compounded by clashing national and ideological interests, has fueled instability in such countries as Iraq, Lebanon, Syria, and Yemen. Sunni terrorist organizations like al-Qaeda and the Islamic State (IS) have exploited sectarian and ethnic tensions to gain support by posing as champions of Sunni Arabs against Syria's Alawite-dominated regime and other non-Sunni governments and movements.

Regional demographic trends also play an important and often destabilizing role. The Middle East's population is one of the youngest and most rapidly growing in the world. The West would view this as a favorable dynamic, but in the Middle East, these "youth bulges" are demographic tsunamis that have overwhelmed many countries' inadequate political, economic, and educational infrastructures. The lack of access to education, jobs, and meaningful political participation further fuels discontent. Because more than half of its inhabitants are under 30 years old, this demographic bulge will continue to undermine political stability across the Middle East.[2]

Since 2010, the political situation in the Middle East has been fraught with uncertainty. The Arab Spring uprisings of 2010–2012 eroded the foundations of many authoritarian regimes, erased borders, and destabilized many of the region's countries,[3] but the popular uprisings in Tunisia, Libya, Egypt, Bahrain, Syria, and Yemen did not usher in a new era of democracy and liberal rule as many in the West had hoped. At best, they made slow progress toward democratic reform; at worst, they added to political instability, exacerbated economic problems, and contributed to the rise of Islamist extremism.

Contributing to this instability are the expansionist ambitions of the Islamic Republic of Iran. Using the breathing space and funding afforded by the 2015 Joint Comprehensive Plan of Action (JCPOA), for example, Iran exploited Shia–Sunni tensions to increase its influence on embattled regimes and undermine adversaries in Sunni-led states. In May 2018, the Trump Administration left the JCPOA after European allies failed to address many of its serious flaws, including its sunset clauses, and imposed a crippling economic sanctions program in a "maximum pressure campaign" with more than 1,500 sanctions that targeted individuals and entities that were doing business with Iran.[4] The sanctions were meant to force changes in Iran's behavior, particularly with regard to its support for terrorist organizations and refusal to renounce a nascent nuclear weapons program.[5]

However, the Biden Administration sought to resurrect the JCPOA when it came into office. On February 18, 2021, the Biden Administration rescinded its predecessor's restoration of U.N. sanctions on Iran, and in April, it began indirect talks with Iran that were brokered by the European Union. This corresponded with the lifting of sanctions designations on several entities and individuals several times over the course of the negotiations—largely fruitless efforts meant to inject momentum.[6] Unacceptable Iranian demands for non-nuclear sanctions relief, including the lifting of U.S. terrorist sanctions on the Islamic Revolutionary Guard Corps (IRGC) and a guarantee that the International Atomic Energy Agency's investigation of Iran's nuclear activities would be ended, led to the suspension of negotiations in September 2022.[7]

Despite Iran's insistence, the Biden Administration did refuse to lift the terrorist designations of the IRGC.[8] Anti-regime protests in Iran, sparked by the 2022 murder of 22-year-old Mahsa Amini by the morality police, and Iran's supplying of missiles and drones to Russia have made further negotiations politically difficult.[9] The Biden Administration's inability to maintain economic pressure while engaged in negotiations meant that the regime could press ahead with its nuclear ambitions cost-free. The net result was that Iran was advancing to "one- to two-weeks away" from breakout according to then-Secretary of State Antony Blinken in the summer of 2024.[10]

Iran's threat to regional political stability and security also comes in the unconventional empire it has built through sub-state entities like Hamas in the Palestinian territories, Hezbollah in Lebanon, the Mahdi movement and other Shia militias in Iraq, and the Houthi insurgents in Yemen. The Iranian Quds Force, the special-operations wing of the IRGC, has orchestrated the formation, arming, training, and operations of these sub-state entities as well as other surrogate militias. These Iran-backed militias have carried out terrorist campaigns against U.S. forces and allies in the region for many years.

It is in pursuit of Iran's "ring of fire" strategy—encircling Israel with non-state terrorist groups that force the Jewish state into an extended war of attrition through persistent low-level border conflicts and instability—that Hamas launched an invasion of Israel on October 7, 2023. However, in seeking to disrupt the normalization process between Israel and the Arab states (especially Saudi Arabia[11]) and to fulfill its stated objective to destroy the Jewish state, Hamas succeeded in triggering the greatest regional geopolitical realignment since 1979 when Israel and Egypt signed a peace treaty and the Islamic Republic overthrew the shah of Iran.

Hamas's surprise attack on the Jewish holiday of Simchat Torah echoed Egypt's attack on Yom Kippur in 1973. The terrorist organization succeeded in slaughtering more than 1,200 Israelis, wounding thousands more, and taking more than 250 back into Gaza as hostages. Among the casualties were 34 Americans killed, dozens wounded, and 15 captured.[12]

Hamas envisioned its "Operation al-Aqsa Flood" as the long-awaited, multifront attack that would see Israel significantly defeated if not destroyed. On October 8, Hezbollah began to launch attacks against Israel from its position in Lebanon. Iran-aligned Shia militias in Iraq also joined the fight against Israel; the first claimed attacks by the so-called Islamic Resistance in Iraq were launched in November 2023.[13] The Houthis in Yemen would soon launch ballistic missiles and unmanned aerial vehicles (UAVs) against Israel and attack commercial and naval ships in the Bab al-Mandeb Strait, disrupting international commercial shipping lanes.

However, as of October 2025, Israel had emerged in a much stronger military position. It had significantly degraded Hamas's fighting capability in

Gaza and was working to destroy it. The Israeli Air Force decapitated Hezbollah's leadership, including by killing longtime Secretary General Hassan Nasrallah, and the Lebanese group's fighting force was severely debilitated by aerial assaults that destroyed most of its long-range missiles, a ground operation into southern Lebanon, and a highly targeted operation against individual fighters using pagers and walkie-talkies that wounded or killed thousands of fighters simultaneously, taking them off the battlefield.

In addition, working with the United States, Israel has conducted numerous airstrikes against the Houthis and their infrastructure in response to continued missile and UAV attacks launched from Yemen, some of which have penetrated Israeli air defenses. In December 2024, the Assad regime fell in Syria—a significant blow to Iran's regional hegemony as it severed its land bridge to Hezbollah and therefore Tehran's ability to resupply and rearm the crown jewel of its regional proxy network.

Most consequentially, Israel—along with the United States—conducted an offensive campaign against Iran's nuclear, military, and regime infrastructure during the Twelve-Day War in June 2025. This campaign followed numerous attacks and counterattacks between the Islamic Republic and the Jewish state in 2024. In April 2024, Iran launched a combined salvo of hundreds of UAVs, cruise missiles, and ballistic missiles in the first direct attack between the two countries. The United States led and coordinated a multinational response that saw air-to-air and surface-to-air interceptions; of the more than 300 projectiles launched, about 99 percent were intercepted by Israeli and partner nations' air defenses.[14] In October 2024, Iran launched a second attack of nearly 200 ballistic missiles; in response, Israel conducted an overnight aerial assault that succeeded in destroying Iran's air defense systems and undeclared nuclear sites.

On June 13, Israel initiated Operation Rising Lion, an aerial assault targeting Iran's nuclear infrastructure including enrichment facilities, ballistic missile production sites, stockpiles and launching pads, air and missile defense batteries, nuclear scientists, and other regime targets.[15] Within days, Israel had achieved air supremacy over western Iran, including Tehran.[16] Iran responded by launching overnight barrages of ballistic missiles and UAVs at military and civilian targets in Israel. Many of these missiles were intercepted by Israel's multitiered aerial defense system, including Arrow 3, Arrow 2, David's Sling, and Iron Dome. Israeli fighter aircraft intercepted more than 99 percent of UAVs launched both from Iran and by the Houthis in Yemen.[17] Two Terminal High Altitude Area Defense (THAAD) batteries that the U.S. had previously prepositioned in Israel also engaged Iran's missiles.[18]

Israel's successful campaign paved the way for the United States to launch Operation Midnight Hammer on June 21, in which seven B-2 bombers flew from Missouri to Iran to drop 14 GBU-57 Massive Ordnance Penetrator (MOP) "bunker buster" bombs on Fordow and Natanz and a submarine in the region launched two dozen land attack cruise missiles against Isfahan.[19] This was the first direct attack by the United States on Iran and the first operational use of the MOP. In a face-saving measure, Iran launched a limited missile strike on the U.S. Air Force's Al Udeid Air Base in Qatar; all of the projectiles were intercepted.[20]

Although Operations Rising Lion and Midnight Hammer struck a decisive blow to Iran's prestige and capabilities, the Islamic Republic remains a potent force in the region, not least because it retains the ability to rebuild its nuclear program, its ballistic missile arsenal, and its relationship with its regional proxies.

With its enemies on nearly every front defeated or deterred, Israel has refocused its efforts on defeating Hamas in Gaza and recovering the hostages. To apply more pressure on Hamas to release hostages, Israel declared that it would target Hamas's leadership outside Gaza. This was clearly a threat to the remaining Hamas leaders living in Doha, Qatar. In early September, Israel launched an airstrike against this leadership, targeting members while they deliberated over the newest U.S. offer.[21] The strike proved unsuccessful, but it demonstrated Israel's determination to hunt down those responsible for the October 7 attack. Qatar condemned the attack, and the Arab states, including those party to the Abraham Accords, made it known that they considered Israel's actions to be destabilizing.[22]

As this book was being prepared, the war against Hamas in Gaza officially ended, but the future of the enclave remains uncertain. On October 13, 2025, the U.S. convened a "Summit for Peace" in Egypt after successfully brokering a ceasefire deal between Israel and Hamas.[23] On January 26, 2026, the final

hostage was returned to Israel, bringing to a close the longest war in Israel's history.[24]

Over the two years since Hamas's attack, Israel had succeeded in turning the deadliest day for the Jewish people since the Holocaust into the greatest demonstration of its military strength and rollback of Iran's regional capabilities.

Nevertheless, the Houthi rebels in Yemen continue to threaten international commerce from their position on the southwest coast of Yemen. For over a year, the United States engaged in sporadic attacks against Houthi infrastructure. In March 2025, after its return to the White House, the Trump Administration committed to a new offensive against Houthi leadership and its capabilities, notably holding its chief patron—Iran—responsible for the group's actions. However, following a two-month campaign, the United States ceased operations against the Iranian proxy.[25] The Houthis continued to launch occasional missiles toward Israel and joined Iran in the Twelve-Day War.

Elsewhere in the region, Tehran has deepened its ties with Kabul following the Biden Administration's disastrous withdrawal from Afghanistan in August 2021, which paved the way for a Taliban takeover. Iran has used the Afghan border city of Herat to project its influence into Afghanistan, which includes using it to provide arms to the Taliban both before its takeover and in the run-up to the U.S. withdrawal.[26] The fall of Afghanistan also has opened the door for a revival of al-Qaeda in Afghanistan. Rebuilding the group will take time, but al-Qaeda remains a long-term threat to American interests and citizens as well as to the American homeland.[27]

The most significant blow to Iran's regional ambitions is the fall of the Assad regime in Syria. In November 2024, Hay'at Tahrir al-Sham (HTS), formerly known as the al-Qaeda–affiliated Jabhat Fateh al-Sham and before that as the al-Nusra Front, launched a rapid offensive south from its position in Homs to capture Damascus. Neither Assad's forces nor Russia's nor Iran's IRGC provided a defense of the Assad family, who fled to Moscow where they currently reside in exile.

This concludes one chapter in the Syrian civil war that began in 2011 and saw more than half a million people killed and created a major humanitarian crisis. As of June 2025, according to the United Nations High Commissioner for Refugees, 6.5 million internally displaced people and an additional 4.3 million Syrian refugees were still registered in neighboring Turkey, Lebanon, Jordan, Iraq, and Egypt.[28] The large refugee populations created by this civil war could become a source of recruits for terrorist groups. Portions of this population are already returning home to Syria.

However, the next chapter in the Syrian civil war has begun as various state and sub-state actors vie for control of the country. HTS controls Damascus and many other major cities, but the Alawites who supported the Assad regime maintain resistance along the coast as Turkey encroaches upon the northern territory and Syrian Kurds attempt to establish their own autonomous zones in the northeast. The Islamic State, also known as the Islamic State of Iraq and Syria (ISIS) and the Islamic State of Iraq and the Levant (ISIL) and before that as al-Qaeda in Iraq, retains control in some portions of eastern Syria and western Iraq. Druze factions in southern Syria have sought protection from Israel, which organized the first crossing of Druze leaders into Israeli territory to visit Druze religious sites and communities in the Jewish state.[29]

Assad's fall also disrupts Iran's trafficking in Captagon, a psychostimulant that has become the most in-demand narcotic in the region. Under Assad, Syria was a hub for the drug's production and trafficking.[30] The more than $10 billion Captagon trade bankrolled the regime, Hezbollah in Lebanon, and Popular Mobilization Forces in Iraq, and this has sparked a regional drug war that especially affects Jordan, Saudi Arabia, and other countries in the Persian Gulf.[31] If violence were to break out among rival drug cartels, the effects on the operating environment for U.S. forces could be significant.

Despite the October 7 attack, the resulting war, and regional turmoil, the Abraham Accords are holding. Signed in 2020, these U.S.-brokered agreements normalizing relations between Israel and the United Arab Emirates (UAE), Bahrain, Morocco, and Sudan have created new opportunities for trade, investment, and defense cooperation.[32] To strengthen the Accords, the United States, Egypt, the UAE, Bahrain, Morocco, and Israel established the Negev Forum, a new framework for regional cooperation with six working groups: Clean Energy, Education and Coexistence, Food and Water Security, Health, Regional Security, and Tourism.[33] These efforts are

important milestones in the diplomatic march toward a broader Arab–Israeli peace.[34]

While the Hamas attack and Iran's war against Israel were designed to disrupt the normalization process, the bilateral ties between Accords members remain strong. From 2023 to 2024, trade between Israel and the UAE, Morocco, and Bahrain increased 10 percent, 40 percent, and 843 percent, respectively, totaling over $3.45 billion.[35] Bringing Saudi Arabia into the Accords remains a primary objective and is often considered a question of "when," not "if."

Ultimately, the Abraham Accords reflect a recognition by their member states that bilateral and multilateral trade and commercial, economic, and security ties are a net asset, particularly in the face of shared regional threats. The COVID-19 pandemic, Russia's war on Ukraine, and the October 7 attack and its effects have undermined national economies and shaken political systems. Moreover, regional economic growth remains low: According to the World Bank, the Middle East and North Africa region grew at 5.8 percent in 2022, 3 percent in 2023, 2.2 percent in 2024, and between 2.6 percent and 2.8 percent in 2025.[36] At the same time, there is still the potential for the region's financial and logistics hubs to grow along some of the world's busiest transcontinental trade routes. In the Persian Gulf in particular, the UAE emirates of Dubai and Abu Dhabi, along with Qatar, are competing to become the region's top financial center.

As the region's geopolitical and commercial environments change, the United States maintains strong military security and diplomatic ties with several Middle Eastern nations. Throughout the 20th and early 21st centuries, the United States has weathered upheaval and conflict to pursue its national security interests, partly because of its relationships with Israel, Egypt, Jordan, and the six members of the GCC: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. These ties are often primarily bilateral. Because the historical and political circumstances that led to the creation of NATO in Europe have been largely absent in the Middle East, the region lacks a similarly strong collective security organization.

In 2017, the Trump Administration proposed the idea of a multilateral Middle East Strategic Alliance (MESA) with its Arab partners.[37] The initial U.S. concept, which included security and economic cooperation as well as conflict resolution and deconfliction, generated considerable enthusiasm, but the project was sidelined by the Biden Administration. President Trump's return to the White House in January 2025 suggests that MESA could feature in the Administration's approach to the region, particularly as it looks to expand the Abraham Accords framework.

In April 2022, shortly after the previous month's Negev summit, the United States established the 34-nation Combined Task Force 153 (one of five task forces operated by the Combined Maritime Forces) "to enhance international maritime security and capacity-building efforts in the Red Sea, Bab al-Mandeb and Gulf of Aden."[38] Then, over the spring and summer of 2022, the United States organized regional discussions about air-defense cooperation.[39] Building on these agreements, the UAE hosted Negev Forum partners for talks on regional cooperation in 2023.[40] Traditionally, however, Middle Eastern countries have preferred to maintain bilateral relationships with the United States and generally have shunned multilateral arrangements because of the lack of trust among Arab states.

This lack of trust manifested itself in June 2017 when Saudi Arabia, the UAE, Bahrain, Egypt, and several other Muslim-majority countries cut or downgraded diplomatic ties with Qatar after Doha was accused of supporting terrorism in the region.[41] These nations severed all commercial land, air, and sea travel with Qatar and expelled Qatari diplomats and citizens. In January 2021, Saudi Arabia, the UAE, Bahrain, and Egypt agreed to restore ties with Qatar during the 41st GCC summit. Per the agreement, Saudi Arabia and its GCC allies lifted the economic and diplomatic blockade of Qatar, reopening their airspace, land, and sea borders. This diplomatic détente paves the way for full reconciliation in the GCC and, at least potentially, a more united front in the Gulf.[42]

Military training is an important part of these relationships. Exercises involving the United States are intended principally to ensure close and effective coordination with key regional partners, demonstrate an enduring U.S. security commitment to regional allies, and train Arab armed forces so that they can assume a larger share of responsibility for regional security.

Important Alliances and Bilateral Relations in the Middle East

Israel. America's most important bilateral relationship in the Middle East is with Israel. Both countries are democracies, value free-market economies, and believe in human rights at a time when many Middle Eastern countries reject those values. With support from the United States, Israel has developed one of the world's most sophisticated air and missile defense capabilities.[43] No significant progress on peace negotiations with the Palestinians or on stabilizing Israel's volatile neighborhood is possible without a strong and effective Israeli–American partnership.

Ties between the United States and Israel reached a historic low during the Biden Administration. Before October 7, that Administration actively distanced itself from the Abraham Accords framework and refunded the U.N. Relief and Works Agency for Palestine Refugees in the Near East (UNRWA), for which the Trump Administration had ended U.S. taxpayer funding in 2019 because of the agency's role in perpetuating the Israeli–Palestinian conflict. During the war, the Biden Administration applied public pressure to Israel over its operational conduct in Gaza and Lebanon and privately withheld critical munitions and supplies that the Israel Defense Forces (IDF) needed to prosecute the war.[44]

The Trump Administration's return to the White House has brought renewed support for Israel, including release of the munitions the Biden Administration withheld and approval of additional sales of munitions and other capabilities that Israel requires.[45]

Saudi Arabia. After Israel, the deepest U.S. military relationship is with the Gulf States, including Saudi Arabia, which serves as de facto leader of the GCC. The Saudis enjoy huge influence across the Muslim world, and approximately 2 million Muslims participate in the annual Hajj pilgrimage to Mecca. Riyadh has been a key partner in efforts to counter the influence of Iran. The United States is also the largest provider of arms to Saudi Arabia and has regularly, if not controversially, sold munitions to resupply stockpiles expended in the Saudi-led campaign against the Houthis in Yemen.

America's relationship with Saudi Arabia is based on pragmatism and is important for both security and economic reasons. Under the Biden Administration, bilateral relations deteriorated significantly as President Biden seemed intent on turning Saudi Arabia into a pariah state because of the October 2018 murder of Saudi dissident journalist Jamal Ahmad Khashoggi in the Saudi consulate in Istanbul, Turkey. The Administration also turned a blind eye to Houthi aggression on the Arabian Peninsula. For example, the Biden Administration lifted the Trump Administration's designation of the Houthi Ansar Allah (Supporters of God) movement as a terrorist organization. This persisted despite Houthi drone and ballistic missile attacks against military and civilian targets in Saudi Arabia and the UAE and then against international commercial shipping vessels and U.S. naval ships. Finally, the relationship suffered over oil production disputes, with the Biden Administration threatening "consequences" for Saudi Arabia after OPEC+ cut production in 2022 (although it never followed through on that threat).[46]

With the return of the Trump Administration, the United States and Saudi Arabia are now on friendlier terms. Within two days of taking office, President Trump redesignated the Houthis as a Foreign Terrorist Organization.[47] In addition, Saudi Arabia's Crown Prince Mohammed bin Salman has vowed to invest at least $1.3 trillion in the United States over four years.[48]

Gulf Cooperation Council. The GCC's member countries—the UAE, Bahrain, Saudi Arabia, Oman, Qatar, and Kuwait—are located in an oil-rich region close to the Arab–Persian fault line and are therefore strategically important to the United States. The root of Arab–Iranian tensions in the Gulf is Iran's ideological drive to export its Islamist revolution and overthrow the traditional rulers of the Arab kingdoms.

This ideological clash has further amplified long-standing sectarian tensions between Shia Islam and Sunni Islam. Tehran has sought to radicalize Shia Arab minority groups for the purpose of undermining Sunni Arab regimes in Saudi Arabia, Kuwait, Yemen, and Bahrain. It also sought to incite revolts by the Shia majorities in Iraq against Saddam Hussein's regime and in Bahrain against the Sunni al-Khalifa dynasty.

GCC member countries often have difficulty agreeing on a common policy with respect to matters of security. This reflects both the organization's intergovernmental nature and its members'

desire to place national interests above those of the GCC. The 2017 dispute with Qatar illustrates this difficulty.

Another source of disagreement involves the question of how best to deal with Iran. The UAE, Kuwait, and Saudi Arabia, all of which once opposed the Iran nuclear deal, have restored diplomatic relations with Tehran—the UAE and Kuwait in 2022 and Saudi Arabia in a deal brokered by China in March 2023.[49] Bahrain still maintains a hawkish view of the threat from Iran. Oman prides itself on its regional neutrality, and Qatar shares natural gas fields with Iran, so it is perhaps not surprising that both countries view Iran's activities in the region as less of a threat and maintain cordial relations with Tehran.

Egypt. Egypt is another important U.S. military ally. As one of six Arab countries that maintain diplomatic relations with Israel, and as one that borders on both Israel and the Gaza Strip, Egypt is closely enmeshed in the Israeli–Palestinian conflict. Though its regional political, diplomatic, and military influence has shrunk over the decades, Egypt remains a leading power.

Relations between the United States and Egypt have been difficult since the 2011 downfall of President Hosni Mubarak after 30 years in power. The Muslim Brotherhood's Mohamed Morsi was elected president in 2012 and used the Islamist-dominated parliament to pass a constitution that advanced an Islamist agenda. Morsi's authoritarian rule, combined with rising popular dissatisfaction with falling living standards, rampant crime, and high unemployment, led to a massive wave of protests in June 2013 that prompted a military coup in July. The leader of the coup, Field Marshal Abdel Fattah el-Sisi, pledged to restore democracy and was elected president in 2014—and won re-election in 2018 and 2023 in elections that many considered to be neither free nor fair.

Sisi's government faces major political, economic, and security challenges, although the government's tight control of internal security and Egypt's ban on anti-government demonstrations have limited popular protests. By mid-2023, Egypt was on the brink of economic collapse because of soaring bread prices and high rates of inflation. The Houthis' disruption of commercial shipping in the Red Sea beginning in the fall and winter of 2023 cost Cairo an estimated $7 billion in transit revenue.[50]

The post–October 7 war has elevated Egypt's importance to the United States. Egypt has played an instrumental role as a mediator, along with Qatar, between Hamas and Israel in negotiations for the release of the hostages. However, Cairo has also used its position as a country bordering on Gaza to prevent the outflow of refugees into the Sinai Peninsula, thereby exacerbating the humanitarian cost of the war.

Why the Region Matters

The United States maintains four key national security interests in the Middle East:

- Ensuring the flow of energy out of the region;
- Ensuring the flow of commerce through the region;
- Limiting, if not preventing, nuclear proliferation; and
- Ensuring that the region does not become a launching pad for terrorism directed against the U.S. homeland.

The Middle East is a critical component of the global energy economy. It accounts for 31 percent of global oil production, 18 percent of gas production, 48 percent of proven oil reserves, and 40 percent of proven gas reserves.[51] In 2023, the Middle East's daily oil flow constituted approximately 20 percent of global petroleum consumption.[52] Though the United States is the world's largest producer and consumer of oil, it imports relatively little of its oil from the Middle East. But because oil is a fungible commodity, the U.S. economy remains vulnerable to sudden spikes in world oil prices.

The Biden Administration's decision in 2021 to shutter some existing energy production and refuse permission for new exploration made the United States more sensitive to Middle East–based volatility in the energy market. Russia's invasion of Ukraine in February 2022 caused the price of oil to jump to more than $139 a barrel while gas prices doubled—the highest levels for both in almost 14 years.[53] The price of oil gradually fell to below $100 a barrel until Hamas's October 7 attack, which pushed it back up to the $100 mark.

Regional conflict has caused the price to fluctuate from a low of just over $73 in December 2023 to

a high of over $91 in April 2024 as the market reacted to the volatility of the regional conflict.[54] However, significant shocks to the global energy market have not materialized. Even during the Twelve-Day War with direct engagement between the United States and Iran, the global energy markets saw only a 10 percent spike in the price of oil, which jumped from $68 to $75.[55]

Yet because many U.S. allies depend on Middle East oil and gas, there is also a second-order effect for the United States if supply from the Middle East is reduced or compromised. For example, as of December 16, 2025, Japan was the world's fifth largest economy, and as of November 18, 2025, it was the world's second largest importer of liquefied natural gas (LNG), surpassed only by China.[56] The United States might not have to depend on Middle East oil or LNG, but the economic consequences arising from a major disruption of supplies would ripple across the globe. Thus, tensions and instabilities continue to affect global energy markets and directly affect U.S. national security and economic interests.

Moreover, the region's significance is not limited to energy. Before November 2023, approximately 12 percent of global trade and 30 percent of global container traffic traversed the Suez Canal, transporting more than $1 trillion worth of goods each year. The Houthis disrupted international shipping lanes by harassing and attacking commercial and military vessels in the area after joining Hamas's war against Israel in November 2023. As a result, ships had to reroute around the Cape of Good Hope, which in turn led to higher shipping costs, insurance premiums, global food and oil prices, and more.[57] The total cost has been estimated at nearly $200 billion.[58]

Nuclear proliferation also presents a significant threat to regional stability, to America's partners and allies, and potentially to the U.S. homeland. Iran's pursuit of nuclear capabilities presents a danger not only by itself, but also because Tehran will have a nuclear umbrella to pursue its regional ambitions, notably support for terrorist organizations and ballistic missile development. With nuclear power, Iran will have delivery options: It can place a nuclear warhead on its ballistic missiles and launch a salvo against Israel, needing only one to make it through Israel's formidable but not impenetrable missile defense system, or smuggle it to a proxy or proxies in the region, thereby making it harder to trace and easier to evade accountability.

A nuclear-armed Iran is also sure to trigger a nuclear arms race throughout the region. Through the Abraham Accords framework, the United States provided the UAE with the materials, equipment, and know-how for a civil nuclear program; it is believed that any agreement with Saudi Arabia for normalization with Israel will also entail a nuclear component. However, these countries would likely seek a military component to these programs if their enemy across the Persian Gulf developed the same.

As the al-Qaeda attacks of late 20th century, culminating in 9/11, made clear, terrorism emanating from the Middle East can target American military and civilian assets in the region or at home. It was largely the significant U.S. presence in the region after 9/11 and robust security measures at home that prevented any similar attack in the nearly quarter-century since then. However, the threat remains real as long as the Iranian regime pursues its stated policy of "Death to America" and jihadist organizations have territory to govern and the financial and other means to launch attacks. Given the millions of illegal aliens who streamed across the open southern border into the American interior under the Biden Administration, the potential for a lone wolf or organized attack that originated in the Middle East obviously remains high.

Finally, instability in the Middle East has a destabilizing impact on the West. The refugees of the Syrian civil war are transforming Europe. Having taken advantage of lax European immigration laws and European nations' unwillingness and inability to assimilate this large and culturally alien population, the refugees are contributing to the explosion of antisemitism across the continent and to the Islamization of Western society and institutions.

Threats to the U.S. Homeland

No power in the Middle East currently has the capacity to attack the U.S. homeland directly with conventional means. However, the U.S. homeland is still under threat from state and non-state actors that seek to roll back American influence in the region and in the global order more generally.

Iran is chief among these threats and has deployed a variety of means to target the U.S. homeland. Through information, financial, or psychological operations, it actively supports anti-American organizations in an effort to disrupt American society. As the Director of National Intelligence

revealed in July 2024, Iran is "seeking to stoke discord and undermine confidence in our democratic institutions" by "opportunistically tak[ing] advantage of ongoing protests regarding the war in Gaza." Specifically, "[w]e have observed actors tied to Iran's government posing as activists online, seeking to encourage protests, and even providing financial support to protestors."[59]

The regime also has a history of conducting assassination operations on American soil. In 2011, two individuals tied to the IRGC were arrested for plotting to assassinate the Saudi ambassador.[60] In 2024, an Iranian asset attempted to assassinate then-presidential candidate Donald Trump.[61]

Iran also conducts cyberattacks against the United States. Following Hamas's October 7 attack on Israel, a water utility facility in Pennsylvania came under attack by hackers affiliated with the IRGC.[62] In 2024, the U.S. Treasury Department sanctioned companies and individuals for conducting malicious cyber activity on behalf of the IRGC.[63] Following Operation Midnight Hammer in late June 2025, hospitals, water dams, and power plants across the United States were on high alert because of possible Iranian retaliation.[64]

Iran uses these asymmetric means because it currently lacks the ability to reach the United States by conventional means. However, it is systematically developing the ballistic missile technology that might enable it to reach the U.S. homeland. Its arsenal includes short-range and medium-range ballistic missiles with a maximum range of about 2,000 kilometers (km), putting Southeastern and Central Europe within striking distance.[65]

Reaching the U.S. East Coast would require developing an intercontinental ballistic missile (ICBM) with a range of more than 10,000 km. Iran's military does not currently possess this capability, but the regime's civilian space program is developing multistage rockets to launch satellites. A July 2024 U.S. intelligence report notes that Iran's Simorgh rocket, with its second stage for space deployment, "probably would shorten the timeline to produce an intercontinental ballistic missile, if it decided to develop one, because the systems use similar technologies."[66]

Finally, as 9/11 demonstrated, the U.S. homeland is under perennial threat from terrorist organizations, some of which are funded or otherwise supported by Iran.

Quality of Key Allied or Partner Armed Forces in the Middle East

The quality and capabilities of the region's armed forces are mixed. Some countries spend billions of dollars each year on advanced Western military hardware; others spend very little. Saudi Arabia's military budget is by far the region's largest, and Saudi Arabia spent the most in 2023 (the most recent year for which data are available) at 7.1 percent of GDP (Lebanon is noted to have spent 8.9 percent of its gross domestic product on defense, but this is based on estimates and a less reliable figure).[67] This is followed by Oman (5.4 percent); Israel (5.3 percent); and Jordan and Kuwait (both at 4.9 percent).

Different security factors drive the degree to which Middle Eastern countries fund, train, and arm their militaries. For Israel, which fought and defeated numerous Arab nation-state coalitions throughout its first few decades of independence, the chief potential threat to its existence is now an Iranian regime that has called for Israel to be "wiped off the map" and has developed a network of terrorist organizations on Israel's borders to implement this objective.[68] States and non-state actors in the region have invested in asymmetric and unconventional capabilities to offset Israel's military superiority.[69] For the Gulf States, the main driver of defense policy is the Iranian military threat combined with internal security challenges; for Iraq, it is the internal threat posed by Iran-backed militias and Islamic State terrorists.

Israel. The Israel Defense Forces is considered the most capable military force in the Middle East, and its operations against enemies in Gaza, Lebanon, Syria, Yemen, and Iran since October 7, 2023, have reinforced this assessment. Iran and Arab countries have spent billions of dollars in an effort to catch up with Israel's capabilities, but U.S. support preserves Israel's qualitative military edge (QME). Iran is steadily improving its missile capabilities and, the U.N. conventional arms embargo having expired in October 2020, now has access to the global arms trade.[70] In response, Arab countries are upgrading their weapons capabilities while establishing officer training programs to improve military effectiveness.[71]

Israel funds its military sector heavily and has a strong national industrial capacity that is supported by significant funding from the United States. Combined, these factors give Israel a regional advantage

despite limitations of manpower and size. In particular, the IDF has focused on maintaining its superiority in missile defense, intelligence collection, precision weapons, and cyber technologies.[72] The Israelis regard their cyber capabilities as especially important and use cyber technologies for numerous purposes that include defending Israeli cyberspace, gathering intelligence, and carrying out attacks.[73]

An early lesson from Hamas's October 7 attack is the need to avoid overreliance on technology and underreliance on the basic tactic of having soldiers man border positions. Israel invested three years and more than $1 billion in a high-tech border fence along Gaza that was intended to function as an alert to prevent infiltration into Israel.[74] At the same time, the IDF had been cutting required service times for male conscripts (service time remains shorter for female conscripts than it is for their male counterparts) and limiting soldiers' operational deployments to border posts.[75] The results were catastrophic.

In recent decades, this reliance on technology has seen Israel invest heavily in its air force. Following its initial 2010 agreement with the United States to procure 20 F-35I Adir stealth fighters, Israel expanded its order numerous times to a now-expected total fleet of 75 aircraft. As of March 2025, the Israeli Air Force (IAF) had received 42 of these fifth-generation fighters with the most recently delivered three arriving at Nevatim Airbase on March 16, 2025.[76] Deliveries for the third squadron are expected to begin in 2027.

Israel's F-35I has been actively utilized in various operations including strikes in Syria, Lebanon, and Gaza. Notably, during the 2023 conflict, an Israeli F-35I achieved the first operational shootdown of a cruise missile launched toward Israel by the Houthis. To further enhance its aerial capabilities, Israel secured a $6.75 billion agreement with the United States in February 2025 for the procurement of GPS-guided munitions with deliveries set to begin later the same year.[77]

In December 2021, Israel also signed a $3 billion deal with the United States to buy 12 Lockheed Martin–Sikorsky CH-53K helicopters and two Boeing KC-46 refueling planes to replace the Sikorsky CH-53 Yas'ur heavy-lift aircraft that have been in use since the late 1960s. As of March 2025, Sikorsky had initiated the integration of Israeli-specific systems into the CH-53K helicopters with deliveries expected to commence in 2028.[78] Initial delivery of the KC-46A tankers was delayed from their anticipated May 2025 delivery date because of structural cracks. These advanced aircraft are intended to enhance Israel's operational readiness, particularly in potential conflicts with Iran.[79]

Israel maintains its qualitative superiority in medium-range and long-range missile capabilities and fields effective missile defense systems that include Iron Dome, David's Sling, and Arrow, all of which have benefitted from U.S. financial and technical support.[80] Designed to intercept long-range ballistic missiles, Arrow 3 was first used in October 2023 to intercept ballistic missiles that the Houthis fired from Yemen.[81] It then featured prominently in Iran's combined missile and drone attack against Israel in April 2024.[82] As mentioned, all three systems were used during the Twelve-Day War between Israel and Iran in June 2025.

Israel also has a nuclear weapons capability (which it does not publicly acknowledge) that increases its strength relative to other powers in the region and has helped to deter adversaries as the gap in conventional capabilities has been reduced.

Gulf Cooperation Council. The GCC countries possess the region's most technologically advanced and best-equipped armed forces, second only to Israel's. Historically, revenues from oil and gas exports have enabled substantial investments in defense. Despite fluctuations in oil prices, these nations have sustained or increased their military expenditures to address ongoing regional security challenges. For instance, Saudi Arabia's defense budget for 2025 is $78 billion, up from $75.8 billion in 2024, and accounts for 21 percent of total government spending and 7.1 percent of GDP. Similarly, the overall defense market in the GCC is projected to grow by more than 5.51 percent.[83] While the GCC may not have the region's most effective armed forces, these investments have enabled GCC nations to acquire advanced defense hardware, predominantly from the United States, Britain, and France.

The GCC's most capable military force is Saudi Arabia's with an estimated 257,000 active-duty personnel—including 130,000 National Guardsmen—and about 25,000 in reserve.[84] The Royal Saudi Land Forces operate a large fleet of main battle tanks, including approximately 600 U.S.-made M1A2 Abrams. The Royal Saudi Air Force consists of more than 700 aircraft, including more than 440

combat-capable fighters, primarily American F-15 variants and British-made Eurofighter Typhoons and Tornado aircraft.[85]

In recent years, GCC countries have invested in long-range firepower and precision-strike capabilities. In October 2024, the UAE purchased $1.2 billion worth of advanced Guided Multiple Launch Rocket Systems (GMLRS) and Army Tactical Missile Systems (ATACMS) from the United States.[86] In March 2025, to strengthen defenses against Houthi drone attacks, Saudi Arabia purchased 2,000 Advanced Precision Kill Weapon Systems (APKWS) valued at $100 million. This follows Riyadh's October 2024 acquisition of more than 2,000 Hellfire missiles.[87] These acquisitions reflect a broader GCC effort to modernize arsenals with U.S.-made systems that improve both offensive and defensive precision-strike capabilities.

Nonetheless, air power remains a strong suit of most GCC members. Oman, for example, operates F-16s and Typhoons. Bahrain has enhanced its air force with the acquisition of 16 F-16 Block 70 aircraft from the United States; the first three jets were delivered in March 2024, and the remaining deliveries are ongoing.[88] Qatar operates French-made Mirage fighters and has expanded its fleet with the purchase of 24 Eurofighter Typhoons from the United Kingdom, deliveries of which commenced late in 2023. Additionally, Qatar has expressed its intention to acquire an additional 12 Typhoons to further strengthen its air capabilities and deepen defense ties with the U.K. These advancements underscore the GCC's commitment to maintaining advanced and capable air forces amid evolving regional security dynamics.[89]

After first considering acquisition of the F-35 from the United States, the UAE went with France's Rafale fighter jet. In November 2020, the U.S. Department of State had notified Congress that it had approved the sale of a $23.4 billion defense package of F-35A Joint Strike Fighters, armed drones, munitions, and associated equipment to the UAE.[90] After a temporary freeze on arms sales by the Biden Administration, the sale moved forward in April 2021. However, by December 2021, the UAE suspended discussions over the F-35 acquisition, citing technical requirements, operational restrictions, and cost-benefit considerations.[91] In September 2024, a senior Emirati official stated that the UAE did not plan to resume negotiations with the United States over the F-35; the UAE instead received its first French Rafale fighter jets in January 2025.[92]

Despite their Western-supplied platforms and hardware, Middle Eastern countries have shown a willingness to use their military capabilities only under certain limited circumstances. The navies of GCC member countries, for example, rarely deploy beyond their exclusive economic zones (EEZs), but they increasingly have been working together to address common regional threats. Kuwait, Bahrain, the UAE, Saudi Arabia, and Qatar have participated in and, in some cases, have commanded Combined Task Force (CTF) 152, formed in 2004 to maintain maritime security in the Persian Gulf.[93] Egypt commands CTF 153, a 34-nation naval partnership established in 2022 "to enhance international maritime security and capacity-building efforts in the Red Sea, Bab Al-Mandeb and Gulf of Aden."[94] In January 2025, the United States and GCC countries launched Exercise Eagle Resolve 2025 in Qatar, a combined joint all-domain exercise aimed at enhancing interoperability and readiness across land, air, sea, space, and cyberspace domains.[95] Additionally, the GCC's Peninsula Shield Forces have evolved into a symbol of collective Gulf security that reflects a unified commitment to safeguarding regional stability.

In April 2024, a coordinated multinational defense operation showcased exceptional joint interoperability among the United States, Israel, Jordan, the United Kingdom, and France in response to Iran's large-scale UAV and missile assault on Israel.[96] The United States played a pivotal role with American aircraft and naval assets intercepting more than 80 Iranian projectiles before they reached Israeli airspace. The United Kingdom contributed by deploying Royal Air Force (RAF) Typhoon fighters from bases in Cyprus and Romania, successfully shooting down multiple UAVs. France provided radar coverage and, at Jordan's request, actively intercepted Iranian drones. Jordan, situated along the flight path of the incoming threats, intercepted numerous drones and missiles violating its airspace, demonstrating its commitment to regional security. This collective defense effort, codenamed Iron Shield, resulted in the interception of approximately 99 percent of the 300 projectiles launched by Iran in April 2024 toward Israel, underscoring the effectiveness of international military cooperation in countering complex threats.[97]

Egypt. Egypt maintains the region's largest Arab military force with 438,500 active personnel and 479,000 reserve personnel.[98] It possesses a fully operational military with an army, air force, air defense, navy, and special operations forces. Historically reliant on Soviet military technology until 1979, Egypt has since significantly upgraded its army and air force with U.S. weapons, equipment, and aircraft.[99] Egypt's naval capabilities have grown with the opening of a naval base at Ras Gargoub in July 2021 and commissioning of four German-made Type 209/1400 submarines and two Italian-built FREMM frigates, all of which has significantly strengthened its maritime operational capacity.[100]

Egypt continues to confront persistent terrorist activity in the Sinai Peninsula with groups such as the Islamic State's Sinai Province (IS-SP) conducting attacks against security forces and civilians. To address these threats, the Egyptian military has intensified operations, including raids and airstrikes targeting terrorist hideouts in such areas as Bir al-Abed, Rafah, and Sheikh Zuweid.[101] Following Hamas's October 7 attack on Israel, Cairo closed the Rafah Border Crossing to prevent the infiltration of militants and maintain national security.[102] The crossing remained closed during the ensuing conflict as Egypt expressed its concerns about potential mass displacement of Palestinians into the Sinai.[103]

Jordan. The Hashemite Kingdom of Jordan is a close U.S. ally with small but capable armed forces. Jordan's principal security threats continue to include terrorism, political unrest, the burden of regional refugees, and the growing Captagon drug trade spilling over from Syria and Iraq. Jordan faces few conventional threats from neighboring states, but its internal security has been strained by the presence of Islamist terrorists, some of whom are fighters returning from conflicts in Syria and Iraq. The 2023 Gaza conflict further heightened tensions as Jordan experienced several terrorist incidents and tightened border controls in response to regional instability.[104] The illicit Captagon trade has prompted Jordan and Syria to coordinate more closely on border security operations to curb smuggling and militant infiltration.[105] As a result, Jordan's armed forces remain focused on internal stability, counterterrorism, and securing the kingdom's northern and eastern borders.

Jordan maintains a robust conventional military capability relative to its size. The Jordanian Armed Forces comprise approximately 100,000 active-duty soldiers and 65,000 reservists.[106] The Royal Jordanian Army operates a diverse fleet of main battle tanks, including 402 British-made Al-Hussein tanks (Challenger 1); 288 M60A1/A3 tanks; and 274 Khalid tanks (Chieftain).[107] The Royal Jordanian Air Force's backbone consists of 43 F-16A/B Fighting Falcons with an additional 12 advanced F-16C/D Block 70 aircraft due for delivery. Jordan's special operations forces are highly capable and benefit from extensive training and cooperation with U.S. and U.K. military programs.[108] Jordanian forces have participated in international missions including deployments in Afghanistan and various United Nations peacekeeping operations.

Iraq. Iraq's military remains hindered by deeply rooted politicization and corruption that emerged after the 2011 U.S. withdrawal. Successive governments have continued to appoint officers based on political loyalty, often favoring Shiite personnel over Sunni, Kurdish, and Christian counterparts.[109] This favoritism has contributed to dysfunction and has enabled corruption that includes the widespread use of "ghost soldiers" to divert military funds.[110] Efforts to reform the system, such as anti-corruption committees, have faced setbacks or have been disbanded. Integration of the Popular Mobilization Forces into Iraq's security forces has raised additional concerns about accountability and sectarian influence, especially following the passage of a controversial 2025 amnesty law affecting those convicted of attacks on U.S. troops.[111]

Iraq's armed forces have shown improvement in capabilities and morale, but concerns about Baghdad's ability to maintain operational effectiveness amid the ongoing U.S. drawdown and redeployment of forces persist. Issues such as the promotion of unqualified military leaders, inadequate logistical support due to corruption, limited operational mobility, and deficiencies in intelligence, reconnaissance, medical support, and air force capabilities persist. These factors historically have undermined operational performance as exemplified by the 2014 collapse of multiple divisions during the Islamic State's offensive, which led to the fall of Mosul.[112] In response, the United States and its allies initiated extensive training programs that culminated in Mosul's liberation on July 9, 2017.[113] Despite these efforts, however, recent assessments indicate that the Iraqi military's capabilities remain constrained,

particularly in high-end conventional operations, due to a lack of artillery and air power.

The presence of Iranian-aligned militias in Iraq remains a significant obstacle to force unity. Following the October 7 Hamas attack on Israel, some of these militias participated in strikes against Israel, escalating regional tensions.[114] Notably, on January 28, 2024, the Islamic Resistance in Iraq—a coalition of Iranian-backed groups—claimed responsibility for an attack on a U.S. outpost in Jordan that resulted in the deaths of three American servicemembers.[115] In response, the United States launched retaliatory airstrikes targeting militia positions in Iraq and Syria. These developments underscore the ongoing challenges that militia groups pose to Iraq's internal security and regional stability. The planned drawdown of U.S.-led coalition forces by 2026 could further affect Iraq's security landscape, underscoring the need for continued reforms within its armed forces.[116]

Relationships with the People's Republic of China and Russia

China. China has expanded its trade and security relations with many Middle Eastern nations in the past decade. Beijing knows that the region is a vital source of energy fueling its economic growth and military, both of which depend heavily on external resources.

China is the largest consumer of Middle Eastern oil, and its trade with the region has more than tripled in the past 20 years.[117] Imports currently constitute nearly 70 percent of China's overall oil consumption, and the Gulf region accounts for 46 percent of those imports.[118] China's oil imports will continue to grow to an estimated 80 percent of its total consumption by 2030.[119]

The PRC's Belt and Road Initiative (BRI) is designed in part to ensure access to the resources required to sustain China's economy and military. It would be a grave strategic error to abandon the Middle East and its petrochemical resources, which sustain the global economy, to Xi Jinping and the Chinese Communist Party. Through the BRI, China has strengthened infrastructure, trade, and technology ties, which include its Digital Silk Road projects focused on digital connectivity that have involved deployment of next-generation 5G networks in Saudi Arabia, the UAE, Qatar, and Egypt by Huawei and ZTE.[120]

In recent years, China and Iran have come into greater strategic alignment. Throughout the Biden Administration, despite sanctions on Iranian oil exports that it maintained from the Trump Administration, four of every five barrels that Iran exported went to China at a total cost to China of more than $140 billion.[121] This has allowed Iran to maintain and expand its regional influence. In 2021, China and Iran signed a comprehensive strategic partnership agreement that promised significant Chinese investment in energy, transportation, and telecommunications as well as long-term oil and gas contracts.[122] China also mediated the 2023 détente between Saudi Arabia and Iran and hosted Arab leaders in Beijing in May 2024 to discuss the Israeli–Palestinian conflict.[123]

China's regional military presence remains limited but is growing. Beijing's first permanent overseas base is in Djibouti, situated near the Bab al-Mandeb Strait across from Yemen. The base, which can house 10,000 troops and has been used by Chinese marines to stage live-fire exercises featuring armored combat vehicles and artillery, is strategically located near commercial shipping lanes passing from the Gulf of Aden to the Red Sea. In March 2025, China participated in the Marine Security Belt 2025 exercise with Iran and Russia. This was the fifth year that these joint naval drills, which are focused on strengthening cooperation among the participating naval forces, had been conducted.[124]

Russia. Russia historically has had limited presence and influence in the Middle East. This changed in 2015 when the Obama Administration proposed a military cooperation partnership between Russia and Syria, which helped to stabilize the Assad regime during the civil war.[125] In addition to its naval base in Tartus, established in 1971, Russia would build an air base in the coastal province of Latakia. However, the fall of the Assad regime in December 2024 forced Russia to abandon the naval base.[126]

Despite losing its foothold in Syria, Russia has developed close ties with Iran in recent years as both countries look to support those countering the United States and the West. In November 2022, Moscow and Tehran reached an agreement to manufacture Iranian drones—which have proven highly effective in Russia's war against Ukraine—in Russia.[127] In January 2025, the two countries signed a comprehensive strategic partnership agreement

that covers trade, military cooperation, science, education, and more.[128] It includes helping Russia to manufacture Iranian UAVs; nine months later, a Russian Shahed drone was shot down in Romania.[129]

U.S. Force Presence and Infrastructure

Before 1980, the limited U.S. military presence in the Middle East consisted chiefly of a small naval force that had been based in Bahrain since 1958. Washington had pursued a "twin pillar" strategy that relied on prerevolutionary Iran and Saudi Arabia to take the lead in defending the Persian Gulf from the Soviet Union and its client regimes in Iraq, Syria, and South Yemen.[130] In 1979, however, the Iranian revolution demolished one pillar, and the Soviet invasion of Afghanistan that December increased the Soviet threat to the Gulf.

In January 1980, proclaiming in a commitment known as the Carter Doctrine that the United States would take military action to defend oil-rich Persian Gulf states from external aggression, President Jimmy Carter ordered the creation of the Rapid Deployment Joint Task Force, the precursor to U.S. Central Command (CENTCOM), which was established in January 1983.[131]

Until the late 1980s, according to CENTCOM, America's "regional strategy still largely focused on the potential threat of a massive Soviet invasion of Iran."[132] After the collapse of the Soviet Union, Saddam Hussein's Iraqi regime became the chief threat to regional stability. Iraq invaded Kuwait in August 1990, and the United States responded in January 1991 by leading an international coalition of more than 30 nations to expel Saddam's forces from Kuwait. CENTCOM commanded the U.S. contribution of more than 532,000 military personnel to the coalition's armed forces, which totaled at least 737,000.[133] This marked the peak U.S. force deployment in the Middle East.

Confrontations with Iraq continued throughout the 1990s as Baghdad continued to violate the 1991 Gulf War ceasefire. Baghdad's failure to cooperate with U.N. arms inspectors to verify the destruction of its weapons of mass destruction and its links to terrorism led to the U.S. invasion of Iraq in 2003. During the initial invasion, U.S. forces numbered nearly 192,000, joined by military personnel from coalition forces.[134] Apart from the "surge" in 2007 when President George W. Bush deployed an additional 30,000 personnel, the number of American combat forces in Iraq fluctuated between 100,000 and 150,000.[135]

In December 2011, the U.S. officially completed its withdrawal of troops from Iraq, leaving only 150 personnel attached to the U.S. embassy in Baghdad.[136] Later, following Islamic State territorial gains, the United States redeployed thousands of troops to the country to assist Iraqi forces against the Islamic State and help to build Iraqi capabilities.

In 2021, the Biden Administration brought America's combat mission in Iraq to a close and transitioned U.S. forces to an advisory role. U.S. force levels in Iraq declined from 5,200 in 2020 to 2,500 in January 2021.[137] CENTCOM Commander General Frank McKenzie stated that "[a]s we look into the future, any force level adjustment in Iraq is going to be made as a result of consultations with the government of Iraq."[138] In September 2024, the United States announced an agreement with Iraq under which the U.S.-led coalition fighting the Islamic State would end and U.S. troops would leave their bases sometime in 2025.[139] By September 2025, U.S. forces were beginning to withdraw from parts of the country, leaving a planned residual force in the autonomous Kurdistan Region until September 2026.[140]

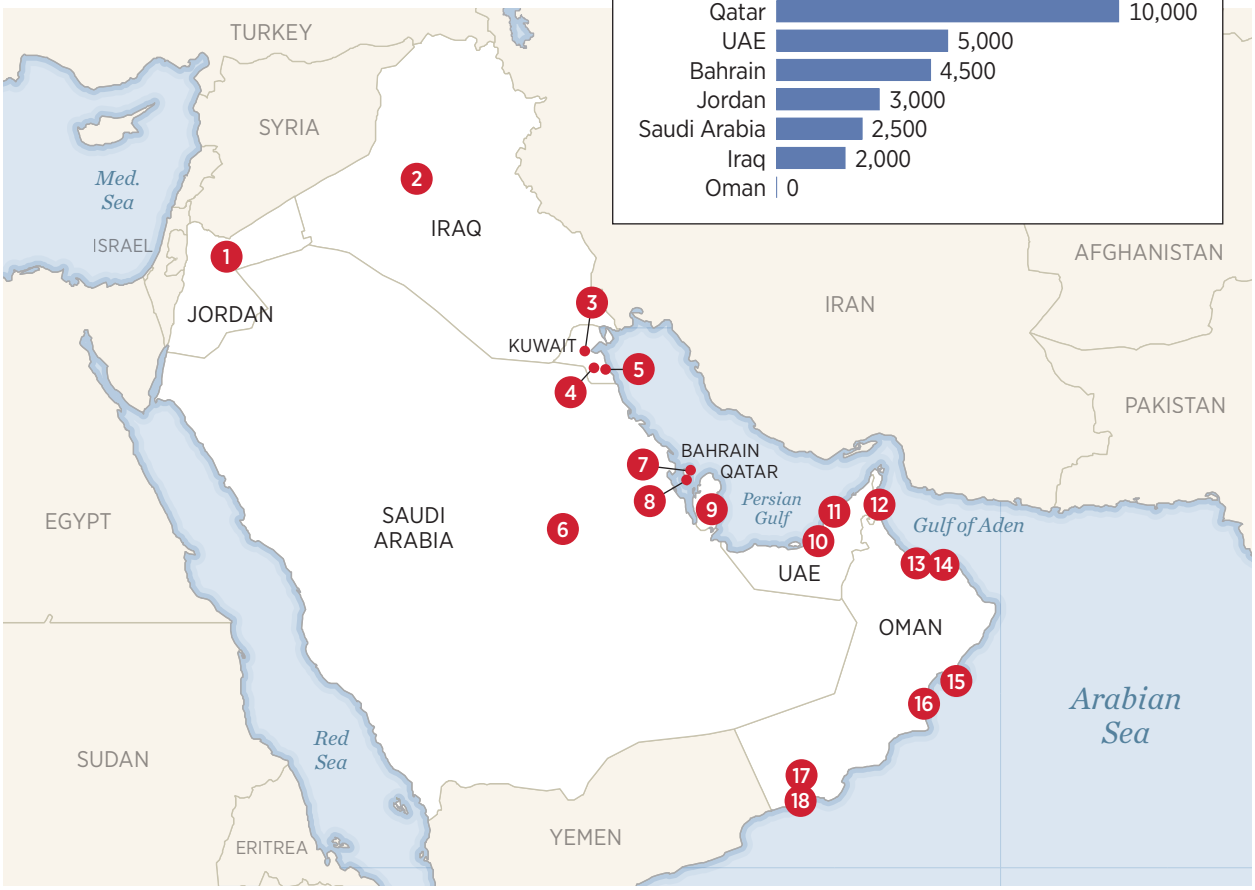
The United States continues to maintain a limited number of forces in other locations in the Middle East, primarily in GCC countries. In 2019, rising naval tensions in the Persian Gulf prompted the additional deployments of troops, Patriot missile batteries, and combat aircraft to the Gulf to deter Iran, but most were later withdrawn.[141] In August 2022, it was reported that the U.S. State Department had "approved more than $5 billion in arms deals for key Middle East partners, including $3.05 billion in Patriot missiles for Saudi Arabia" to defend itself "against persistent Houthi cross-border unmanned aerial system and ballistic missile attacks on civilian sites and critical infrastructure" and "$2.25 billion in THAAD systems for the United Arab Emirates."[142]

In the wake of the October 7 Hamas attack on Israel, the Biden Administration sent two aircraft carrier strike groups to deter Hezbollah or Iran from joining Hamas.[143] Throughout 2024, the United States maintained two strike groups in the region to deter Houthi attacks and respond to Iran's ballistic missile strikes on Israel. In December 2023, the United States formed Operation Prosperity Guardian, a multinational coalition formed to address

MAP 4

U.S. Access to Bases and Facilities in the Middle East

COUNTRY	U.S. TROOPS
Kuwait	10,000
Qatar	10,000
UAE	5,000
Bahrain	4,500
Jordan	3,000
Saudi Arabia	2,500
Iraq	2,000
Oman	0



JORDAN
1. Muwaffaq Salti Airbase

IRAQ
2. al-Asad Air Base

KUWAIT
3. Ali al-Salem Air Base
4. Ahmad al-Jabir Air Base
5. Camp Arifjan

SAUDI ARABIA
6. Eskan Village Air Base

BAHRAIN
7. Khalifa bin Salman Port
8. Shaykh Isa Air Base

QATAR
9. Al Udeid Air Base

UNITED ARAB EMIRATES
10. Al-Dhafra Air Base
11. Jebel Ali Port
12. Fujairah Naval Base

OMAN
13. Musnanah Air Base
14. Muscat International Airport
15. RAFO Masirah
16. Al Duqm Port
17. RAFO Thumrait
18. Salalah Port

SOURCES: "Chapter Six: Middle East and North Africa," in International Institute for Strategic Studies, *The Military Balance 2025:* The Annual Assessment of Global Military Capabilities and Defence Economics (London: Routledge, 2025), and Heritage Foundation research.

heritage.org

the Houthi threat to international shipping lanes in the southern Red Sea and the Gulf of Aden, and deployed four destroyers under Combined Task Force 153.[144] In April 2025, two new carrier strike groups remained in the CENTCOM area of responsibility (AOR) with B-2 and B-52 bombers sent to the region as well.

By June 2025, CENTCOM had deployed an estimated 40,000 U.S. troops to 21 countries within its AOR.[145] Although the exact disposition of U.S. forces is hard to determine because of the fluctuating nature of U.S. military operations in the region,[146] information gleaned from open sources reveals the following:

- **Kuwait.** More than 13,500 U.S. personnel are based in Kuwait and spread among Camp Arifjan, Ahmad al-Jabir Air Base, and Ali al-Salem Air Base. A large depot of prepositioned equipment and a squadron of fighters and Patriot missile systems are also deployed to Kuwait.[147] In February 2025, the U.S. State Department approved a potential $1 billion Foreign Military Sale to Kuwait for design and construction services intended to enhance military infrastructure such as maritime and land facilities at the Mohammed Al Ahmed Naval Base.[148]

- **United Arab Emirates.** More than 5,000 U.S. personnel are deployed at Jebel Ali Port, Al Dhafra Air Base, and naval facilities at Fujairah. Jebel Ali Port is the U.S. Navy's busiest port of call for aircraft carriers.[149] U.S. Air Force personnel who are stationed in the UAE use Al Dhafra Air Base to operate fighters, UAVs, refueling aircraft, and surveillance aircraft; it is the busiest U.S. base in the world for surveillance flights.[150] In addition, the United States has regularly deployed F-22 Raptor combat aircraft to Al Dhafra and in April 2021 deployed the F-35 combat aircraft because of escalating tensions with Iran. Patriot and THAAD missile systems have been deployed for air and missile defense.[151]

- **Oman.** In 1980, Oman became the first Gulf State to welcome a U.S. military base. While the number of U.S. military personnel in Oman has fallen to a few hundred, mostly from the U.S. Air Force, the country provides important access in the form of over 5,000 aircraft overflights, 600 aircraft landings, and 80 port calls annually.[152] The U.S.–Oman Strategic Framework Agreement, signed in March 2019, remains foundational, granting U.S. forces access to Omani ports such as Al Duqm, with its capacity to accommodate U.S. carriers that enhances strategic flexibility, and Salalah.[153]

- **Bahrain.** More than 9,000 U.S. military personnel are based in Bahrain. Naval Support Activity Bahrain remains the headquarters for U.S. Naval Forces Central Command in Manama and for the U.S. Fifth Fleet, overseeing operations across the Persian Gulf, the Red Sea, and the Arabian Sea.[154] A significant number of U.S. Air Force personnel operate out of Shaykh Isa Air Base where F-16s, F/A-18s, and P-8 surveillance aircraft are stationed. U.S. Patriot missile systems also are deployed to Bahrain. The deep-water port of Khalifa bin Salman is one of the few Gulf facilities that can accommodate U.S. aircraft carriers. In 2021, Bahrain became an operational hub for the use of new artificial intelligence technology to direct unmanned surface vessels and unmanned underwater vehicles in the CENTCOM AOR.[155]

- **Saudi Arabia.** In June 2021, President Biden reported to Congress that approximately 2,700 U.S. military personnel were deployed in Saudi Arabia "to protect United States forces and interests in the region against hostile action by Iran or Iran-backed groups." The President confirmed that these troops, "operating in coordination with the Government of the Kingdom of Saudi Arabia, provide air and missile defense capabilities and support the operation of United States fighter aircraft."[156] The six-decade-old United States Military Training Mission to the Kingdom of Saudi Arabia, the four-decade-old Office of the Program Manager of the Saudi Arabian National Guard Modernization Program, and the Office of the Program Manager–Facilities Security Force are based in Eskan Village Air Base approximately 13 miles south of the capital city of Riyadh.[157]

- **Qatar.** The number of U.S. personnel, mainly from the U.S. Air Force, deployed in Qatar "has

ranged from about 8,000 to over 10,000."[158] The U.S. operates its Combined Air Operations Center at Al Udeid Air Base, which is one of the world's most important U.S. air bases. The base continues to host the Combined Air and Space Operations Center and serves as the forward headquarters of CENTCOM. Al Udeid supports heavy bombers, tankers, transports, and intelligence, surveillance, and reconnaissance (ISR) aircraft and houses prepositioned U.S. equipment as well as Patriot missile systems.[159] In January 2024, the U.S. and Qatar agreed to extend the American military presence at Al Udeid for another 10 years.[160] In January 2025, Space Forces Central (SPACECENT) broke ground on a new campus at Al Udeid to strengthen space operations integration.[161]

- **Jordan.** Although there are no permanent U.S. military bases in Jordan, the United States maintains a significant military presence there with approximately 3,813 U.S. military personnel deployed to support counterterrorism efforts and bolster Jordan's security.[162] According to CENTCOM, "Jordan remains one of U.S. Central Command's strongest and most reliable partners in the Levant sub-region."[163] The U.S. and Jordan share a robust defense partnership formalized by a Defense Cooperation Agreement that facilitates joint military exercises, training programs, and defense-related collaborations.[164] Jordanian air bases continue to play a crucial role in U.S. operations, particularly for ISR missions in Syria and Iraq.

CENTCOM "directs and enables military operations and activities with allies and partners to increase regional security and stability in support of enduring U.S. interests."[165] Execution of this mission is supported by four service component commands—U.S. Naval Forces Middle East (NAVCENT); U.S. Army Forces Middle East (ARCENT); U.S. Air Forces Middle East (AFCENT); and U.S. Marine Forces Middle East (MARCENT)—and one subordinate unified command, U.S. Special Operations Command Middle East (SOCCENT).

- **U.S. Naval Forces Central Command.** NAVCENT is CENTCOM maritime component. With its forward headquarters in Bahrain, it is responsible for commanding the afloat units that rotationally deploy or surge from the United States in addition to other ships that are based in the Gulf for longer periods. NAVCENT conducts persistent maritime operations to advance U.S. interests, deter and counter disruptive countries, defeat violent extremism, and strengthen partner nations' maritime capabilities in order to promote a secure maritime environment in an area that encompasses approximately 2.5 million square miles of water.

- **U.S. Army Forces Central Command.** ARCENT is CENTCOM's land component. Based in Kuwait, it is responsible for land operations in an area that totals 4.6 million square miles (1.5 times larger than the continental United States).

- **U.S. Air Forces Central Command.** AFCENT is CENTCOM's air component. Based in Qatar, it is responsible for air operations and for working with the air forces of partner countries in the region. It also manages an extensive supply-and-equipment prepositioning program at several regional sites.

- **U.S. Marine Forces Central Command**. MARCENT is CENTCOM's designated Marine Corps service component. Based in Bahrain, it is responsible for all Marine Corps forces in the region.

- **U.S. Special Operations Command Central**. SOCCENT is a subordinate unified command under CENTCOM. Based in Qatar, it is responsible for planning special operations throughout the CENTCOM region, planning and conducting peacetime joint/combined special operations training exercises, and orchestrating command and control of peacetime and wartime special operations.

In addition to the American military presence in the region, two NATO allies—the United Kingdom and France—play an important role.

The U.K.'s presence in the Middle East is a legacy of British imperial rule. The U.K. has maintained close ties with many countries that it once ruled and

has conducted military operations in the region for decades. As of 2024, approximately 410 British service personnel were permanently based throughout the region.[166] This number fluctuates with the arrival of visiting warships.

The British presence in the region is dominated by the Royal Navy. Permanently based naval assets include four mine hunters and one Royal Fleet Auxiliary supply ship. In general, "UK armed forces are involved in three major military operations in the wider Middle East region" including "Operation Kipion, a long-standing maritime security mission in the Arabian/Persian Gulf and Indian Ocean." In addition, frigates or destroyers in the Gulf or Arabian Sea are generally performing maritime security duties, and (although such matters are not the subject of public discussion) U.K. attack submarines also operate in the area.[167] In April 2018, as a sign of its long-term maritime presence in the region, the U.K. opened a base in Bahrain—its first overseas military base in the Middle East in more than four decades.[168] The U.K. has made a multimillion-dollar investment in modernization of the Duqm Port complex in Oman to accommodate its new *Queen Elizabeth*–class aircraft carriers.[169]

The U.K. also has a small RAF presence in the region, mainly in the UAE and Oman. A short drive from Dubai, Al-Minhad Air Base is home to a small contingent of U.K. personnel, and small RAF detachments in Oman support U.K. and coalition operations in the region. The U.K.'s Sovereign Base Areas of Akrotiri and Dhekelia in Cyprus have supported U.S. military and intelligence operations in the past and are expected to continue to do so.

Finally, the British presence in the region is not limited to soldiers, ships, and planes. A British-run staff college operates in Qatar, and Kuwait chose the U.K. to help it to run its own equivalent of the Royal Military Academy at Sandhurst.[170] The U.K. also plays a very active role in training the Saudi Arabian and Jordanian militaries.

The French presence in the Gulf is smaller than the U.K.'s but still significant. France opened a military base in Abu Dhabi in 2009, its first in the Gulf and the first foreign military installation built in 50 years.[171] The French have 700 personnel based in the UAE along with seven Rafale jets and an armored battlegroup in addition to military operations in Iraq, Saudi Arabia, and Qatar.[172] French ships have access to the Zayed Port in Abu Dhabi, which is big enough to handle every ship in the French Navy except the aircraft carrier *Charles de Gaulle*.

Military support from the U.K. and France has been particularly important in Operation Inherent Resolve, a U.S.-led joint task force that was formed to combat the Islamic State in Iraq and Syria. As of May 2021, France had between 600 and 650 troops stationed in the UAE; 600 stationed in Jordan, Syria, and Iraq; and 650 stationed in Lebanon.[173] The U.K. temporarily redeployed troops back to the U.K. because of COVID-19 but announced in February 2021 that 500 troops would be sent back along with an additional 3,500 troops to boost its counterterrorism training mission in Iraq.[174] The additional troops will help both to prevent the Islamic State from returning and to manage threats from Iran-backed militias more effectively.

Another important actor in Middle East security is the small East African country of Djibouti. Djibouti sits on the Bab el-Mandeb Strait, through which an estimated 6.2 million barrels of oil a day transited in 2018 (the most recent year for which U.S. Energy Administration data are available) and which is a choke point on the route to the Suez Canal.[175] An increasing number of countries recognize Djibouti's value as a base from which to project maritime power and launch counterterrorism operations. The country is home to Camp Lemonnier, which can hold as many as 4,000 personnel and is the only permanent U.S. military base in Africa.[176] France, Italy, and Japan also have presences of varying strength in Djibouti.[177]

Key Infrastructure That Enables Expeditionary Warfighting Capabilities

The Middle East is a critical geographic area. Two-thirds of the world's population lives within an eight-hour flight from the Gulf region, making it accessible from most other regions of the globe. The Middle East also contains some of the world's most critical maritime choke points, including the Suez Canal and the Strait of Hormuz.

Although infrastructure is not as developed in the Middle East as it is in North America or Europe, during a decades-long presence, the U.S. has developed systems that enable it to move large numbers of matériel and personnel into and out of the region. According to the Department of War, at the height of U.S. combat operations in Iraq during the Second Gulf War, the U.S. presence included 165,000

servicemembers and 505 bases. Moving personnel and equipment out of the country was "the largest logistical drawdown since World War II" and included redeployment of "the 60,000 troops who remained in Iraq at the time and more than 1 million pieces of equipment ahead of their deadline."[178]

The condition of the region's roads varies from country to country. Virtually all roads in Israel, Jordan, and the UAE are paved. Other nations—for example, Oman (29,685 km paved, 30,545 unpaved); Yemen (6,200 km paved, 65,100 km unpaved); and Saudi Arabia (47,529 km paved, 173,843 km unpaved)—have poor paved road coverage.[179] Rail coverage is also poor. China's BRI has targeted ports, roads, and railway development in Syria, Iraq, Egypt, and many other countries, and the result could be improved transportation conditions across the region at the expense of U.S. interests.[180]

The United States has access to several airfields in the region. The primary air hub for U.S. forces is Al Udeid Air Base in Qatar. Other airfields include Ali Al Salem Air Base in Kuwait; Al Dhafra and Al Minhad in the UAE; Isa in Bahrain; Eskan Village Air Base in Saudi Arabia; and Muscat, Thumrait, Masirah Island, and the commercial airport at Seeb in Oman. In the past, the United States has used major airfields in Iraq, including Baghdad International Airport and Balad Air Base, as well as Prince Sultan Air Base in Saudi Arabia.

The fact that a particular air base is available to the United States today, however, does not necessarily mean that it will be available for a particular operation in the future. For example, because of their more cordial relations with Iran, Qatar and Oman probably would not allow the United States to use air bases in their territory for strikes against Iran unless they were first attacked themselves.

The United States also has access to ports in the region, the most important of which may be the deep-water port of Khalifa bin Salman in Bahrain and naval facilities at Fujairah in the UAE.[181] The UAE's commercial port of Jebel Ali is open for visits from U.S. warships and the prepositioning of equipment for operations in theater.[182]

In March 2019, "Oman and the United States signed a 'Strategic Framework Agreement' that expands the U.S.–Oman facilities access agreements by allowing U.S. forces to use the ports of Al Duqm, which is large enough to handle U.S. aircraft carriers, and Salalah."[183] The location of these ports outside the Strait of Hormuz makes them particularly useful. Approximately 90 percent of the world's trade travels by sea, and some of the busiest and most important shipping lanes are located in the Middle East. Tens of thousands of cargo ships travel through the Strait of Hormuz and the Bab el-Mandeb Strait each year. However, the Houthis demonstrated how vulnerable this shipping lane is when they began to attack commercial and naval vessels in the fall of 2023.

Given the high volume of maritime traffic in the region, no U.S. military operation can be undertaken without consideration of the opportunity and risk that these shipping lanes offer to America and her allies. The major shipping routes include:

- **The Suez Canal.** In 2023, more than 26,000 ships transited the Suez Canal, accounting for 12 percent of global trade, but tensions in the Red Sea late in 2023 caused transits to fall by nearly 50 percent to 13,200 in 2024.[184] The Trump Administration's campaign against the Houthis in the spring of 2025 could cause traffic to rebound, but considering that the canal itself is 120 miles long but only 670 feet wide, 13,200 transits is still an impressive amount of traffic. The Suez Canal is important to Europe because it provides access to oil from the Middle East. It also serves as an important strategic asset for the United States, as it is used routinely by the U.S. Navy to move surface combatants between the Mediterranean Sea and the Red Sea. Thanks to a bilateral arrangement between Egypt and the United States, the U.S. Navy enjoys priority access to the canal.[185]

  The journey through the Suez Canal's narrow waterway is no easy task for large surface combatants; the canal was not constructed with the aim of accommodating 100,000-ton aircraft carriers. For this reason, different types of security protocols are followed to ensure the security of larger vessels, including the provision of air support by the Egyptian military.[186] These security protocols, however, are not foolproof. In April 2021, the Suez Canal was closed for more than 11 days after a container ship ran aground, blocking the waterway and creating a 360-ship traffic jam that disrupted almost 13 percent of global maritime traffic.

This crisis proves that ever-larger container ships transiting strategic choke points are prone to accidents that can lead to massive disruptions of both global maritime trade and U.S. maritime security.[187]

- **Strait of Hormuz.** According to the U.S. Energy Information Administration, the Strait of Hormuz, which links the Persian Gulf with the Arabian Sea and the Gulf of Oman, "is the world's most important oil chokepoint because of the large volumes of oil that flow through the strait."[188] In 2024, its daily oil flow averaged "around 20.3 million barrels" per day, the equivalent of "[o]ne fifth of global oil supply."[189]

  Given the extreme narrowness of the passage and its proximity to Iran, shipping routes through the Strait of Hormuz are particularly vulnerable to disruption. Since 2021, Iran has harassed, attacked, and interfered with over a dozen internationally flagged merchant ships according to the White House and the Pentagon. In April 2024, IRGC naval special forces seized a container ship.[190] Iran had previously seized two foreign-flagged oil tankers in the spring of 2023.[191] In response, U.S. Navy warships stationed in the Persian Gulf increased their patrols.[192] The U.S. needs a naval presence and port access to countries that border the Strait of Hormuz to maintain awareness of Iran's illicit drug and weapons smuggling.[193]

- **Bab el-Mandeb Strait.** The Bab el-Mandeb Strait is a strategic waterway located between the Horn of Africa and Yemen that links the Red Sea to the Indian Ocean. Exports from the Persian Gulf and Asia that are destined for Western markets must pass through the strait en route to the Suez Canal. Because the Bab el-Mandeb Strait is 18 miles wide at its narrowest point, passage is limited to two channels for inbound and outbound shipments.[194]

- **Maritime Prepositioning of Equipment and Supplies.** The U.S. military has deployed noncombatant maritime prepositioning ships (MPS) containing large amounts of military equipment and supplies in strategic locations from which they can reach areas of conflict relatively quickly as associated U.S. Army or Marine Corps units located elsewhere arrive in the area. The British Indian Ocean Territory of Diego Garcia, an island atoll, hosts the U.S. Naval Support Facility Diego Garcia, which supports prepositioning ships that can supply Army or Marine Corps units deployed for contingency operations in the Middle East.

Conclusion

The Middle East region remains a key focus for U.S. military planners. Once considered relatively stable because of the ironfisted rule of authoritarian regimes, the area is now highly unstable and a breeding ground for terrorism and the return of regional powers vying for territory and influence.

Overall, regional security has deteriorated in recent years. Hamas's October 7, 2023, attack on Israel led to the greatest change in the operating environment in a generation. In response to the attack, Israel has effectively destroyed or significantly degraded terrorist organizations and terrorist armies in three locations—Hamas in Gaza, Hezbollah in Lebanon, and the Houthis in Yemen—while defending itself against two unprecedented direct ballistic missile attacks on its soil from Iran. In striking back against the Islamic Republic, Israel and the United States dealt a significant blow to Tehran's ability to defend its territory, produce ballistic missiles, and advance its nuclear program. This culminated in the Twelve-Day War with Israel destroying much of Iran's ballistic missile infrastructure and the United States delivering a decisive blow to the regime's nuclear facilities. Yet Tehran appears to be undeterred in its ambition to dominate the region and acquire nuclear capabilities.

Many of the region's borders created after World War I are under significant stress. The fall of the Assad regime has created a power vacuum in Syria that the HTS-led transitional government of Ahmed al-Sharaa (previously known by his *nom de guerre* Abu Mohammad al-Julani) is attempting to navigate, while regional players use the moment to encroach on Syrian territory in a bid to seize territory (Turkey) or establish a forward-deployed defensive position (Israel). Though its caliphate was defeated, ISIS survives in Syria and continues to threaten the integrity of that country and the security of its borders.

In Lebanon, the pummeling of Hezbollah by the Israelis after the Iranian proxy joined Hamas in its

war against Israel has created an opportunity for the Lebanese army to reassert control of the country's southern territory. As this book was being prepared, HTS was battling with Hezbollah on the Syrian–Lebanese border. It remains to be seen whether the new government in Damascus will prevent Iran from using Syria as a land bridge to resupply Hezbollah, which could well significantly reduce the Lebanese terrorist group's capabilities. Under the direction of the new administration in Syria, Syrian forces have claimed success in anti-smuggling operations. For example, Syrian forces have captured several wanted individuals, have seized large quantities of weapons and narcotics, and claim to have established control of several villages in an effort to combat Hezbollah's smuggling operations.[195]

Elsewhere, Yemen's civil war persists, and the Houthis have used their territorial control and Iranian supply lines to launch attacks against Israel, American naval ships, and international commercial vessels. Despite numerous Israeli and American airstrikes targeting the group's infrastructure, weapons, and leadership, Iran's proxy appears to be undeterred.

Iran also exercises significant influence over Iraq. Baghdad has restored its territorial integrity since the defeat of the Islamic State, but the political situation and future relations between Iraq and the United States will remain difficult as long as Iran retains control of powerful Shia militias that it uses to intimidate Iraqi political leaders.[196]

Though the regional dispute with Qatar has been resolved, the Gulf country has played a unique role in the post–October 7 war, using its position as host to Hamas's leadership outside of Gaza and close relations with both the United States and Iran to serve as a mediator in negotiations over the return of the more than 250 hostages Hamas captured in its attack.[197]

Egypt, though stable for the moment, faces its own security challenges. Cairo has prevented refugees from Gaza from entering the Sinai Peninsula largely because of concerns about the spread of Hamas and other terrorist elements into Egypt and to prevent the Palestinian people from relocating to a third country, which is seen as an abrogation of the Palestinian claim to territory in any negotiated deal with Israel. As this book was being prepared, Egypt had sent armored battalions and other forces into Sinai, violating the 1979 Camp David Accords with Israel.[198]

Jordan also faces threats to its stability. About half of its population is Palestinian, and the Hashemite Kingdom has been unable to stem the flow of weapons smuggled to Palestinian terrorist groups in Judea and Samaria. Amman has engaged with the new government in Damascus and resumed flights between the countries, but much of the borderland remains ungoverned, giving the Islamic State the opportunity to reestablish territory. This area was also the site of an Iranian-aligned proxy group in Iraq's missile strike against an American outpost that killed three servicemembers in January 2024.[199]

In response to recent regional upheaval, the U.S. military continues to demonstrate its capacity to surge troops, warships, and supplies to the region in defense of American interests and support of American allies and partners. Decades of military operations in the Middle East have created tried-and-tested procedures for operating across the theater. Personal links between allied armed forces are also present. Joint training exercises improve interoperability, and U.S. military educational courses that are regularly attended by officers (and often royals) from the Middle East give the U.S. an opportunity to influence some of the region's future leaders. Maintaining a sustainable presence in the region will require leveraging the capabilities of U.S. allies and partners to ensure that vital shared national security interests—energy, trade, nuclear nonproliferation, and countering terrorism—are secured.

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 benefit from cooperation with partners and allies in the Middle East when shared interests are threatened.

Scoring the Middle East Operating Environment

As noted at the beginning of this section, there are several regional characteristics that affect the ability of the U.S. to conduct military operations to defend its vital national interests against threats

in the Middle East. This assessment of the operating environment uses a five-point scale that ranges from "very poor" to "excellent" conditions and covers four regional characteristics that are of greatest relevance to the conduct of military operations:

1. **Very poor.** Significant hurdles exist for military operations. Physical infrastructure is insufficient or nonexistent, and the region is politically unstable. The U.S. military is poorly placed or absent, and alliances are nonexistent or diffuse.

2. **Unfavorable.** A challenging operating environment for military operations is marked by inadequate infrastructure, weak alliances, and recurring political instability. The U.S. military is inadequately placed in the region.

3. **Moderate.** A neutral to moderately favorable operating environment is characterized by adequate infrastructure, a moderate alliance structure, and acceptable levels of regional political stability. The U.S. military is adequately placed.

4. **Favorable.** A favorable operating environment includes adequate infrastructure, strong alliances, and a stable political environment. The U.S. military is well placed for future operations.

5. **Excellent.** An extremely favorable operating environment includes well-established and well-maintained infrastructure, strong and capable allies, and a stable political environment. The U.S. military is well placed to defend U.S. interests.

The key regional characteristics consist of:

a. **Alliances/Partnerships.** Alliances are important for interoperability and collective defense, as allies are more likely to lend support to U.S. military operations. Indicators that provide insight into the strength or health of an alliance include whether the United States trains regularly with countries in the region, has good interoperability with the forces of an ally, and shares intelligence with nations in the region.

b. **Political stability.** Political stability brings predictability for military planners when considering such components as transit, basing, and overflight rights for U.S. military operations. The overall degree of political stability indicates whether U.S. military actions would be hindered or enabled and reflects, for example, whether transfers of power are generally peaceful and whether there have been any recent instances of political instability in the region.

c. **U.S. military positioning.** Being able to base military forces or to stage equipment and supplies in a region greatly facilitates the ability of the United States to respond to crises and presumably to achieve success in critical "first battles" more quickly. Being routinely present in a region also helps the United States to remain familiar with its characteristics and the various actors that might either support or try to thwart U.S. actions. With this in mind, we assessed whether the U.S. military was well positioned in the region. Again, indicators included bases, troop presence, prepositioned equipment, and recent examples of military operations (including training and humanitarian) launched from the region.

d. **Infrastructure.** Modern, reliable, and suitable infrastructure is essential to military operations. Airfields, ports, rail lines, canals, and paved roads enable the United States to stage, launch, and logistically sustain combat operations. We combined expert knowledge of regions with publicly available information on critical infrastructure to arrive at our overall assessment of this metric.

The U.S. enjoys strong military-to-military relationships with many countries in the Middle East, but few can provide the necessary capabilities to defend themselves in the event of a credible threat from a nation-state or terrorist organization, Israel being the lone exception. The multinational response from Middle Eastern and European partners to defend Israel against Iran's April 2024 UAV and missile attack demonstrates the ability of the United States to coordinate military action among Middle Eastern and European countries with assets in-region in response to a common threat.

Operating Environment: Middle East

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances			✓		
Political Stability		✓			
U.S. Military Posture				✓	
Infrastructure			✓		
OVERALL			✓		

Although destabilizing in the near term, the near-destruction of Hamas in the Gaza Strip, crippling of Hezbollah in Lebanon, and fall of the Assad regime in Syria create long-term opportunities for new, favorable political dynamics to emerge. The U.S. presence is significantly diminished since the height of operations in Iraq and Afghanistan, but its response in the immediate aftermath of the October 7, 2023, attack and subsequent operations against the Houthis and Iran demonstrate the U.S. military's ability to respond rapidly to a wide range of crises across the region.

Finally, the region's natural chokepoints—the Suez Canal, Bab al-Mandeb Strait, and Strait of Hormuz, among others—will always pose a risk to free movement within and through the region. In addition, the poor infrastructure within many countries can limit ground-based operations. Yet the U.S. maintains a robust network of air, naval, and ground bases that enable it to launch and logistically sustain combat operations.

Overall, the U.S. has developed an extensive network of bases in the Middle East and has acquired substantial operational experience in combatting regional threats. At the same time, however, many of America's allies are hobbled by political instability, economic problems, internal security threats, and mushrooming transnational threats. With these considerations in mind the overall score for the region is "moderate," and we arrived at these average scores for the Middle East (rounded to the nearest whole number):

- Alliances/Partnerships: **3—Moderate.**
- Political Stability: **2—Unfavorable.**
- U.S. Military Positioning: **4—Favorable.**
- Infrastructure: **3—Moderate.**

Aggregating to a regional score of: **Moderate.**

Endnotes

1. For example, during a 1916 meeting in Downing Street, Sir Mark Sykes, Britain's lead negotiator with the French on dividing the Ottoman Empire in the Middle East, pointed to the map and told the Prime Minister that for Britain's sphere of influence in the Middle East, "I should like to draw a line from the e in Acre [modern-day Israel] to the last k in Kirkuk [modern-day Iraq]." See James Barr, *A Line in the Sand: Britain, France, and the Struggle That Shaped the Middle East* (London: Simon & Schuster U.K., 2011), pp. 7–20. See also Margaret McMillan, *Paris 1919: Six Months That Changed the World* (New York: Random House, 2003).
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Africa

Douglas and Sarah Allison Center for National Security

Introduction

Africa is a region of great promise—but also of many challenges. Points of interest to America include Africa's proximity to choke points between the Mediterranean and Red Seas and considerable natural resources. Moreover, the United States has some role in mitigating threats emanating from the region, to include terrorism, extremism, outbreaks of disease, and migration crises that can affect American security and safety. U.S. military forces on the continent must operate within an expansive, diverse, and challenging environment that includes unresolved legacy issues and rapidly increasing threats driven by political, societal, and ideological concerns.

The American perception of Africa is often one of a continent made up of similar countries. The reality is very different: more than 50 unique countries with varying geography, histories, governance and tribalism, economics, global alliances, and humanitarian and development obstacles. Historically, much of the U.S. approach to Africa has centered on specific security responses, foreign aid, and development assistance. Chief factors in Africa's security profile currently include China's 20-year rise on the continent, Russia's aggressive expansion into key regions through military cooperation, France's declining reputation in Francophone Africa, civil conflict and disruption of governance, and the spread of terrorism. Supply chain and shipping interests and potential growth in relations with reliable partners like Morocco, Ghana, and Kenya suggest areas for operational expansion, and such common threats as terrorism and disease crises can create a meeting point for like-minded actors on the continent.

Regional Overview

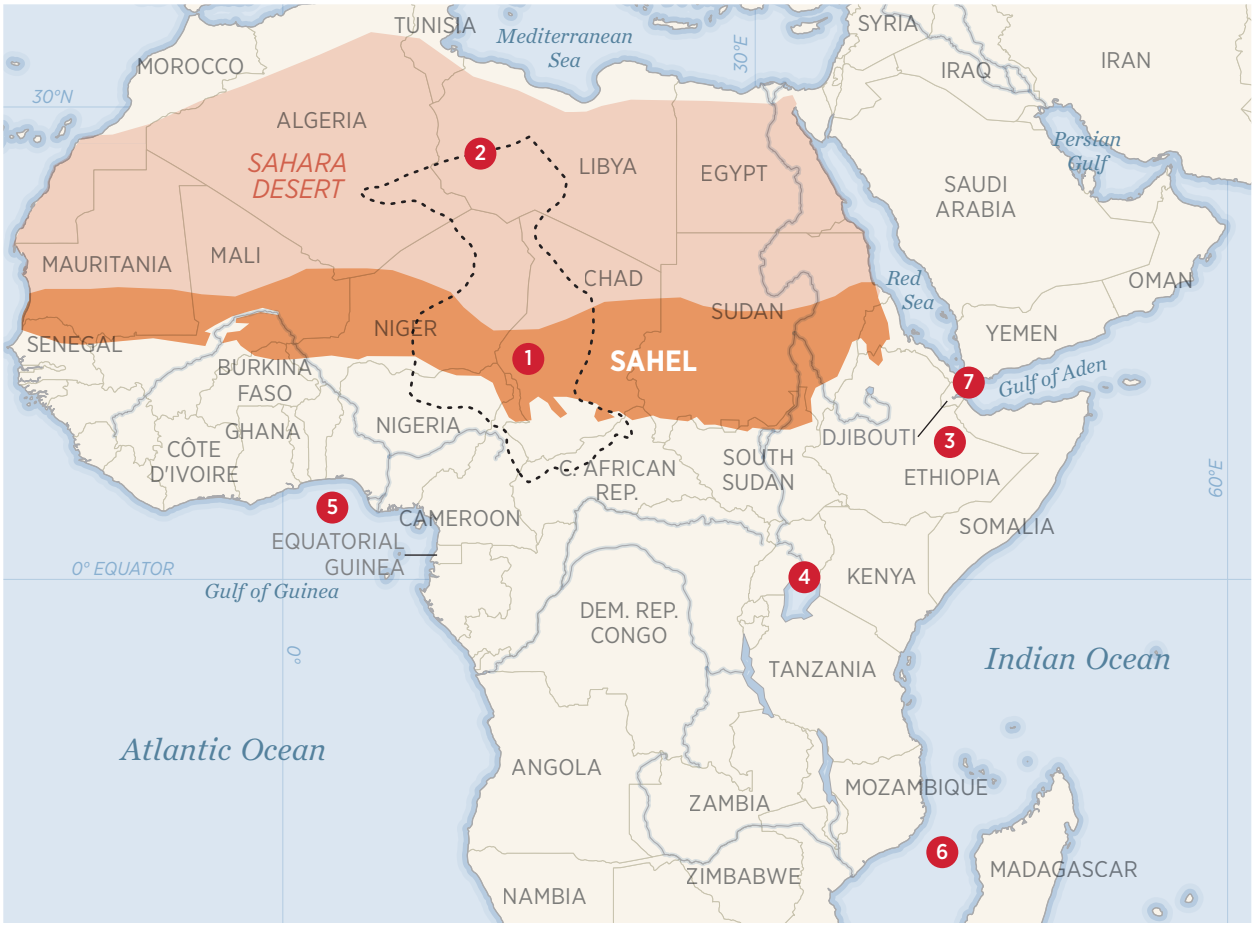
Africa is vast: Its geography includes the world's largest desert and second largest rainforest, expansive mountain ranges, semi-arid lands, and critical locations among the world's most traveled seas and straits. With much of the continent still pursuing an industrialized economy, environmental factors further hinder operational readiness and mobility. For example, low-lying regions near the Nile and Congo Rivers are prone to flooding, drought creates significant food and water shortages in the Horn of Africa, and a recent El Niño phenomenon exacerbated storms and flooding in East Africa, straining limited infrastructure and resources.[1]

These environmental conditions are met by inconsistent infrastructure and development with poor transportation, communication, and energy access or continuity experienced throughout much of the continent. Regions can be extremely isolated from one another because of natural geographies and unreliable or nonexistent infrastructure.

The disparity in industrialization is present in every region of the continent, and although significant progress has been made, development gains are country-specific, and much of the continent remains seriously challenged. Kenya, Nigeria, Ghana, Morocco, and Egypt are examples of countries that are working to attract and accommodate foreign direct investment and that now enjoy modern road networks, high-speed rail systems, well-developed ports, internet access, and reliable and diversified energy portfolios as part of rapidly modernizing industrial economies. However, many other countries, including nations across the Sahel region, the Horn of Africa, and Central Africa, struggle to maintain any durable growth and are in zones of constant conflict.

MAP 5

Key Areas in Africa



1 Sahel
From the Atlantic Ocean to the Red Sea, the Sahel serves as an arid border between North and sub-Sahara Africa and includes Senegal, Mauritania, Mali, Guinea, Burkina Faso, Niger, Chad, and Sudan.

2 Lake Chad Basin
Extending the Sahel into West and Central Africa, the semi-arid basin region includes Chad, Niger, Nigeria, Cameroon, and the Central African Republic.

3 Horn of Africa
East Africa peninsula along the Red Sea, Gulf of Aden, and Indian Ocean, including Sudan, Somalia, Djibouti, Eritrea, and Ethiopia

4 Great Lakes Region
Rift Valley lake region of Lake Tanganyika, Lake Victoria, Lake Kivu, Lake Edward, and Lake Albert and including Burundi, Rwanda, Uganda, northeastern Democratic Republic of the Congo, and northwestern Kenya and Tanzania.

5 Gulf of Guinea
Atlantic Ocean tropic gulf stretching from Liberia to Gabon.

6 Mozambique Channel
An approximately 1,000-mile Indian Ocean channel located between Mozambique and Madagascar.

7 Red Sea, Bab el-Mandeb Strait, and Gulf of Aden
Critical waters between the Horn of Africa and the Arabian Peninsula.

SOURCE: Heritage Foundation research.

heritage.org

These infrastructure gaps leave countries with unreliable power, poor transportation options, and limited access to telecommunications networks, all of which not only affect security and mobility conditions, but also hamper prospects for the economic growth and social development that could help to avert future disruption.

Politically, several African states benefit from strong, mutually beneficial ties with the U.S.—stable working relationships with security, commercial, and other goals. Conversely, the continent presents many volatile and problematic situations, including countries that are under unstable government or uncooperative rule, are the targets of unrelenting terrorist attacks, face uncontrollable humanitarian challenges, and enable adversaries' expansion on the continent, chiefly in support of Chinese and Russian interests.

In the security sphere (although results remain mixed), Morocco, Egypt, Somalia, Kenya, Ethiopia, Nigeria, and Uganda either partner with or have recently participated with the U.S. in counterterrorism and other military training and peacekeeping cooperation. Among the more successful examples, Kenya hosts several U.S. military operations and partners within the Combined Joint Task Force–Horn of Africa (CJTF–HOA), which works to counter violent extremism by the al-Qaeda–aligned al-Shabaab and execute maritime security operations. Morocco is a member of the Global Coalition to Defeat ISIS and remains a reliable partner in counterterrorism operations in North Africa and the Sahel—an increasingly valuable relationship with the recent loss of the U.S. capabilities in Niger and, to a lesser degree, Chad.

Conversely, the United States faces a multitude of conventional and other threats to its interests throughout the continent. Nigeria has been working for years to isolate violence by Boko Haram jihadist insurgents, based primarily in the north and northeastern provinces, and also more recently by ISIS–West Africa as well as to mitigate religious violence against Christians by other Islamic herders and other groups. South Sudan remains unable to achieve lasting stability and has sunk into a civil war, renewing a major humanitarian crisis. The Central African Republic (CAR) is under duress from rebel groups operating from remote regions. Zimbabwe's regime and economic instability have created a roadblock to U.S. engagement.

The following countries and regions merit the strongest U.S. attention both because of their real and potential impact on U.S. interests and because of their possible bearing on U.S. military capabilities.

The Sahel. Stretching from the Atlantic Ocean to the Red Sea, the Sahel serves as an arid border between North and sub-Saharan Africa. The region has seen a complete undoing of its governance structures in just over four years: Mali, Guinea, Burkina Faso, Niger, Chad, and Sudan represent a sequence of coups d'états and conflicts by military juntas and other paramilitary groups, often under the influence of Russian support, insurgency pressure, or both. Resentment has been directed especially at the region's colonial history with the French, who have been expelled summarily from several countries following coups.

This change finds U.S. interests, partners, and the people of the region imperiled. For the United States, this disruption directly impacts its leadership role in containing terrorism and extremism threats. With the fall of Niger's government, the U.S. was forced to withdraw more than 1,000 military personnel and vacate Niger Airbases 101 and 201 in Niamey and Agadez in July and August 2024, respectively.[2] This represents a more than $100 million loss of investment in the airbases, which had served as a launch point for counterterrorism cooperation since 2019. This asset is now under Nigerian control, which is heavily influenced by Russia. Moscow's engagement is found elsewhere as well including in Chad, where a small contingent of approximately 100 U.S. military personnel conducting training exercises were required to depart the country in May 2024.[3] The U.S. absence and the disruption of governance also enable greater terrorism and extremism: Al-Qaeda and ISIS affiliates are flourishing, pressing new ruling regimes, and working to recruit, stage attacks, and expand territorial control. As these new regimes attempt to establish order, civilian populations face increased violence, displacement, and disruption of basic services, further exacerbating the humanitarian crises that are common to the Sahel.

Additionally, the Sahel's current regimes appear to be less inclined to cooperate with international partners, particularly traditional leaders like the United States and France, or with such African alliances as the African Union (AU) and the Economic Community of West African States (ECOWAS), the

latter of which had condemned the coups and imposed sanctions on several Sahel states. Withdrawing from ECOWAS, Mali, Burkina Faso, and Niger formed the Alliance of Sahel States (AES) in September 2023 as a cooperative forum to engage security and regional issues. Sahel states like Mali and Niger are also revising approaches to managing natural resources; where metals like gold and uranium are sourced can directly impact global supply chains.

In the Sudan, an intra-military conflict between the Sudan National Army and the paramilitary Rapid Support Forces (RSF) ultimately ousted democratically elected leaders in April 2023. This ongoing civil war adds to the complicated landscape with the turmoil attracting competing influence and support from North African and Middle East peers and Russia. Instability has displaced thousands, has generated immigration concerns in neighboring states like Egypt and Chad, and is creating avenues for insurgencies to inject further extremism into an already historically stressed country.

Morocco. With dual access to the Atlantic and Mediterranean and long-standing political ties, Morocco is one of the U.S.'s most capable and dependable partners in Africa. Designated as a Major Non-NATO Ally (MNNA), it maintains a level of interoperability with U.S. forces that is unmatched anywhere else on the continent. The annual African Lion exercise demonstrates interoperability in practice, bringing together tens of thousands of troops across air, land, and maritime domains. Moroccan forces operate such U.S. platforms as the F-16 and the AH-64E Apache, ensuring seamless integration into joint operations. The State Partnership Program with the Utah National Guard has deepened its ties over the decades and has produced a generation of officers trained to NATO standards.[4]

Morocco is a member of the Global Coalition to Defeat ISIS and contributes to counterterrorism coordination across North Africa and the Sahel. This cooperation is reinforced at the political level by Washington's recognition of Moroccan sovereignty over the Western Sahara. First announced in 2020, the policy was reaffirmed in April 2025 by Secretary of State Marco Rubio, who stated that Morocco's autonomy plan is "the only feasible solution" to ambiguity over territorial sovereignty. This further reinforced a relationship that has the potential to expand to basing, port access, and intelligence cooperation.[5]

Algeria. Algeria is Africa's largest country in terms of land area and commands vast natural resources that make it a significant if complicated factor in America's regional calculus. Algeria has exhibited a slight tilt toward China and Russia during the past decade. In 2014, it became the first Arab state to establish a comprehensive strategic partnership with China, a status that signals top-tier political coordination with a defense component, not just commercial ties. Additionally, Russia remains a key partner in Algeria's defense posture. Algeria's force structure and training pipeline are tied to Russian systems, and joint naval drills in the Mediterranean and ground exercises reinforce that cooperation, constraining NATO-standard interoperability and narrowing the space for meaningful U.S. defense engagement.

The United States has tested limited openings. High-level engagements by U.S. Africa Command (AFRICOM)[6] have included two visits by AFRICOM Commander General Michael Langley in 2024. That outreach was maintained early in 2025 with a U.S.–Algeria military cooperation memorandum of understanding,[7] and Algiers has signaled interest in selected U.S. equipment while inviting U.S. investment more broadly. The channels opened by AFRICOM and Algeria's interest in selected U.S. defense ties suggest that pragmatic cooperation is possible if it is aligned with clear American conditions and priorities—an uncertain outcome given regional tensions between Algeria and America's long-standing partner Morocco.

Somalia. Somalia's fragility cannot be overstated with the terrorist organization al-Shabaab controlling significant portions of south and central Somalia and threatening to topple the government in Mogadishu. Should the capital fall, U.S. troops and airbase access would immediately be jeopardized, and American and allied maritime security in the Gulf of Aden would suffer greatly from the loss of this position. Despite U.S. defensive attacks against terrorist forces, including airstrikes in February and March 2025 to prevent attacks on American interests,[8] al-Shabaab continues to make gains against a weakened government.

In addition to the threat from al-Shabaab, ISIS maintains a limited but persistent presence in northern Somalia, particularly in the Puntland region. Smaller than al-Shabaab, ISIS in Somalia has established ties with regional and global

jihadist networks. The group engages in targeted assassinations, extortion, and small-scale attacks, clashing with Somali security forces as well as with al-Shabaab.

Desperate for continued U.S. security assistance, Somalia recently offered the United States access to two strategic ports. Both ports, however, are controlled by autonomous territories in Somaliland and Puntland that advocate a possible deal by which the United States would recognize their legitimacy in exchange for basing and commercial port access opportunities. Somaliland's push for recognition presents an inflection point for the country's security, regional stability, and the U.S. presence in Somalia. Somaliland presents itself as a more stable partner against Somalia, and the Somali government cautions that any recognition would subsequently disrupt Mogadishu's relationship with Washington, although to what extent is unknown.

Ethiopia. A stable Ethiopia is important because of Ethiopia's role in mitigating regional risks, including by supporting U.S. counterterrorism efforts against al-Shabaab and other terrorist groups in the Horn of Africa with airspace access, information sharing, and other permissions.[9] The U.S. partnership with Ethiopia is currently minimal, however, because of civil conflict in the country's northern Tigray region.

The two-year war between Ethiopian forces and the Eritrean-backed Tigray People's Liberation Front (TPLF) in the Tigray region was resolved with a peace agreement in November 2022.[10] However, periodic violence continues throughout the region, and both sides of the conflict have been accused of violating human rights. As the region attempts to recover, rebel groups operating into Ethiopia from across its borders present new risks. The possibility of a conflict between Ethiopia and Eritrea also exists.

In addition, the Grand Ethiopian Renaissance Dam (GERD), which opened on September 9, 2025, stands as a major point of contention among Ethiopia, Egypt, and Sudan.[11] Essential for Ethiopia's development and energy needs, the GERD affects the flow and control of Blue Nile waters that are critical to downstream countries, and Egypt is concerned that the dam will reduce water availability, threatening its agriculture and water security. Despite multiple rounds of negotiations, the three countries have struggled to reach a binding agreement on dam operations and water management, and the issue remains unresolved, keeping tensions high in a region that requires peer cooperation for lasting security.

Egypt. Egypt is among the continent's most important security partners and plays a crucial role both in the Middle East and in North Africa. Egypt is involved throughout the region and can serve as a mediator in situations like Sudan's and Libya's ongoing civil conflicts. Egypt also cooperates with Gulf States to counterbalance the influence of Iran and terrorist groups, and its control of the Suez Canal ensures its importance in global trade and military logistics.

Egypt's partnership with the United States remains a cornerstone of its security strategy. The United States provides $1.3 billion in military aid to support Egypt's counterterrorism efforts and the modernization of its armed forces.[12] Joint exercises, intelligence sharing, and arms sales, including sales of advanced fighter jets and missile defense systems, reinforce this cooperation. The U.S. and Egypt also continue to collaborate on maritime security to safeguard the Red Sea and Gulf of Aden from piracy and terrorist threats.

Internally, Egypt continues to face threats from Islamist militant groups, particularly in the Sinai Peninsula, where insurgent activity persists despite ongoing military campaigns.

Libya. It has been 15 years since 2011 when the government of Colonel Muammar Gaddafi was overthrown, yet Libya remains highly unstable, beset by multiple political and military conflicts. Tensions have diminished slightly in recent years, but disagreement persists between the Tripoli-based Government of National Unity (GNU) and the Libyan National Army (LNA) operating semi-autonomously in eastern Libya. Factions seeking control of valuable oil resources have ignored ceasefires and other agreements. Efforts to achieve a lasting peace stall partly because of foreign influences that include Europe, Algeria, Turkey, Qatar, and Russia, which operates through its Africa Corps. The ceding of ground to terrorist organizations, chiefly Ansar al-Sharia, by Libya's government represents a serious threat not only to Libya, but to points north of the Mediterranean as well.

Kenya. The U.S. has designated Kenya as a Major Non-NATO Ally and has reinforced Kenya's role as a key security partner by providing access to advanced military equipment and participating in

Terrorist Groups and Paramilitary Organizations in Africa

Terrorists, juntas, and paramilitary groups have undone both long-standing authoritarian regimes and nascent democracies in recent years. They promote extreme agendas through influence, recruitment, violence, and disruption; attack civilian, military, and government targets; and assault Western interests and international peacekeeping efforts. The following are among the most persistent, organized, and dangerous of these actors:

1. **Al-Shabaab: Somalia, Ethiopia, Kenya.** Al-Shabaab is a Somalia-based terrorist organization aligned with al-Qaeda that threatens to topple the government in Mogadishu. It also has staged successful attacks in Kenya and throughout the Horn of Africa.

2. **Boko Haram: Nigeria, Cameroon, Chad, Niger.** Founded in northeastern Nigeria in the early 2000s, Boko Haram works to establish an Islamic state governed by sharia law and has been responsible for multiple bombings, kidnappings, and other attacks across the Lake Chad Basin.

3. **ISIS–West Africa: Nigeria, Cameroon, Chad, Niger.** Branching off from Boko Haram, ISIS–West Africa, also known as the Islamic State West Africa Province, similarly targets military and civilians in northeastern Nigeria and elsewhere in the Lake Chad Basin.

4. **Al-Qaeda in the Islamic Maghreb: Algeria, Mali, Mauritania, Niger.** Al-Qaeda in the Islamic Maghreb (AQIM) is the North African affiliate of al-Qaeda. AQIM has operated in the Sahel and lower Sahara for nearly 20 years and seeks to establish an Islamic state and challenge Western influence in the region. It also cooperates with smaller peer groups such as the **Movement for Oneness and Jihad in West Africa** (MUJAO) in Mauritania and **Ansar Dine** in Mali and Niger.

5. **Islamic State in the Greater Sahara: Mali, Burkina Faso, Niger.** The Sahel's ISIS satellite, the Islamic State in the Greater Sahara (ISGS), also known as ISIS-Sahel, originated as a jihadist movement in Mali and expanded into Burkina Faso and Niger. ISGS attacks military and civilian targets and Western interests generally, further destabilizing an already destabilized region.

joint training exercises. Recent agreements include the provision of 16 U.S.-manufactured helicopters and the acquisition of 150 M1117 armored vehicles. Kenya co-hosted the 2025 African Chiefs of Defense Conference with the U.S., underscoring its strategic role in regional security.

Kenya continues to confront threats from al-Shabaab, particularly in its coastal regions, and is a key partner in antipiracy efforts. Kenya has strengthened its military capabilities through joint exercises with the United States such as Justified Accord 2025, which was aimed at enhancing multinational combat readiness and crisis response capabilities. Kenya has been actively involved in regional peacekeeping efforts, and its increased participation as a global security partner includes leading a multinational force in Haiti to combat gang violence.

Democratic Republic of the Congo (DRC) and Rwanda. Historically, among the threats to Central African security, ongoing violence between DRC military forces and Rwandan-supported Tutsi insurgent organizations has presented the greatest risk to stability for the Great Lakes region. Fighting along the DRC–Rwanda border has been ongoing for 30 years with insurgent groups—chiefly the March 23 Movement (M23)—operating under the Congo River Alliance (CRA). M23 sees itself as defending Tutsi interests against Hutu militias, but its incursions into the North Kivu Province maintain the decades-long conflict that created the 1994 Rwandan genocide. Today, this conflict has grown to encompass fighting over territory, security, migration, and natural resources.

President Trump has actively engaged with the DRC and Rwanda since taking office. Shortly

6. **Ansar al-Sharia: Libya, Tunisia.** Ansar al-Sharia (AAS) rooted itself in the instability following the Libyan Revolution in 2011 and focuses on disrupting the current weak governance structure, establishing sharia law, and eliminating Western influence. Ansar al-Sharia in Tunisia (AAS-T) was founded after the Arab Spring in 2011 and similarly attacks the Tunisian government and Western interests.

7. **Lord's Resistance Army: Uganda, Democratic Republic of the Congo, Central African Republic, South Sudan, Sudan.** Founded by warlord Joseph Kony and infamous for its use of child soldiers, the Lord's Resistance Army (LRA) is an extremist military organization operating in remote areas of Central Africa. Responsible for widespread violations of human rights since 1987, the LRA is assumed to be greatly reduced though still a problem in areas with weak government oversight.

8. **March 23 Movement: Democratic Republic of the Congo (DRC).** Operating with the presumed support of the government of Rwanda, the March 23 Movement (M23) is a Tutsi-led rebel paramilitary organization that was established as part of the rebellion against DRC regional governance and the Democratic Forces for the Liberation of Rwanda (FDLR), a Rwandan Hutu rebel group. M23's operations, which are controversial and include violence, humanitarian abuses, and theft, have attracted tacit support from others in the region as well.

9. **ISIS-Mozambique: Mozambique, Tanzania.** ISIS-Mozambique, a disruptive insurgency formed in 2017 and also known as Ansar al-Sunna or al-Shabab (no known relation to the Somali group), seeks to establish a government under sharia law. Its attacks target the government of Mozambique and foreign energy development projects including investments by the United States. ISIS-Mozambique operates primarily in the Cabo Delgado province but also has executed attacks in Tanzania.

following the President's inauguration, on January 27, 2025, M23 rebel fighters executed a rapid assault into the City of Goma, the largest metropolitan area in North Kivu, and immediately displaced residents in a city of approximately 3 million people.[13] This latest incident risked becoming a major crisis, as the province faces hunger, migration, and health issues that include an Ebola outbreak, the chief humanitarian concern for the West. A peace agreement, brokered by the United States with support from Qatar, was announced in June 2025 and included commitments to resolve such decades-long issues as disarmament, border integrity, paramilitary groups, economic integration, the return of refugees, and humanitarian access to the region.[14] Despite peer government cooperation, questions remain about the rebel groups' willingness to end their attacks.

In addition to M23, the Lord's Resistance Army (LRA) continues to disrupt DRC and other remote Central African populations in the Great Lakes Region through violence, kidnappings, and abuses of human rights including the use of child soldiers. Operating sporadically in jungles and rural areas from the DRC to Sudan, the LRA remains difficult to eliminate and continues to be a security threat because of weak local governance and the challenging terrain.

South Africa. The Republic of South Africa is the African continent's sole G20 economy. Traditionally, it was viewed as a safe investment destination for Western trade and development, but during the past five years, President Cyril Ramaphosa's government has stood increasingly in opposition to American positions on such issues as currency and Israel, either tacitly or explicitly, while simultaneously advocating for increased U.S. trade, investment, and aid.

South Africa only heightened concerns following a joint naval exercise with Russia and China in the Indian Ocean on the one-year anniversary of Russia's invasion of Ukraine,[15] and as recently as January 2026's Will for Peace BRICS exercise, which expanded the drills to include Iran and the UAE.[16]

Although there is no direct conflict or threat, South Africa's openness to cooperating with these two global military powers, coupled with a tense relationship with the United States, raises the country's risk profile.

Bilateral relations between the U.S. and South Africa have become progressively more strained since 2023; issues include U.S. accusations that South Africa has aided Russian weapons transports and South Africa's support for Palestinian insurgents against Israel.[17] U.S. presidential executive orders condemning South African racism and the expulsion of South Africa's ambassador to the United States in response to derogatory remarks against America further underscore these tensions.[18] South Africa has replaced its ambassador to Washington and continues to lobby in an effort to repair its relationship with the U.S., particularly regarding tariff relief and maintaining its Africa Growth and Opportunity Act (AGOA) trade program eligibility, but progress appears to be limited at best.

Threats to the Continent

Russia and China. The Russian Federation and the Chinese Communist Party (CCP) have established their respective presences across Africa with one or the other serving as the primary global relationship for much of the continent. Achieved through a combination of security partnerships, diplomatic relations that capitalize on post-colonial dissent, and commercial engagement and entrapment, Russia's and China's prioritization of African affairs during the past 20 years have led to a favorable view of their defense and commerce aims, replacing an American brand traditionally centered on humanitarian aid and development. This pair of malign actors complicates U.S. military cooperation with countries like their BRICS partner South Africa that find it easier to have connections with authoritarian regimes because of their shared political and social philosophies.

Moscow's fingerprints in Africa's disrupted regions include bilateral security agreements, paramilitary cooperation, and arms proliferation. Acting as a military counterweight to Western democracies, Moscow helps African authoritarian and nascent military regimes create the appearance of legitimacy and stability. Since 2021, Russian influence has been notably evident throughout the Sahel, where multiple coups d'état have been executed by Russian-trained juntas with support from the Wagner Group, a private military company that has since been folded into Russia's Africa Corps.[19] Today, the Africa Corps is involved in Niger, Chad, Mali, Libya, Sudan, the Central African Republic, and Mozambique, among other countries, and offers military assistance to regimes in exchange for access to natural resources, including gold and oil, as well as access to strategic locations along the Mediterranean and the Horn of Africa.

Russia's geopolitical influence ultimately complicates U.S. efforts to promote peace and stability, economic cooperation, and better governance. As Nigerien paramilitary groups deposed the country's democracy with the Wagner Group's assistance, for example, Nigeriens waved Russian flags in celebration.[20]

Unlike Russia's security-focused engagements, China's strategic investments in infrastructure, military cooperation, and resource extraction employ a commercial and development approach that is implemented primarily through Beijing's Belt and Road Initiative (BRI), an emerging market investment program that has been accused of economic coercion and unfair asset acquisition. China has surpassed the United States and Europe as Africa's chief trade and investment partner; it meets immediate needs (telecommunications, logistics, etc.) in exchange for resource rights and infrastructure primacy as well as influence in government regulatory and procurement entities. China's commercial activities on the continent have strengthened its position in its rivalry with the U.S., and through these efforts, Beijing prioritizes its access to and control of such African resources as oil, gas, critical minerals, and rare earth elements, which are essential for China's industrial growth.

The BRI includes a distinct focus on port development (Africa has more than 230 commercial ports[21]) and creating avenues to enable Chinese naval positioning. China established its first overseas military base in Djibouti in 2021, supporting the naval anti-piracy operations of the People's Liberation Army (PLA) off the coasts of Yemen and Somalia and providing a strategic position in the Gulf of Aden. The PLA Navy has made several visits around the continent during the past four years with an emphasis on West Africa that includes a naval exchange with Nigeria and sponsorship of military projects in Ghana. China also appears to be interested in establishing a second military base in Equatorial Guinea to create a dedicated military port on the Atlantic Ocean.

Terrorism and Extremism. Terrorism and extremism threaten most of Africa with various

militant groups advancing violent ideologies and executing attacks on military, government, civilian, and foreign targets.[22] Reaching every part of the mainland, terrorist organizations such as al-Shabaab, Boko Haram, and ISIS exploit unsettled and fledgling governance structures and long-term humanitarian crises, operating in spaces with weak government control to recruit, train, and orchestrate violence and messaging. Rapidly growing populations throughout Africa, combined with high unemployment rates and poverty among youth, increase vulnerability to terrorist recruitment.

African terrorist networks benefit from operational flexibility, peer organization cooperation, unstable operating environments, remote and disconnected environments, and self-defeating government turmoil. African governments seek global security and peacekeeping assistance, and the United States stands as a reliable partner, but the global commitment to mitigating terrorism and extremism on the continent is limited, partly because of governance issues that often fail to negate the appeal of terrorist ideology.

Maritime Concerns. Given its substantial coastline, Africa's maritime security is under constant threat of piracy. Key commercial waterways in the Gulf of Guinea, Red Sea, Gulf of Aden, Indian Ocean, and Mozambique Channel represent cruising grounds for pirates and crime organizations that present security challenges to U.S. and allied shipping. Conducted by a multitude of organizations and individuals to fund other illegal activities and terrorist operations, examples include attacks on oil and gas interests in the Gulf of Guinea, attacks on large commercial tankers in the Gulf of Aden, and the operations of Yemeni Houthi rebels in the Red Sea as well as widespread abductions and ransoming, drug smuggling, human trafficking, illegal fishing, and other transnational crimes.

The global community has increased naval patrols with a particular emphasis on the Red Sea and Gulf of Aden, and the United States remains a leader in anti-piracy efforts and naval training for African forces, deploying efforts such as the CJTF–HOA Bull Shark exercise and the Special Operations Maritime Task Unit's training programs to enhance cooperation and readiness.

Humanitarian and Immigration Crises. Many of the world's least developed countries are represented on the African continent and suffer from the greatest humanitarian challenges including famine, water shortages and drought, cyclones, flooding, and outbreaks of disease. Food insecurity is rampant, and more than half of the continent's countries experience food shortages of greater than 60 percent.[23] More than 600 million Africans also lack reliable access to electricity. Economies can be fragile and subject to corruption, which undermines economic freedom, and characterized by commercial barriers, underemployment, and unemployment, which deter the foreign direct investment that could help to facilitate sustainable change.

These conditions encourage the disruption that fosters desperation, migration, violence, and extremism. Humanitarian and development crises enable further extremism and violence and create opportunities for sophisticated terrorist organizations to exploit as well as global malign influences. Coups d'état across the Sahel, civil conflict in Sudan and Libya, and intensified terrorist activities in Somalia, for example, reflect the instability that terrorists have successfully exploited to expand their influence. As conditions continue to deteriorate, people are displaced and subsequently create added security challenges for neighboring countries as extreme ideologies and dissent are carried into other societies.

Persecuted Religious Minorities. Religious minorities, particularly Christians, face increasing persecution in several African countries, typically from terrorist groups and armed militias. In countries like Nigeria, Burkina Faso, and the Central African Republic, jihadist groups such as Boko Haram and al-Shabaab target Christian communities for killings and abductions as a way to eliminate Western influence. In Nigeria, Christians are especially vulnerable to attacks in the region's Middle Belt by regional terrorist organizations and by local Islamic herdsmen who commit violence against Christian farmers over land disputes. The plight of persecuted Christians in Nigeria has earned the concern of Washington and Brussels, and the U.S. government has relisted Nigeria as a Country of Particular Concern. In response to escalating violence, President Trump ordered airstrikes against terrorist groups in the country on December 25, 2025, with further military intervention to be determined.[24]

In Nigeria and elsewhere, the U.S. military plays a small but important role in preventing this persecution through select partnerships with African

MAP 6

Terrorist Groups and Paramilitary Organizations in Africa

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SOURCE: Heritage Foundation research.

1 Al-Shabaab

Somalia, Ethiopia, Kenya

Al-Shabaab is a Somalia-based terrorist organization aligned with al-Qaeda that threatens to topple the government in Mogadishu. The organization has also staged successful attacks in Kenya and throughout the Horn of Africa.

2 Boko Haram

Nigeria, Cameroon, Chad, Niger

Founded in northeastern Nigeria in the early 2000s, Boko Haram works to establish a sharia law–governed Islamic state and has been responsible for multiple bombings, kidnappings, and other attacks across the Lake Chad Basin.

3 ISIS-West Africa

Nigeria, Cameroon, Chad, Niger

Branching off from Boko Haram, ISIS-West Africa (or the Islamic State West Africa Province) similarly targets military and civilians in northeastern Nigeria and elsewhere in the Lake Chad Basin.

4 Al-Qaeda in the Islamic Maghreb

Algeria, Mali, Mauritania, Niger

Al-Qaeda in the Islamic Maghreb (AQIM) is the North African affiliate of al-Qaeda and has existed in the Sahel and lower Sahara for nearly 20 years. AQIM seeks to establish an Islamic state and challenge Western influence in the region. It cooperates with smaller peer groups such as The Movement for Oneness and Jihad in West Africa (MUJAO) in Mauritania and Ansar Dine in Mali and Niger.

5 The Islamic State in the Greater Sahara

Mali, Burkina Faso, Niger

The Sahel's ISIS satellite, the Islamic State in the Greater Sahara (ISGS), also known as ISIS-Sahel, threatens an already destabilized region. It originated as a jihadist movement in Mali and expanded into Burkina Faso and Niger. ISGS attacks military and civilian targets and Western interests.

6 Ansar al-Sharia

Libya, Tunisia

Ansar al-Sharia (AAS) rooted itself in the instability following the Libyan Revolution in 2011 and focuses on disrupting the current weak governance structure, establishing sharia law, and eliminating Western influence. Ansar al-Sharia in Tunisia (AAS-T), founded after the Arab Spring in 2011, similarly attacks the Tunisian government and Western interests.

7 The Lord's Resistance Army

Uganda, Democratic Republic of the Congo, Central African Republic, South Sudan, Sudan

Founded by warlord Joseph Kony and infamous for its use of child soldiers, the Lord's Resistance Army (LRA) is an extremist military organization operating in remote areas of Central Africa. Responsible for widespread human rights violations since 1987, it is today assumed to be greatly reduced though still problematic in areas with weak government oversight.

8 The March 23 Movement

Democratic Republic of the Congo

Under the assumed support of the government of Rwanda, the March 23 Movement (M23) is a Tutsi-led rebel paramilitary organization established as part of the rebellion against DRC regional governance and the Democratic Forces for the Liberation of Rwanda (FDLR), a Rwandan Hutu rebel group. M23's operations, which are controversial and include violence, humanitarian abuses, and theft, have also attracted tacit support from others in the region.

9 ISIS-Mozambique

Mozambique, Tanzania

ISIS-Mozambique, known also as Ansar al-Sunna or al-Shabab (no known relation to the Somali group), is a disruptive insurgency working to establish a sharia law government. Attacks include violence against the Mozambique government and foreign energy development projects, including investments by the U.S. Formed in 2017, ISIS-Mozambique operates primarily in the Cabo Delgado province and has also executed attacks in Tanzania.

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states for security training to improve the ability of state forces to protect religious minorities and combat terrorist groups.

Threats to the U.S. Homeland

Although disruption, terrorism, and individual malign state activities are not likely to present an immediate risk to the U.S. homeland, security

issues in Africa threaten American interests on and around the continent as well as the interests of U.S. partners. Without mitigation, these security challenges have the potential to create or exacerbate global issues such as terrorism, the drug trade, or immigration crises that can impact the United States.

Quality of Local Forces by Country

A recent ranking of the world's strongest military powers finds five African states in the top quarter percentile: Egypt (ranked 19th); Algeria (26th); Nigeria (31st); South Africa (40th); and Ethiopia (52nd).[25] Military spending for the entire African continent totals an estimated $52.1 billion—just 1.9 percent of global military expenditures.

Military spending varies greatly from country to country but continues to increase overall: It rose by 3 percent during the past year and has grown by 11 percent since 2015.[26] Reporting inconsistencies and other issues make data for many countries uncertain, but rising military expenditures in countries for which the data are more certain reflect such causes as civil and border conflicts, regional disruption in the Sahel, counterterrorism and anti-piracy efforts, and economic growth.

Algeria and Morocco lead the continent in military expenditures. Algeria's military spending was more than $21.8 billion in 2024, a 12 percent increase over the prior year and more than twice as much as 2019's $10.3 billion. This represents more than 40 percent of all military expenditures on the continent and accounts for more than 21 percent of Algeria's total government budget and just under 8 percent of its GDP. Morocco spent $5.5 billion, a 2.6 percent increase, more than 10 percent of government spending, and 3.5 percent of GDP. These two North African states account for half of the continent's total military expenditures.[27]

Though their spending totals are smaller, nascent military-led and junta-led governments in the Sahel represent military growth. Burkina Faso (from $357 million in 2019 to $1.02 billion in 2024), Chad (from $234 million to $557 million), Guinea (from $197 million to $562 million), Mali (from $475 million to $929 million), and Niger (from $247 million to $435 million) have steadily increased both their military spending and the percentage of total government spending on military and defense since a series of coups during the past five years.[28] Neighboring states such as Cameroon and Senegal also have consistently increased their military spending during the same period, possibly signaling a change in posture in response to regional disruption in addition to continuous terrorism concerns. Conflict states, states responding to civil disruption, and states like South Sudan, the Democratic Republic of the Congo, Mozambique, Somalia, and Uganda that face terrorism and migration crises also continue to devote more attention to military spending.

However, elsewhere in Africa, expenditures have decreased, most notably in several of the continent's largest economies. Angola, Egypt, Ethiopia, Nigeria, and South Africa have consistently reduced their military spending, as well as military spending as part of total GDP and as a percentage of total government spending, in recent years. As it shifts its focus to economic development, energy, and infrastructure, South Africa, the largest military spender in sub-Saharan Africa, continues to reduce military spending and has decreased its budget by 17.5 percent since 2019 to $2.8 billion in 2024.[29]

Among the most developed African states, Kenya has consistently funded its military. Kenya recently increased its spending from $1.05 billion in 2023 to $1.223 billion in 2024 and is assuming a greater role in regional and global security.

U.S. Force Presence and Infrastructure

The United States' modest interests in Africa are maintained by military capabilities: conducting counterterrorism operations, protecting American interests, providing cooperative training, supporting global peacekeeping and stability efforts, and delivering humanitarian assistance and disaster response. U.S. security activities currently are organized under U.S. Africa Command, established in 2007 and headquartered in Stuttgart, Germany.

AFRICOM reports to the Secretary of War and is currently led by General Dagvin R.M. Anderson, USAF, who was appointed as AFRICOM's sixth Commander on August 15, 2025. AFRICOM works closely with the U.S. Department of State and its embassies. AFRICOM's scope includes security along two oceans, the Mediterranean coast, mountainous regions, deserts, and rainforest as well as a geopolitical arena that encompasses both stable and struggling democracies as well as kingdoms, authoritarian rulers, junta-led regimes, and the

influence of international peers and transnational criminal and terrorist networks. In response to this challenging landscape, the U.S. military's presence includes operations across the continent.

Camp Lemonnier, located in Djibouti near the Bab el-Mandeb Strait between the Red Sea and Gulf of Aden, serves as the American hub for operations in the Horn of Africa, including anti-piracy operations in local waters and counterterrorism strikes in Somalia. In addition to Camp Lemonnier, the U.S. has smaller, temporary bases and rotational deployments in such countries as Kenya and Uganda. These spaces serve as logistics hubs, training centers, and intelligence-gathering stations. In addition to working with African forces, AFRICOM partners with allied nations and regional and international organizations like the United Nations (U.N.); African Union (AU); and Economic Community of West African States.

Regions meriting consistent attention and response readiness include the Sahel, the Horn of Africa, the Gulf of Guinea, the Lake Chad Basin, the Great Lakes Region in Central Africa, and the Mozambique Channel. AFRICOM provides substantial support for counterterrorism, anti-piracy, and peacekeeping efforts, particularly in these conflict-prone areas. Security cooperation emphasizes prevention and response capabilities and training programs such as Flintlock, Africa Endeavor, and Cutlass Express as well as the Africa Partnership Station (APS) program, a maritime security effort to improve readiness capabilities.[30] The Special Operations Command (SOCAFRICA) mitigates terrorist threats in countries such as Somalia and Libya, manages counterterrorism operations, coordinates joint task force responses, provides specialized training, and uses drone strikes to target militants.[31]

In addition to protection and counterterrorism, the U.S. military plays a role in providing humanitarian assistance and disaster relief. AFRICOM coordinates efforts to deliver aid, assists in rebuilding efforts, and provides medical assistance for Ebola, malaria, and other outbreaks. For example, AFRICOM was instrumental in managing the West Africa Ebola outbreak in 2014 through its Operation United Assistance with U.S. military personnel constructing treatment centers, organizing supplies, and training local health care staff.[32]

Overall Assessment

Africa is best understood in a regional and country-specific context. To navigate the current environment, U.S. military forces should continue to consider enhancements, programs, and future partnerships with an eye to regional and state needs. Given their impact on U.S. interests and the risk of global disruption, areas of focus should continue to include containment and stabilization in the Sahel and Lake Chad Basin and protection of maritime interests off the Horn of Africa and in the Gulf of Guinea and Mozambique Channel. Operational readiness in response to critical health events and outbreaks, like the Ebola virus, should be maintained.

AFRICOM can respond to ongoing challenges by building on existing frameworks such as the Africa Partnership Station program and regional counterterrorism preparedness and response training programs. It also should continue to identify counterterrorism program enhancements with aligned entities to mitigate the spread of extremism and disruption as well as immigration and other related effects. Maritime programs like CJTF-HOA's Bull Shark exercise and the Special Operations Maritime Task Unit could be replicated for the Gulf of Guinea and Mozambique Channel. Other areas for expanded collaboration could include cybersecurity resilience, response to transnational crime, containing the spread of terrorism in North and West Africa, and deescalating regional conflicts and tensions in the DRC and Ethiopia.

Expansion of U.S. military capabilities in Africa should be considered carefully as it would involve navigating political, security, and logistical challenges that include the sensitivity of African governments to foreign military influence; Russian and Chinese competition; poor infrastructure, telecommunications networks, and access to energy; and, in Washington, budget considerations and political will. Advancing AFRICOM's operations would require a direct and clear return on investment to achieve U.S. national security objectives.

In support of greater security, AFRICOM could emphasize partnerships with stable countries like Egypt, Morocco, Ghana, and Kenya and existing or recent security relationships with potential for careful growth such as those with Ethiopia, Uganda, Nigeria, and Senegal. Internationally, it should pursue further cooperation with such peers as the

United Kingdom, Italy, Germany, Saudi Arabia, India, and Australia on security issues of common interest and the capabilities needed to address them.

With a direct correlation to stability, the Trump Administration has underscored the importance of strategic commercial investment to regain ground in the economic competition with China while ensuring a return on investment for the American people. This is especially clear with regard to critical mineral supply chains and logistics infrastructure. Whether advanced bilaterally or through multilateral organizations, greater market reforms and expanded economic freedom would help to solidify working alliances and improve security environments. Examples like Botswana, Mauritius, and Kenya demonstrate success for peer states in adopting free-market principles. Rival influences and governance challenges are among the issues that must be navigated by the U.S. Departments of State and Treasury and the U.S. International Development Finance Corporation (DFC). Nevertheless, the United States should continue to invest strategically and proactively in outcomes that will support its economic and national security goals.

Scoring the African Operating Environment

As with the operating environments of Europe, Asia, the Middle East, and Latin America, the *2026 Index* assesses the African operating environment with a view to how it could reasonably be expected to facilitate or inhibit America's ability to conduct military operations against threats to its vital national interests. This assessment uses a five-point scale that ranges from "very poor" to "excellent" conditions and covers four regional characteristics of greatest relevance to the conduct of military operations:

1. **Very Poor.** Significant hurdles exist for military operations. Physical infrastructure is insufficient or nonexistent, and the region is politically unstable. The U.S. military is poorly placed or absent, and alliances are nonexistent or diffuse.

2. **Unfavorable.** A challenging operating environment for military operations is marked by inadequate infrastructure, weak alliances, and recurring political instability. The U.S. military is inadequately placed in the region.

3. **Moderate.** A neutral to moderately favorable operating environment is characterized by adequate infrastructure, a moderate alliance structure, and acceptable levels of regional political stability. The U.S. military is adequately placed.

4. **Favorable.** A favorable operating environment includes good infrastructure, strong alliances, and a stable political environment. The U.S. military is well placed for future operations.

5. **Excellent.** An extremely favorable operating environment includes well-established and well-maintained infrastructure, strong and capable allies, and a stable political environment. The U.S. military is exceptionally well placed to defend U.S. interests.

The key regional characteristics consist of:

a. **Alliances.** Alliances are important for interoperability and collective defense, as allies would be more likely to lend support to U.S. military operations. Indicators that provide insight into the strength or health of an alliance include whether the U.S. trains regularly with countries in the region, has good interoperability with the forces of an ally, and shares intelligence with nations in the region.

b. **Political Stability.** Political stability brings predictability for military planners when considering such things as transit, basing, and overflight rights for U.S. military operations. The overall degree of political stability indicates whether U.S. military actions would be hindered or enabled and reflects, for example, whether transfers of power are generally peaceful and whether there have been any recent instances of political instability in the region.

Operating Environment: Africa

	VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT
Alliances		✓			
Political Stability			✓		
U.S. Military Posture		✓			
Infrastructure		✓			
OVERALL		✓			

c. **U.S. Military Positioning.** Having military forces based or equipment and supplies staged in a region greatly facilitates the ability of the United States to respond to crises and presumably achieve success in critical "first battles" more quickly. Being routinely present also helps the United States to maintain familiarity with a region's characteristics and the various actors that might assist or thwart U.S. actions. With this in mind, we assessed whether or not the U.S. military was well positioned in the region. Again, indicators included bases, troop presence, prepositioned equipment, and recent examples of military operations (including training and humanitarian) launched from the region.

d. **Infrastructure.** Modern, reliable, and suitable infrastructure is essential to military operations. Airfields, ports, rail lines, canals, and paved roads enable the U.S. to stage, launch, and logistically sustain combat operations. We combined expert knowledge of regions with publicly available information on critical infrastructure to arrive at our overall assessment of this metric.

For Africa, assessment profiles are as complex as the continent itself. The assessments for each country that contribute to the regional assessment highlight the diversity of the operating environment and take into account the following four factors:

- **Alliances.** The United States encounters both opportunities and challenges to sustainable alliance-building across the continent. American security interests benefit from long-standing counterterrorism, anti-piracy, and interoperability alliances found in each African region, and many African nations have worked with the U.S. National Guard State Partnership Program for enhanced training. Increased attention by African governments to counterterrorism suggests the United States as a most reliable partner, creating avenues for additional alliance-building. However, because of political disruption, nascent government structures, and deep ties to American competitors, many states are improbable if not altogether impossible security allies.

- **Political Stability.** The continent's political stability profile is complex. Several states like Morocco, Ghana, Botswana, Mauritius, and Kenya remain stable and encourage political reform at the regional level; in other regions such as the Sahel, the Horn of Africa, and parts of Central Africa, instability persists. Key trends include recent military coups in Niger, Mali, Burkina Faso, and Gabon; disputed elections in Mozambique and Tanzania; the ongoing Sudan war; and terrorist disruption of government stability. Economic pressures, migration crises, and food insecurity exacerbate political risk. Conversely, reforms undertaken by African nations with a view to advancing economic freedom have attracted foreign direct investment, solidified governance stability, and increased geopolitical importance.

- **U.S. Military Positioning.** Permanent U.S. basing is limited to Djibouti, but the U.S. is involved in several joint exercises and other operations throughout the continent with an emphasis on the Gulf of Aden and the Horn of Africa. Greater attention is likely needed

to reinforce positioning capabilities and readiness for North Africa, the Sahel, and West Africa.

- **Infrastructure.** The continent's infrastructure varies from country to country. Generally, the need for greater infrastructure remains urgent for much of Africa, especially in its rural regions. Reforms have supported swift economic growth in some areas, and the continent often boasts that it is among the world's most rapidly developing markets. In many countries, such as Ghana, Kenya, Rwanda, South Africa, and Morocco, infrastructure is reliable and improving, and multilateral and foreign direct investment further encourage expectations for development. However, this growth is not found consistently across the continent and can be influenced by malign partners and, for some regions, completely undone by governance issues, conflict, and terrorism.

Taking into account the complexities encountered in the African operating environment, as well as weak governance and the limited U.S. footprint, we arrived at these average scores (rounded to the nearest whole number):

- Alliances: **2—Unfavorable.**
- Political Stability: **3—Moderate.**
- U.S. Military Positioning: **2—Unfavorable.**
- Infrastructure: **2—Unfavorable.**

Aggregating to a regional score of: **Unfavorable.**

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Conclusion: Scoring the Global Operating Environment

Because the United States is a global power with interests in various parts of the world, threats to those interests can emerge from a number of regions, to include the Western Hemisphere, East Asia, Europe, or the Middle East. The U.S. military must be prepared to operate in a variety of regions, even while maintaining strategic focus on the regions that matter most and must account for a range of conditions that it might encounter when planning for potential military operations. These considerations necessarily inform the military's decisions about the types and amounts of equipment it procures (especially to transport and sustain the force); the locations from which it might operate; and how easily it can project and sustain combat power during conflict.

Aggregating the five regional scores provides a global operating environment score of "moderate" in the *2026 Index*.

Western Hemisphere/Latin America. After years of military, economic, and political cooperation with the United States, the Latin American operating environment is broadly supportive of U.S. relations and military activities, but it also is under stress. Illegal immigration, drug cartels, and the malign influence of the People's Republic of China have strained both regional stability and relations between many countries and the United States. The activities of the Venezuelan regime in particular, as well as those of Cuba, have exacerbated destabilization in the region, but the removal of Venezuelan President Nicolás Maduro could significantly mitigate some of these trends. We assess Latin America as "moderate" with respect to U.S. interests in terms of alliances, overall political stability, and military threats. The United States has neglected the security of the Western Hemisphere for decades, and the actions taken by the second Trump Administration in 2025 and 2026 are an outstanding first step toward fixing this and setting things in order in America's backyard.

Asia. The Asian strategic environment includes half of the planet and is characterized by a variety of diverse nations. American conceptions of Asia and the Indo-Pacific must recognize the physical limitations imposed by the tyranny of distance and the need to move forces to respond to Chinese and North Korean aggression. The need to prioritize the Indo-Pacific in defense planning is clear and the United States will need to shift forces to the Indo-Pacific, invest greater resources, and prioritize Indo-Pacific operations and systems relevant to deterring China across the board.

The lack of a regional alliance structure such as NATO makes the defense of U.S. security interests in Asia challenging. However, the United States has strong relations with allies and partners in the region and their willingness to host bases helps 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 are interested in developing missile defense capabilities that will be essential in combatting the regional threats posed by China and 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. Nevertheless, the continued growth of China's military and its aggression in the region as U.S. military posture and infrastructure have weakened prompt a downgrade of the region's overall stability from "favorable" to "moderate."

Europe. Overall, the European region remains a stable, mature, and friendly operating

Global Operating Environment: Summary

VERY POOR	UNFAVORABLE	MODERATE	FAVORABLE	EXCELLENT

environment. Russia remains the primary military threat to Europe, both with conventional and nuclear forces, and its invasion of Ukraine marks a serious escalation of its efforts to exert influence in the region. China continues its efforts to expand its presence in Europe through propaganda, influence operations, and financial investments. By mitigating the effect of sanctions and supporting Russia's war in Ukraine, it also has significantly enhanced and deepened its relationship with Russia. Both NATO and non-NATO European countries should be increasingly concerned about the neo-imperialist ambitions of Russia and China. European nations will need to take primary responsibility for the conventional defense of Europe as America by necessity shifts resources to the Indo-Pacific to deter China.

In the *2024 Index*, we noted a strengthening of alliance relationships. NATO placed renewed emphasis on logistical matters and the extent to which it could respond to emergent crises. In 2025, U.S. prodding and leadership have had a galvanizing effect on European political establishments, causing them to focus on increasing their defense expenditures and on reinvesting in their defense industrial base. The 2025 Hague Summit resulted in an alliance-wide shift with nations pledging to spend a minimum of 5 percent of their gross domestic product on defense spending. However, significant work remains to be done if Europe is to assume the lead for the conventional defense of Europe.

This overall picture has led us to score Europe's political stability as "excellent" once again in the *2026 Index*. 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 are merely short-term responses to Russia's aggression in Ukraine. Given the potential for Russia to replace its battlefield losses, 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. The *2026 Index* assesses the European operating environment as "excellent" overall.

The Middle East. The Middle East will remain an area of concern for U.S. military planners because of the interests involved and the region's historical and continuing volatile nature. The Middle East region is now significantly more stable both because of Israel's successful military operations against Hamas and Hezbollah and because of U.S. efforts to destroy Iran's nuclear weapons infrastructure and capabilities. Further, successful operations against the Houthis in Yemen have reduced threats to U.S. interests and to broader global economic shipping.

In the Middle East, the United States 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. America's relationships in the Middle East are based on shared security and economic concerns. As long as these issues remain relevant to both sides, the United States will be able to act with decisiveness when its national interests require.

The *2026 Index* assesses the Middle East operating environment as "moderate," but the region's political stability continues to be "unfavorable."

Africa. Africa is an enormous region of great complexity. Its operating environment is multifaceted, and U.S. interests there vary based on military infrastructure, terrorist threats to the homeland, illegal immigration, unfavorable trade practices, and the destabilizing effects of Russian and Chinese influence. We assess Africa as "moderate" with respect to U.S. interests in terms of political stability but "unfavorable" overall because of alliance, infrastructure, and U.S. military posture challenges.

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 remains broadly stable with the United States able to project military power anywhere in

Global Operating Environment

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

the world to defend its interests without substantial opposition or high levels of risk. However, increased activities by China cause the overall global environment to be downgraded from "favorable" to "moderate" in the *2026 Index*.

Threats to U.S. Vital Interests

Assessing U.S. Vital National Security Interests

The United States is a global power, but one that must make judgments about the importance and priority of its global interests, whether the use of force is the most appropriate and effective way to address the threats to those interests, and how much and what types of force are needed to overcome such threats.

This *Index* focuses on three fundamental, vital national interests:

1. Defense of the homeland;
2. Successful conclusion of a major war; and
3. Preservation of freedom of movement across free and open air and maritime lanes.

The geographical focus of the threats in these areas is further divided into five broad regions: Western Hemisphere/Latin America, Asia, Europe, the Middle East, and Africa.

Measuring or categorizing a threat is challenging because there are no absolute references that can be quantified. Two fundamental aspects of threats, however, are pertinent to the *2026 Index*: the threatening entity's intent and its capability to achieve that intent. While capability is the easier of the two factors to assess, intent can at times be difficult. What policymakers and defense planners can and should do, however, is listen to the words our adversaries use and observe their subsequent behavior. In this sense, a pattern of coercive language backed by military capability and real-world application of force would indicate that our adversaries seek to threaten U.S. vital interests either directly or indirectly. The United States is fortunate in its enemies: China, Russia, Iran, and North Korea have been very forthcoming in their intentions—and have exhibited behaviors and fielded capabilities that lend credence to such intentions.

Any single actor that threatened U.S. vital interests, particularly in the face of U.S. military power, would be of concern to U.S. policymakers. If that actor had both the capability and the intent or behavior to do so, this would obviously be a major concern.

Each categorization used in the *2026 Index* conveys a picture of an adversary's behavior and military capabilities. The five ascending categories for adversary behavior are:

- Benign,
- Assertive,
- Testing,
- Aggressive, and
- Hostile.

The five ascending categories for military capability are:

- Marginal,
- Aspirational,
- Capable,
- Gathering, and
- Formidable.

As noted, these characterizations—behavior and capability—form the two halves of the *2026 Index*'s assessment of the threats to U.S. vital interests.

One example of the interplay between behavior and capability centers on Russia's invasion of Ukraine. Throughout its buildup of forces along

Threat Categories

Behavior	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
Capability	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL

the border with Ukraine in the months preceding the war, Russia consistently dismissed observers' concerns that it was preparing to invade. Russia's behavior, combined with the military capability it had deployed in posture and geographic position, belied its official pronouncements.

The same thing can be said about our adversaries in China, Russia, Iran, and North Korea. Each of these states repeatedly rejects outside concerns that its activities and capabilities threaten the interests of neighbors or the United States, but no rational country can ignore the threats they pose. As noted earlier, it is helpful for us and our allies when these actors explicitly question the legitimacy of their neighbors or threaten to turn their homelands into seas of fire. Such statements are clarifying.

The United States must therefore take stock of the military capabilities and behaviors of its chief adversaries as it considers the status of its own military.

Defining National Security Interests

The United States has vital security and economic interests and at times must employ its military capabilities to defend those interests. A large percentage of U.S. global trade, for example, comes from Asia and Europe: The Indo-Pacific region and Europe, respectively, account for well over 30 percent and more than 20 percent of America's overseas trade. This means that America's prosperity is based in large part on its ability to ensure market access in both regions. Though the United States at this point draws only a fraction of its energy from the Middle East, much of the world still depends on fossil fuels produced in that region. Consequently, any disruption of the production of fossil fuels from the Middle East will have repercussions across the global economy.

Threats to these interests generally come from other countries that have the capability and intent to disrupt them.[1] China is the primary threat to the United States not just because of the size and capability of its armed forces, but because of its stated intent to disrupt the global order and its active effort to undermine regional, if not global, stability. Additionally, its expanding inventory of nuclear weapons makes it an existential threat to the United States. Russia also has a large inventory of nuclear weapons and, while weakened as a result of its invasion of Ukraine, still maintains a large conventional military with somewhat capable strategic bombers and submarines. Iran poses a regional and indirect threat to core U.S. interests with its nuclear programs, missile inventories, and activities that threaten to destabilize the Middle East. North Korea is a similar but even greater threat because of its maturing nuclear and ballistic missile capabilities that can threaten both its neighbors and the American homeland. Consequently, though China is clearly the primary threat, the United States cannot completely ignore other actors in other regions. Instead, it must work with regional allies and partners in regions of lesser priority, providing its allies with key enabling capabilities while they assume the conventional lead in deterring and if necessary, defeating adversary aggression.

Both the political and economic interests of the United States and its physical safety are at risk when its military does not have sufficient size, readiness, and capability to deter and if necessary, defeat adversary threats to vital American interests. Currently, the military could prevail in one major war if it pulled all of its resources from other theaters to focus on one contingency, but this is not a winning strategy because it leaves the other regions vulnerable to the opportunistic aggression of other regional adversaries. Moreover, the time it would take to pull all forces from all regions and focus those forces on a specific theater of operation would be substantial. In such a timeframe, adversaries might achieve their operational objectives and present the United States with a *fait accompli*.

As part of this analysis, one must disaggregate national interests from national security. The two are related but not the same; the first drives the second. National *security* interests are more

narrowly defined to focus on things that protect highest-order interests—things that military power can protect so that national culture, values, governance, and global status are preserved from physical threats. As the original *2015 Index of U.S. Military Strength* stated:

> [N]ational security is not something that merely affects the well-being of Americans. Rather, it involves their safety, their security, and their freedoms....
>
> National security is the safekeeping of the nation as a whole. Its highest order of business is the protection of the nation and its people from attack and other external dangers by maintaining armed forces and guarding state secrets....
>
> Because national security entails both national defense and the protection of a series of geopolitical, economic, and other interests, it affects not only defense policy, but foreign and other policies as well. Foreign and defense policies should be seen as mutually reinforcing....[2]

The Biden Administration's October 2022 National Security Strategy violated these precepts by conflating such issues as food insecurity and climate change with national security issues. Food insecurity is indeed a problem; it is just not one that threatens U.S. national security.[3]

The Trump Administration's 2025 National Security Strategy reinforces some very similar basic principles and is worth quoting at length:

- **Focused Definition of the National Interest.** Since at least the end of the Cold War, administrations have often published National Security Strategies that seek to expand the definition of America's "national interest" such that that [sic] almost no issue or endeavor is considered outside its scope. But to focus on everything is to focus on nothing. America's core national security interests shall be our focus.

- **Peace Through Strength.** Strength is the best deterrent. Countries or other actors sufficiently deterred from threatening American interests will not do so. In addition, strength can enable us to achieve peace, because parties that respect our strength often seek our help and are receptive to our efforts to resolve conflicts and maintain peace. Therefore, the United States must maintain the strongest economy, develop the most advanced technologies, bolster our society's cultural health, and field the world's most capable military.

- **Predisposition to Non-Interventionism.** In the Declaration of Independence, America's founders laid down a clear preference for non-interventionism in the affairs of other nations and made clear the basis: just as all human beings possess God-given equal natural rights, all nations are entitled by "the laws of nature and nature's God" to a "separate and equal station" with respect to one another. For a country whose interests are as numerous and diverse as ours, rigid adherence to non-interventionism is not possible. Yet this predisposition should set a high bar for what constitutes a justified intervention.

- **Flexible Realism.** U.S. policy will be realistic about what is possible and desirable to seek in its dealings with other nations. We seek good relations and peaceful commercial relations with the nations of the world without imposing on them democratic or other social change that differs widely from their traditions and histories. We recognize and affirm that there is nothing inconsistent or hypocritical in acting according to such a realistic assessment or in maintaining good relations with countries whose governing systems and societies differ from ours even as we push like-minded friends to uphold our shared norms, furthering our interests as we do so.

- **Primacy of Nations.** The world's fundamental political unit is and will remain the nation-state. It is natural and just that all nations put their interests first and guard their sovereignty. The world works best when nations prioritize their interests. The United States will put our own interests first and, in our relations

with other nations, encourage them to prioritize their own interests as well. We stand *for* the sovereign rights of nations, *against* the sovereignty-sapping incursions of the most intrusive transnational organizations, and *for* reforming those institutions so that they assist rather than hinder individual sovereignty and further American interests.

- **Sovereignty and Respect.** The United States will unapologetically protect our own sovereignty. This includes preventing its erosion by transnational and international organizations, attempts by foreign powers or entities to censor our discourse or curtail our citizens' free speech rights, lobbying and influence operations that seek to steer our policies or involve us in foreign conflicts, and the cynical manipulation of our immigration system to build up voting blocs loyal to foreign interests within our country. The United States will chart our own course in the world and determine our own destiny, free of outside interference.

- **Balance of Power.** The United States cannot allow any nation to become so dominant that it could threaten our interests. We will work with allies and partners to maintain global and regional balances of power to prevent the emergence of dominant adversaries. As the United States rejects the ill-fated concept of global domination for itself, we must prevent the global, and in some cases even regional, domination of others. This does not mean wasting blood and treasure to curtail the influence of all the world's great and middle powers. The outsized influence of larger, richer, and stronger nations is a timeless truth of international relations. This reality sometimes entails working with partners to thwart ambitions that threaten our joint interests.

- **Pro–American Worker.** American policy will be pro-worker, not merely pro-growth, and it will prioritize our own workers. We must rebuild an economy in which prosperity is broadly based and widely shared, not concentrated at the top or localized in certain industries or a few parts of our country.

- **Fairness.** From military alliances to trade relations and beyond, the United States will insist on being treated fairly by other countries. We will no longer tolerate, and can no longer afford, free-riding, trade imbalances, predatory economic practices, and other impositions on our nation's historic goodwill that disadvantage our interests. As we want our allies to be rich and capable, so must our allies see that it is in their interest that the United States also remain rich and capable. In particular, we expect our allies to spend far more of their national Gross Domestic Product (GDP) on their own defense, to start to make up for the enormous imbalances accrued over decades of much greater spending by the United States.

- **Competence and Merit.** American prosperity and security depend on the development and promotion of competence. Competence and merit are among our greatest civilizational advantages: where the best Americans are hired, promoted, and honored, innovation and prosperity follow. Should competence be destroyed or systematically discouraged, complex systems that we take for granted—from infrastructure to national security to education and research—will cease to function. Should merit be smothered, America's historic advantages in science, technology, industry, defense, and innovation will evaporate. The success of radical ideologies that seek to replace competence and merit with favored group status would render America unrecognizable and unable to defend itself. At the same time, we cannot allow meritocracy to be used as a justification to open America's labor market to the world in the name of finding "global talent" that undercuts American workers. In our every principle and action, America and Americans must always come first.[4]

Security Interests. To this end, the security interests that these goals underwrite should be limited in number and clearly defined. Top-level national security documents issued by multiple presidential Administrations have consistently made clear that, as noted above, three principal security interests are central to any assessment of national military power:

1. Defense of the homeland,
2. Successful conclusion of a major war, and
3. Preservation of freedom of movement across free and open air and maritime lanes.

These interests help the military to determine how much military power is needed, how it should be organized and employed, and where it should be deployed to achieve maximum effect. An analysis of these security interests reflects that the nation's interests and the challenges to those interests exist in several regions around the world. They are not limited to any one region because America's prosperity and security depend on and are affected by multiple regions.

Economic Interests. Fifteen countries and regions (e.g., South and Central America and the European Union) account for approximately 87 percent of all U.S. trade. Canada and Mexico represent 15.4 percent of the total; six of the top 15 countries responsible for 44 percent of U.S. trade are in Asia; six in Europe account for 26 percent; and the remaining countries and regions (e.g., Brazil, Mexico, and South and Central America) account for 20 percent.[5]

The top five U.S. trading partners are Mexico (13.6%); Taiwan (12%); Vietnam (11%); China (10%); and Switzerland (5.6%). Of the remaining 10, five countries and regions in Europe (the United Kingdom, the Netherlands, Germany, Ireland, and the European Union) account for 20 percent of trade, and three in Asia (Hong Kong, Japan, and South Korea) account for 7.5 percent.[6]

These data illustrate that the economic interests of the U.S. are linked to more than one region; they include the Americas, Europe, and a broad expanse of the Indo-Pacific. To the extent that military power buttresses diplomatic initiatives and strengthens economic relationships, the United States cannot afford to focus on just one region. It must maintain the capacity for military presence and action in those key regions concurrently with capabilities that are relevant to the geography involved, the ability of allies to contribute to the defense of common interests, and the ability of potential enemies to impose their will.

However, U.S. interests are not defined solely by direct trade relationships with specific countries or regions. America's economic partners also have trade and financial relations with others, notably China. For example, while the United States might not be as dependent on fossil fuels from the Middle East as other countries are, the fact that many of its partners do depend on this source of energy must be factored into any assessment. Disruption of the flow of energy for any meaningful length of time could have a devastating impact on those countries with which the U.S. trades and lead to serious indirect consequences for the United States itself. Moreover, disruption need not come from conflict; it can be the result of an economic competitor's taking a larger share of a market at the expense of the United States.

With respect to the broader Middle East, in 2023, just over half of China's oil imports—approximately 52 percent—came from the Gulf region with 17.2 percent coming from Saudi Arabia alone, amounting to $162.14 billion.[7] The United States cannot ignore this non-U.S. economic relationship in its national security calculations.

In terms of trade relationships, the United States remains China's largest single trading partner, importing $524.9 billion worth of Chinese goods and accounting for 14.7 percent of China's exports in 2024, but China also has other partners. In Europe, China's exports to the Netherlands, Germany, and the United Kingdom total $315.4 billion, a bit more than half of what it exports to the United States. In Asia, China's exports to its top 10 regional partners amount to $1,312.3 billion or 36.6 percent of total exports—three times the amount it exports to the U.S.[8]

The United States maintains a range of relationships with a diverse array of countries for one purpose: to ensure that its interests are protected not just in one region, but globally to account for various threats that differ in their character and magnitude. In all of these relationships, it is important for the U.S. to be seen as a powerful, reliable, and capable actor that can be counted on by friends and must be accounted for by foes. Diplomatic presence is important, as is a robust economic relationship, but it is more important that America's military presence is maintained in prioritized regions because military power maintains the peace where these other endeavors take place. Geographically present military force is essential to reassuring friends and deterring enemies, but it may not necessarily

be sufficient to fully protect national interests. If deterrence fails, the United States must be able to project additional combat power and sustain operations. This implies sufficient strategic sealift, airlift, and logistical sustainment to move and support military forces and enable them to respond in mass to defeat an enemy attack. But this response capability must not come at the expense of risking key national interests in areas that are not under immediate attack: Capacity to respond and protect matters.

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China

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Regional Overview

The People's Republic of China (PRC) represents the greatest military threat facing the United States today. In April 2025, it was reported that Secretary of Defense Pete Hegseth, in an internal guidance memo known as the Interim National Defense Strategic Guidance, had declared that "China is the Department's sole pacing threat, and denial of a Chinese fait accompli seizure of Taiwan—while simultaneously defending the U.S. homeland is the Department's sole pacing scenario."[1] Secretary Hegseth further emphasized the importance of the China challenge during his address at the May 2025 Shangri-La Dialogue in Singapore:

> President Trump and the American people have an immense respect for the Chinese people and their civilization. But we will not be pushed out of this critical region. And we will not let our allies and partners be subordinated and intimidated.
>
> China seeks to become a hegemonic power in Asia. No doubt. It hopes to dominate and control too many parts of this vibrant and vital region. Through its massive military build-up and growing willingness to use military force to achieve its goals, including grey zone tactics and hybrid warfare, China has demonstrated that it wants to fundamentally alter the region's status quo.
>
> We cannot look away, and we cannot ignore it. China's behavior towards its neighbors and the world is a wake-up call. And an urgent one.[2]

In recent years, the PRC has been acting more aggressively in the Indo-Pacific, particularly in the Taiwan Strait and in its territorial disputes in the South China Sea, in the East China Sea, and along the China–India border.

The 20th Congress of the Communist Party of China (CCP) took place from October 16 to 22, 2022. General Secretary Xi Jinping's report "focused on intensifying and accelerating the People's Liberation Army's Ground Force (PLAGF) modernization goals over the next five years, including strengthening its 'system of strategic deterrence.'"[3] The five-year plan laid out at the 20th Party Congress is part of China's decades-long plan to achieve national rejuvenation by 2049.

China increasingly views the United States as an adversary thwarting its drive toward national rejuvenation. According to the U.S. Department of Defense (DOD) 2025 report on *Military and Security Developments Involving the People's Republic of China*:

> Beijing perceives U.S. alliances and partnerships as constraining China's national objectives, and fears Washington is expanding the scope and scale of its defense partnerships and activities in the Asia-Pacific region. In 2024, Beijing expressed heightened concern over U.S. actions to strengthen defense cooperation in the Asia-Pacific region, including U.S. deployments of mid-range and anti-ship missile systems to the Philippines and U.S. arms sales to Taiwan.
>
> Beijing continues to believe that a bipartisan consensus exists in Washington, committed to containing China's rise. Throughout 2024, Beijing denounced numerous U.S. policy actions

related to competition with China, including export controls on advanced technologies, trade barriers on electric vehicles, and military sales to Taiwan. China condemned U.S. competitive actions as intentionally provocative, intended to suppress China's economic and technological development, and an interference in China's internal affairs.[4]

The DOD report further states that, among other notable developments:

- In the maritime domain, the PLA Navy (PLAN) completed the inaugural sea trials of its third aircraft carrier—Fujian, also known as CV-18—in May. This is the PLAN's first indigenously designed aircraft carrier. It is larger than the PLAN's previous two aircraft carriers and is its first flat-deck carrier.[5]

- The JOINT SWORD exercises demonstrated that the PLAAF has a large number of advanced aircraft capable of conducting operations against Taiwan without requiring refueling, providing it with a significant capability to conduct air and ground-attack operations.[6]

- In September 2024, China launched an unarmed intercontinental ballistic missile (ICBM) into the Pacific Ocean for the first time since 1980. The PLA Rocket Force launched the DF-31B ICBM from northern Hainan Island, and the missile flew approximately 11,000km before impacting the ocean near French Polynesia.[7]

- In December 2024, the PLA launched several ICBMs in quick succession from a training center into Western China, indicating the ability to rapidly launch multiple silo-based ICBMs, as required for an EWCS operation. The PLA has likely loaded more than 100 solid-propellant ICBM missile silos at its three silo fields with DF-31 class ICBMs, which are very likely intended to support EWCS.[8]

- China's stockpile of nuclear warheads remained in the low 600s through 2024, reflecting a slower rate of production when compared to previous years.[9]

- China probably expanded its space-based early warning architecture in 2024 and early 2025 by launching two additional Tongxun Jishu Shiyan (TJS), also known as Huoyan-1, satellites with likely infrared sensor payloads into geosynchronous orbit. China's early warning infrared satellites can reportedly detect an incoming ICBM within 90 seconds of launch with an early warning alert sent to a command center within three to four minutes.[10]

- The PLA almost certainly plans to conduct terrestrial and space-based kinetic and non-kinetic antisatellite (ASAT) operations during a conflict with the United States and will adapt employment strategies as new capabilities are fielded.[11]

The CCP is still heavily influenced by Marxist–Leninist ideology.[12] As neatly summarized by Australian expert John Garnaut, "[t]he key point about Communist Party ideology—the unbroken thread that runs from Lenin through Stalin, Mao and Xi—is that the party is and always has defined itself as being in perpetual struggle with the 'hostile' forces of Western liberalism."[13] Today, "[f]or the first time since Mao we have a leader [in Xi Jinping] who talks and acts like he really means it."[14]

The CCP's ideology consistently animates it to invest in military capabilities and activities that pose substantial challenges to U.S. interests. Moreover, with a GDP in excess of $19 trillion—second only to that of the U.S.—China has the economic foundations to sustain an unprecedented level of military modernization while advancing efforts to dominate critical next-generation technologies and supply chains that are vital to the health of the U.S. economy and military. From crucial minerals to pharmaceuticals, renewables, artificial intelligence, and missile technology, China is a global economic power and the largest trading partner of a majority of global capitals.

In short, China has become "the greatest external threat America has faced since the collapse of the USSR."[15]

American Interests

Three flashpoints are of particular concern to American interests in the region, all related to Chinese territorial claims: the status of Taiwan, the

MAP 7

U.S. Forces Operate in Chinese Missile Envelope



SOURCE: Center for Strategic and International Studies, Missile Defense Project, "Missiles of China," *Missile Threat*, last updated April 12, 2021, https://missilethreat.csis.org/country/china/ (accessed January 21, 2026).

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TABLE 1

Breakdown of Chinese Missiles

Missile Name	Range, in KM	Class
DF-11	280–300	Short-range ballistic Missile
DF-12 / M20	280	
DF-15	600	
DF-16	800–1,000	
DF-17	1,800–2,500	Hypersonic Glide Vehicle
DF-21	2,150	Medium-Range Ballistic Missile
DF-26	4,000	Intermediate-Range Ballistic Missile
DF-4	4,500–5,500	
DF-31	7,000–11,700	Intercontinental Ballistic Missile
DF-41	12,000–15,000	
DF-61	12,000–15,000	
DF-5	13,000	
JL-2	8,000–9,000	Submarine-launched Ballistic Missile
HN 1	50–650	Cruise Missile
YJ-18	220–540	
HN 2	1,400-1,800	
HN 3	3,000	

SOURCE: Center for Strategic and International Studies, Missile Defense Project, "Missiles of China," *Missile Threat*, last updated April 12, 2021, https://missilethreat.csis.org/country/china/ (accessed January 21, 2026).

ArticleName ☎ heritage.org

escalation of maritime disputes in the East and South China Seas, and the border conflict with India.

Taiwan. China's escalating efforts to change the status quo in the Taiwan Strait constitute the greatest risk of conflict between China and the United States. China's long-standing threat to end Taiwan's de facto independence and bring Taiwan under the authority of Beijing—by force if necessary—endangers America's interest in peace and stability in the Western Pacific.

While China's use of force against Taiwan could take a variety of forms, the possibility of an amphibious invasion has fueled speculation over when such a contingency would most likely occur. Representative Mike Gallagher (R–WI), then chairman of the House Select Committee on the Strategic Competition between the United States and the Chinese Communist Party, has argued that "the U.S. military is entering into a 'window of maximum danger,'" more commonly known as the "Davidson Window."[16] This is a reference to then-U.S. Indo-Pacific Command (USINDOPACOM) Commander Admiral Philip Davidson's statement during testimony before the Senate Armed Services Committee in 2021 that China is "accelerating [its] ambitions to supplant the United States" and that "the threat [to Taiwan] is manifest during this decade, in fact, in the next six years."[17] Separately, then-CIA Director William Burns stated that Xi has instructed the People's Liberation Army (PLA) "to be ready by 2027 to invade Taiwan," although he also assessed that Xi and the PLA "have doubts today about whether they could accomplish that invasion."[18]

Tensions across the Taiwan Strait have worsened because of Beijing's efforts to pressure and isolate Taiwan's democratically elected government. Following President Lai Ching-te's election in early 2024, Beijing initiated several military operations across the strait, on many occasions violating Taiwan's self-declared centerline and Air Defense Identification Zone (ADIZ). Beijing has suspended most direct government-to-government discussions with Taipei and is using a variety of inducements to deprive Taiwan of its remaining diplomatic partners.

Beijing has also undertaken significantly escalated military activities directed at Taiwan. For example:

- Throughout the first half of 2025, China conducted several "joint readiness" drills. In February, the PLAN and PLAAF conducted live-fire drills in an area just 40 nautical miles from Taiwan. Taiwan's Ministry of National Defense (MND) reported sorties consisting of J-11 fighters, KJ-500 airborne early warning and control aircraft, other types of main and auxiliary fighter aircraft, and UAVs (unmanned aerial vehicles). The MND spotted 22 aircraft crossing the median line.[19] In May, the PLA carried out Strait Thunder-2025A, a drill focused on cross-service coordination that involved encircling Taiwan through coordination of maritime militia, coast guard, and naval forces.[20]

- In May 2024, the PLA's Eastern Theater Command (ETC) conducted Joint Sword 2024A in response to President Lai's inauguration. PLA aircraft and ships engaged in joint operations at nine locations, including several areas surrounding Taiwan's mainland and offshore islands Kinmen, Matsu, Wuqiu, and Dongyin.[21] The ETC "noted that the 2-day exercise will focus on joint sea-air-combat-readiness patrols, joint seizure of comprehensive battlefield control, and joint precision strikes on key targets."[22] In October, the ETC carried out Joint Sword 2024B, a similarly structured military exercise involving official ships and support and fighter aircraft.[23]

- In February 2024, following the capsizing of a PRC fishing boat near Kinmen Island, Beijing dispatched five Chinese Coast Guard (CCG) ships into restricted waters around Kinmen, announcing that the CCG would monitor waters off the southern coast of Xiamen.[24]

- In January 2024, following then-Vice President Lai Ching-te's victory in Taiwan's presidential elections, the PLA conducted "military maneuvers around Taiwan, consisting of joint air and naval patrols, during which 11 aircraft crossed the Taiwan Strait centerline."[25]

- In 2023, the PLA entered Taiwan's ADIZ 1,641 times, and PLA aircraft crossed the Taiwan Strait centerline at least 712 times that same year.[26]

- During then-presidential candidate and Vice President Lai Ching-te's transit in the U.S. in August 2023, "[t]he PLA sent 25 aircraft across Taiwan's claimed centerline while nine ships were on patrol around Taiwan."[27]

- In April 2023, China escalated to then-historic records of military activity around Taiwan, allegedly in response to the transit of then-President Tsai Ing-wen through the United States, although such routine travel stops had not drawn similar responses in the past. On the final day of these "exercises," a dozen Chinese warships and 91 Chinese aircraft—a then-new record for a single day—practiced "joint shock and deterrence and island closure and control," essentially another rehearsal for a blockade.[28]

- China used former U.S. House Speaker Nancy Pelosi's August 2022 visit as a pretext to increase the quantity and provocativeness of aerial incursions around Taiwan with a historic record of 446 aircraft entering Taiwan's ADIZ and more than 300 of those 446 aircraft crossing the median line of the Taiwan Strait. Chinese aircraft had last crossed the median line in September 2020 with 48 aircraft involved that month.[29]

- PLA air and naval activity around Taiwan surged again in 2025. Taiwan's MND "recorded 248 [PLA sorties] in 2025—1.75 times greater than the previous peak in January 2022."[30]

Chinese leaders from Deng Xiaoping and Mao Zedong to Xi Jinping have consistently emphasized the importance of ultimately reclaiming Taiwan. The island—along with Tibet—is the clearest example of a geographical "core interest" for the CCP, seen as essential for its claim to unchallenged rule. China has never renounced the use of force against Taiwan and continues to employ political warfare against Taiwan's political and military leadership.

For the Chinese leadership, the failure to effect unification, whether peacefully or by using force, would reflect fundamental political weakness. CCP leaders therefore believe that they cannot back away from the stance of having to unify the island with the mainland, and the island remains an essential part of the PLA's "new historic missions," shaping its acquisitions and military planning.

It is widely posited that China's A2/AD strategy—the deployment of an array of overlapping capabilities, including anti-ship ballistic missiles (ASBMs), submarines, and long-range cruise missiles, satellites, and cyber weapons—is aimed largely at forestalling American intervention in support of friends and allies in the Western Pacific, including Taiwan. By holding at risk key American platforms and systems (for example, aircraft carriers), Beijing seeks the capability to delay or even deter American intervention, thereby allowing the PLA to achieve a *fait accompli*. The growth of China's military capabilities is specifically oriented toward countering America's ability to assist in the defense of Taiwan.

Moreover, China's efforts to reclaim Taiwan are not limited to overt military means. The "Three Warfares" highlight Chinese political warfare methods, which include legal warfare (lawfare), public opinion warfare, and psychological warfare. The PRC employs such approaches to undermine both Taiwan's will to resist and America's willingness to support Taiwan. China's goal is to "win without fighting"—to take Taiwan without firing a shot or with only minimal resistance before the United States can organize an effective response.

Escalation of Maritime and Territorial Disputes. The PRC and other countries in the region see active disputes over the East and South China Seas as matters of territorial sovereignty, not as differences over the administration of international common spaces. As a result, the threat of armed conflict exists between China and American allies, including Japan and the Philippines, as well as nascent American security partners such as Vietnam.

China has escalated maritime and territorial disputes for both economic and geopolitical reasons, steadily expanding its maritime power, including its merchant marine and maritime law enforcement capabilities, and acting to secure its "near seas" as a Chinese preserve. Because its economic center of gravity is now in the coastal region, China has had to emphasize maritime power to defend key assets and areas and depends increasingly on the seas for its economic well-being.[31] With global trade heavily dependent on shipping networks, China has sought to develop "shipbuilding, port infrastructure, and sea logistics."[32] The ability to apply pressure in disputed areas also offers China a useful geopolitical tool against rival claimant states that complements Beijing's other means of coercion and inducement such as its Belt and Road Initiative (BRI). This toolset has contributed to a lack of pushback against China's effort to achieve hegemony in the Indo-Pacific, including from countries that are directly affected by China's territorial aggression.

In both the East China and South China Seas, China has sought to exploit "gray zone tactics," gaining control incrementally and deterring others with means that lie below the threshold of war.[33] China uses military and economic threats, bombastic language, and legal warfare (including the employment of Chinese maritime law enforcement vessels) as well as military bullying. Chinese paramilitary-implemented, military-backed encroachment in support of expansive extralegal claims could lead to an unplanned armed clash.

In the East China Sea, China has intensified its efforts to assert claims of sovereignty over the Senkaku Islands of Japan. Beijing asserts both exclusive economic rights within the disputed waters and recognition of "historic" rights to dominate and control those areas as part of its territory.[34] Chinese fishing boats (often believed to be elements of the Chinese maritime militia) and CCG vessels have been encroaching steadily on the territorial waters within 12 nautical miles of the uninhabited islands around twice per month.[35] China first deployed a naval unit (as opposed to the CCG) within the contiguous zone of the Senkakus between 12 miles and 24 miles from shore in 2016.[36] Meanwhile, the CCG has routinized incursions within 12 miles of Senkaku features. In 2022 and 2023, the CCG set successive records for time lingering within this area: 72 hours in December 2022 and more than 80 hours in April 2023.[37] Official PRC government ships were spotted in adjacent zones around the Senkakus for 352 days in 2023 and 355 days in 2024, again gradually increasing the time in contested waters.[38] In May 2025, a CCG helicopter flew into Japanese territorial airspace, marking the first incursion by a PRC helicopter.[39]

In 2013, Beijing unilaterally declared an ADIZ over the East China Sea.[40] This is part of a broader pattern of using intimidation and coercion to assert expansive extralegal claims of sovereignty and/or control to restrict lawful air travel over the East China Sea. For example:

- In June 2016, a Chinese fighter made an "unsafe" pass near a U.S. Air Force RC-135 reconnaissance aircraft in the East China Sea area.
- In March 2017, Chinese authorities warned the crew of an American B-1B bomber operating in the area of the ADIZ that they were flying illegally in PRC airspace, and the Chinese Foreign Ministry "urged the U.S. and other countries to respect its declared airspace."[41]
- In May 2018, the Chinese intercepted a U.S. Air Force WC-135, also over the East China Sea.[42]
- From late 2017 through 2018, Chinese vessels targeted U.S. aircraft with "blinding laser

MAP 8

Chinese Fault Lines



China–India Border. The Line of Actual Control represents one of the world's longest disputed borders and has been the site of several standoffs between the Chinese and Indian militaries in recent years, including a border crisis in 2020 that resulted in the first casualties from hostilities at the border in more than 40 years.

Taiwan. The sovereignty of Taiwan remains unsettled. The People's Republic of China disputes this status and regularly conducts provocative military maneuvers near Taiwan.

East China Sea. China claims the disputed Senkaku/Diaoyu Islands, which are currently administered by Japan. In recent years, Chinese aircraft and naval vessels have entered the airspace and territorial sea around the islands with growing frequency.

South China Sea. Several territorial disputes between China and Taiwan and its Southeast Asian neighbors involve the South China Sea. China's unlawful claims in the sea and attempts to restrict freedom of navigation there have also produced tensions with the U.S., which has sent aircraft and naval vessels through the South China Sea to signal its objections to the nature of China's claims. This has resulted in a number of confrontations between Chinese and U.S. vessels.

SOURCE: Heritage Foundation research.

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attacks" more than 20 times according to media reports citing US INDOPACOM.[43]

- In June 2022, a Chinese fighter jet released chaff and flares into the engines of an Australian plane.[44]

- On December 21, 2022, a PLAN J-11 fighter pilot performed an unsafe maneuver while intercepting another U.S. Air Force RC-135, coming within 20 feet of the RC-135's nose and forcing it to engage in evasive maneuvers.[45]

- On May 26, 2023, a PRC J-16 fighter pilot performed an aggressive maneuver while intercepting a U.S. Air Force RC-135 aircraft. The RC-135 was forced to fly through its jet wake after the J-16 flew "directly in front of the [RC-135's] nose."[46]

China has asserted an illegal territorial claim to virtually the entire South China Sea, which overlaps with Bruneian, Philippine, Malaysian, Vietnamese, Indonesian, and Taiwanese claims.[47] Various of the South China Sea claimant states' proposed boundaries overlap, and this has generated long-standing political and diplomatic disagreements, but China's actions to advance its territorial ambitions and restrict other claimants' use of the area are unparalleled and have resulted repeatedly in confrontation.

The most significant development in the South China Sea since Xi Jinping assumed leadership of the CCP has been China's reclamation and militarization of seven artificial islands or outposts. In 2015, Xi promised President Barack Obama that China had no intention of militarizing the islands. That pledge was not honored.[48] "The PRC," according to the DOD, "has added more than 3,200 acres of land to the seven features it occupies in the Spratlys. The PRC has added military infrastructure, including 72 aircraft hangars, docks, satellite communication equipment, antenna array, radars, and hardened shelters for missile platforms."[49] The defensive and offensive capabilities on these islands are now "the most capable land-based weapons systems deployed by any claimant in the disputed [South China Sea] to date."[50]

China–Vietnam tensions have flared sporadically in the South China Sea in recent years. In 2020, CCG vessels rammed and sank Vietnamese fishing boats twice near the disputed Paracel Islands.[51] Chinese vessels have interfered repeatedly with Vietnamese energy-exploration blocks. One instance in May 2023 involved a 14-vessel fleet of CCG and paramilitary ships.[52] Vietnam has also protested China's decision to create additional administrative regions for the South China Sea, one centered on the Paracels and the other centered on the Spratlys.[53] More recently, in early 2025, China conducted a live-fire military exercise in the Gulf of Tonkin following Vietnam's attempt to redefine contested territorial waters.[54] This is part of Beijing's "legal warfare," which employs legal, military, and administrative measures to underscore China's claimed control of the South China Sea region. For this reason, friction often occurs around Chinese enforcement of unilaterally determined fishing bans in international waters that are claimed by China.[55]

Given that the United States shares a defense alliance with the Philippines, tensions between Beijing and Manila are the most likely to prompt American involvement in these disputes. There have been several volatile incidents between the two parties since the 1990s. The most contentious occurred in 2012 when a Philippine naval ship operating on behalf of the country's coast guard challenged private Chinese poachers in waters around Scarborough Shoal. The resulting escalation left Chinese government ships in control of the shoal after the U.S. helped to broker an agreement by which both sides agreed to withdraw from the standoff site. The Philippines complied; China did not.

Following the Scarborough Shoal crisis, the Philippines successfully challenged Beijing in the Permanent Court of Arbitration regarding its rights under the U.N. Convention on the Law of the Sea (UNCLOS). The tribunal found that many of China's claims in the South China Sea were unlawful. China has simply ignored the ruling, and the ongoing presence of the CCG around Scarborough Shoal remains a source of tension.[56]

The Philippines began to publicize instances of Chinese aggression at sea in 2023. In February, the Philippines condemned the CCG for "dangerous maneuvers and the use of a military-grade laser on members of the Philippine Coast Guard" who were "undertaking a mission in support of the regular rotation and resupply mission for the BRP Sierra Madre in Ayungin [Second Thomas] Shoal, the Philippines' permanent presence on the feature."[57] The

Philippine Coast Guard released photo evidence of the laser incident, which reportedly temporarily blinded Philippine crewmen. In all of these cases, tensions have been exacerbated by rising Chinese nationalism.

To impose its demarcations, China patrols contested waters with the CCG. In early 2025, CCG ships, supported by a navy helicopter, demanded that a group of Philippine vessels cancel their operation, citing violations of territorial sovereignty. The incident occurred near Sandy Cay, an uninhabited sandbar that China claims falls within its self-proclaimed 10-dash line.[58]

In the event of armed conflict between China and the Philippines or between China and Japan, either by design or as the result of an accidental incident at sea, the U.S. could be required to exercise its treaty commitments.[59] In recent years the U.S. government has clarified that its treaty obligations to Japan and the Philippines extend to disputed territories claimed by China. The risk of an incident escalating and involving the United States is a growing threat, particularly in the East and South China Seas, where naval as well as civilian law enforcement vessels from both China and the U.S. operate in what the U.S. considers to be international waters. If China ultimately tries to assert its authority by declaring an ADIZ over the entire South China Sea as some have speculated it might, its action could further increase tensions.[60]

Border Conflict with India. India claims that China occupies more than 14,000 square miles of Indian territory in the Aksai Chin along its northern border in Kashmir, and China lays claim to more than 55,000 square miles of India's northeastern state of Arunachal Pradesh. The latter dispute is closely related to China's ongoing efforts to control Tibetan Buddhism and the presence in India of the Tibetan government in exile and the Dalai Lama, spiritual leader of Buddhists worldwide.

The possibility of armed conflict between India and China poses an indirect threat to U.S. interests because it could disrupt the territorial status quo and raise nuclear tensions in the region. A border conflict between India and China could also prompt Pakistan to take advantage of the situation, thereby increasing regional instability. The long-standing border dispute that led to a Sino–Indian war in 1962 has become a flashpoint again in recent years. In April 2013, the most serious border incident between India and China in more than two decades occurred when Chinese troops settled several miles within northern Indian territory on the Depsang Plains in Ladakh. A visit to India by Chinese President Xi Jinping in September 2014 was overshadowed by another flare-up in border tensions when hundreds of PLA forces reportedly set up camps in the mountainous regions of Ladakh, prompting Indian forces to deploy to forward positions in the region. This border standoff lasted three weeks until both sides agreed to pull their troops back to previous positions.

In 2017, Chinese military engineers were building a road to the Doklam plateau, an area claimed by both Bhutan and China. This led to a confrontation between Chinese and Indian forces, the latter requested by Bhutanese authorities to provide assistance. The crisis lasted 73 days. Both sides pledged to pull back, but Chinese construction efforts in the area have continued.[61] Improved Chinese infrastructure not only would give Beijing the diplomatic advantage over Bhutan, but also could make the Siliguri corridor that links the eastern Indian states with the rest of the country more vulnerable.

In 2020, the situation escalated even further. Clashes between Indian and Chinese troops using rocks, clubs, and fists led to at least 20 Indian dead and (as the Chinese authorities later admitted) at least four Chinese dead in the Galwan Valley area of Ladakh.[62] It was the first loss of life due to hostilities at the border in nearly 50 years and plunged China–India relations to a contemporary low point. Dozens of rounds of negotiations between China and India eventually resulted in at least partial deescalation and pullback from several standoff sites in Ladakh. A new agreement governing patrolling arrangements followed in October 2024 during a mild thaw in bilateral relations.[63] However, both sides maintain elevated forward-deployed forces all along the Line of Actual Control in Ladakh. India claims it is engaged in the largest peacetime military deployment to one of its borders in its modern history.[64]

In 2025, China played a role in the brief but intense military conflict between India and Pakistan. Following a bloody terrorist attack against Indian citizens in Kashmir specifically targeting Hindus, India launched Operation Sindoor, striking several terrorist targets inside Pakistan. Beijing issued a strong statement in support of Islamabad, and Pakistan reportedly employed the Chinese-made

PL-15 beyond-visual-range missile during the conflict. The two countries have since accelerated plans to deliver advanced Chinese J-35A fifth-generation stealth fighter jets to the Pakistan Air Force.[65] The first batch of J-35As is now expected to arrive by early 2026, marking a major leap in Pakistan's aerial capabilities and signaling deepening military ties between Beijing and Islamabad.[66]

Threats to the Homeland

America's critical interests in the international commons, across sea, air, space, and cyberspace, have a direct impact on the security of the continental United States. These interests include ensuring the free flow of global commerce and maintaining military access to these domains to protect the homeland. Washington has long underwritten the security of the Indo-Pacific's common areas, and this in turn has supported the region's remarkable economic development. However, China is taking increasingly aggressive steps—including the construction of islands atop previously submerged features—to advance its own interests and is pursuing expanded military access and basing globally.

Two things are clear: China and the United States do not share a common conception of international space, and China is actively seeking to undermine American predominance in securing international common spaces. Together, these dynamics pose tangible risks to U.S. national security.

Dangerous Behavior in Maritime and Airspace Common Spaces. The aggressiveness of the Chinese navy, maritime law enforcement forces, and air forces in and over the waters of the East China Sea, South China Sea, and Taiwan Strait, coupled with ambiguous, extralegal territorial claims and assertion of control in these areas, poses an incipient threat to American and overlapping allied interests. Chinese military writings emphasize the importance of establishing dominance of the air and maritime domains in any future conflict.

Although the Chinese may not yet have sufficient capacity to prevent the U.S. from operating in local waters and airspace, the ability of the U.S. to operate within the First Island Chain at acceptable costs in the early stages of a conflict has become a matter of greater debate.[67] A significant factor in this calculus is the fact that China has "fully militarized at least three of several islands it built in the disputed South China Sea, arming them with anti-ship and anti-aircraft missile systems, laser and jamming equipment and fighter jets in an increasingly aggressive move that threatens all nations operating nearby."[68] China also has been intensifying its challenges to long-standing rivals Vietnam and the Philippines and has begun to push toward Indonesia's Natuna Islands and into waters claimed by Malaysia.

It is unclear whether China is yet in a position to enforce an air ADIZ consistently, but the steady two-decade improvement of PLAAF and PLAN naval aviation will eventually yield the necessary capabilities. Chinese observations of recent conflicts, including wars in the Persian Gulf, the Balkans, and Afghanistan, as well as Russia's war against Ukraine and, as of 2025, the military clash between India and Pakistan and the Israel–Iran conflict, have emphasized the growing role of airpower and missiles in "non-contact, non-linear, non-symmetrical" warfare.[69] This growing parity, if not superiority, constitutes a radical shift from the Cold War era when the United States and its allies clearly would have dominated air and naval operations in the Pacific.

China has also begun to employ nontraditional methods of challenging foreign military operations in what Beijing regards as its territorial waters and airspace. It has employed lasers, for example, against foreign air and naval platforms, endangering pilots and sailors by threatening to blind them.[70]

In addition, Chinese military aircraft have been performing dangerous intercepts of American and allied aircraft in international airspace, especially since 2022. For example:

- In February 2025, a Chinese PLAAF fighter jet popped flares close to an Australian P-8A fighter aircraft, "[posing] a risk to the aircraft and personnel." Manila has voiced similar concerns, citing two instances in which Philippine Air Force transport planes were harassed in 2024.[71]

- In 2023, the DOD reported "more than 180 coercive or risky intercepts by Chinese military aircraft since 2021" with "100 such incidents involving allied and partnered nations."[72]

- In June 2022, a Chinese fighter jet released chaff and flares into the engines of an Australian plane.[73]

- On June 3, 2022, in the Taiwan Strait, China further escalated its aggressive conduct when the "PLAN LUYANG III DG 132 (PRC LY 132) executed maneuvers in an unsafe manner" by crossing the USS *Chung-Hoon*'s bow twice, "violat[ing] maritime 'Rules of the Road,' of safe passage in international waters" and forcing the *Chung-Hoon* to slow "to avoid a collision."[74]

- On December 21, 2022, a PLAN J-11 fighter pilot performed a similarly unsafe maneuver while intercepting another U.S. Air Force RC-135, coming within 20 feet of the plane's nose and "forcing the RC-135 to take evasive maneuvers to avoid a collision."[75]

- On May 26, 2023, a PRC J-16 fighter pilot performed "an unnecessarily aggressive maneuver" while intercepting a U.S. Air Force RC-135 aircraft, flying "directly in front of the nose of the RC-135" and "forcing the U.S. aircraft to fly through its wake turbulence."[76]

Expanding Global Military Footprint. As China expands its naval capabilities, it will be present farther and farther away from its home shores. In 2017, it established its first formal overseas military base pursuant to an agreement with the government of Djibouti. Since then, China's overseas military infrastructure has continued to expand. China has laid the groundwork for a second, undeclared military base in Cambodia, is creating logistics facilities and other military construction around the world, and controls a number of dual-use commercial facilities that could support power projection in future contingencies. The U.S. Intelligence Community reportedly has concluded that China plans to "build a global military network that includes at least five overseas bases and 10 logistical support sites by 2030."[77]

In 2019, China and Cambodia reportedly signed a secret agreement providing for the PLA's use of Cambodia's Ream Naval Base.[78] Officials from both countries publicly deny plans for a Chinese base,[79] but other governments and public reporting have confirmed that work continues toward a significant PLA presence at Ream.[80] According to the DOD, "[t]he PRC's military facility at Ream Naval Base in Cambodia will be the first PRC overseas base in the Indo-Pacific."[81] Since June 2022, China has financed significant development of Ream, including multiple new piers and buildings, dredging of the harbor to support larger ships, and site development for further construction.[82] The base officially reopened on April 5, 2025, showcasing extensive technical upgrades and office refurbishments.[83] The U.S. Department of the Treasury has sanctioned Chinese state-owned Union Development Group for (among other reasons) the potential militarization of nearby Dara Sakor airport.[84]

China is also pursuing or already operating additional facilities abroad for explicit military purposes. Chinese paramilitary units have operated from a base near the Afghan border in Tajikistan since at least 2016, and the Tajik government reportedly has offered to transfer ownership of the facility to China in return for further military construction and aid.[85] As part of an effort to secure a military presence in the Atlantic, China has made inroads through the potential development of a naval facility in Equatorial Guinea and a purported joint training facility with Gabon.[86] According to the DOD:

> The PRC has likely considered Burma, Thailand, Indonesia, Pakistan, Sri Lanka, United Arab Emirates, Kenya, Equatorial Guinea, Seychelles, Tanzania, Angola, Nigeria, Namibia, Mozambique, Bangladesh, Papua New Guinea, the Solomon Islands, and Tajikistan. The PRC has probably already made overtures to Gabon, Equatorial Guinea, Namibia, Vanuatu, and the Solomon Islands. The PLA is probably most interested in military access along the SLOCs from the PRC to the Strait of Hormuz and Africa.[87]

China is also leveraging its extensive network of commercial ports developed under its BRI, both for current overseas military operations and for potential future basing. Chinese firms, overwhelmingly state-owned, have participated in the development of at least 200 ports globally and have an ownership or operating interest in 95 ports.[88] The PRC uses commercial infrastructure to support all of its military operations abroad, including the PLA's presence in other countries' territories, such as at its base in Djibouti. The DOD reports that "[s]ome of the PRC's BRI projects could create potential military advantages, such as PLA access to selected foreign ports to pre-position the necessary

logistics support to sustain naval deployments in waters as distant as the Indian Ocean, Mediterranean Sea, and Atlantic Ocean to protect its growing interests."[89]

In Sri Lanka, for example, Chinese military vessels have visited Chinese-developed commercial ports in both Colombo and Hambantota in recent years. U.S. intelligence agencies believe that since 2021, China has been building an undisclosed military facility in Abu Dhabi's Khalifa port, where Chinese state-owned shipping giant Cosco operates a terminal.[90]

Increased Military Space Activity. One of the key force multipliers for the United States is its extensive array of space-based assets. Through its various satellite constellations, the U.S. military can track opponents, coordinate friendly forces, engage in precision strikes against enemy forces, and conduct battle-damage assessments so that its munitions are expended efficiently.

Because the American military is expeditionary—meaning that its wars are fought far from the homeland—its reliance on space-based systems is greater than that of many other militaries. Consequently, it requires global rather than regional reconnaissance, communications and data transmission, and meteorological information and support. At this point, only space-based systems can provide this sort of information on a real-time basis. No other country is capable of leveraging space as the United States does, and that is a major advantage. However, this heavy reliance on space systems is also a key American vulnerability.

China aims to be "a broad-based, fully capable space power" and is "second only to the U.S. in the number of operational satellites."[91] The PLA has been developing a range of anti-satellite capabilities that include both hard-kill and soft-kill systems. The former include direct-ascent kinetic-kill vehicles (DA-KKVs) such as the system famously tested in 2007, but they also include more advanced systems that are believed to be capable of reaching targets in mid-Earth orbit and even geosynchronous orbit (GEO).[92] The latter include anti-satellite lasers for either dazzling or blinding purposes.[93] This is consistent with PLA doctrinal writings, which emphasize the need to control space in future conflicts. For the Chinese, "seizing command of space has become a prerequisite condition for seizing information dominance, command of the air, and command of the sea, and has become crucial in seizing and holding the initiative in warfare; it directly affects the course and outcome of the war."[94]

Orbital threats are growing as well. The DOD reports that the PRC is continuing to develop four counterspace capabilities: direct ascent, co-orbital, electronic warfare (EW), and directed energy. Such measures are designed to "contest or deny an adversary's access to and operations in the space domain during a crisis or conflict."[95] The PRC's Shijian-17 satellite has a robotic arm that can physically redirect satellites. In January 2022, the Shijian-21 "moved a derelict BeiDou navigation satellite to a high graveyard orbit above GEO."[96]

It should also be noted that soft-kill attacks need not come only from dedicated weapons. The case of Galaxy-15, a communications satellite owned by Intelsat Corporation, showed how a satellite could disrupt communications simply by always being in "switched on" mode.[97] Before it was finally brought under control, the satellite had drifted through a portion of the geosynchronous belt, forcing other satellite owners to move their assets and juggle frequencies. A deliberate such attempt by China (or any other country) could prove far harder to handle, especially if conducted in conjunction with attacks by kinetic systems or directed-energy weapons.

Most recently, China has landed an unmanned probe at the lunar south pole on the far side of the Moon.[98] This is a major accomplishment because the probe is the first spacecraft ever to land at either of the Moon's poles. To support this mission, the Chinese deployed a data relay satellite to Lagrange Point-2, one of five points where the gravity wells of the Earth and Sun cancel out each other, allowing a satellite to remain in a relatively fixed location with minimal fuel consumption.[99] The satellite itself may or may not have military roles, but its deployment highlights that China will now be using the enormous volume of cis-lunar space (the region between the Earth and the Moon) for various deployments. This will greatly complicate American space situational awareness by forcing the U.S. to monitor a vastly greater area of space for possible Chinese spacecraft. The Chang'e-5 lunar sample retrieval mission in 2020 and China's recent landing on Mars underscore the PRC's effort to move beyond Earth orbit to cis-lunar and interplanetary space.

Cyber Activities and the Electromagnetic Domain. As far back as 2013, the Verizon Risk

Center reported that "96% of espionage cases [in its dataset] were attributed to threat actors in China" and that this "could...mean that China is, in fact, the most active source of national and industrial espionage in the world today."[100] Verizon also listed China as the country of origin for 30 percent of the world's threat actors—the largest percentage among the world's top 10 countries of origin.[101] Given the difficulties of attribution, country of origin should not necessarily be conflated with perpetrator, but forensic efforts have associated at least one Chinese military unit with cyber intrusions, albeit many years ago.[102]

In 2023, Microsoft uncovered one of the largest and potentially most damaging cyberattacks linked to China. Hackers affiliated with the PRC gained access to local network systems using compromised credentials, infiltrating sensitive data across sectors that included "communications, manufacturing, transportation, construction, maritime, government, information technology, and education."[103]

Since the 2015 summit meeting between Chinese President Xi and U.S. President Obama, during which the two sides reached an understanding to reduce cyber economic espionage, Chinese cyber actions have shifted. Although the overall level of activity appears to be unabated, Beijing seems to have moved toward more focused attacks.

China's cyber espionage is often aimed at economic targets, reflecting China's much more holistic view of both security and information. Rather than creating an artificial dividing line between military security and civilian security, much less information, the PLA plays a role in supporting both aspects and seeks to obtain economic intellectual property as well as military electronic information.

This is not to suggest that the PLA has not emphasized the military importance of cyber warfare. Chinese military writings since the 1990s have emphasized a fundamental transformation in global military affairs. Future wars will be conducted through joint operations involving multiple services, not through combined operations focused on multiple branches within a single service, and will span outer space and cyberspace in addition to the traditional land, sea, and air domains. Outer space and cyberspace will be of special importance because the introduction of information technology into all areas of military operations has caused the goal of warfare to move beyond establishing material dominance (characteristic of industrial-age warfare) to include establishing information dominance.

Consequently, according to PLA analysis, future wars will most likely be "informationized local wars." That is, they will be wars in which information and information technology will be both widely applied and a key basis of victory. The ability to gather, transmit, analyze, manage, and exploit information will be central to winning such wars: The side that is able to do these things more accurately and more quickly will be the side that wins. This means that future conflicts will no longer be determined by platform-versus-platform performance and not even by system against system: Conflicts are now clashes between rival systems of systems.[104]

Chinese military writings suggest that a great deal of attention has been focused on developing an integrated network and electronic warfare (INEW) capability. This would allow the PLA to reconnoiter a potential adversary's computer systems in peacetime, influence opponent decision-makers by threatening those same systems in times of crisis, and disrupt or destroy information networks and systems by cyber and electronic warfare means in the event of conflict. INEW capabilities would complement psychological warfare and physical attack to secure "information dominance," which, as noted, Chinese military writings emphasize as essential for fighting and winning future wars.

It is essential to recognize, however, that the PLA views computer network operations as part of information operations, or information combat. Information operations are specific operational activities that are associated with striving to establish information dominance. They are conducted in both peacetime and wartime with the peacetime focus on collecting information, improving its flow and application, influencing opposing decision-making, and effecting information deterrence.

Information operations involve four mission areas:

- **Command and Control Missions.** The ability of commanders to control joint operations by disparate forces is essential to the success of information operations. Command, control, communications, computers, and intelligence, surveillance, and reconnaissance (ISR) structures therefore constitute a key component

of information operations by providing the means for collecting, transmitting, and managing information.

- **Offensive Information Missions.** These are intended to disrupt the enemy's battlefield command and control systems and communications networks as well as to strike the enemy's psychological defenses.

- **Defensive Information Missions.** Such missions are aimed at ensuring the survival and continued operation of information systems. They include deterring an opponent from attacking one's own information systems, concealing information, and combating attacks when they do occur.

- **Information-Support and Information-Safeguarding Missions.** The ability to provide the myriad types of information necessary to support extensive joint operations and to do so on a continuous basis is essential to their success.[105]

Computer network operations are integral to all four of these overall mission areas. They can include both strategic and battlefield network operations and can incorporate both offensive and defensive measures. They also include protection not only of data, but also of information hardware and operating software.

Finally, computer network operations will not stand alone; they will be integrated with electronic warfare operations as reflected in the phrase "network and electronics unified." Electronic warfare operations are aimed at weakening or destroying enemy electronic facilities and systems while defending one's own.[106] Techniques include jamming and anti-jamming technologies that deny space-based communications, radar systems, and GPS navigation.[107] The combination of electronic and computer network attacks will produce synergies that affect everything from finding and assessing the adversary to locating one's own forces, weapons guidance, logistical support, and command and control. The PLA Strategic Support Force (PLASSF) was created to integrate these forces and make them more complementary and effective in future "local wars under informationized conditions."[108]

Force Assessment

With more than 2 million active-duty military personnel, the PLA remains one of the world's largest militaries, and its days of largely obsolescent equipment are in the past.[109] In March 2025, China announced a draft defense budget of $245 billion, an increase of 7.2 percent over the previous year.[110] The PRC defense budget has increased each year for three decades, sustaining China's position as the world's second-largest military spender.[111] From the late 1990s to the mid-2010s, China's official defense budget increased by double-digit percentages nearly every year.[112]

China's official numbers, as large as they are, conceal the sheer scale of the country's military buildup. It is widely believed that China spends considerably more on defense than it officially acknowledges: Estimates of real defense spending run as high as $711 billion.[113] This spending has been complemented by improvements in Chinese military training and, in 2015, the largest reorganization in the PLA's history.[114] The PLA has shed 300,000 personnel since those reforms even as its overall capabilities have increased as newer, much more sophisticated systems have replaced older platforms.[115] Notably, since mid-2023, Beijing has dismissed or placed under investigation more than a dozen top generals for alleged corruption—a move that could affect the PLA's morale and credibility in the short term but also could improve its efficiency in the long run.[116]

PLA Ground Force (PLAGF). The PLAGF has mostly completed the major force restructuring required by reforms announced in 2016 and 2017.[117] The force has steadily modernized its capabilities, incorporating both new equipment and a new organizational structure. The PLAGF currently "has approximately 965,000 active-duty personnel in its service" and is the PLA's "primary ground force."[118] The force is increasingly equipped with modern capabilities, such as advanced unmanned systems, C-UAS systems, electronic warfare capabilities, and helicopters.[119] The PLAGF also appears to be absorbing lessons from the Russia–Ukraine War: The International Institute for Strategic Studies has reported that the dominance of UAVs in the conflict appears to be driving "discussion of the concept of 'low altitude dominance' in relation to the PLAGF's own UAV, surveillance, and air-defense capabilities."[120]

According to the DOD, "in addition to continued PLAGF deployments to China's unsettled borders with India and Burma, the PLAGF [has] conducted multiple large-scale exercises in training areas throughout the country."[121] The PLAGF has also participated in multiple major exercises postured against Taiwan, including Strait Thunder 2025A, Joint Sword 2024A, and Joint Sword 2024B.[122] During the most recent of these exercises (Strait Thunder 2025A), PLAGF units, part of the Eastern Theater Command, conducted long-range live-fire shooting drills in the East China Sea that "involved precision strikes on such simulated targets as key ports and energy facilities."[123]

PLA Navy. Between 2015 and 2020, the types of PLAN ships that count toward the quoted size of the U.S. Navy "surpassed the U.S. Navy in numbers of battle force ships."[124] Today:

> The PLAN is the largest navy in the world with a battle force of over 370 platforms, including major surface combatants, submarines, ocean-going amphibious ships, mine warfare ships, aircraft carriers, and fleet auxiliaries. Notably, this figure does not include approximately 60 HOUBEI class patrol combatants that carry anti-ship cruise missiles (ASCM). The PLAN's overall battle force is expected to grow to 395 ships by 2025 and 435 ships by 2030. Much of this growth will be in major surface combatants.[125]

The PLAN has fielded increasingly sophisticated and capable multirole ships. Multiple classes of surface combatant ships are now in series production, including the *Renhai*-class guided-missile cruisers, *Luyang III*-class guided-missile destroyers, and *Jiangkai II*-class and *Jiangkai III*-class guided-missile frigates.[126] Beijing is building these ships at breakneck pace. As of June 2024, the PLAN had launched 23 destroyers in the past 10 years compared to America's 11 destroyers; likewise, China has launched eight cruisers since 2017, while the United States has not launched a new cruiser since 2016.[127] The PLAN is also developing the Z-20F helicopter for the *Renhai*, *Jiangkai*, and *Luyang*, bolstering the ships' anti–submarine warfare (ASW) capabilities.[128]

The PLAN has similarly been modernizing its submarine force. The PLAN currently operates six nuclear-powered ballistic missile submarines, six nuclear-powered attack submarines, and 48 diesel-powered/air-independent powered attack submarines. The PLAN is expected to expand its burgeoning submarine fleet to 65 units in 2025 and 80 units by 2035.[129] The quality of the submarine fleet is also improving as the PLAN replaces its aging *Kilo*-class submarines, purchased from Russia in the mid-1990s and mid-2000s, with *Song*-class and *Yuan*-class submarines.[130]

Evidence suggests that the PLAN has continued to design and build new submarines. In 2024, satellite imagery revealed that the PLAN is building a new class of submarine at Wuchang Shipyard, a yard in Wuhan known for constructing conventional submarines. While details are scarce, evidence suggests that this new submarine may be nuclear powered.[131]

The PLAN has been expanding its amphibious assault capabilities as well. The PLA Marine Corps (PLANMC), for example, is the U.S. Marine Corps' Chinese counterpart. According to the DOD:

> After taking possession of three PLAGF BDEs [brigades] in late 2022, the PLANMC now has 11 BDEs—eight maneuver, two SOF [Special Operations Forces], and one aviation—and an approximate total force composition of 55,000 marines. With the assumption of the three PLAGF BDEs, the PLANMC gained their legacy equipment, which the BDEs continued to train on in 2023. It is expected that the new BDEs will begin updating their inventory to match the other PLANMC BDEs in 2024. The addition of the three new BDEs places PLANMC elements in every theater except for the WTC [Western Theater Command]. The PLANMC maintains a presence at the PRC's first overseas military base in Djibouti, extending the PRC's military reach and strategic influence in Africa and the Middle East.[132]

To move this force, Beijing has begun to build more amphibious assault ships. In January 2025, the PLAN launched the new *Yulan*-class amphibious assault ship, which can also launch fighter jets and UAVs because of its electromagnetic catapult and arrestor technologies. The ship has the capacity to hold up to 1,000 marines and associated equipment.[133] In addition to the *Yulan*-class, the PLAN

launched its fourth *Yushen*-class amphibious assault ship in 2024, adding further to its amphibious capabilities.[134]

Earlier in 2025, the PLAN began to experiment with a new type of anti-tank missile platform. The new trials included two HJ-10 top-attack anti-tank missiles mounted atop a ZTD-05 amphibious assault vehicle chassis.[135] This development could mark a shift toward integrating high-precision strike abilities with armored amphibious mobility.

Supporting these expanded naval combat forces is a growing fleet of support and logistics vessels. The 2010 PRC defense white paper noted the accelerated construction of "large support vessels." It also noted specifically that the navy is exploring "new methods of logistics support for sustaining long-time maritime missions."[136] These include tankers and fast combat support ships that extend the range of Chinese surface groups and allow them to operate for more prolonged periods away from main ports. Chinese naval task forces dispatched to the Gulf of Aden have typically included such vessels. According to satellite and ground imagery, China also appears to be building a new set of amphibious bridging barges to facilitate a large-scale amphibious operation.[137]

The PLAN also has been expanding its naval aviation capabilities. The most publicized element of this expansion is the growing Chinese carrier fleet, which currently includes not only the *Liaoning*, purchased from Ukraine over a decade ago, but a domestically produced copy, the *Shandong*, that completed its first exercise in 2021.[138] In 2025, the *Liaoning* and *Shandong* travelled farther east than Guam, becoming the first Chinese carriers to reach beyond the Second Island Chain.[139]

Both of these ships have ski jumps to launch their air wing, but China is also building several conventional takeoff/barrier landing (CATOBAR) carriers (like American or French aircraft carriers) that will employ catapults and therefore allow their air complement to carry more ordnance and/or fuel.[140] The first of these new-generation carriers, the *Fujian*, started sea trials in the first half of 2024 and was officially commissioned in November 2025. This new class of carriers can "support additional fighter aircraft, fixed-wing early-warning aircraft, and more rapid flight operations, thus extending the reach and effectiveness of the PRC's carrier-based strike aircraft."[141]

The PLAN is also developing new aircraft for its new carriers, including a catapult-capable J-15 variant; the J-35, a carrier-capable variant of the fifth-generation J-31 fighter; the KJ-600, the carrier-borne AEW aircraft; and multiple UAVs capable of vertical take-off and landing (VTOL) to be used for ISR purposes.[142] As its carrier fleet increases, the PLAN is also increasing its operational tempo: In 2023, the PLAN conducted three deployments with the *Shandong* to the Philippines Sea—a record number for any PLAN carrier in a calendar year.[143]

As the PLAN boosts its naval aviation capabilities, it is divesting from much of its shore-based aviation. In 2023, the PLAN transferred a "significant portion of PLAN shore-based, fixed wing combat aviation units, facilities, air defense, and radar units to the PLAAF."[144] The PLAN also operates fixed-wing, medium-to-large UAVs such as the Xianglong, BZK-005, and ASN-209 from land bases for ISR purposes.[145]

Despite this divestment effort, the PLAN still maintains formidable shore-based aviation capabilities. In particular, the PLAN has retained its fixed-wing ASW assets, including its fleet of KJ-200s and KJ-500s. According to the China Aerospace Studies Institute:

> [These aircraft] enable the PLAN to conduct modern combined arms tasks such as ASW, supplement a currently non-operational carrier based fixed wing AEW [airborne early warning] capability, continue to collect electronics intelligence (ELINT) and signals intelligence (SIGINT), and enable further range and jointness when fulfilling air defense and domain awareness tasks in the last PLAN controlled air defense area, the South China Sea.[146]

PLA Air Force (PLAAF). Together, PLAAF and PLAN aviation form Asia's largest air force and the world's third-largest. Of its more than 3,150 aircraft, 2,400 are combat aircraft, including fighters, strategic bombers, tactical bombers, multimission tactical, and attack aircraft.[147] The force has shifted steadily from one that is focused on homeland air defense to one that is capable of power projection, including long-range precision strikes against both land and maritime targets. The DOD notes that:

> The PLAAF is seeking to extend its power projection capability with the development of a new H-20 stealth strategic bomber, with official PRC state media stating that this new stealth bomber will have a nuclear mission in addition to filling conventional roles. The PLAAF is developing new medium- and long-range stealth bombers to strike regional and global targets. PLAAF leaders publicly announced the program in 2016; however, it may take more than a decade to develop this type of advanced bomber.[148]

PLAAF and PLAN aviation currently have a total of 1,900 fighters, more than 1,300 of which are fourth-generation fighters that are comparable to the American F-15, F-16, and F-18.[149] They include the domestically designed and produced J-16, a multirole fighter, and the fifth-generation J-20 stealth fighter.[150] By 2023, China had built more than 225 J-16s and 200 J-20s.[151]

China has made progress on two fifth-generation stealth fighter designs. The J-20, the larger of the two aircraft, resembles the American F-22 fighter and has been operationally fielded. China continues to iterate on the J-20, conducting flight tests on multiple new variants in 2023.[152] Prospective upgrades to the J-20 include "increasing the number of AAMs [air-to-air missiles] the fighter can carry in its low-observable configuration, installing thrust-vectoring engine nozzles, and adding super cruise capability by installing higher thrust indigenous WS-15 engines." China reportedly has tripled the radar detection range of the J-20 by leveraging advances in semiconductor technology.[153] The J-35, which was officially unveiled at the 2024 Zhuhai Airshow, is the other fifth-generation stealth fighter.[154] Its development continues for export or as a future naval fighter for PLAN's next class of aircraft carriers.[155]

China also has begun to develop sixth-generation fighters and unveiled the first two in December 2024.[156] Details on these new planes are scant, but a leaked image of the J-36 contains features that make the plane "something of a hybrid between a very heavy fighter and a tactical bomber."[157] While China's sixth-generation fighters are still in early stages of development, they will likely include a central manned aircraft supported by drones that possess a high level of autonomy.[158]

The PLAAF is deploying an increasing number of H-6 bombers, which can undertake longer-range strike operations, including operations employing land-attack cruise missiles. Although the H-6, like the American B-52 and Russian Tu-95, is a 1950s-era design copied from the Soviet-era Tu-16 Badger bomber, the updated versions (H-6K) are equipped with new electronics and engines and are made of carbon composites. In addition, China is developing the H-20, a flying wing–type stealth bomber that Chinese state media say will have a nuclear mission in addition to filling conventional roles.[159]

Equally important, the PLAAF has been introducing a variety of support aircraft, including AEW, command and control (C2), and electronic warfare (EW) aircraft. These systems field state-of-the-art radars and electronic surveillance systems that allow Chinese air commanders to detect potential targets. These targets include low-flying aircraft and cruise missiles, and allow the Chinese to gather additional intelligence on adversary radars and electronic emissions more quickly. The Chinese aerial tanker fleet, which is based on the H-6 aircraft, also has been expanding.[160] China's combat aircraft are increasingly capable of undertaking mid-air refueling, which allows them to conduct extended, sustained operations.

Chinese UAVs have been included in various military parades over the past several years, which suggests that they are being incorporated into Chinese forces.[161] According to the DOD:

> The PRC continues its comprehensive UAS modernization efforts, highlighted by the routine appearance of increasingly sophisticated systems across theater and echelon levels. The last three years have seen several key milestones, including the airshow display and operational appearance of the Xianglong jet-powered UAS as well as the unveiling of the supersonic WZ-8 UAS and a redesigned version of the GJ-11 stealth unmanned combat air vehicle. The PLA continues the maritime use of ISR UASs, featuring the venerable BZK-005 and the newer TW-328/TB001. The PRC is expanding the applications of large UASs by demonstrating uses, including disaster communications, anti-submarine roles, firefighting, and weather modification. Advanced small

UASs are increasingly appearing in military and civilian applications, with PRC industry remaining a key exporter of UASs and components of all sizes.[162]

The PLAAF is responsible for the Chinese homeland's strategic air defenses. Its array of surface-to-air missile batteries is one of the world's largest and includes the Russian S-300 (SA-10B/SA-20) and its Chinese counterpart, the Hongqi-9 long-range SAM. The S-400 series of Russian long-range SAMs, delivery of which began in 2018, marks a substantial improvement in PLAAF air defense capabilities because the S-400 has both anti-aircraft and anti-missile capabilities.[163] According to the Department of Defense, "PRC researchers are interested in developing SAMs with a range similar to the DF-17 to provide ultra-long-range air defense using space-based ISR to support in-flight target updates."[164] China has deployed these SAM systems in a dense, overlapping belt along its coast, protecting the nation's economic center of gravity. Key industrial and military centers such as Beijing are also heavily defended by SAM systems.

China's airborne forces are part of the PLAAF. The 15th Airborne Corps has been reorganized from three airborne divisions to six airborne brigades in addition to a special operations brigade, an aviation brigade, and a support brigade. These forces have been incorporating indigenously developed airborne mechanized combat vehicles for the past decade, and this has given them more mobility and a better ability to engage armored forces. According to recent footage on Chinese social media, China's airborne infantry is now using fighting vehicles with GL6 active protection systems, which would likely be useful in a Taiwan invasion scenario.[165]

In line with the capability improvements, the PLAAF is also rapidly modernizing its fighter pilot training programs. At several institutions that offer the required three years of officer training and education, including the Shijiazhuang Flight Academy, old training programs have been entirely replaced by new curricula. This overhaul has streamlined and centralized the training process, reducing the completion time by a year.

PLA Rocket Force. Chinese nuclear forces are the responsibility of the PLA Rocket Force (PLARF), one of three services created on December 31, 2015. China's nuclear ballistic missile forces include land-based missiles with a range of 13,000 kilometers that can reach the United States and CSS-4 and submarine-based missiles that can reach the United States when the submarine is deployed within missile range. The DOD estimates that China has more than 600 operational nuclear warheads in its stockpiles and plans to have 1,000 by 2030.[166] The PLARF has approximately 400 ICBMs, including fixed and mobile launchers capable of launching unitary and multiple reentry vehicles.[167]

The PRC became a nuclear power in 1964 when it exploded its first atomic bomb as part of its "two bombs, one satellite" program. China then exploded its first thermonuclear bomb in 1967 and orbited its first satellite in 1970, demonstrating the capability to build a delivery system that can reach the ends of the Earth. China chose to rely primarily on a land-based nuclear deterrent instead of developing two or three different basing systems as the United States did.

Unlike the United States or the Soviet Union, China chose to pursue only a minimal nuclear deterrent and fielded only a small number of nuclear weapons: 100 to 150 weapons on medium-range ballistic missiles and approximately 60 ICBMs. Its only ballistic missile submarine (SSBN) conducted relatively few deterrence patrols (perhaps none),[168] and its first-generation submarine-launched ballistic missile (SLBM), the JL-1, if it ever attained full operational capability, had limited reach. The JL-1's 1,700-kilometer range makes it comparable to the first-generation Polaris A1 missile fielded by the United States in the 1960s.

After remaining stable for several decades, China's nuclear force became part of Beijing's two-decade modernization campaign. The result has been both modernization and expansion of the Chinese nuclear deterrent. The core of China's ICBM force is the DF-31 series, a solid-fueled, road-mobile system, along with a growing number of longer-range, road-mobile DF-41 missiles that are now in the PLA operational inventory. The DOD reported in 2022 that the PRC was now "fielding the DF-41, China's first road-mobile and silo-based ICBM with MIRV capability."[169] China's medium-range nuclear forces have similarly shifted to mobile, solid-rocket systems so that they are both more survivable and more easily maintained. China also operates the DF-31A ICBMs, which have a range of 11,000 kilometers and can hit most locations in the continental United States (CONUS).[170]

In 2022, China completed the construction of three new solid-propellant silo fields that will cumulatively contain at least 300 ICBM silos. At least some of those new silos reportedly are already filled with warheads.[171] In 2021 alone, "the PLARF launched approximately 135 ballistic missiles for testing and training, more than the rest of the world combined excluding ballistic missile employment in combat zones."[172] In 2024, the PLARF test-fired an ICBM into the Pacific Ocean, marking the first time China had launched an ICBM into international waters since 1980.[173] The DOD assesses that as China constructs new nuclear facilities, it "intends to use this infrastructure to produce nuclear warhead material for its military in the near term" and that the PRC, which has not produced large quantities of plutonium for weapons since the 1990s, will restart plutonium production this decade to meet the demands of its nuclear program.[174]

Notably, the Chinese are also expanding their ballistic missile submarine fleet:

> Over the past 15 years, the PLAN has constructed 12 nuclear-powered submarines—two SHANG I class SSNs (Type 093), four SHANG II class SSNs (Type 093A), and six JIN class SSBNs (Type 094). Equipped with the CSS-N-14 (JL-2) submarine-launched ballistic missile (SLBM) (3,900 nm) or the CSS-N-20 (JL-3) SLBM (5,400 nm), the PLAN's six operational JIN class SSBNs represent the PRC's first credible sea-based nuclear deterrent.[175]

In addition, each of China's *Jin*-class SSBNs "is equipped to carry up to 12 JL-2 or JL-3 SLBMs."[176]

There is some possibility that the Chinese nuclear arsenal now contains land-attack cruise missiles. The CJ-20, a long-range, air-launched cruise missile carried on China's H-6 bomber, may be nuclear-tipped, although the evidence that China has pursued such a capability is limited. China is also believed to be working on a cruise missile submarine that, if equipped with nuclear cruise missiles, would further expand the range of its nuclear attack options.[177]

As a result of China's modernization efforts, its nuclear forces appear to be shifting from a minimal deterrent posture that is suited only to responding to an attack and then only with limited numbers to a more robust but still limited deterrent posture. The PRC will still likely field fewer nuclear weapons than either the United States or Russia fields, but it will field a more modern and diverse set of capabilities than its nuclear-armed neighbors India, Pakistan, and North Korea are capable of fielding. If there are corresponding changes in doctrine, China at least will have limited nuclear options from which to choose in the event of a conflict.

This assessment changes, however, if the missiles going into the newly discovered silos are equipped with multiple independently targetable re-entry vehicles (MIRVs). With five MIRVs atop each missile, for example, 300 new ICBMs would have some 1,500 warheads—equivalent to the U.S. and Russian numbers allowed under New START. Even with fewer than 300 ICBMs, the new SLBMs and new bombers would enable China to field as large a nuclear force within a few years as the United States or Russia is capable of fielding.

In addition to strategic nuclear forces, the PLARF has responsibility for medium-range and intermediate-range ballistic missile (MRBM and IRBM) forces. These include (among others) the DF-21 MRBM, which has a range of approximately 1,500 kilometers, and the newer DF-26 IRBM, which has a range of approximately 3,000 kilometers and is "capable of conducting precision conventional or nuclear strikes against ground targets as well as conventional strikes against naval targets."[178] A Center for Strategic and International Studies report notes that Chinese missile brigades equipped with these systems may have both nuclear and conventional responsibilities, making any deployment from garrison much more ambiguous from a stability perspective.[179] The expansion of these forces also raises questions about the total number of Chinese nuclear warheads. Moreover, the PLARF may be exploring the development of a conventionally armed intercontinental range missile system that, if developed and fielded, would enable PRC conventional strikes against targets in the continental U.S., Hawaii, and Alaska.[180]

Although it is unclear whether they are nuclear-armed, China's hypersonic glide vehicles (HGVs) also pose a growing threat to the United States and its allies. HGVs are slower than ICBMs—Mach 5 for a hypersonic vehicle as opposed to Mach 25 for an ICBM warhead—but are designed to maneuver during their descent, making interception far more difficult. During a Chinese test in August 2021, a

hypersonic vehicle apparently went into orbit.[181] Additionally, the DOD has stated that the PLARF may have developed a long-range DF-27 ballistic missile with an HGV payload option, which would boost its strategic HGV capabilities.[182]

These developments create a fundamentally different threat, as a fractional orbital bombardment system (FOBS) could allow attacks from southern trajectories—that is, from over the South Pole—or even the placement of warheads in orbit, which would make them almost impossible to intercept. Even without a nuclear warhead, an orbiting hypersonic vehicle could do enormous damage to a city or a military facility such as an air base or an ICBM silo. Because of the strategic instability that FOBS programs would introduce, neither the United States nor the Soviet Union has pursued them.

Former PLA Strategic Support Force (PLASSF) and Successor Entities. In April 2024, the PLA announced the dissolution of the PLASSF and "the creation of a new Information Support Force (ISF) and...alteration of the reporting relationships of two of its departments."[183] Specifically, the reorganization "eliminated the Strategic Support Force and subordinated the Space Systems Department [SSD] and Network Systems Department [NSD]—now designated the Military Aerospace Force and Cyberspace Force, respectively—to the Central Military Commission."[184] The ISF, like the former PLASSF SSD and NSD, is now a deputy theater–grade force that reports directly to the CMC.[185] The CMC did not release detailed explanations of the reorganization, but some analysts speculate that the PLASSF was always designed to be a "transitional structure...for disparate space, cyber, and informatization forces until their force structure could be developed enough to stand as independent branches."[186]

The newly created ISF will likely support the PLA's push to create an "informatised military—one in which services and theatre commands seamlessly collect and share data."[187] Its primary mission is to "build and operate a network information system that can support joint and multi-domain operations in any contested environment and under any enemy attack."[188] The ISF is likely to serve as a driver for the innovation and integration of such cutting-edge technologies as artificial intelligence.

Cyberspace Force (CSF). Formerly the SSF Network Systems Department, the CSF inherited the PLASSF's information warfare capabilities and mission set. Many CSF units have been responsible for major cyberattacks against the United States.[189] In 2014, the U.S. Department of Justice charged PLA officers from Unit 61398, then a unit in the General Staff Department's 3rd Department, with the theft of intellectual property and implanting of malware in various commercial firms.[190] Members of that unit are thought also to be part of Advanced Persistent Threat-1, a group of computer hackers believed to be operating on behalf of a nation-state rather than a criminal group. In 2020, the U.S. Department of Justice charged several PLA officers with one of the largest breaches in history: stealing the credit ratings and records of 147 million people from Equifax.

The CSF's responsibilities, however, extend beyond traditional cyber mission sets like cyber warfare and electronic warfare. The force is also responsible for missions associated with the PLA's "Three Warfares" concept, which includes psychological warfare, public opinion warfare, and legal warfare.[191]

Aerospace Force (ASF). The ASF, formerly the PLASSF Space Systems Department, is responsible for military space and counterspace operations.[192] The PLA views space superiority as critical for winning "informatized warfare" and likely considers it a deterrent and countermeasure against any possible U.S. military interventions during a regional military contingency.[193] The PRC has been conducting space operations since 1970 when it first orbited a satellite, but its space capabilities did not gain public prominence until 2007 when the PLA conducted an anti-satellite (ASAT) test in low-Earth orbit against a defunct Chinese weather satellite. The test became one of the worst debris-generating incidents of the space age: Many of the several thousand pieces of debris that were generated will remain in orbit for more than a century.[194] In addition, according to the DOD, "the PRC probably is developing advanced nuclear delivery systems, such as a strategic HGV and a fractional orbital bombardment (FOB) system."[195]

Equally important, Chinese counterspace measures have been expanding steadily. The PLA not only has tested ASATs against low-Earth-orbit systems, but also is believed to have tested a system designed to attack targets at GEO approximately 22,000 miles above the Earth.[196] Because many vital satellites are at GEO, including communications and

Threats: China

	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
Behavior		✓			

	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
Capability	✓				

missile early-warning systems, China's ability to target such systems constitutes a major threat. In early 2022, China's Shijian-22 towed a dead Chinese satellite into a "graveyard" orbit above the GEO belt.[197] This was officially touted as a servicing operation, but the ability to attach one satellite to another and then tow it also has potential military implications.

China also has a growing civilian space industry that develops space technologies that can serve both a civilian purpose and a military purpose as part of China's civil–military fusion strategy. According to the DOD, the former SSF "worked with PRC universities and research organizations to incorporate civilian support to military efforts to access high-demand aerospace talent and R&D. The PRC has a growing commercial space sector that supports government objectives, including remote sensing, launch, and communication services."[198]

Conclusion

China presents the United States with its most comprehensive and daunting national security challenge across all three areas of vital American national interests: the homeland; regional war (including potential attacks on overseas U.S. bases as well as against allies and partners); and international common spaces. China is challenging the United States and its allies at sea, in the air, and in cyberspace. It has sparked deadly confrontations on its border with India and poses a standing and escalating threat to Taiwan.

The Chinese military is no longer a distant competitor. It has begun to field indigenous aircraft carriers and advanced missile technology. It is rapidly expanding its nuclear arsenal and conducting live-fire exercises and mock blockades around Taiwan. If current trends persist, the gap between the Chinese and U.S. militaries is likely to narrow further, and the idea that China might surpass U.S. capabilities in some fields is no longer implausible.

This *Index* assesses the overall threat from China, considering the range of contingencies, as "aggressive" for level of provocative behavior and "formidable" for level of capability.

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Russia

Paul McCarthy

Regional Overview

In the years since President Vladimir Putin's failed attempt to capture Ukraine swiftly in February 2022, the conflict has devolved into a grinding war of attrition. Russian forces have leveraged their advantage in manpower and general control of the skies to make steady territorial gains. However, these advances have come at a steep cost: Some estimates suggest that Russia has lost up to a million soldiers along with significant numbers of tanks, ships, and aircraft. Further compounding these losses are systemic military weaknesses that include a rigid command structure, a depleted corps of professional troops, and tactics that have resulted in exceptionally high casualty rates.

Now in its fourth year, the war in Ukraine has revealed weaknesses in Russia's armed forces and significantly diminished its short-term ability to threaten U.S. and European interests in Europe, but it also has shown the depth of Russia's stockpiles of equipment, munitions, and supplies as well as the Putin government's willingness to continue to commit troops and resources to the conflict. Despite gathering economic problems and its losses in Ukraine, Moscow continues to prioritize military spending and funding for its military operations abroad. Support from China, North Korea, and Iran has complemented Russia's massive budgetary commitments and helped to offset the impact of Western sanctions. Russia's energy position in Europe has been seriously degraded by destruction of the Nord Stream 1 and 2 pipelines and Europe's transition away from Russian energy sources, but losses in energy sales to Europe have been offset by higher prices for energy in general and increases in sales to non-European countries including India and China.

The war in Ukraine reflects Putin's broader goal of restoring the prestige and global influence that he believes Russia lost after the collapse of the Soviet Union in 1991. It is also part of an effort in recent times to reassert control of former Soviet states such as Moldova and Georgia. Russia seeks to dominate the foreign, domestic, and economic policies of these countries while blocking influence from rival powers.

Although Russia poses a serious threat to U.S. allies, experts are divided with respect to whether it will engage in conflict directly with the North Atlantic Treaty Organization (NATO). Current U.S. assessments indicate that, despite the lethal aid that the West has provided to Ukraine, Russia is likely to avoid direct conflict with NATO, believing that it cannot win a conventional war against the Alliance. Nevertheless, Moscow retains significant asymmetric capabilities such as cyber and information warfare and poses an existential threat through its strategic nuclear forces, which can reach the U.S. homeland.

In addition to its nuclear arsenal, Russia maintains strong conventional military forces and remains the primary conventional threat to European security. Its aggressive actions in Ukraine, Georgia, the Balkans, various regions of Africa, and Syria continue to destabilize Europe and challenge U.S. interests. Overall, however, China's capacity to challenge U.S. interests is far greater than Russia's, and the U.S. national security strategy and budget must prioritize deterrence of Chinese aggression in the Indo-Pacific. European NATO members will need to assume responsibility for the bulk of conventional deterrence in Europe as the United States shifts resources to the Indo-Pacific.

Threats to U.S. Forces, Regional Allies, and Partners

Many U.S. allies view Russia as a serious threat. At times—for example, in its war against Ukraine—this threat is military. At other times, it takes the form of less conventional tactics including cyberattacks, the use of energy resources as political leverage, covert assassination efforts, and propaganda. Russia also seeks to cement influence through agreements and treaties that aim to tie regional capitals more closely to Moscow: the Collective Security Treaty Organization, a military alliance of six post-Soviet states; the Eurasian Economic Union, which consists of five post-Soviet states; and BRICS, which now consists of 10 members: Brazil, Russia, India, China, South Africa, Egypt, Ethiopia, Iran, Saudi Arabia, and the United Arab Emirates.

Russia's war in Ukraine has weakened its ability to use some of these tools. For instance, Europe is steadily reducing its dependence on Russian energy. However, many countries in the Global South view Russia through an anti-Western lens and are therefore indifferent to—or even supportive of—its actions. One of Moscow's core objectives is to create an alternative to the U.S.-led global order. In pursuing this goal, Russia is increasingly leaning on alliances with China, Iran, and North Korea, all of which support its efforts in the war against Ukraine.

Sabotage and subversion have become increasingly important tools in Moscow's war against the West. As the Intelligence Community reported in 2025:

> Since at least January 2024, pro-Russian saboteurs have been linked to various arson, sabotage, and assassination plots against military and civilian targets in Europe, in a continued effort to undermine Western cohesion and support to Ukraine. Russia probably views a direct escalation against NATO as counterproductive to its war aims while the overall battlefield slowly trends in its favor, and will instead continue using covert action, information operations, cyber, and proxies in response to Western support for Ukraine.[1]

Russia is conducting an escalating and violent campaign of sabotage and subversion against European and U.S. targets in Europe led by Russia's military intelligence agency, the GRU. The number of Russian attacks "nearly tripled between 2023 and 2024."[2] Russia's primary targets have included transportation, government, critical infrastructure, and industry, and its main weapons and tactics have included explosives, blunt or edged instruments (such as anchors), and electronic attack. Since Sweden and Finland joined NATO, undersea infrastructure damage has been on the rise, but "Western countries have not developed an effective strategy to counter these attacks."[3]

Russia also uses "***all applicable sources of national power to advance its interests and…undermine the United States and its allies.***" These efforts "range from using energy to try to coerce cooperation and weaken Western unity on Ukraine, to military and security intimidation, malign influence, cyber operations, espionage, and subterfuge."[4] Russia's cyber operations include the "ability to target critical infrastructure, including underwater cables and industrial control systems, in the United States as well as in allied and partner countries."[5]

Pressure on Central and Eastern European NATO Members and the Nordic Countries

Moscow poses a security challenge to NATO members in Russia's immediate neighborhood. Until recently, a conventional Russian attack against a NATO member was thought to be unlikely, but Russia's assault on Ukraine and threats against NATO members that support Ukraine raise the possibility of a larger conflict involving NATO members, especially the Baltic States.[6] This threat has increased since Sweden and Finland joined NATO in 2024. Finland has been closely monitoring Russia's military activities near its eastern border ever since Finland's armed forces and international media reported a Russian military buildup.[7]

Western political and military leaders have long contended that Russian propaganda and disinformation are an extension of Russia's military capabilities. In April 2025, General Christopher Cavoli, at the time Commander, U.S. European Command, and Supreme Allied Commander Europe, reemphasized this point:

> Following the old Soviet playbook, Russia is engaging in a calculated destabilization campaign through cyberattacks on infrastructure, public sabotage, targeted violence, weaponized migration, election interference, and

> information operations. These activities have serious consequences for the freedoms and prosperity we enjoy in the United States. Taken together, they confirm the chronic threat that Russia poses to U.S. interests.[8]

The Baltics are a special target of these Russian operations. "In 2024," according to the Latvian State Security Service, "the aggressor state Russia remained the biggest threat to Europe's security" and "continued testing the resilience and unity of the Western countries by using increasingly aggressive methods...."[9] Specifically:

> Russia extended not only discrediting disinformation campaigns but also physical malign activities against the North Atlantic Alliance (NATO), European Union (EU) and member countries of these international organisations, including Latvia. The main goal of sabotage acts and other malign activities was to create fear and insecurity in Western societies and decision-makers, as Russia tried to not to allow [sic] or at least delay imposing new sanctions against it as well as provision of additional support to Ukraine.[10]

Russia also has sought to use disinformation to undermine NATO's Enhanced Forward Presence (eFP) in Poland and the Baltics. This campaign typically aims to weaken public support for NATO deployments, sow divisions among allies, and portray NATO as a threat rather than as a protective force. Russia spreads narratives portraying NATO troops as occupiers, aggressors, and threats to local populations. These often include fabricated stories of misconduct by NATO personnel (such as criminal behavior and disrespect of local customs) to create resentment.[11]

To undermine the resolve of NATO allies Poland and the Baltic States, Russia employs a narrative that blames these countries for stoking tensions in Russia's neighborhood. For example, Russian Foreign Intelligence Service (SVR) Director Sergey Naryshkin recently stated that Poland and the Baltic countries "just can't understand that it was the build-up of [Poland and the Baltic States'] military activity on the borders of Russia and Belarus that became...one of the reasons for the current large, acute, and very dangerous crisis on the European continent." Echoing a familiar Kremlin line, Naryshkin contended that these countries "would be 'the first to suffer' in a direct conflict between NATO and the Russian Federation."[12]

Sweden and Finland have been subjected to similar campaigns in the lead-up to and aftermath of their accession to NATO:

> Often threatening in tone, these narratives claimed that Finland was preparing armed aggression against Russia, even a "world war". Finland would "repeat the destructive experience of the Baltic countries and Poland" and "inevitably turn into an anti-Russian springboard for the deployment of foreign troops". Most Finns, the story went, understood that "neutrality" was the key to Finland's security, and as a result most Finns were against NATO membership. So called "NATO elites", however, were preventing them from expressing their views in a referendum.[13]

The Russian narrative further contended that most Finns and Swedes understood that "'neutrality' was the key to Finland's security" and therefore "were against NATO membership." In addition, "Russia frames NATO enlargement as 'expansion,' removing agency from Finland and Sweden and attributing the Alliance's enlargement not to their desire to join but to NATO's determination to encircle Russia."[14]

Russia in Its "Near Abroad"

According to the U.S. Intelligence Community:

> Since its full-scale invasion of Ukraine in 2022, Russia has gained the upper hand and is moving to seize greater leverage to press Kyiv and its Western backers to negotiate an end to the war that grants Moscow the concessions it seeks. Continuing the Russia–Ukraine war poses strategic risks to the United States including unintended escalation to large-scale war, the potential use of nuclear weapons, heightened insecurity among NATO Allies, particularly in Central, Eastern, and Northern Europe, and a more emboldened China and North Korea.[15]

Putin remains firmly committed to achieving victory in Ukraine, and his primary goals—Ukrainian

neutrality and further partitioning of the country—have remained largely unchanged since the war began. Unless a negotiated settlement is reached or the West significantly increases its support, the battlefield will likely continue to shift gradually in Russia's favor as it has throughout 2025.[16]

Russian forces have maintained incremental progress toward capturing portions of the Donetsk and Luhansk Oblasts. Russian forces have also been pushing north of Dvorichna in the Kharkiv region and have seized a settlement in the Sumy region.[17] In late April 2025, Russia claimed to have completely expelled Ukrainian troops from the Kursk Oblast. To this end, Russia introduced more than 10,000 North Korean soldiers along the Kursk salient to support Russian offensive operations. Simultaneously, Russia is targeting critical Ukrainian infrastructure with a combination of one-way attack unmanned aerial vehicles (UAVs) and long-range missiles to degrade Ukraine's national will to fight.[18]

The Kremlin says it wants to negotiate, but only if Ukraine's sovereignty and future ability to fight are severely restricted:

> While affirming an openness to a negotiated settlement, Russia has remained largely steadfast in its demands for post-conflict Ukrainian neutrality, authority over the size of Ukraine's armed forces, and a further partitioning of the Ukrainian state. Russia is likely to continue its strategy of attrition, focused on degrading Ukraine's ability and will to resist through 2025, and allowing Russia to impose its preferred terms in any future negotiated settlement. Although Putin and his military leaders probably would prefer more rapid battlefield gains, Moscow seems comfortable with the current cost of its slow advances, calculating they can steadily drain Ukraine's resources and will, and outlast the West's support for Ukraine.[19]

In addition to its war in Ukraine, according to General Cavoli, Russia is also undermining security in its "near abroad." Specifically:

> Russia is exploiting the volatility in high-risk regions of Europe to expand its influence at the expense of the United States. In Georgia, the pro-Russian Georgia Dream party has aligned Tbilisi closer to Moscow. In Moldova, Russian influence in the November 2024 presidential election intensified as Moscow engaged in fraudulent vote-buying, election related cyberattacks, and false bomb threats against polling stations, as well as employing trained agitators to incite disorder. Since the spring of 2024, Russia has been working to steer the Western Balkans away from Euro-Atlantic integration through key-leader rhetoric, information operations, diplomatic outreach, and economic influence. Russia also courted Serbian and Bosnian-Serb officials who moved closer into the Kremlin's orbit following their participation at the October 2024 BRICS summit in Kazan, Russia.[20]

Moldova. In Moldova, Russia backs the separatist region of Transnistria, perpetuating a frozen conflict that serves Moscow's interests and amounts to the effective occupation of roughly 12 percent of Moldovan territory. Concerns that Russian troops stationed in Transnistria could be mobilized for the war in Ukraine persist.[21] Moscow could also seek to invade Moldova using Russian troops based in the enclave.

Moldovan and U.S. officials have accused Russia of illicitly financing political parties, interfering in elections, and subverting democratic institutions in Moldova. Russian authorities allegedly interfered in Moldova's 2024 elections with the aim of preventing pro-EU President Maia Sandu's reelection and passage of an EU referendum. According to U.S. and Moldovan officials, Russia illicitly financed a major vote-buying operation on behalf of its ally, the oligarch Ilan Shor. Moldovan authorities alleged that at least $39 million was transferred from Russia to more than 135,000 bank accounts in Moldova in September and October of 2024 alone. Other alleged actions by Russia-connected actors included vandalism, preparations for postelection protests, and false bomb threats against expatriate voting sites in Europe. Authorities also accused Russia of disinformation operations seeking to subvert the legitimacy of the electoral process.[22] In the end, Sandu was reelected to a second term in a runoff election held on November 3, 2024, but the European integration referendum and Sandu's reelection were approved only by narrow margins.[23]

The South Caucasus. The South Caucasus sits at a crucial geographical and cultural crossroads

and has been strategically important, both militarily and economically, for centuries. Russia views the South Caucasus as part of its natural sphere of influence and stands ready to exert its influence by force if necessary.

Georgia. In August 2008, Russia invaded Georgia, coming as close as 15 miles to the capital city of Tbilisi. A decade later, several thousand Russian troops occupied the two Georgian regions of South Ossetia and Abkhazia. Under the control of the pro-Russia Georgian Dream party since 2012, the government has deepened its ties with Russia and China and has implemented policies, such as the law on "transparency of foreign influence," that signal a shift away from Europe and the United States and toward Russia and China.

In the 2024 parliamentary elections, Russian influence was a significant factor, impacting the outcome and raising concerns about Georgia's future trajectory. Georgian Dream won again with a clear message that cautioned against aligning with the West, which it argued could lead to Georgia's fate mirroring that of Ukraine. This outcome, coupled with Russian interference through disinformation and hybrid warfare tactics, has led to accusations of a rigged election and a slide back into Russia's sphere of influence.[24]

As in Moldova's Transnistria region, Russia has deployed troops in Georgia, supporting the breakaway regions of South Ossetia and Abkhazia since 2008, and in 2024, satellite imagery revealed the construction of a new Russian naval base in Ochamchire.[25] This development follows Ukraine's successful attacks on Russia's Black Sea Fleet, which prompted Russia to relocate some of its naval assets and establish a more secure base farther from potential Ukrainian strikes. The construction is seen as a strategic move by Russia to solidify its presence in the Black Sea region and potentially to expand its influence.[26]

Nagorno–Karabakh. Another major source of regional instability has been the Nagorno–Karabakh conflict, which began in 1988 after Armenia asserted territorial claims over Azerbaijan's Nagorno–Karabakh Autonomous Oblast. In the aftermath of a conflict in 2020, which ended with a Russian-brokered ceasefire, another war over the contested enclave was in the offing. Following Azerbaijan's lightning offensive and occupation of Nagorno–Karabakh in September 2023, the ethnic Armenian enclave was officially dissolved on January 1, 2024.[27] Faced with the prospect of rule by Azerbaijan, more than 100,000 people—almost all of Nagorno–Karabakh's population—fled to Armenia in a single week. In August 2025, the two governments signed an "Agreement on the Establishment of Peace and Interstate Relations" to end the nearly 40-year conflict. Since the signing, there has been a notable reduction in border hostilities with reports of "uninterrupted calm" during this time period.

In the 2023 Armenia–Azerbaijan conflict over Nagorno–Karabakh, Russia's role shifted from that of a mediator to that of a less decisive observer. While Russia brokered the ceasefire in 2020 and deployed peacekeepers, it did not intervene to stop the 2023 Azerbaijani offensive, ultimately contributing to Azerbaijan's regaining control of Nagorno–Karabakh. Russia's influence subsequently waned as Azerbaijan gained full control, leading Armenia to seek alternative security partners.[28]

For decades, Russia has viewed the South Caucasus as a vital theater and has used military aggression, economic pressure, and the stoking of ethnic tensions to exert influence and control, usually to promote outcomes that are at odds with U.S. and NATO interests. It is certain that Russia will continue to try to exert its influence in the region, but the war in Ukraine has caused its power to decline in relative terms, at least temporarily.

The Western Balkans. Since the end of the Cold War, U.S. policy in the Western Balkans has focused on creating a secure and prosperous region that eventually will be part of the transatlantic community. Russia's interests are at odds with this goal: Moscow alleges that NATO enlargement in the Balkans is one of the biggest threats to Russia. Moscow therefore seeks to sever the transatlantic bond forged with the Western Balkans by sowing instability and increasing its economic, political, and military footprint in the region.

Serbia. Russia's goal in the Balkans is clear: to create difficulties for NATO and the EU in the region.[29] Moscow seeks to keep the frozen conflict in the Balkans—like the one in Moldova—from thawing in ways that would undermine Russia's interests.[30]

While Serbia and Russia historically have maintained close ties, by 2025, Serbia was seeking to balance its relations with Russia with its desire to join the EU. Due to these aspirations, the country

has come under pressure to join EU sanctions against Russia, something Serbia has so far refused to do. In October 2024, Serbian President Aleksandar Vučić stated that his country was determined to "accelerate" its efforts to become an EU member state. This nuanced policy toward the West has pushed Belgrade to distance itself from Russia's defense industry, all the while awarding major military contracts to European companies. These include Serbia's purchase of 12 Rafale fighter jets from France. In January 2025, Serbia canceled a number of contracts to purchase Russian weapons, underlining a possible realignment in military procurement.[31]

Russia recently accused Serbia of supplying arms to Ukraine through third countries, potentially straining relations.[32] According to the Russian Foreign Intelligence Service (SVR), Serbia furnished Ukraine with hundreds of thousands of shells for rocket launchers and howitzers as well as a million rounds of small-arms ammunition through mostly state-owned defense factories. The sales allegedly went through the Czech Republic, Poland, Bulgaria, and more recently through African countries.[33] Russia's SVR attacked Belgrade in a statement claiming that "Serbia's military industry is trying to shoot Russia in the back.... The cover for anti-Russian actions is a simple scheme using fake end-user certificates and intermediary countries."[34]

Bosnia and Herzegovina. Russia is also active in Bosnia and Herzegovina—specifically, the ethnically Serb Republika Srpska, one of two substate entities inside Bosnia and Herzegovina that emerged from that country's civil war in the 1990s. Moscow knows that exploiting internal ethnic and religious divisions among the country's Bosniak, Croat, and Serb populations is the easiest way to prevent Bosnia and Herzegovina from entering the transatlantic community. Republika Srpska's current unofficial leader, Milorad Dodik, has long advocated independence for the region and has enjoyed a very close relationship with the Kremlin. Dodik has long planned to withdraw Republika Srpska from Bosnia and Herzegovina's state institutions.[35] In June 2022, the Constitutional Court of Bosnia and Herzegovina ruled unconstitutional the Declaration on Constitutional Principles of Republika Srpska, which was passed by the entity's national assembly in December 2021 and allowed "the establishment of an army at the entity level, the exit from the taxation system, and the establishment of the High Council of Judges and Prosecutors within the entity."[36]

Dodik continues to threaten to break Republika Srpska away from Bosnia and Herzegovina and refuses to recognize state-level institutions based in Sarajevo. In March 2025, a court in Sarajevo issued an international arrest warrant for Dodik following his order the previous month barring police representing Bosnia's central authorities from operating in Republika Srpska. A defiant Dodik visited Moscow once again days after the warrant was issued.[37] In April, an attempt by Bosnia's state-level law enforcement agency to arrest Dodik on a warrant for violating constitutional order was blocked by his security and entity-level police.[38] As of this writing, the situation remains at an impasse with Dodik continuing to reiterate Republika Srpska's intention to move forward with the declaration despite the Constitutional Court's rulings.[39]

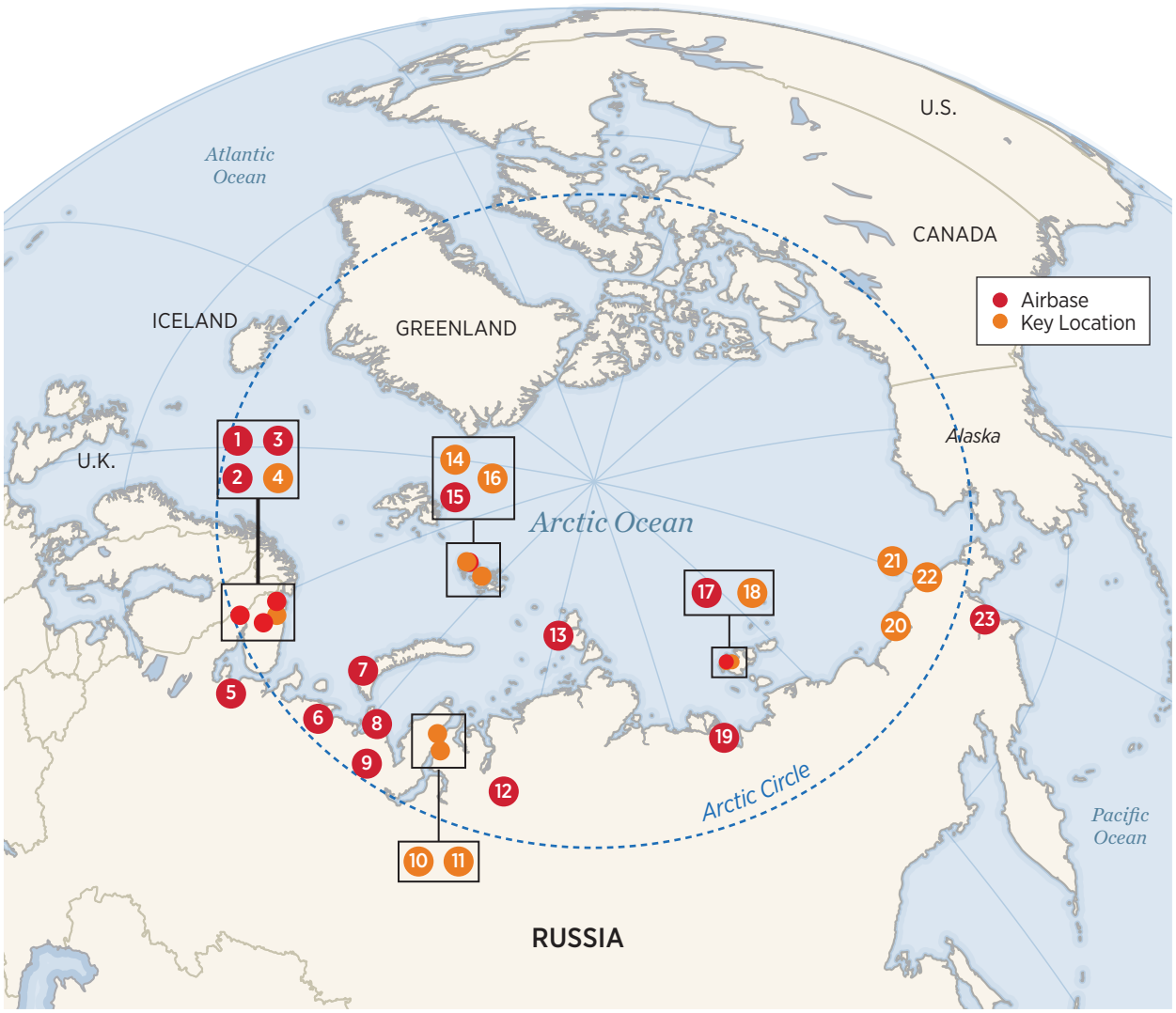
Kosovo. Another Balkan flashpoint is Kosovo. Russia has consistently opposed international recognition of Kosovo[40] and has condemned Kosovo's decision to establish its own armed force. Moscow aims to obstruct Kosovo's integration with the West, frequently by exploiting grievances within the Serbian minority. Kosovo and its Western allies have long accused both Serbia and Russia of attempting to destabilize the country.

Tensions escalated in September 2023 when a group of armed Kosovo Serbs and Serbian militants ambushed Kosovo police units in the village of Banjska in northern Kosovo, killing one policeman and wounding two others. The Kosovo government denounced the assault as a "terrorist attack" and called for a thorough international inquiry into Serbian involvement in the violence.[41] Serbian President Vučić denied any connection to the incident, pointing the finger instead at local Kosovo Serbs "who do not want to be ruled by Prishtina." Belgrade has repeatedly accused Kosovo of oppressing Serb communities in the country's North and has demanded more autonomy for them.[42] Russia's Foreign Ministry blamed Kosovo for the escalation, claiming that "[t]here is no doubt that yesterday's bloodshed is a direct and immediate consequence of the course of the so-called 'Prime Minister' Albin Kurti to incite conflict." Moscow warned that the situation could spiral out of control, pushing "the entire Balkan region to a dangerous precipice," and that there "is a direct threat of the resumption of

MAP 9

Russian Militarization of the Arctic

In the face of growing competition from NATO countries in the region, the Arctic is becoming an increasingly important component of Russia's military strategy and posture.



1. Alakurtti Airbase
2. Olenya Airbase
3. Luostori/Pechenga Airbase
4. Severomorsk
5. Lakhta Naval Airbase
6. Naryan Mar Airport
7. Rogachevo Military Base
8. Amderma Airport
9. Vorkuta Sovetsky Airbase
10. Yamal LNG Plant
11. ARCTIC LNG 2
12. Norilsk/Alykel Airport
13. Stedny Ostrov Airfield
14. Alexandra Land
15. Nagurskoye Airbase
16. Franz Josef Land
17. Temp Airbase
18. Kotelny Island
19. Aeroport Tiksi
20. Pevek Floating Nuclear Powerplant
21. Wrangel Island
22. Cape Schmidt
23. Anadyr Ugolny Airport

SOURCE: Heritage Foundation research.

heritage.org

the ethnic cleansing previously practiced by Kosovo-Albanian radicals."[43]

Militarization of the Arctic

Russia considers the Arctic vital both to its economic interests and to its national security. For more than a decade, the Russian government has prioritized the region in its national security strategy, foreign policy, and economic planning. About 25 percent of Russia's territory lies above the Arctic Circle, and 65 percent of its land is covered by permafrost. The Arctic holds key natural resources, hosts under-ice zones where Russian ballistic missile submarines operate, and contains a dense network of critical military infrastructure.[44]

Russia is concerned about increasing competition from Western countries in the region, and its worries increased in 2023 and 2024 when NATO enlarged to include two previously nonaligned Arctic states, Finland and Sweden, respectively. Russia is interested in Greenland but mainly because of its "proximity to strategically important naval routes between the Arctic and Atlantic Oceans—including for nuclear-armed submarines—and the fact that Greenland hosts a key U.S. military base."[45]

According to the Defense Intelligence Agency's 2025 Global Threat Assessment, the Arctic is becoming an increasingly important component of Russia's military strategy and posture:

> Russia aspires to improve its military posture in the Arctic to enhance its ability to defend against a strategic attack, and to respond to Western operations in the region. Much of Russia's strategic nuclear and conventional forces are stationed on or near the Kola Peninsula, in some cases only a few miles from the Finnish border.
>
> Though the war in Ukraine has heavily degraded specialized ground forces previously based in the Arctic, the rest of Russia's naval, strategic air, and air defense forces stationed in the region are mostly intact.[46]

However, the war in Ukraine has strained Russia's finances and limited its military resources, hindering its Arctic ambitions. In response, Russia has sought closer cooperation with China and welcomed greater involvement from non-Western countries to counterbalance NATO's perceived advantages. Both Russia and China are actively expanding their presence and infrastructure in the Arctic and aim to influence international norms in the region to advance their security and economic objectives.[47]

In addition to pursuing military goals, Russia is focused on advancing its economic interests in the Arctic. The region holds vast, untapped reserves of oil and gas, and a large portion of these reserves lies within Russian territory. Moscow is particularly invested in developing the Northern Sea Route (NSR), which it aims to transform into a major global shipping corridor. By expanding its Arctic energy projects and enhancing maritime infrastructure, Russia seeks to capitalize on the anticipated surge in trade through the region.[48]

Shipping and Energy. Russia is expanding oil and gas extraction and transportation facilities in the Arctic with a focus on projects like the Yamal LNG and Arctic LNG-2 plants, which are key exporters of liquefied natural gas (LNG). More than half of the cargo traffic along the NSR in 2024 consisted of LNG.[49]

Military Bases. Russia has been actively modernizing and expanding existing military installations in the Arctic, including air bases, radar facilities, and naval bases, along its Arctic coastline. This infrastructure includes:

- **Novaya Zemlya,** equipped with air defense systems, including Bastion-P and Pantsir-S1, to defend against potential threats.
- **Severomorsk (Kola Peninsula),** home to the Northern Fleet, which is crucial for defending Russia's Arctic coastline and nuclear assets.
- **Franz Josef Land,** a remote archipelago with a military base that potentially could serve as a launch point for operations in the high Arctic.
- **Kotelny Island,** equipped with air defense systems, contributing to a layered coastal defense system.[50]

Additional bases are located on Wrangel Island, Cape Schmidt, and Alexandra Land.

Air Power. Air power in the Arctic is increasingly important to Russia, which has 14 operational

airfields in the region. Upgrades in 2024 included a newly expanded and paved runway at the Temp Air Base at the western shore of Kotelny Island, part of the New Siberian Islands.[51] Russia also has invested heavily in developing drones capable of operating in the High North. Specifically, "Russia has deployed drones such as the *Orlan*-10 and *Inokhodets* and they are also developing the S-70 *Okhotnik*, a plane-sized combat drone designed for attack and surveillance missions in Arctic conditions, though details about its technology remain highly secretive."[52]

In 2024 and 2025, Russia conducted a variety of military exercises in the Arctic, including exercises involving MiG-29K fighters, simulating real-world combat scenarios.[53] The deployment of MiG-29Ks, including those based at Severomorsk-3, is seen as a demonstration of Russia's commitment to modernizing its air power in the region. Long-range patrol flights by Russia's Tu-160 strategic bombers over international Arctic waters have drawn Western attention and are part of a larger pattern of Russian military activity in the region.[54]

The North American Aerospace Defense Command (NORAD) and NATO are closely monitoring Russian air activity in the Arctic, and fighter jets like F-16s and F-35s have been scrambled repeatedly to intercept or shadow Russian aircraft. In February 2025, it was reported that "[s]everal Russian strategic bombers and fighter jets were intercepted by North American air defense forces as they flew over international airspace near Alaska." Russia subsequently confirmed that "two of its Tu-95MS strategic missile carriers had flown over the Bering Sea accompanied by Su-30 jets, and that it had made similar flights north of Norway and over international waters near Russia's far east."[55]

Nuclear Power. In June 2022, Russia withdrew from an Arctic nuclear safety program, prompting Western concerns that the move signaled "a new period of heightened nuclear risks."[56] Russia has also deployed a floating nuclear power plant off the northern coast of Siberia near the town of Pevek to supply energy for nearby resource-extraction projects, including gold and tin mines. Russia's state-owned nuclear company, Rosatom, plans to build four additional floating reactors in the area by 2030.[57]

Naval Presence. Submarines form the core of Russia's Northern Fleet, and the *Knyaz Pozharsky*—Russia's newest Borei-A–class nuclear-powered ballistic missile submarine—is scheduled to join the fleet in June 2025. Moscow promotes the Borei-A class as one of its most advanced in both design and capability, positioning it as the foundation of Russia's naval strategic nuclear forces for the coming decades. This development highlights Russia's ongoing naval modernization, evolving approach to nuclear deterrence, and commitment to strengthening the Northern Fleet—especially in the context of growing military and economic competition in the Arctic.[58]

Russia is also developing and deploying other naval assets in the Arctic, including Arctic patrol ships and nuclear icebreakers, as part of its efforts to enhance its capabilities in the region. According to a 2025 U.S. Naval Institute report:

> Russia continues to expand its icebreaking and patrol capabilities in the waters of the far north, and it recently introduced the new Arktika-type Arctic patrol ships, also known as Project 23550. The lead ship, Ivan Papanin… conducted trials in the Gulf of Finland earlier this year.… Sea trials are expected to continue around Franz Josef Land at least through June 2025, with commissioning expected by the end of this year.… A second ship, to be named the Nikolay Zubov…is expected to join the fleet around 2027.[59]

Increased Activity in the Mediterranean

Russia's naval presence in the Mediterranean is not designed for a full-scale naval battle but rather for a "long game" of gradually expanding its influence, securing access to ports and bases, and contesting NATO's dominance, according to the NATO Defense College.[60] Another observer has pointed out that:

> Russia's strategy uses the Mediterranean's geography to protect Russia's southern flanks while seeking to challenge the naval supremacy of the North Atlantic Treaty Organization (NATO) and the United States in the eastern Mediterranean. Russia depends on maintaining and gradually expanding its naval presence in the Mediterranean while also securing expanded access to ports and bases, with the possibility of eventually contesting NATO's dominance in the central Mediterranean as well.[61]

Syria. Russia has maintained a military presence in Syria for decades, but in September 2015, it became the decisive force in the country's civil war by preventing the overthrow of Bashar al-Assad and bolstering his military position. This intervention enabled Assad's forces to reclaim territory lost during the conflict. While Assad aimed to reassert control over all of Syria, Russia's primary objective was to secure and strengthen its influence in the region. Moscow used its support for Assad as a means to achieve that strategic goal.

The fall of the Assad regime in December 2024 to forces led by former al-Qaeda affiliate Hay'at Tahrir al-Sham (HTS) was a major setback to Moscow in its efforts to deepen Russia's military footprint in Syria. Following the new Syrian government's move to terminate the investment agreement that granted Russia the operation of Tartus Port for 49 years, Russia has begun to vacate the port.[62]

The collapse of Assad's regime could significantly weaken Russia's geopolitical position in the region, undermining its ability to project power in the Mediterranean and Africa. For instance, Khmeimim Air Base has been central to Russia's efforts in Africa where operations in the Sahel have expanded the country's influence while "pressuring Europe (e.g., through strategic manipulation of migrant flows)."[63] Using this platform, Russia has successfully diminished France's influence in the region, causing France to withdraw from the Sahel. Furthermore, Africa is economically vital for Russia, particularly for the Wagner Group, because of mining contracts with countries in the region.[64]

As of January 2026, Russia continued to maintain a military presence at Khmeimim Air Base and the Tartus naval base despite the Assad regime's fall. While there were reports that equipment was being moved and preparations were being made for possible evacuation, especially after the Syrian opposition's success in December 2024, the Russian military remained in control of both bases.[65] Unconfirmed reports suggest that negotiations are already underway with Syrian fighters to maintain access to the bases at Tartus and Khmeimim.[66] The Tartus base is Russia's only replenishment and repair station in the Mediterranean Sea.[67]

Egypt. Russia leverages its relationship with Egypt—the most populous country in the Middle East and North Africa—to reassert and strengthen its regional influence, directly challenging the long-standing primacy of the United States. Military cooperation and arms sales have been key instruments in Russia's strategy. From 2016 to 2021, Russia overtook the United States as Egypt's largest arms supplier with a peak in exports in 2017. These deals included surface-to-air missile systems, anti-ship missiles, and combat aircraft. However, Egypt's efforts to acquire Russia's advanced Su-35 fighter jets were ultimately thwarted by the United States.[68] Referring to bilateral relations with Egypt, Russian Foreign Minister Sergei Lavrov has said that "[w]e continue to expand our strategic partnership in all areas, including the economy, trade, and the investment sector.... Military and military-technical ties occupy a very important place."[69]

Libya. The Wagner Group aided the failed efforts of Khalifa Haftar's Libyan National Army to take control of Libya's capital beginning in 2018. Since then, Russia has remained active in Libya as part of its broader strategy to project power in the Mediterranean and challenge Western influence in the region.[70] The Wagner Group uses Libya as a forward operating base for its activities across the Sahel, particularly in Chad and Niger, and has established networks of influence with local communities and smuggling groups in southern Libya. Through these networks, Wagner has facilitated the transfer of weapons and in some cases has provided equipment and expertise for the extraction of gold and other valuable minerals. Following the collapse of the Assad regime in Syria, Russia evacuated many of its forces and undertook a significant redeployment of military assets to Libya.[71] This has involved the redeployment of personnel and equipment to Haftar-controlled areas with a notable increase in the number of Russian personnel at Brak al-Shati air base.[72] The U.S. is reevaluating its stance on Haftar because of Russia's growing influence in the region.[73]

Threats to the Commons

The situation with respect to the "commons," particularly European airspace, has become more unpredictable since Russia's second invasion of Ukraine.

Sea. Russia was originally thought to be behind the September 2022 sabotage of the Nord Stream 1 and 2 pipelines. While the investigations are ongoing, there is no conclusive evidence linking Russia directly to the sabotage. Investigations

have identified evidence of explosives and a sailing yacht that may have been used in the attack, but no evidence adduced so far points directly to Russia's involvement.[74]

Russian threats to the maritime theater also include activity near undersea fiber-optic cables. In late 2024 and early 2025, multiple incidents of undersea cable disruptions in the Baltic Sea raised concerns about possible Russian involvement in hybrid warfare and sabotage. In November 2024, two telecommunication cables, the BCS East–West Interlink and C-Lion1, were disrupted; in December 2024, Estlink 2, a power cable connecting Finland and Estonia, and several telecom lines were damaged; and in January 2025, an incident involving a Sweden–Latvia telecom cable led to investigations and the seizure of a Maltese-flagged bulk vessel.[75] While damage has been attributed to accidents like unintentional anchor drags, some incidents have sparked suspicion of intentional acts, and some Western intelligence officials believe the Chinese cargo ship *Yi Peng 3* may have been involved in at least some of the incidents.[76] However, in the absence of material evidence linking the incidents to either Russia or China, the current consensus among security services suggests that the damage was more likely to be the result of maritime accidents than it was to be the result of Russian sabotage.[77]

Russia's "shadow fleet" allows the country to circumvent sanctions and continue to export oil, thus funding its war effort. The EU has identified 342 vessels in Russia's shadow fleet.[78] These vessels transport Russian oil and are involved in ship-to-ship transfers using falsified documentation and other practices that make them difficult to monitor. They often utilize "flag states" with lax regulations, further obscuring their identity and operations.[79]

Airspace. Russia has increasingly been conducting provocative, aggressive, and reckless military flights near U.S. and European airspace. These violations of NATO members' sovereign airspace are deliberate actions meant to test the Alliance's defenses and serve as practice for potential future conflicts. In 2024, NATO forces across Europe scrambled more than 400 times according to Allied Air Command. In the majority of cases, jets were scrambled when aircraft approached European borders without properly identifying themselves or communicating with air traffic control.[80]

There have been several incidents involving Russian military aircraft flying in Europe without using their transponders. In September 2024, the Latvian Air Force reported that NATO fighter jets were scrambled to intercept five Russian military aircraft flying over the Baltic Sea without flight plans or active transponders.[81] In February 2025, according to the Netherlands Ministry of Defence, two Dutch F-35 fighters intercepted a formation of three Russian military aircraft near Poland and "escorted the formation from a distance and handed over the escort to NATO partners."[82] The same month, two Royal Norwegian Air Force F-35 jets scrambled when two Russian TU-95 Bear H Bomber Aircraft escorted by two Flanker-Ds flew close to NATO airspace in the High North.[83]

There have been incidents near North American airspace as well. In February 2025, two TU-95 Bear bombers, two SU-35 fighters, one TU-142 F/J, and one A-50 Mainstay flew over the Bering Sea for approximately two-and-a-half hours near Shemya Island in the western Aleutians.[84] The Russian aircraft were flying in the Alaska Air Defense Identification Zone, which stretches out 150 miles from sovereign U.S. territory.

Cyberspace. Russian cyber capabilities are a sophisticated, active, and an ongoing threat to economic, social, and political targets around the world. Moscow also appears to be increasingly aggressive in its use of digital techniques, often employing only the slightest veneer of deniability in an effort to intimidate targets and openly defy international norms.

Ukraine is a consistent and sustained target of Russian cyberattacks. The scale of these attacks was magnified in the period leading up to Russia's second invasion in February 2022. Russia sought to leverage overwhelming cyberattacks to advance its military offensive. According to the Center for Strategic and International Studies:

> Russian cyberattacks on Ukraine surged by nearly 70% in 2024, with 4,315 incidents targeting critical infrastructure, including government services, the energy sector, and defense-related entities. Ukraine's cybersecurity agency reported that attackers aimed to steal sensitive data and disrupt operations, with tactics such as malware distribution, phishing, and account compromises.[85]

In October 2024, "Russian cybercriminals sent information-stealing malware to an unknown number of Ukrainian draft-age men to undermine Ukraine's military recruitment efforts."[86]

After Russia's 2022 invasion of Ukraine, criminal "hacktivists" pledged support for the Russian government and targeted the United States and other countries that were providing material support to Ukraine. Russian state-sponsored cyber actors continue to seek ways to improve their sophisticated ability to execute stealthy cyber operations and identify new vulnerabilities to leverage against a variety of critical infrastructure targets. In late 2023, these actors gained access to Microsoft Corporation's internal emails, including those of its cybersecurity teams, which could provide them with unique insights for future campaigns and make it more difficult for victims to detect their activity. The operation was dubbed Midnight Blizzard.[87] In January 2024, "pro-Russia criminal hacktivists disrupted multiple U.S. municipality water distribution systems, demonstrating criminal hacktivist intent and capability to disrupt US critical infrastructure entities."[88]

U.S. allies are also frequent targets of Russian cyberattacks. In May 2024, for example:

> Germany accused Russian hackers of breaking into the emails of Germany's Social Democrats, the leading party in its governing coalition, and recalled its ambassador from the country. The campaign started in March 2022 when hackers exploited vulnerabilities in Microsoft Outlook to target the party's executive committee, as well as German defense and aerospace companies.[89]

Also in May 2024, both Poland and the Czech Republic "accused Russian cyber spies of targeting government and infrastructure networks" at "around the same time Russian hackers attacked the German government. Hackers gained access by exploiting a Microsoft Outlook vulnerability, and the extent of the compromised data is currently unknown."[90]

Threats to the U.S. Homeland

Russia continues to be the only adversary in Europe that possesses the capability to threaten the U.S. homeland using both conventional and nonconventional means. Throughout the Russia–Ukraine conflict, Russia has threatened nuclear use and conducted military exercises to signal its resolve and deter Russia-perceived Western involvement in the conflict. However, according to a recent U.S. Intelligence Community assessment, "Russia is very unlikely to use nuclear weapons in the conflict unless Russian leadership judged it faced an existential threat to the regime."[91]

Although there does not currently appear to be a strong likelihood that Russia will use its nuclear capabilities against the United States directly, Putin continues to cast the war in Ukraine as an inevitable confrontation with the United States, which he accuses of threatening Russia by meddling in its backyard and enlarging the NATO military alliance.[92] Russia's most recent national security strategy does not mention NATO directly, but it does claim that the United States is planning to deploy "intermediate-range and short-range missiles in Europe and the Asia-Pacific region."[93]

In July 2024, the United States announced that it plans to deploy medium-range conventional missiles in Germany in 2026.[94] In a November 21, 2024, televised address, Putin declared that:

> Russia has voluntarily and unilaterally committed not to deploy intermediate-range and shorter-range missiles until US weapons of this kind appear in any region of the world.... I would like to emphasize once again that it was not Russia, but the United States that destroyed the international security system and, by continuing to fight, cling to its hegemony, they are pushing the whole world into a global conflict.[95]

Strategic Nuclear Threat

With its massive nuclear arsenal, Russia is one of the few nations with the ability to destroy many targets in the U.S. homeland and in U.S.-allied nations as well as the capability to threaten and prevent free access to the commons by other nations. In early 2025, it was estimated that Russia has the world's largest nuclear arsenal with an inventory of approximately 5,459 nuclear warheads, according to the *Bulletin of the Atomic Scientists*.[96] Of these, roughly 1,718 are deployed, according to Congress.gov.[97] The remaining warheads either are in reserve stockpiles or have been retired and are slated for dismantling.

Russia has both intercontinental-range and short-range ballistic missiles and a varied arsenal of nuclear weapons that can be delivered by sea, land, and air. It is also investing significant resources in modernizing its arsenal and maintaining the skills of its workforce. An aging nuclear workforce could impede this modernization, but modern weapons and equipment still allegedly constitute 95 percent of Russia's nuclear triad.[98]

In 2024, Russia published "Fundamentals of the State Policy of the Russian Federation in the Area of Nuclear Deterrence," a new version of its nuclear doctrine.[99] In this new version, Russia has lowered the threshold for its use of nuclear weapons.[100] This is significant because Russia already had the world's lowest threshold for nuclear weapons use.[101] General Cavoli pointed out the risks of the new doctrine in his 2025 EUCOM posture statement: "Recently, the Kremlin updated its nuclear policy, which is intended to communicate a lower nuclear threshold and outlines the range of contingencies that could justify the use of nuclear weapons."[102] The new scenarios that lower the threshold for nuclear use and are potentially destabilizing include "aggression against the Russian Federation and/or the Republic of Belarus as members of the Union State with the use of conventional weapons, posing a grave threat to their sovereignty and/or territorial integrity" and "the receipt of reliable information about the massive launch (take-off) of aerospace strike capabilities (strategic and tactical aircraft, cruise missiles, unmanned, hypersonic, and other aircraft) and their crossing of the state border of the Russian Federation."[103]

Just as it is doing to deter Western support for Ukraine, Moscow has repeatedly threatened U.S. allies in Europe with nuclear deployments and even preemptive nuclear strikes.[104] The Russians justify their aggressive behavior by pointing to deployments of U.S. missile defense systems in Europe.

Patriot systems were first deployed to Ukraine in 2023,[105] and more systems have been provided since then. In early 2025, the United States decommissioned 90 interceptors from Israel and sent them to Ukraine.[106] The Missile Defense Complex in Deveselu, Romania, has assumed an essential role for the security of the NATO Alliance. In addition, as of July 2024, a new U.S. ballistic missile defense site in Redzikowo, Poland, became operational. Dubbed "Aegis Ashore," the sites are part of a NATO missile shield that is designed to detect, track, and intercept ballistic missiles in flight.[107]

The U.S. withdrew from the Intermediate-Range Nuclear Forces (INF) Treaty in 2018 in response to Russian violations, and in 2023, Washington declared Moscow to be noncompliant with the New START Treaty and denounced Moscow's invalid suspension of that treaty. In March 2023, Putin announced that Russia would deploy tactical nuclear weapons to Belarus, which had relinquished its nuclear weapons to Russia in the 1990s in exchange for security guarantees.[108] However, according to Ukrainian reports, Russia has yet to deliver these nuclear weapons to Belarus.[109] In December 2024, Russia announced that it will scrap a moratorium on deployment of intermediate and shorter-range nuclear-capable missiles because "the United States has deployed such weapons in various regions around the world."[110]

Russia's large nuclear arsenal remains the only existential threat to the U.S. homeland originating from Europe and Eurasia. While the likelihood of its use is currently low, Moscow's ongoing nuclear threats against Europe underscore the arsenal's continued importance in Russian strategic planning. This significant nuclear capability will remain a key factor influencing both Russia's military and political decisions as well as the intensity of its aggressive actions toward other nations.

Quality of Local Forces

Recently published data provide a sense of Russia's current military strength in terms of materiel.[111] Among the key weapons in Russia's inventory are 5,580 nuclear warheads, 5,750 main battle tanks, 131,527 armored vehicles, and approximately 13,673 pieces of artillery (including both self-propelled and towed). The navy has one aircraft carrier (undergoing extensive refit); 63 submarines (including 14 ballistic missile submarines); 10 destroyers; 12 frigates; and 123 patrol and coastal combatants. The air force has 4,957 total aircraft.

In addition, Russia has one of the largest armies in the world. As of April 2025, Russia's armed forces included approximately 1,320,000 active military personnel, of which 160,000 are conscripts.[112] Russia also has a total reserve force of 2 million for all of its armed forces.[113]

Russian Losses in Ukraine. The war in Ukraine has exposed major weaknesses in the

Russian military and significantly diminished Russia's short-term ability to threaten U.S. and European interests in Europe. However, it has also revealed the depth of Russia's stockpiles of equipment, munitions, and supplies, as well as the Putin government's continued willingness to invest both lives and resources in the conflict. As summarized by General Cavoli:

> Despite extensive battlefield losses in Ukraine, the Russian military is reconstituting and growing at a faster rate than most analysts had anticipated. In fact, the Russian army, which has borne the brunt of combat, is today larger than it was at the beginning of the war—despite suffering an estimated 790,000 casualties. In December 2024, Moscow ordered the military to increase its strength to 1.5 million active service members and is recruiting approximately 30,000 troops per month. Russian forces on the frontlines of Ukraine are now at over 600,000, the highest level over the course of the war and almost double the size of the initial invasion force.[114]

Personnel. Losses of Russian officers and crews vary widely. BBC Russian Service, in collaboration with *Mediazona*, analyzed open-source data including obituaries, cemetery records, and social media posts to identify Russian soldiers killed in action. The report says it confirmed the names of more than 106,745 Russian soldiers killed as of May 4, 2025.[115] However, this analysis excludes casualties among pro-Russian separatist forces in the Donetsk and Luhansk regions, which could add another 21,000 to 23,500 deaths, potentially bringing the total to 185,000 to 260,700.

As of April 2025, U.S. officials estimate that Russia has suffered more than 790,000 casualties (both killed and wounded).[116] Other estimates place Russian casualties as high as 900,000 and even one million.[117] These numbers could reflect Russia's continued use of high-casualty tactics—"including a reliance on massed personnel attacks and massed artillery fire—and limited operational-level flexibility. Casualty totals likely include mobilized personnel, volunteers, members of the Russian National Guard, recruited prison convicts, and personnel from Russian-occupied Ukrainian regions."[118] Many of these losses include Russia's elite and professional soldiers in addition to its junior officer corps.[119] Less experienced recruits replacing these troops have less training and are seemingly eroding the effectiveness of some Russian military units, which could have a long-term detrimental effect on Russia's military capabilities.[120]

Recruitment and Mobilization. Although Russia's failure to take Kyiv in the early stages of its second invasion led to significant losses among its best soldiers, it has since rebuilt its forces using conscripts and private volunteer forces and now has the fifth-largest military force in the world.[121] In September 2024, Putin ordered an increase in the size of the Russian military to 1.5 million active-duty troops.[122] Russia's draft budget for 2025–2027 allocates 30 billion rubles (about $370 million at then-current exchange rates) per year for sign-on bonuses.[123] However, Russian authorities, probably fearing domestic opposition, have not ordered a large-scale mobilization since September 2022 when 300,000 were called up outside the regular draft.[124]

The Russian defense ministry has prioritized the recruitment of contract soldiers to replenish ranks. Russian official sources report that these efforts have been a success: A recent spring recruitment drive netted "160,000 men between 18 and 30 [for] Russia's armed forces—an increase of 10,000 on last year's spring drive, and a rise of more than 15,000 compared to three years ago."[125]

Good pay and bonuses have been a major factor in attracting recruits. According to the Congressional Research Service (CRS):

> Contract recruits may earn high salaries as well as sign-on bonuses offered by both regional and federal authorities. MoD [Ministry of Defense] salaries may be several times the average Russian monthly wage (including sign-on bonuses reportedly as high as 22 times the monthly wage), as well as additional payments should soldiers be killed or wounded. Since late 2024, Russia's regional authorities have increased one-time signing bonuses and advertising campaigns to attract new recruits. These measures may indicate increased recruitment difficulties.[126]

The Ministry of Defense also uses coercive conscription and recruitment methods that include "penalties for ignoring draft summons, pressure on

conscripts to sign contracts, and punishments for canceling contracts."[127] In addition, "Russia has instituted a number of 'stop-loss' policies to prohibit soldiers from resigning and bolster the number of soldiers available, including by forcing wounded soldiers back to the front lines."[128]

General Cavoli testified in April 2025 that Russia "is recruiting approximately 30,000 troops per month" to replenish and rotate units.[129] According to the CRS:

> This rate is arguably sufficient to sustain Russia's current scope of operations in Ukraine, but it may be insufficient to support large-scale offensive operations. Russian officials have claimed the military recruited almost 440,000 personnel in 2024, but some observers assert these figures are likely exaggerated and do not accurately reflect the often ad hoc nature of current Russian military recruitment. Additionally, reports suggest the training of recruits is often substandard and rushed, undermining the military's ability to conduct complex offensive operations.[130]

In recent years, Russia has increasingly relied on paid "volunteer" forces trained at special forces bases and often operating under the direction of Russian special forces units to minimize domestic political fallout from military casualties abroad. Moscow has used these forces in Ukraine, as well as in Libya and Syria, because they reduce costs, preserve "a degree of deniability," and allow personnel losses to be concealed from public scrutiny.[131]

The most infamous such mercenary unit, the Wagner Group, has undergone significant changes in structure and operations in the past two years since a failed mutiny by its members in 2023. Following the deaths of its founder, Yevgeny Prigozhin, and key leaders a few months after the mutiny, the group was largely dismantled and restructured under the Russian Ministry of Defense. This reorganization led to the emergence of a new entity known as the Africa Corps, which has assumed many of Wagner's previous missions, particularly across the African continent.[132] Wagner formally withdrew from Mali on June 12, 2025, as the Kremlin continued to transition control of its military operation in Africa to the Ministry of Defense–backed Africa Corps.[133]

In July 2016, Putin signed legislation establishing the National Guard (Rosgvardia), a force of roughly 400,000 civilian and military personnel placed under his direct control.[134] In response to internal security challenges such as the Wagner Group mutiny in 2023, Putin authorized the arming of Rosgvardia with heavy weaponry in order to bolster its capabilities both for internal security and for operations in Ukraine.[135] Rosgvardia has incorporated former Wagner Group assault detachments into its structure, forming volunteer corps for deployments in Ukraine and Africa.

Rosgvardia remains actively involved in the war in Ukraine. Estimates suggest that more than 30,000 Rosgvardia personnel are currently deployed in Ukraine, a fact that highlights their significant role in Russia's military campaign.[136] Rosgvardia was initially deployed along with regular Russian forces during the 2022 invasion, and its role has expanded over time. Currently, it is engaged in both combat and occupation duties across various regions of Ukraine.[137] Rosgvardia units are particularly active in the Zaporizhzhia and Kherson regions where they conduct combat missions that include the neutralization of Ukrainian drones. Their responsibilities encompass rear-area security, suppression of dissent in occupied territories, and direct combat operations.[138]

Equipment. As with the human toll, Russian equipment losses in Ukraine have been considerable. U.S. officials estimate that Russia has lost more than 3,000 tanks—"a higher number than its pre-war active duty tank inventory."[139] Other heavy equipment losses include armored personnel carriers, artillery and rocket systems, helicopters, and naval vessels. According to the CRS:

> Russia has responded to these losses by mobilizing its economy to support the war effort. Among other actions, it has directed civilian enterprises to manufacture products with military applications; it has transitioned the defense industry to round-the-clock production; and it plans to spend 40% of its 2025 federal budget on the military and security services. Russia's 2025 defense spending is estimated to be at 7.2 percent of GDP; some observers question whether the Russian government will be able to sustain such high levels of defense spending.[140]

This production is not entirely for new equipment. According to the CRS, Russian defense production has been focused largely "on refurbishing old equipment rather than producing new versions, particularly in the face of sanctions restricting the import of critical components. It remains unclear whether the defense industry can produce advanced weapon systems or increase production over the long term." Additionally, "U.S. officials assess that China is a crucial source of components for Russia's defense industry. Iran's supply of drones and North Korea's large supply of artillery ammunition and troops have also proven crucial to supporting Russian military operations."[141] However, supply and labor shortages have proven to be a persistent problem.

Russia has steadily expanded its defense production capabilities, notably increasing its output of drones. However, limitations such as shortages of components and manufacturing tools, full factory capacity, and labor constraints have reportedly forced the Russian defense industry to focus on quantity over quality. This shift includes the use of dual-use items—generally less effective than military-specific components—and reactivation of Soviet-era tanks and artillery. According to U.S. officials, most of Russia's replacement equipment comes from refurbished older models in storage rather than newly manufactured or modern systems. Some reports also suggest that Russia is building new factories to boost production capacity.[142]

In 2024, Russia produced and refurbished more than 1,500 tanks and approximately 2,800 infantry fighting vehicles (IFVs) and armored personnel carriers (APCs), effectively compensating for that year's losses. This replenishment relied heavily on reactivating older Soviet-era equipment from storage with about 70 percent of replacements coming from reserves and only 30 percent being newly manufactured.[143]

Despite these efforts, Russia's military industry faces significant challenges. Production of modern tanks like the T-90M remains limited with estimates suggesting that more than 200 T-90Ms have been delivered since the war began. Additionally, sanctions have hampered Russia's ability to acquire essential components, leading to a reliance on older models such as the T-55 and T-62, which are less effective on the modern battlefield.[144]

Command and Control. Despite attempts to decentralize leadership and increase autonomy, "the Russian military continues to operate with a Soviet-style centralized command."[145] This centralization has contributed to tactical and operational inflexibility that has resulted in failures like the unsuccessful attempt to seize Ukraine at the start of the war.

Following repeated military failures, in May 2024, Putin replaced Defense Minister Sergei Shoigu with an economics official, Andrei Belousov. Some observers believe that Belousov's appointment "reflected the Russian leadership's recognition that the war in Ukraine is a longer-term challenge and that managing economic and defense industrial resources is key to sustaining Russia's war effort."[146]

The Economy

Following a downturn in 2022 as a result of international sanctions imposed on Russia for its invasion of Ukraine, the Russian economy rebounded in 2023, recording a GDP growth of 3.6 percent. This recovery was driven by increased government spending, particularly on defense, and a surge in exports to countries like China and India, which helped to offset the impact of Western sanctions. Additionally, Russia's gross national income per capita reached $14,250, leading the World Bank to classify Russia as a high-income country for the first time since 2015.[147]

In 2024, the Russian economy experienced robust growth with GDP expanding by 4.1 percent. The surge was largely fueled by substantial military spending and increased household consumption. However, this growth was accompanied by rising inflation, which reached 9.3 percent. Analysts cautioned that the economy's heavy reliance on defense expenditures could pose risks to long-term stability.[148]

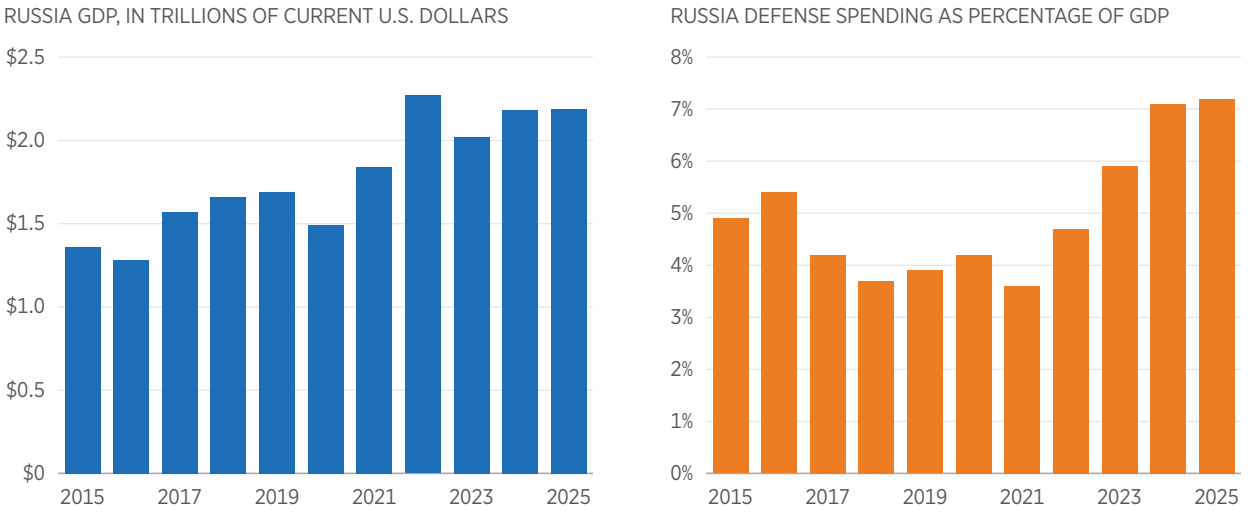
Economic growth in Russia slowed to 1 percent in 2025. Factors contributing to this slowdown include labor shortages, persistent inflation, and the long-term effects of sanctions, particularly in the technology sector. Also, declining oil prices have strained the federal budget, increasing the risk of deficits and limiting the government's ability to sustain high levels of military spending.[149]

Military Spending

In 2024, Russia's military expenditure reached an estimated $149 billion, which was 38 percent more than in 2023 and double the level in 2015.[150]

CHART 11

Military Spending in Russia Growing Faster than Economy



NOTE: Figures for 2024 and 2025 are estimates.
SOURCES: World Bank, "GDP (Current US$)—Russian Federation," https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=RU (accessed January 21, 2026); International Monetary Fund, "World Economic Outlook Database," https://www.imf.org/en/Publications/WEO/weo-database/2024/October/ (accessed January 21, 2026); World Bank, "Military Expenditure (% of GDP)—Russian Federation," https://data.worldbank.org/indicator/MS.MIL.XPND.GD.ZS?locations=RU (accessed January 21, 2026); and media reports by Stockholm International Peace Research Institute.

heritage.org

The country's military spending in 2024 was equivalent to 7.1 percent of GDP and 19 percent of total government expenditure, making Russia one of the world's top five nations in terms of defense spending.[151] Russia plans to spend 40 percent of its 2025 federal budget on its military and security services, an increase of 25 percent from 2024.[152] Analysts, however, caution about ascertaining exact expenditure numbers:

> Russia's military budget has become increasingly opaque since the full-scale invasion of Ukraine in early 2022. Around 30 per cent of budgetary spending was marked as classified in 2024. Russia's actual military spending in 2024 is also likely to be higher than the $149 billion estimated here: the budget was further amended in October 2024 to bolster Russia's war efforts, making it difficult to estimate total actual annual spending, and the military continued to receive additional contributions from regional budgets and extra-budgetary funding from other sources during the year.[153]

Much of Russia's military expenditure has been directed to funding new weapon systems for the Ukraine war and "subsidiz[ing] some arms producers that were reportedly on the brink of bankruptcy. Social support, including payments to military personnel, was another major expense, with spending reaching $9.4 billion by October 2024, surpassing the planned $5.7 billion in the initial budget."[154] The U.S. Intelligence Community has noted that:

> **Moscow's massive investments in its defense sector will render the Russian military a continued threat to U.S. national security, despite Russia's significant personnel and equipment losses—primarily in the ground forces—during the war with Ukraine.** Russia's air and naval forces, despite suffering some

> losses and expending substantial quantities of precision-guided munitions, remain capable of providing Moscow with regional and global power projection forces, while Russia's nuclear and counterspace forces continue to provide it with strategic deterrence capability.[155]

Nuclear Capabilities

With the world's largest arsenal, Russia has prioritized the upgrading of its nuclear capabilities and in 2024 claimed that its nuclear trifecta was more than 95 percent of the way through its modernization from the Soviet era.[156] Russia has been modernizing its strategic nuclear arsenal by replacing older ICBMs with newer models. According to a recent Japanese assessment:

> 21 ICBM regiments—16 of them mobile—underwent modernization over the past decade. As a result, the Soviet-era RS-12M Topol has been fully retired. The newer RS-24 Yars missile has become the backbone of the ground-based strategic force, with over 200 launchers deployed in both mobile and silo-based configurations. Several variants of the Yars, including the Yars-S and Yars-M, are believed to be in service.... Meanwhile, development is underway on a new ICBM known as Osina, expected to eventually replace the Yars series.[157]

Hypersonic vehicles have also been in development: "Deployment of the Avangard system featuring hypersonic glide vehicles is also slowly moving forward, with two regiments reportedly being formed under the 13th Orenburg Rocket Division."[158] The Russian Navy's strategic submarine fleet is likewise being upgraded:

> While the number of nuclear-powered submarines capable of launching ballistic missiles (SSBNs) remains unchanged at around 11 or 12, older models like Project 667BDR (Delta III-class) and Project 667BDRM (Delta IV-class) are being phased out in favor of newer vessels, such as Project 955 Borei and Project 955A Borei-A...and future upgrades are expected to include Project 955AM Borei-AM, primarily in the Northern Fleet.[159]

As a result of these efforts, more than half of the current SSBN force now consists of post-Soviet vessels.[160]

The situation with respect to the RS-28 Sarmat, Russia's next-generation heavy ICBM, is less certain: "As the aging RS-20V Voyevoda missiles are retired, a delay in introducing the Sarmat could temporarily reduce Russia's ground-based strategic warhead count. An explosion during a test launch of a Sarmat ICBM at Plesetsk in 2024 highlighted reliability issues that could further postpone deployment."[161]

An additional risk factor is the Russian Strategic Rocket Forces' (RSVN's) apparent deployment of intermediate-range ballistic missiles (IRBMs) to Belarus.

> In November 2024, Russia used a new ballistic missile called Oreshnik in a strike against Ukraine. Russian announcements describe it as a conventional IRBM to be operated by the RVSN. There are plans for it to be forward deployed to Belarus, but details on the scale and configuration of deployment are as yet unclear.... [I]if it were converted to carry nuclear warheads, it could also function as a tactical nuclear weapon.[162]

The development of strategic bombers, on the other hand, has been slow, and the existing fleet is aging and shrinking. The development of next-generation PAK-DA stealth bombers, for example, has been subject to numerous delays. However, Russia is making efforts "to modernize and extend the life of existing aircraft, and production of the Tu-160 has resumed—though at a sluggish pace." Overall "an abrupt [near-term] decline in the size of the bomber force is unlikely. All in all, Russia will likely maintain its strategic nuclear forces at current levels in quantitative terms while seeking qualitative modernization."[163]

Tanks

Although tanks were almost written off as obsolete before the war, both Russia and Ukraine have leaned heavily on tank forces in their battles for territory. Losses on both sides have been high as drones, mines, and a lack of an effective air force take their toll, but losses of Russian tanks have been especially high. According to recent figures

from Kyiv, Moscow has lost more than 3,000 tanks since the war began. "Western estimates suggest that, with Moscow's economy now on a war footing, it can manufacture 1,500 tanks a year, although a large portion of these is made up of refurbished older models."[164]

Russia has reportedly stepped up production of its T-90Ms, manufacturing nearly 300 T-90M tanks annually.[165] However, many of these new units are being retained in Russia, possibly for future conflicts, with only a portion being deployed to Ukraine. The T-72B3, an upgraded version of the Soviet-era T-72, has been used extensively by Russian forces in Ukraine. In 2024, arms manufacturer Uralvagonzavod reportedly modernized approximately 200 T-72B and T-72B1 tanks to the T-72B3 standard.[166]

Air Force

The Russian Air Force continues to rely on a combination of modern and legacy aircraft. While it remains one of the world's largest air forces, ongoing conflicts, loss of planes, and production constraints pose challenges to maintaining and modernizing the fleet.

Russia has two families of fighter jets in production, the new Sukhoi Su-57 Felon and the Su-27 Flanker family of jets that includes the Su-30SM, the Su-34, and the Su-35. In 2024, the Russian Air Force received between 22 and 28 new aircraft, including Su-34s, Su-35s, Su-57s, and Yak-130 trainers. However, there also were approximately 23 irrecoverable aircraft losses due to combat and accidents—an indication that new production barely offset losses.[167]

Moscow has been keen to keep its top-of-the-line, fifth-generation Su-57 stealth jets away from the front lines. Unlike other jets widely used in Ukraine, such as Russia's Su-35, Su-57 fighters have not played a major role in the Kremlin's air presence in Ukraine.[168] The Tu-22M3 supersonic bomber remains a critical asset, although its numbers reportedly have dwindled. Ukrainian sources suggest that of the 57 bombers listed as being in service, only 27 were operable.[169] In April 2024, Ukraine claimed to have shot down a Tu-22M3, marking another setback in Russia's strategic bombing capability.[170]

Ukraine's Operation Spiderweb on June 1, 2025, when Kyiv was able secretly to truck in and deploy attack drones close to Russian strategic airbases, may have set the Russian Air Force back even further. Ukraine claims to have destroyed 40 aircraft in the operation. However, after-action assessments disagreed as to the degree of damage to the Russian fleet. NATO concurred with Ukraine that around 40 aircraft were damaged but said that only "10 to 13 aircraft were completely destroyed."[171] As reported by NBC News:

> Satellite imagery...taken 2,500 miles away from Ukraine, in Russia's Irkutsk oblast, on June 5, four days after the attack showed six aircraft at Belaya airfield that were completely destroyed in the Ukrainian attack.
>
> Three were Tupolev Tu-95 strategic bombers, and three Tupolev Tu-22 supersonic bombers, all of which have been used to launch missiles at Ukraine.
>
> At Olenya air base, 1,200 miles from Ukraine in Russia's far north, fresh burn marks and rubble where planes had previously been parked were visible in satellite images taken the same day. They suggest that Ukraine had destroyed at least four Russian aircraft.
>
> The images confirm that at least two were Tu-95s and another was a Tu-22. Social media video geolocated by NBC News to Olenya air base shows a man dressed in military fatigues filming a wall of flames also around a Tu-95 bomber.[172]

Navy

Russia's Maritime Doctrine, released in July 2022, explicitly names the United States as the country's principal national security threat and signals that the Russian Navy will continue to prioritize capabilities designed to threaten U.S. forces.[173]

While Kyiv claims to have destroyed one-third of Russia's Black Sea Fleet by mid-2024,[174] Russia has put serious effort into replacing and upgrading its naval capabilities. Key areas of focus have been upgrading the submarine fleet, strengthening surface combatant forces, and developing new technologies for naval air and electronic warfare. In April 2025, Putin announced a $100 billion investment in his naval forces over 10 years and indicated that nuclear forces will be a key component of this upgrade.[175]

Submarines. Russia's naval modernization continues to prioritize submarines. The previously noted Japanese study on Russia's fleet is revealing:

> The Russian Navy's strategic submarine fleet is…being upgraded. While the number of nuclear-powered submarines capable of launching ballistic missiles (SSBNs) remains unchanged at around 11 or 12, older models like Project 667BDR (*Delta III*-class) and Project 667BDRM (*Delta IV*-class) are being phased out in favor of newer vessels, such as Project 955 *Borei* and Project 955A *Borei-A*. More than half of the current SSBN force now consists of post-Soviet vessels, and future upgrades are expected to include Project 955AM *Borei-AM*, primarily in the Northern Fleet.[176]

Russia also has been modernizing its conventional submarine force with new *Kilo*-class submarines (also known as *Varshavyanka*-class submarines) that are armed primarily with torpedoes, mines, and *Kalibr* cruise missile systems.[177]

Surface Combatants. Beyond submarines, Russia's surface fleet is lagging behind. The *Admiral Gorshkov*–class frigate, a modern design equipped with anti-ship and land-attack missiles, represents progress, but only four are active with six more in development. These 5,400-ton vessels, costing around $400 million each, carry *Zircon* hypersonic missiles, which travel at Mach 9 and can challenge missile defenses.[178]

Russia's only aircraft carrier, the *Admiral Kuznetsov*, "has been plagued by mishaps and is undergoing a refit unlikely to be finished before 2027."[179] New carriers like the proposed *Shtorm* class remain in the planning stage. Infrastructure in Russia's shipyards is outdated, and "Western sanctions have reportedly disrupted engine supplies, delaying projects like the Karakurt-class corvettes. With $100 billion spread over ten years, Russia could theoretically build 10 Borei-class submarines or 20 frigates, but historical delays suggest a narrower scope."[180]

Counter-Space/Counter-Satellite Capabilities

Russia's anti-satellite (ASAT) capabilities have advanced significantly in recent years, reflecting a strategic emphasis on counterspace operations. These developments encompass kinetic weapons, electronic warfare systems, and directed-energy technologies.

Nuclear Anti-Satellite Weapons. Russia is reportedly developing a nuclear-armed satellite, *Cosmos* 2553, designed to disable or destroy other satellites by means of a nuclear detonation in orbit. Such an event could generate an electromagnetic pulse (EMP), potentially crippling global satellite infrastructure.[181] U.S. intelligence assessments have raised concerns about this capability, noting that *Cosmos* 2553 has exhibited erratic behavior, including uncontrolled spinning, that suggests possible malfunctions.[182]

Kinetic and Co-Orbital Systems. Russia continues to develop kinetic ASAT systems like the *Nudol* missile that are capable of intercepting satellites in low-Earth orbit. Additionally, satellites such as the *Luch (Olymp)* demonstrate co-orbital capabilities, performing rendezvous and proximity operations that could be used to disrupt or damage other satellites.[183]

Directed-Energy Weapons (DEWs). The *Peresvet* laser system, operational since 2019, is designed to blind or damage optical sensors on reconnaissance satellites. Deployed alongside mobile intercontinental ballistic missile units, it serves both as a protective measure and a potential offensive tool against satellite-based surveillance.[184]

Russia's counterspace and counter-satellite capabilities are formidable. According to a recent assessment by the U.S. Intelligence Community, **"Russia continues to train its military space elements and field new antisatellite weapons to disrupt and degrade U.S. and allied space capabilities. It is expanding its arsenal of jamming systems, DEWs, on-orbit counterspace capabilities, and ASAT missiles designed to target U.S. and allied satellites."**[185]

Electronic and Cyber Warfare

Russia employs advanced electronic warfare (EW) techniques, including GPS jamming and spoofing, which have disrupted navigation systems and communications and notably affected both civilian aviation and military operations. Reports also indicate that Russian jamming has interfered with SpaceX's Starlink satellite network, which is crucial for Ukrainian military communications.[186]

Russia's EW systems are among the world's most sophisticated and are designed to disrupt enemy

communications, navigation, and surveillance. Key systems include:

- *Krasukha Series*, mobile jamming systems capable of disrupting airborne radar and satellite communications over ranges up to 300 km. The *Krasukha*-4 variant can even affect low-Earth orbit satellites.[187]

- *Murmansk-BN*, a long-range system mounted on *KAMAZ* trucks, designed to jam high-frequency communications over distances up to 8,000 km, targeting NATO's high-frequency communications.[188]

- *Borisoglebsk-2*, a multifunctional system mounted on MT-LBu vehicles, used to disrupt communications and GPS systems.[189]

- *Khibiny*, an airborne electronic countermeasure system installed on aircraft like the Su-30SM, designed to jam enemy radar and missile guidance systems.[190]

- *Solyaris NS*, a newer system reportedly in its final testing stages, designed to detect and suppress UAV control channels across a wide frequency range.[191]

These systems have been deployed extensively in areas of conflict, notably in Ukraine, where they have been used to "create dense jamming zones, disrupting communications, GPS, and drone operations."[192] According to the Defense Intelligence Agency, "Russia is employing EW in offensive and defensive operations to disrupt Ukraine's communications and weapons guidance. Russia designs its EW capabilities specifically to counter Western-supplied technologies."[193]

With respect to cyber capabilities, the Intelligence Community assesses that "Russia has demonstrated real-world disruptive capabilities during the past decade, including gaining experience in attack execution by relentlessly targeting Ukraine's networks with disruptive and destructive malware." In addition:

> Russia's advanced cyber capabilities, its repeated success compromising sensitive targets for intelligence collection, and its past attempts to pre-position access on U.S. critical infrastructure make it a persistent counterintelligence and cyber attack threat. Moscow's unique strength is the practical experience it has gained integrating cyber attacks and operations with wartime military action, almost certainly amplifying its potential to focus combined impact on U.S. targets in time of conflict.[194]

Unmanned Aerial Vehicles (Drones)

According to the Defense Intelligence Agency's 2025 Worldwide Threat Assessment, "Russia's use of UAVs in [Ukraine] has expanded dramatically as these systems have proven to be cost-effective tools to detect enemy movements, provide artillery targeting assistance, and conduct short-[range] and long-range strikes."[195]

Drones have become increasingly important in the battlefield since Russia's invasion of Ukraine in 2022, and Moscow's capabilities in drone technology have grown exponentially in the face of Ukraine's gains in this field. In 2025, Russia aims to produce a massive number of drones, including 30,000 long-range drones and 30,000 decoy drones along with 2 million first-person view (FPV) drones.[196] This represents a significant increase in drone production compared to previous years; Russia's production of long-range drones in 2025 is reportedly twice as great as the number produced in 2024.[197] In addition, Ukraine's Strategic Industry Ministry has said that "Ukraine more than doubled its long-range drone output in 2024 compared to 2023—a 22-fold increase over 2022."[198] Russia's drone production is also geographically diverse with key production centers located in different regions of the country.[199]

Military Exercises

Russian military exercises, especially snap exercises, have masked real military operations in the past. Russia's snap exercises are conducted with little or no warning and often involve thousands of troops and pieces of equipment.

In 2024, Russia conducted several military exercises, including the large-scale Ocean 2024 naval exercise in September 2024 with China.[200] Other notable exercises that year included those with the Collective Security Treaty Organization (CSTO) member states, Joint Sea 2024 with China, and various bilateral naval exercises like the one with

Threats: Russia

	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
Behavior		✓			

	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
Capability		✓			

Indonesia in November 2024.[201] These exercises typically involve significant personnel and equipment and are designed to enhance interoperability and evaluate military capabilities. Beyond training, they serve several purposes: projecting power, showcasing Russia's allies, demonstrating equipment for potential buyers, and signaling Russia's interest in a particular region.[202]

Conclusion

The threat to the U.S. homeland from Europe remains low, but risks to American interests and allies in the region are significant, particularly because of Russia's aggressive war in Ukraine. While Russia has the military—and nuclear—capability to threaten the United States directly, it has not shown a clear intent to do so.

Though no longer the global rival the Soviet Union was during the Cold War, Russia still challenges U.S. and allied interests. It maintains a broad array of capabilities—land, air, naval, space, and cyber—and the world's largest nuclear arsenal. A nuclear strike on the United States is unlikely, but the potential for such a strike gives Russia strategic leverage in Europe. More immediate threats to U.S. interests come from Russian provocations below the nuclear threshold, particularly in Central and Eastern Europe, the Arctic, the Balkans, and the South Caucasus.

Russia has suffered significant losses in its war against Ukraine, and its economy is tipping into recession, but the decision by several countries to continue trading with Russia despite sanctions is ensuring a steady flow of funds into Russia's accounts that Putin is using to continue funding his aggression. Russia will therefore continue to be a significant security concern for the United States, its NATO partners, and other allies.

In Ukraine, the Russian military appears to remain a resilient and capable adversary and is likely to sustain its operational tempo in the near term.[203] According to the Defense Intelligence Agency:

> Russian President Vladimir Putin regards the war in Ukraine as an existential struggle against the West that will determine Russia's place in the world, Putin's hold on power, and his historical legacy. Putin remains confident in Russia's ultimate victory in Ukraine and is prepared to use military force at least through 2025. Putin also remains steadfast in his demand that Ukraine be permanently prohibited from joining the North Atlantic Treaty Organization (NATO) while insisting Kyiv withdraw all its military forces from Donetsk, Luhansk, Zaporizhzhia, and Kherson Oblasts.[204]

Putin remains firmly committed to winning the war in Ukraine, and his main objectives—Ukrainian neutrality and further territorial division—have remained largely unchanged since the conflict began. Unless a negotiated settlement is reached or the West substantially increases its support, the battlefield is likely to tip gradually in Russia's favor through 2025 and possibly beyond.

For these reasons, the *Index of U.S. Military Strength* continues to assess the threat from Russia as "aggressive" for level of provocative behavior and "gathering" for level of capability.

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Iran

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Regional Overview

The Islamic Republic of Iran experienced profound changes and setbacks from 2024–2025. These changes did not alter Tehran's bellicosity, anti-American and antisemitic rhetoric, pursuit of violent and malign activities, or desire to export its radical theocratic ideology, but they did impose significant costs on the regime and its ability to project strength across the Middle East.

On October 7, 2023, Iran's strength was at its zenith. It commanded a network of proxy terrorist groups that gave Tehran influence or control in four separate countries or territories: Lebanon, Yemen, Iraq, and the Palestinian Territories of the Gaza Strip and Judea and Samaria (the West Bank). The Assad regime in Syria served as a client state that provided Iran with a land bridge to Lebanon and the means to supply and support its most vital regional asset, Hezbollah. Assad also granted Iran the ability to establish a military presence in the Syrian Golan Heights and directly threaten Israel's northern border.

Iran had amassed the region's largest and most sophisticated arsenal of ballistic missiles. Its ever-expanding capabilities threatened U.S. allies—notably Israel—and interests, and Iran's developing space program suggests that it was developing the means to put much of Europe (and potentially the U.S. homeland) within missile range. Iran's nuclear ambitions also continued unimpeded. Having survived the first Trump Administration's "maximum pressure" campaign, the regime used the Biden Administration's relentless pursuit of a new nuclear agreement to accelerate its enrichment and production capacity.

The invasion of Israel by Hamas on October 7, 2023, with its intent to unite the Iranian proxy network in a coordinated, multi-front assault to destroy the Jewish state led to a regional war in which Israel engaged and, to varying degrees, defeated Iran's proxies around its borders. Though not a direct belligerent, the Assad regime also fell in December 2024, further undermining Iran's ability to project power in the region. This war also featured the first direct engagement between Iran and Israel on April 13, 2024, when the regime launched a salvo of over 300 ballistic missiles, cruise missiles, and drones at Israel. This was followed by another ballistic missile attack on October 1, 2024.

On June 13, 2025, Israel launched Operation Rising Lion to destroy Iran's ballistic missile inventory, launch and production capacity, and air defense assets and slow the development of its nuclear enrichment program. On June 22, 2025, the United States conducted Operation Midnight Hammer, a coordinated attack against three Iranian nuclear facilities that delivered a crippling blow to Iran's nuclear programs.

In late 2025, Iran experienced a significant water drought that was exacerbated by government mismanagement and followed quickly by a plunging currency and unstable economic environment. This led in January 2026 to the largest protests in the country's history. The regime responded to these protests with brutal repression, cutting internet access and killing thousands of Iranians.

Although Iran has suffered significant setbacks and is currently at its weakest point in decades, the regime still poses a threat to America's interests in the region and, through its asymmetric capabilities, the U.S. homeland.

Iran's Oil Exports

The Iranian regime depends on its natural resources to sustain its economy and export its revolution and regional ambitions. Oil exports accounted

for about 57 percent of Iran's total export revenue in 2024, making the regime highly dependent on its sale and vulnerable to international sanctions.[1] Following the first Trump Administration's maximum pressure campaign, sanctions against Iran were relaxed under the Biden Administration. Iran's oil production increased from a low of 444,660 barrels per day in 2020 to 1,484,215 barrels per day in 2024.[2]

The primary destination for this oil is China, which accounts for about 90 percent of Iran's seaborne oil exports.[3] Beijing helped to underpin Tehran's ability to sell at steep discounts when necessary and to accept non-conventional arrangements that reduced exposure to the U.S. dollar-based financial system. Analysts also documented the use of insurance and financing workarounds, some involving state-backed Chinese insurers and opaque financial vehicles that smoothed payments and protected long-term projects tied to oil receipts.[4]

Additional U.S. sanctions in 2025 targeted specific Chinese refining and logistics entities, including specific terminals, vessels, and insurers alleged to have been central to Iran's export network. Official actions raised the operational cost for Iran's traders but did not eliminate the regime's ability to sell barrels to willing buyers.[5] Iran lost roughly 26 percent of its potential oil export revenue by the end of 2024 because of sanctions evasion costs.[6]

In February 2025, the U.S. Department of the Treasury and the U.S. Department of State imposed sanctions on more than 30 persons, vessels, and entities in multiple countries for facilitating Iran's petroleum exports. In May, the U.S. announced threats of "secondary sanctions" on countries importing Iranian oil, making clear that buying Iranian crude or products could bring U.S. business exclusion.[7]

In September 2025, U.N.-mandated sanctions that had been suspended under the Joint Comprehensive Plan of Action (JCPOA) were reintroduced through the "snap-back" mechanism: travel bans, asset freezes, prohibitions on funds to specific persons and entities. The European Union's autonomous measures, including asset freezes on the Central Bank of Iran and several Iranian banks, were also resumed.[8]

Force Assessment: Asymmetric Capabilities

Islamic Revolutionary Guard Corps/Quds Force. The Islamic Revolutionary Guard Corps (IRGC) and its expeditionary arm, the Quds (Jerusalem) Force, remain Iran's primary instruments for projecting power, shaping regional conflicts, and pressuring adversaries. Their growing capabilities, which include missiles, drones, cyber operations, intelligence networks, and proxy armies, have enabled Tehran to influence events from the Gulf to the Mediterranean, the Red Sea, and beyond.

Historically, the Quds Force has maintained supply lines via air routes through Syria, Iraq, and Lebanon; land corridors forming the "Iran–Iraq–Syria land bridge;" maritime smuggling in the Red Sea and the Mediterranean; and covert factories in Syria, Lebanon, and Yemen. This network enables Iran to arm its proxies even under heavy sanctions and surveillance. Following the fall of the Assad regime and debilitation of its proxy network, it remains to be seen how the Quds Force will continue to support and supply Iranian assets around the region.

The Quds Force conducts intelligence operations abroad, targeting American, Israeli, Gulf, and Western interests, dissidents, and diplomatic and commercial sites as well as infrastructure and energy assets. It employs informant networks, front companies, operatives embedded in embassies, and cyber-enabled espionage.

Assassination attempts against American officials, among them President Donald Trump, have been traced to the IRGC's Quds Force.[9] Similarly, threats made to such former American Administration officials as former White House National Security Advisor Robert O'Brien and former Secretary of State and Central Intelligence Agency Director Mike Pompeo have come from these very forces.[10] The targeted killing of Quds Force Commander Qassem Suleimani by the United States in 2020 was a severe loss for the organization, as was the targeted killing of IRGC Commander Hossein Salami by Israel in 2025.

Proxy Network. Iran has adopted a political warfare strategy by which it seeks to avoid direct conflict with its adversaries, preferring an indirect approach that emphasizes irregular warfare, asymmetric tactics, and the extensive use of proxy forces. The IRGC has trained, armed, supported, and collaborated with a wide variety of radical Shia and Sunni militant groups as well as Arab, Palestinian, Kurdish, and Afghan groups that do not share its radical Islamist ideology. This includes numerous proxies, particularly the Lebanon-based Hezbollah;

MAP 10

Countries with Iranian Proxy Groups



Country	Militia	Estimated Size
Iraq	Kata'ib Hezbollah	7,000–10,000
	Harkat Hezbollah al-Nujabi	3,000–5,000
	Kata'ib Sayyid al-Shuhada	10,000–20,000
	Harakat Ansar Allah al-Awfiyah	Unknown
Lebanon	Hezbollah	40,000–75,000
Algeria	Polisario Front	8,000
Palestinian Territories	Hamas	20,000
	Palestinian Islamic Jihad	4,000
Yemen	Houthis	10,000–30,000

SOURCES: Meir Amit Intelligence and Terrorism Information Center, "Spotlight on Terrorism: Hezbollah and Lebanon (June 30–July 7, 2025)," https://www.terrorism-info.org.il/en/spotlight-on-terrorism-hezbollah-and-lebanon-june-30-july-7-2025/ (accessed February 3, 2026); Siddhant Kishore, "Hezbollah's Collapse Is Lebanon's Opportunity," Lawfare, September 21, 2025, https://www.lawfaremedia.org/article/hezbollah-s-collapse-is-lebanon-s-opportunity#:~:text=On%20Aug.,storage%20facilities%20in%20southern%20Lebanon (accessed February 3, 2026); Robert Greenway and Amine Ghoulidi, "Why the US Must Confront Terror Proxy Polisario Front," The Daily Signal, May 21, 2025, https://www.dailysignal.com/2025/05/21/why-must-confront-terror-proxy-polisario-front/; Sam Halpern, "Netanyahu Says Iran Trying to Rebuild Nuclear, Ballistic Missile Capabilities After June War," *The Jerusalem Post*, December 31, 2025, https://www.jpost.com/middle-east/article-881870 (accessed February 3, 2026); Kali Robinson and Will Merrow, "Iran's Regional Armed Network," Council on Foreign Relations, updated April 15, 2024, https://www.cfr.org/articles/irans-regional-armed-network (accessed February 3, 2026); Office of the Director of National Intelligence, National Counterterrorism Center, Counterterrorism Guide, "Terrorist Groups," https://www.dni.gov/nctc/terrorist_groups.html (accessed February 3, 2026).

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Iraqi Shia militant groups; Palestinian groups such as Hamas and Palestinian Islamic Jihad; and insurgent groups that have fought against the governments of Afghanistan, Bahrain, Egypt, Israel, Iraq, Jordan, Kuwait, Morocco, Saudi Arabia, Turkey, the United Arab Emirates (UAE), and Yemen.

Hezbollah. For more than 40 years, Hezbollah has served as Iran's key node within a wider network of Iranian proxy organizations spread across the Middle East, Africa, and Central Asia. Hezbollah either has been responsible for or has assisted with dozens of attacks against U.S. targets, allies, and partners and more recently contributed thousands of fighters to aid Iran's efforts in Syria, maintaining the rule of Bashar al-Assad. Hezbollah functions as a key organization involved in Iranian planning, projection, and attacks across the Middle East and the world generally.

In the 1980s–1990s, Hezbollah made a name for itself by attacking Israeli forces in Lebanon and Israel and by organizing and conducting terrorist attacks against Western targets in Lebanon. The organization also hybridized, gaining further power by entering Lebanese politics and winning seats in the Lebanese parliament. However, its political forays have not moderated the group. In 2006, Hezbollah was strong enough to precipitate a war against Israel by attacking, killing, and kidnapping Israeli soldiers stationed along the Lebanese border. Hezbollah's arms also allowed it to maintain its power over Lebanon and even resulted in its May 2008 advance into Beirut when the group dispatched Sunni and Druze political foes.

Following the October 7, 2023, Hamas-led attacks against Israel, Hezbollah assisted its Gaza-based Palestinian allies by launching attacks against Israeli border posts, facilitating other Lebanese and Palestinian groups in their attacks from Lebanon, and launching rocket, missile, and drone attacks against Israeli targets.[11] In July 2024, a Hezbollah rocket attack targeted the Druze border town of Majdal Shams, killing 12 Druze children and wounding 30 others.[12] One October 2024 drone attack on the Binyamina barracks resulted in the deaths of four Israeli soldiers.[13] Another Hezbollah rocket attack in October 2024 killed seven, including four Thai farm laborers in northern Israel.[14] Hezbollah's repeated and deadly attacks caused about 60,000 Israelis to be displaced from their homes in northern Israel.[15]

As for Hezbollah itself, targeted retaliatory strikes and other attacks launched by Israel decimated the group's leadership.[16] Both Sayyid Hassan Nasrallah, leader of the group for 32 years, and his successor Hashim Safi al-Din were killed in Israeli airstrikes.[17] Intermediate-level Hezbollah combatant leaders were also effectively targeted during Israeli intelligence operations that utilized explosive-laden pagers and walkie-talkies.[18]

While Israel was quite effective in destroying large sections of the group's leadership apparatus, however, Hezbollah is still a functional organization and is actively rebuilding its arsenal.[19] The group has also resisted attempts to disarm it.[20] With notable ideological loyalty to Iran, Hezbollah has played a key role in Iran's attempts to build new radical militant organizations across the Middle East and carry out terrorist activity abroad, and its usefulness to Iran has not diminished.

Kata'ib Hezbollah (Hezbollah Brigades). Founded between 2005 and 2007, Kata'ib Hezbollah is staffed by ideologically loyal and extremely militant Iraqi Shia. Controlled by Iran, the group launched attacks against U.S. forces during the war in Iraq (2003–2011); fielded thousands of recruits for the war in Syria; is one of the largest factions in the Popular Mobilization Front (PMF); and continued attacks against American targets into 2024 operating as the Islamic Resistance in Iraq. The group has also maintained a bellicose anti-American stance. Kata'ib Hezbollah is a key organizational element in the building of Iraqi Shia militias, and its links to other organizations have helped it to form a core of violent groups loyal to Iran.

Harakat Hezbollah al-Nujaba (Hezbollah Movement of the Outstanding or HHN). Formed in late 2012/early 2013, this group is currently led by Akram Kaabi, formerly the secretary general of another major Iranian-backed Iraqi proxy, Asa'ib Ahl al-Haq. From 2012–2024, HHN recruited and supplied thousands of fighters to fight in Syria and was one of the most prolific recruiters among Iran's Iraqi Shia militias. After the 2020 killing of IRGC-QF commander Qasim Suleimani, Nujaba was increasingly positioned as the leader of a range of front groups including the Islamic Resistance in Iraq.

Kata'ib Sayyid al-Shuhada (Master of the Martyrs Brigade or KSS). Formed in late 2012/early 2013, KSS was initially part of Kata'ib

Hezbollah. Its leader, Abu Alaa al-Walai, was jailed by U.S. forces in 2010 for his role in attacking U.S. and Coalition forces in Iraq. By 2013, KSS had helped to recruit thousands of Iraqi Shia to fight in Iraq and Syria. It also has been directly involved in more contemporary attacks against U.S. forces and interests.[21] In 2023, the U.S. Department of State listed the group and its leader as Specially Designated Global Terrorists.[22] In September 2025, the U.S. Department of State designated the group as a Foreign Terrorist Organization (FTO).[23]

Harakat Ansar Allah al-Awfiyah (Movement of the Loyal Supporters of God, or HAAA). HAAA sent hundreds of fighters to Syria and assisted Kata'ib Hezbollah in its control of Iraqi–Syrian border sites.[24] In 2024, the U.S. government named HAAA as a group involved in the deadly 2024 attack against U.S. forces on the Jordan–Syria border; its secretary general, Haydar Muzhir Ma'lak al-Sa'idi, was listed as a Specially Designated Global Terrorist in June 2024.[25] In September 2025, the U.S. Department of State designated HAAA as an FTO.[26]

Iraqi Shia militias, particularly groups networked with Kata'ib Hezbollah, continue to pose a significant risk to U.S. personnel and interests within Iraq and the broader Middle East. Although their participation in the post–October 7 fighting was less than that of Lebanese Hezbollah or Yemen's Houthis, these groups have provided training, equipment, and support to networks of fighters that have fallen under Iran's umbrella. As Lebanese Hezbollah addresses losses in leadership resulting from Israeli attacks, Iran may continue its expansionist activities and other militant efforts using these groups.

Hamas. Iran's support for Hamas is one of the most consequential relationships in Middle Eastern geopolitics. The two actors differ in ideology (Shi'a revolutionary Islamism versus Sunni Muslim Brotherhood Islamism), but they share a strategic alignment in seeking the destruction of Israel. Over the past three decades, Iran's financial and military aid has been central to Hamas's development from a grassroots terrorist movement into a governing authority in Gaza with significant military capabilities.

Iran began to support Hamas in the early 1990s, seeing the group as a useful partner within the Palestinian arena. After Hamas's 2007 takeover of Gaza, Iran became its most important state sponsor, offering a mix of money, weapons expertise, training, and diplomatic backing. Estimates from open-source reporting and statements by regional intelligence officials suggest that Iran has provided tens of millions to hundreds of millions of dollars annually in amounts that have varied from year to year according to political conditions.[27] Funding mechanisms have included direct transfers through IRGC Quds Force channels, cash shipments through intermediaries, and budgetary support to Hamas's military wing (Izz ad-Din al-Qassam Brigades) as well as funding from Hezbollah and other proxy forces.[28]

Iranian funding supports a broad spectrum of Hamas operations, such as purchases of raw materials for weapons production, the construction of terrorist tunnels and fortified positions, and procurement of electronic systems, communications equipment, and explosive materials. Iranian money has helped to cover salaries for Hamas terrorists and their families as well as stipends for Hamas operatives studying or training abroad.[29]

Iran has supplied Hamas with blueprints, designs, and engineering guidance for rockets of increasing range; expertise in building multi-barrel launchers; and training on propellants, explosive mixtures, and fusion techniques. Much of this supply was smuggled into Gaza via the Philadelphi Corridor alongside the Gaza–Egypt border. Egypt and Sudan failed to stop this smuggling, and the weapons arsenal in Gaza grew steadily.[30] As a result, Hamas developed Qassam rockets, M-75 and M-302 variants modeled after Iranian or Syrian systems, and longer-range projectiles such as the Fajr-5 missile capable of reaching Tel Aviv and beyond.[31]

Over the 2010s and 2020s, Iran shared with Hamas designs for surveillance drones, components for simple loitering munitions, and training on assembling unmanned aerial vehicles (UAVs) from smuggled electronics and commercial parts. Iranian support contributed to Hamas's production of anti-tank explosives, training in ambush tactics, and the use of guided systems smuggled earlier through Sudan or Sinai. Hamas fighters have undergone training in Iran (where they trained ahead of the October 7 attacks); in Lebanon (by Hezbollah); and at times in Syria.[32]

Iran's financial and military support for Hamas is a long-term, structural pillar of the region's strategic landscape. Tehran has invested heavily in Hamas's military evolution, offering money, weapons expertise, technology transfer, and

strategic mentorship. This assistance has strengthened Hamas's capacity to govern Gaza, resist Israeli military operations, and embed itself within the broader Axis of Resistance.

On October 7, 2023, Hamas invaded Israel and carried out the deadliest terrorist attack in Israel's history.[33] More than 1,200 civilians were murdered, 250 were kidnapped back into Gaza, and hundreds of others were raped and wounded. Israel retaliated and over the past two years has eliminated most of Hamas's core leadership, among them Ismail Haniyeh, Yayha Sinwar, and Mohammed Deif.[34] Following the cease-fire agreement of October 13, 2025, Israeli Defense Forces (IDF) controlled 53 percent of the Gaza Strip, and Hamas released all of the living Israeli hostages and most of the deceased hostages.[35]

While it has suffered a heavy blow during Israel's Operation Iron Swords, Hamas still exists in a semi-operational capacity and continues to benefit from its Iranian enablers. The United States must ensure that Hamas no longer governs the Gaza Strip in any way, as agreed to in the cease-fire agreement, and thus rid the Gaza Strip of all Iranian influence.

Houthis (Ansar Allah). The Houthis emerged from the mountainous northern sections of Yemen in the 1990s as a ragtag group of rebel Shia fighting the central government. Today, they are a well-armed and well-equipped organization that, under the leadership of Abdul-Malik al-Houthi, has about 20,000 fighters.[36] Around 2005, Iran sent the Houthis Hezbollah advisors to assist in training.[37] By 2014, the group had captured the Yemeni capital of Sanaa. In 2015, a coalition of Gulf Arab states—Saudi Arabia, the United Arab Emirates, and Bahrain—intervened and bombed Houthi targets and placed some ground forces in Yemen.[38] Despite this pressure, the Houthis expanded their control of large sections of northern Yemen, including key ports, by 2016.

While Yemen is awash with weapons, Iranian support, particularly the supply of newer missiles and drones, remains a key factor in the Houthis' continuing aggressiveness and power. According to the Defense Intelligence Agency, since 2015, Iran's Islamic Revolutionary Guard Corps–Quds Force, "has been smuggling weapons and weapon components to the Houthis, which has enabled the advancement of the Houthis' military capabilities."[39] In February 2025, the Yemeni Coast Guard, with assistance from U.S. Central Command (CENTCOM), intercepted "cruise missiles' structures, jet engines used in cruise missiles and suicide drones, reconnaissance drones, in addition to marine radars, a modern jamming system, and an advanced wireless communications system."[40] All of these systems have been used by the Houthis against commercial shipping and Western naval vessels in the Red Sea.

The Houthis have provided Iran with another means to pressure international trade, launching direct attacks against Saudi Arabia and more recently against Israel. Houthi involvement in attacks against Israel and international shipping increased in the wake of October 7. As Iran attempts to rebuild Hezbollah and continues to entrench itself in Iraq using its Shia militias, the Houthis have taken on a more prominent position within Iran's proxy army, particularly in the realm of armed attacks using advanced weaponry.[41]

Ballistic Missiles. By 2025, Iran's ballistic missile force remained a centerpiece of its conventional deterrent and power-projection strategy. Operated principally by the Islamic Revolutionary Guard Corps–Aerospace Force (IRGC–AF), the program combines a large and diverse missile inventory and a growing national industrial base for missile production with an operational doctrine that integrates missiles with drones, naval forces, and proxy partners across the region. Iran's missiles have been used both as strategic signals and, increasingly, as operational tools in the flare-ups that erupted in 2024 as well as in the Twelve-Day War of 2025. These launches and their consequences have shaped regional military postures and triggered international sanctions by the U.S. and its allies as well as additional Israeli sabotage countermeasures.

Iran's missile effort traces back to the 1980s and has matured into a layered force with several distinct missions: Deter attacks on the homeland; threaten adversary infrastructure (bases, ports, energy nodes); and provide asymmetric strike options against regional opponents. The IRGC–AF is the lead service for medium-range and short-range ballistic missiles (MRBMs and SRBMs); the regular army has limited ballistic capabilities. Doctrine emphasizes massed salvoes, distributed launchers, mobile road-based and rail-based launch systems, and concealment in hardened and underground facilities to complicate preemption. These operational choices reflect lessons that Iran drew from fighting in the region and from international attempts to degrade its programs.[42]

MAP 11

Iranian Missile Systems: Maximum Ranges



10,000 km
Shahab 6 (still under testing)

5,000 km
Shahab 5

3,000 km
Shahab 4

2,500 km
Ashoura/Sejjil-3

2,000 km
Shahab 3/Emad 1/Sejjil/Khorramshahr-4

750 km
Qiam 1

700 km
Zolfaghar

500 km
Shahab 2

300 km
Shahab 1

SOURCES: Ari Cicurel, "Iranian Ballistic Missile Estimates," Jewish Institute for National Security of America, June 16, 2025, https://jinsa.org/jinsa_report/iranian-ballistic-missile-estimates/ (accessed January 15, 2026); Dalshad Hussein, "Iran Extends Its Reach," Middle East Broadcasting Networks, November 6, 2025, https://alhurra.com/en/6598#:~:text=The%20latest%2C%20in%20October%202025,the%20second%20uses%20solid%20fuel (accessed January 29, 2026).

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Iran's arsenal in 2025 consisted predominantly of solid-propellant and liquid-propellant SRBMs and MRBMs with ranges from a few hundred kilometers up to roughly 2,000–2,500 km for the longest-range systems tested or advertised. The inventory included indigenous designs (Shahin/Scud variants, Fateh-series, Zolfaghar, Dezful, Sejjil) and variants derived from foreign designs and adapted over decades.[43] Iran also continued to expand its ability both to mount different payloads and submunitions and to improve accuracy through better guidance packages and terminal maneuvering—efforts aimed at improving effectiveness against hardened and mobile targets. Estimates of total missiles in inventory vary by source, and intense combat in 2024–2025 affected short-term stock levels.[44]

The direct Israel–Iran confrontation in 2024 and 2025 brought Tehran's ballistic missile capability from deterrence into frequent operational use. Heavy barrages launched against Israel in April and October 2024 and during the June 2025 exchanges demonstrated Iran's capacity to mass-fire and the limits of missile defenses. The exchanges tested multi-layered air defenses and revealed trade-offs for defenders (what most needs to be protected) and for attackers (rate of fire vs. sustaining an arsenal). The combat period also showed that a portion of Iran's missiles could penetrate sophisticated defenses while a significant percentage were destroyed on the launch pad or intercepted in the atmosphere—highlighting the potency and limits of the program in real operations.

It is estimated that before the Twelve-Day War, Iran possessed approximately 2,000–2,500 medium-range and intermediate-range ballistic missiles. Based on their expenditures and the number of those destroyed by Israeli strikes, that figure is likely fewer than 1,000.[45] Additionally, estimates suggest that Israel's strikes destroyed around one-third of Iran's estimated 350 missile launchers, leaving Iran with approximately 100.[46]

Iran claims that its missile stockpile did not suffer heavy damage and that its most powerful systems—including the newly developed Rastakhiz missile, which integrates nuclear and electromagnetic pulse strike capabilities—remained in reserve.[47] An Iranian senior military advisor, Major General Yahya Rahim-Safavi, revealed that "several thousand missiles and drones had been stockpiled in fortified locations for rapid use in the event of any act of aggression."[48] Nevertheless, Iran did suffer losses, and efforts have been underway to restore its missile capabilities by rebuilding and modernizing Iran's air defense systems.[49]

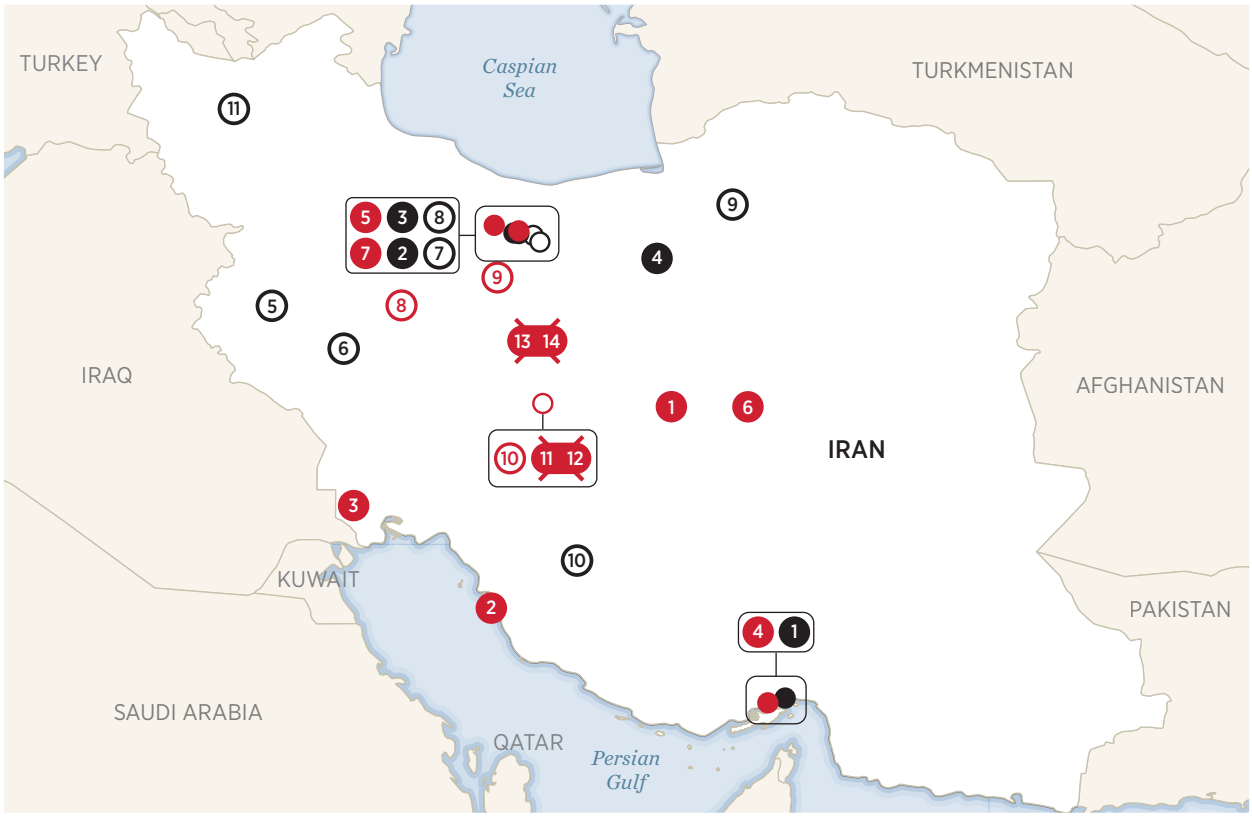
China is a primary supplier of material to Iran for the production and reconstruction of its missile program. In recent months, intelligence sources have said that several shipments of sodium perchlorate, the main precursor in the production of the solid propellant that powers Iran's mid-range conventional missiles, arrived from China at the Iranian port of Bandar Abbas at the end of September. Those sources say the shipments, which began to arrive on September 29, contained 2,000 tons of sodium perchlorate bought by Iran from Chinese suppliers in the wake of its 12-day conflict with Israel in June.[50] The purchases are believed to be part of a determined effort to rebuild the Islamic Republic's depleted missile stocks. Several of the cargo ships and Chinese entities involved are under sanctions from the United States.[51]

Space. Iran's space and rocket programs have given the country more data and experience when developing longer-range missiles, potentially to include ICBMs. "Why do they have a space program?" asked Secretary of State Marco Rubio in June 2025. "Is Iran going to go to the moon? No, they're trying to build an ICBM so they can one day put a warhead on it."[52] In late September, Iran carried out an unannounced missile launch; Iranian parliamentarian Mohsen Zanganeh told Iranian state TV that "we tested one of the country's most advanced missiles, which until now had not, so to speak, been trialed—and that test was successful.... In other words, I mean to say that even under these conditions we are conducting a security test of an intercontinental-range missile."[53]

The Iranians have also declared a desire to advance their capabilities in developing and launching satellites. Iran began its satellite launch program with a symbolic launch of a small satellite in 2009 and by 2020 had launched its first military satellite.[54] Iran's program has also suffered numerous failures. In 2019 and 2022, for example, Iran unsuccessfully launched satellites from its Imam Khomeini Space Center.[55] However, in January 2024, Iran successfully launched its Mahda research satellite along with the Kayhan-2 and Hatef-1 communications and global positioning nanosatellites.[56] In September, using a rocket developed

MAP 12

Iran's Nuclear and Ballistic Missile Infrastructure



NUCLEAR FACILITIES

INTACT
1. Arkadan Yellow Cake Production Plant
2. Bushehr Nuclear Power Plant
3. Darkhovin Nuclear Power Plant
4. Gchine Mine
5. Karaj Agricultural and Medical Center
6. Saghand Mine
7. Tehran Research Center

DAMAGED
8. Arak Heavy Water Reactor
9. Fordow Fuel Enrichment Plant
10. Isfahan Nuclear Technology Center

DESTROYED
11. Isfahan Nuclear Research Center Manufacturing Center
12. Isfahan Uranium Conversion Facility
13. Natanz Fuel Enrichment Plant
14. Natanz Underground Centrifuge Manufacturing Center

MISSILE FACILITIES

INTACT
1. Bandar Abbas
2. Fajr Industrial Group
3. Semnan Missile Complex
4. Shahid Bakeri Industrial Group

DAMAGED
5. Bakhtaran Missile Base
6. Imam Ali Missile Base
7. Parchin Military Complex (Missile)
8. Shahid Hemmat Industrial Group
9. Shahroud Missile Test Site
10. Shiraz Missile Plant
11. Tabriz Missile Base

NOTE: Locations are approximate.

SOURCES: Nuclear Threat Initiative, "Facilities," https://www.nti.org/education-center/facilities/ (accessed February 3, 2026); David Albright et al., "Comprehensive Updated Assessment of Iranian Nuclear Sites Five Months After the 12-Day War," Institute for Science and International Security, November 21, 2025, https://isis-online.org/isis-reports/comprehensive-updated-assessment-of-iranian-nuclear-sites-five-months-after-the-12-day-war (accessed February 3, 2026); press release, "Update on Developments in Iran (5)," International Atomic Energy Agency, June 22, 2025, https://www.iaea.org/newscenter/pressreleases/update-on-developments-in-iran-5 (accessed February 3, 2026); Avihu Marom, "Spotlight Report: Israeli Strikes on Iran's Nuclear Sites (June 19, 2025)," Tel Aviv University, Institute for National Security Studies, June 19, 2025, https://www.inss.org.il/publication/iran-nuclear-spotlight/#:~:text=The%20status%20of%20the%20enriched%20material%20stockpile,centrifuges%20was%20struck%20on%20June%2018%2C%202025.%20%20 (accessed February 3, 2026).

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by the IRGC, Iran carried out its second domestic satellite launch of 2024.[57]

In addition to trying to develop and launch its satellites domestically, Iran has launched satellites in cooperation with other anti-American powers, particularly China and Russia. In 2022, Russia launched one Iranian-funded but Russian-manufactured optical imaging satellite.[58] In February 2024, the Russians launched another Iranian-made imaging satellite.[59] In October 2024, Iran sent a domestically produced imaging and communications satellite to Russia for launch.[60] In July 2025, Russia launched another Iranian satellite into orbit.[61] In mid-2024, Iran announced its interest in purchasing advanced Chinese-produced surveillance satellites.[62] In August 2025, the Islamic Republic announced that it would move to adopt the Chinese BeiDou global positioning system.[63]

Iran's efforts in space further demonstrate a desire to develop a domestically capable program aimed at providing increased competence with rocket and missile technology. This drive coincides with Iran's efforts to build systems that can provide better monitoring of Israeli, U.S., and other troop movements across the region. Iran's continued partnership with and adoption of Russian and Chinese space systems and launch sites also demonstrate a continued desire to cooperate with anti-American actors.

Unmanned Systems. Iran's advancement in unmanned systems (drone) technology also presents new threats beyond the Middle East. In April 2025, *The Times of Israel* reported that Spain, Germany, France, and the United Kingdom had dismantled a Hezbollah drone smuggling ring that was shipping material to Hezbollah that it could use to construct drones.[64] Although the trade in smuggled drone parts was going to the Middle East, the access to parts and equipment demonstrated that Iran could attempt to manufacture drones covertly in the heart of Europe. Adding to this threatening climate, in July 2025, Mohammad Javed Larijani, an advisor to Supreme Leader Ali Khamenei, said that the "Europeans can no longer move about comfortably in their own countries.... It's entirely possible that in the near future, five drones could strike a European city."[65]

Cheap, easy to produce and modify, Iranian drones such as the Shahed-129 and Shahed-136 are systems that have demonstrated their lethality across the Middle East and Europe.[66] The proliferation of Iranian-designed drones has already made its mark in Eastern Europe. Russia has used thousands of Iranian-designed and Iranian-built drones to target Ukraine and in September 2025 used Iranian-designed drones to violate Polish and Romanian airspace.[67]

The drone most frequently exported to Russia is the Shahed-136 loitering munition. Designed for simplicity and cost, the Shahed-136 is launched from a catapult that is often placed on a truck or mobile platform. It can travel 1,500 miles (2,500 km) at speeds of up to 125 miles per hour (200 km per hour) and loiter over a target until the most effective moment to strike. The Shahed-136 is a favored model as it is cost-effective and easy to mass-produce.[68]

In June 2025, Iran unveiled a new drone, the Shahed-107, which appears to possess a more traditional design than the triangle configuration of the Shahed-136 and Shahed-131. Shahed drones are typically slow because of their propellers, are easily detected by air defense systems, and likely fly on pre-programmed routes, which makes them difficult to jam but also difficult to maneuver.[69] Some of Iran's other important drones are the Ababil-2, Ababil-3, Ababil-5, Arash, Fotros, Hamaseh, Kaman-12, Kaman-22, Karrar, Kian, Kian-2, Meraj-521, Mohajer-2, Mohajer-4, Mohajer-6, Mohajer-10, and Shahed-149 Gaza.[70]

China has supported Iran's drone industry, often by procuring parts on Tehran's behalf.[71] Since the Twelve-Day War, China has withheld official material aid despite Beijing's rhetorical support for Iran and condemnation of Israel, but Israeli media, citing anonymous Western intelligence sources, have reported that China is rebuilding Iran's missile arsenal.[72] Iran's alliance with China remains necessary, primarily because China purchases about 90 percent of Iran's oil, which provides funding to Iran for the construction of missiles, nuclear weapons, and other military equipment.[73] Additionally, China supports Iran's missile production through the supply of sodium perchlorate, a precursor chemical that is used to produce ammonium perchlorate, a vital component of solid rocket fuel in missile production.[74] In February 2025, Iran received a shipment of 1,000 tons of sodium perchlorate from China.[75] Iran's development, export, and production of UAV technology provide one of its more dangerous long-term capabilities.

Force Assessment: Conventional Capabilities

Iran's conventional military forces, although relatively weak by Western standards, are large compared to those of Iran's smaller neighbors. Iran's armed forces remain dependent on major weapons systems and equipment that were imported from the U.S. before the country's 1979 revolution. Western sanctions have also limited the regime's ability to maintain or replace these aging weapons systems, many of which were depleted in the 1980–1988 Iran–Iraq war. Iran also has not been able to import large amounts of modern armor, combat aircraft, longer-range surface-to-surface missiles, or major naval warships.[76]

Iran maintains one of the largest standing armed forces in the Middle East. Its conventional military consists primarily of the Artesh, which is composed of four main branches: Ground Forces (NEZAJA); Air Force (IRIAF); Navy (IRIN); and Air Defense Command (Khatam al-Anbiya). Over the past decade, Iran has invested modestly in modernizing its conventional capabilities, but it continues to rely heavily on domestically produced systems, refurbished legacy equipment, and doctrinal flexibility to offset technological inferiority.[77]

The Artesh is focused on deterrence and territorial integrity but has increasingly expanded the range of its activities to include participating in maritime patrols in the Gulf of Aden and joint exercises with foreign powers like Russia and China. The Artesh maintains an estimated 350,000 active-duty personnel and 200,000 reservists, and the Ground Forces account for approximately 70 percent of that strength.[78]

Ground Forces. The Ground Forces remain the backbone of Iran's conventional military power. Numbers, domestic ingenuity, and terrain familiarity help the force to compensate for its lack (by Western standards) of modern armor or mechanized infantry equipment. The force includes an estimated 1,600 main battle tanks, including Soviet-era T-72s, T-55s, and domestically modified versions such as the Karrar tank, a heavily upgraded T-72 that features improved fire control, reactive armor, and Iranian-made optics.[79] While still behind contemporary models like the M1A2 Abrams or Leopard 2A7, the Karrar represents Iran's push for modernization of indigenous weapons.[80]

Iran's ground forces deploy a wide range of self-propelled artillery, multiple rocket launchers (MRLs), and short-range ballistic missiles (SRBMs). Domestically produced systems such as the Fajr-5 and Dezful provide the army with deep-strike capabilities up to 300 km, blurring the line between conventional and strategic forces.[81] Mechanized and motorized infantry units rely on BMP-1/2 IFVs, locally built Boragh APCs, and a growing number of indigenous light tactical vehicles like the Aras and Talaeiyeh series.[82] Mountain and border brigades are optimized for Iran's rugged terrain, providing strong defensive depth.

Naval Forces. The Islamic Republic of Iran's Navy (IRIN) has two main bases: southern fleet command at Bandar Abbas and northern fleet command at Bandar Anzali.[83] Its fleet includes ships and submarines including *Kilo*-class submarines produced in Russia.[84] Iran operates some newer anti-ship missile systems that include anti-ship ballistic missiles, cruise missiles, and anti-radar missiles. Many are domestic copies of Chinese models.[85] In 2006, Hezbollah used an Iranian copy of the Chinese C-802 missile to strike the Israeli INS *Hanit* off the coast of Lebanon.[86] Beyond the missile threats, Iran could repurpose its drone fleet and use them as anti-ship weapons systems.

Iran's IRGC-Navy also operates dozens of small, manned vessels that could swarm commercial and military vessels. These boats have been used in maneuvers to harass U.S. ships in the Gulf. Iran's naval doctrine centers on asymmetric disruption.[87] Iran routinely threatens drone boat attacks on U.S. ships near Bahrain or Qatar as well as coastal missile strikes from IRGC positions along the Strait of Hormuz.

Air Force. The Islamic Republic of Iran Air Force (IRIAF), constrained by sanctions and decades of embargoes on advanced aircraft and spare parts, is the most challenged branch of the Artesh. Nevertheless, through domestic maintenance programs and strategic procurement from allies, the IRIAF has retained operational capability far longer than many expected.

Iran's fighter fleet consists of a mix of aging Western and Soviet-era platforms that include U.S.-made F-14 Tomcats, F-4 Phantoms, and F-5 Tigers acquired before 1979; Soviet-designed MiG-29 Fulcrums and Su-24 Fencers obtained in the 1990s; and newly reported acquisitions of Su-35s from Russia, deliveries of which are ongoing as of 2025.[88]

Iran has pursued several domestic projects to bolster the IRIAF. They include Kowsar, a locally produced jet trainer and light fighter derived from the F-5 design, and Qaher-313 (F-313), a prototype stealth fighter unveiled for propaganda value, although its operational status remains doubtful.[89] The IRIAF also operates Su-24s for deep-strike missions as well as a variety of transport and tanker aircraft. Iran's emphasis on air defense rather than air superiority has shifted resources toward surface-to-air missile (SAM) systems and radar networks.

Air Defense Command. The Khatam al-Anbiya Air Defense Base now operates separately from the IRIAF, controlling such long-range systems as Bavar-373 (Iran's indigenous equivalent of the S-300) and Sayyad-4 and Khordad-15 SAMs that are powered by Russian S-300PMU-2 batteries.[90] This network integrates radar coverage across much of Iran's territory, posing a credible threat to air operations over Iran. Israeli airstrikes in October 2024 and Operation Rising Lion destroyed much of Iran's air defense capacity. The Air Defense Command has started to rebuild, but the level of progress remains unclear.[91]

Threat to the Region

Threats to American Military Facilities and Diplomatic Missions. The United States maintains a significant presence in the region. Iran has launched missile attacks on U.S. military bases in the region on several occasions including in 2020, 2024, and 2025.[92] In January 2024, an Iranian proxy group in Iraq launched an attack on an American base in Jordan, killing three soldiers.[93] In July 2024, an Iranian drone launched by the Houthis targeted the U.S. embassy branch office in Tel Aviv.[94] The Al Udeid base in Qatar and the U.S. 5th Fleet in Bahrain remain key targets for Iranian aggression and fall well within reach of Iran's missile program, as does the Al Asad base in Iraq. Iran has not hesitated to attack these bases in the past and can easily do so again in the future.

Threat to the Global Commons: Sea. America's primary strategic interests in the Middle East are to ensure the free flow of energy and commerce through the region. The Strait of Hormuz is the world's most important oil transit chokepoint. "In 2022," according to the U.S. Energy Information Administration, "its oil flow averaged 21 million barrels per day (b/d), or the equivalent of about 21% of global petroleum liquids consumption."[95] China is the largest consumer of Middle Eastern oil, followed by India, South Korea, and Japan, and more than 80 percent of oil exports through the Strait is destined for Asian markets.[96] A large percentage of international trade also transits through the Middle East.

Iranian threats to international shipping lanes have remained a constant since the country's war with Iraq in the 1980s. During that conflict, in the so-called Tanker War, Iraqi and Iranian forces struck oil tankers and threatened port facilities throughout the Persian Gulf. In 1987, following the delivery of Chinese-made Silkworm anti-ship missiles, the Iranians targeted a U.S.-flagged tanker in the Gulf, and the U.S. retaliated by striking Iranian sites and naval shipping in the Gulf.[97] Iran increased its acquisition and domestic development of anti-ship systems and in mid-2025, following the joint U.S.–Israel strikes on Iran's nuclear facilities, once again threatened to close the Strait, although it did not act on that threat.[98]

The Red Sea is another chokepoint that is increasingly used by Iran through its proxies to put pressure on international trade and U.S. partners and allies. In 2023, about 12 percent of global trade volumes passed through the Red Sea.[99] In addition, with 40 percent of trade from Asia to Europe passing through it, including large amounts of oil and other fuels, Egypt is reliant on the currencies it earns allowing ships to go through the Suez Canal.[100]

Iran's backing of Yemen's Houthis demonstrated their threat to the commons throughout 2025. In November 2023, using a helicopter and smaller vessels, the Houthis seized the *Galaxy Leader* cargo ship. The crew was released from Houthi captivity in January 2025.[101] This was followed by more than 100 missile and drone attacks against commercial vessels from late in 2023 through the middle of 2025.[102] These attacks resulted in the rerouting of hundreds of ships and their cargoes, which cost shippers, manufacturers, and consumers significant revenue. In Germany, Tesla had to shut down a factory due to the slowdown of its supply chains that passed through the Red Sea.[103]

Threat to the Global Commons: Air. Iran has shot down civilian aircraft during crises. Following the killing of IRGC-QF commander Qasim Suleimani on January 3, 2020, Iranian air defenses accidentally shot down a civilian airliner. On January

8, 2020, Ukrainian International Airlines Flight 752 was hit by two missiles fired by the IRGC, and 176 people were killed. To deter potential counterstrikes from the U.S. following the Suleimani killing, Iran kept its civilian airports open and flights on schedule.[104]

The belligerency of Iran and its proxies also has had unintended consequences. On October 27, 2023, a drone launched at Israel by the Houthis hit Nuweiba in Egypt.[105] Later, a missile launched by the Houthis hit Taba, Egypt, injuring six people.[106] In October 2024, Iranian missiles launched at Israel struck Palestinians that Iran claimed to be "defending."[107]

Nuclear Proliferation. Iran's pursuit of nuclear capabilities threatens to create a domino effect of regional proliferation. Saudi Arabia has vowed that if Iran does build nuclear weapons, it will do so as well.[108] The United Arab Emirates established its own nuclear program under the 123 Agreement signed in 2009.[109] Saudi Arabia is currently seeking a similar program, and other countries would likely follow suit.[110] Egypt is currently constructing a nuclear program similar to the UAE's but with Russian support.[111] Bahrain, because of similar fears, recently signed an agreement with the United States on civilian nuclear cooperation.[112]

Regional Partners: Israel. Israel and Iran had close diplomatic relations until the overthrow of the Shah's government in 1979. In addition to embassies and direct flights, the two countries cooperated in trade, tourism, and much more. Ever since the Ayatollah regime took power, however, Iran has openly sought Israel's destruction. This is the only case in which one U.N. member state has called outright for the destruction of another. Iran has used nearly every method it has available to attack Israel, both directly and through its proxies. It has threatened Israel on almost every front, and Supreme Leader Ali Khamenei has denounced Israel as a "malignant cancer."[113]

Nor does this stop with Israel. According to the Iranian regime, Israel is merely the "Little Satan;" the United States is the "Great Satan." The Ayatollah regime believes in reestablishing the Islamic Caliphate and that the Western world is an obstacle that must be overcome if it is to achieve this goal. It therefore wishes to eradicate Western society as a whole, destroy modernity, and replace it with its brand of medieval Islamic theology. Israel is an obstacle for the regime because it represents a Western outpost in the heart of the Islamic world. The State of Israel has not been shy about warning the world of the Iranian threat and exposing it. Israel understands the threat that Iran poses to its very existence, and no country has acted as repeatedly as Israel has to deter Iran. Many other countries have been more passive toward Iranian aggression, but Israel has acted defensively and taken preventive measures against Iran and its proxies whenever it deemed such action to be necessary. Israel's defensive actions against Iran in 2024 and 2025 weakened the Iranian regime in unprecedented ways, but Iran still maintains its radical ideology and will continue to threaten Israel.

Regional Partners: Saudi Arabia. Since 1979, Iran has maintained a generally hostile stance toward most members of the Saudi-led Gulf Cooperation Council (GCC).[114] In a sectarian sense, Saudi Arabia is one of the region's leading Sunni powers and stands in opposition to the radical Shi'ism proffered by Iran. The Saudis also control both of Islam's holiest sites, Mecca and Medina.

Saudi Arabia's Shia population lives primarily in its Eastern Province, which has been a center of Iranian provocations. Iran supported local pro-Hezbollah movements there in the 1980s. One of these groups, Hezbollah fi al-Hejaz (also known as Saudi Hezbollah) attacked the U.S. barracks in Khobar, Saudi Arabia, in 1996, killing 19 American airmen.[115] Following the Arab Spring of 2011–2012, large-scale protests and the growth of small militant sections resulted in Saudi crackdowns. By 2017, the Saudi Shia town of Awamiya saw protests and then fighting between Saudi security forces and Shia militants.[116] Tensions have eased over the years, but radical elements, some with links to Iran, still inhabit Saudi Arabia's oil-rich Eastern Province.

The Saudis have also fought such Iranian-backed groups as Yemen's Houthis. For their part, the Houthis have repeatedly launched rockets, missiles, and drones into Saudi Arabia. In one case, they hit the Islamic holy city of Mecca. In July 2017, the Houthis targeted Saudi oil facilities using missiles. In 2019, they claimed responsibility for targeting major Saudi oil sites in Abqaiq.[117] However, some analysts and U.S. government officials have said the attack actually originated in Iran and that the Houthis took responsibility to obscure Iranian involvement.[118] In 2021, Reuters reported that the

"Houthis have fired 430 missiles, 851 drones at Saudi Arabia since 2015."[119] In 2023, the Saudis drew down their involvement in Yemen and, in a Chinese-brokered deal, cautiously began a rapprochement with Iran. The Houthis ceased their missile and drone attacks against the Saudis around that time, but in April and September of 2025, failed Houthi attacks on Israel resulted in missiles falling within Saudi territory.[120]

While a level of calm may have been reached among the Houthis, Saudi Arabia, and Iran, this does not mean that the possibility of future conflict has disappeared. From 1987–1990, diplomatic ties between Saudi Arabia and Iran were severed. Diplomatic links were renewed in 1991 and persisted until 2016. However, during that period, Iran continued to back anti-Saudi proxies and attacks against targets in Saudi Arabia (the 1996 Khobar Towers attack) and against individual Saudis (such as the 2011 plot to assassinate Saudi ambassador to the U.S. Adel al-Jubeir in a Washington, D.C., restaurant).[121]

Regional Partners: United Arab Emirates. Despite regional tensions, the UAE has maintained diplomatic relations and has pursued trade and economic relationships with Iran.[122] Diplomatic visits have also taken place over the years, and there are direct flights and tourism for both countries.[123] The UAE is nonetheless cautious in dealing with the Iranians and has suffered attacks from its proxies, most prominently the Houthis.[124]

The UAE was early to warn the world about the threat that emerged from the Iranian-backed Houthis in the 2000s. It is also believed that the 2024 assassination of a rabbi who lived and worked in the UAE was sponsored and coordinated by Iran.[125] This was the only such terrorist attack on UAE soil in decades, and the suspects were quickly caught and sentenced to death.[126]

The UAE has dealt with the Iranian threats quietly but efficiently and for the most part has not ceased to communicate with the regime through official channels as have other countries in the region. However, in strategic areas, the UAE has offered its defense cooperation against Iran. During the 2024–2025 Iranian missile attacks on Israel, as part of CENTCOM, the UAE was helpful in intercepting missiles over its airspace.[127]

Regional Partners: Bahrain. Home to the U.S. Navy's 5th Fleet, Bahrain has served as one of many regional flash points that demonstrate heightened Iranian threats against U.S. and Gulf regional partners. With a Shia majority population and a leadership that is predominantly Sunni, and with the failure of Arab Spring protests in 2011–2012, Bahrain has provided a fertile ground for Iran's machinations. In 1981, the Iran-backed Islamic Front for the Liberation of Bahrain attempted a coup in the island country.[128] The attempt failed, but it reflects Iran's early and continued links to Bahraini militant groups. The fact that Bahrain is a signatory to the 2020 Abraham Accords is another source of tension between the two countries.[129]

In the wake of the 2011 Arab Spring protests and the crackdowns that later ensued, some Bahraini Shia became increasingly militant against the Bahraini state and the United States. A series of Iran-backed Bahraini Shia militant groups began to grow in 2012 and reached their apex in 2015–2016. Bahrain cut off diplomatic relations with Tehran in 2016, and despite some attempts to restart them, relations remain icy.[130]

Iran-backed Bahraini groups have carried out dozens of bombings and shooting attacks targeted at infrastructure, security forces, and Bahraini leaders.[131] They have also threatened U.S. forces on the island, particularly the 5th Fleet in Juffair.[132] When relations between Bahrain and Israel were normalized in 2020, these groups threatened to attack U.S. and Bahraini government sites. Fortunately, U.S. security cooperation with Bahrain and the actions of the Bahraini internal security apparatus have helped to diminish the power of many of these Iran-backed networks.

Even though networks of Iran-backed Shia militants were rolled back in Bahrain from 2013–2018, however, elements of these groups have increased their cooperation and networking with Iran-backed Iraqi groups and with Iran.[133] Saraya al-Ashtar, designated by the U.S. Department of State as a Foreign Terrorist Organization, has continued to make threats and claim attacks. In May 2024, after years of general silence, the group claimed to launch a drone attack against the Israeli city of Eilat.[134] On June 19, 2025, three days before the U.S. bombing of Iranian nuclear facilities, the previously unknown Bahraini group Rijal Allah (Men of God) threatened "Zionist and American interests in Bahrain" if Iranian Supreme Leader Ali Khamenei was harmed.[135]

Despite Bahrain's success in dismantling local militant groups, Iran and the remaining networks

remain deeply linked. The potential to use these networks still presents an active threat both in Bahrain and within Shia-majority zones in neighboring eastern Saudi Arabia.

Syria. By 2025, what remained for Iran in Syria was a crumbling shell of what it had constructed from 2012–2024. Despite deploying thousands of foreign Shia militiamen to Syria and establishing dozens of native militia groups, and despite the support of thousands of Revolutionary Guard Corps members, the groups Iran fostered in the country collapsed in the face of the November 2024 onslaught led by Hayat Tahrir al-Sham (HTS) and other Syrian rebel groups. With the December 2024 fall of Bashar al-Assad's rule, Iran's regional projection was made notably more difficult. However, this did not mean that Iran was without assets in Syria or that it would discontinue its destabilizing activities.

Iran had established a long-sought "land bridge" linking it to Lebanese Hezbollah through Iraq and Syria. Disruption of this land bridge was acknowledged by Hezbollah's new secretary general Naim Qassem in December 2024 when he admitted, "Yes, Hezbollah has lost the military supply route through Syria," adding that the group would investigate new ways to continue its trafficking of arms and supplies into Lebanon.[136] Tribal networks with links to drug smuggling that had contributed members to Syrian militias and Lebanese Hezbollah and were often religiously Shia formed one body of elements that remained behind in Syria to advance Iran's interests.[137] In the Qusayr region on the Lebanon–Syria border, for example, Syrian Shia villagers aligned with Lebanese Hezbollah continued to engage in weapons smuggling, drug trafficking, and firefights with the new Syrian government. The area had contributed dozens of fighters to Hezbollah, including its elite Radwan unit.[138] In early 2025, HTS-led Syrian government forces raided the Qusayr region, and the fighting expanded into Lebanon.[139]

Using a strategy that involved the creation of online front groups, Iran created new organizations for Syria. Rallying pro-Iran Alawite minority leaders, formerly from Bashar al-Assad's Syrian Arab Army and linked militias from Iran-backed sections of Assad's Syrian Arab Army, Iran assisted in crafting small militant movements that eventually targeted HTS forces. The HTS response led to days of sectarian bloodletting. The ensuing violence resulted in around 1,500 civilians killed when Alawite villages were targeted by HTS forces.[140]

Playing a spoiler role and doing so asymmetrically allowed Iran to sow chaos and frustrate hopes of further international recognition for the new authorities in Damascus. Blunted by the loss of Syria, Iran may continue to try to play a spoiler role in the country even if its capabilities are lacking. As Lebanese Hezbollah continues to run smuggling networks through Syria, the country may become a flash point in future incidents involving the HTS-led government in Damascus, Iran, and Iran's proxies.

Africa: Sudan. Iran's involvement in Sudan began to deepen in the late 1980s shortly after the rise of Sudanese Islamist leader Omar al-Bashir, backed by Hassan al-Turabi's National Islamic Front. Both Tehran and Khartoum at that time sought to position themselves as leaders of an Islamic revivalist movement, albeit from different sectarian perspectives. However, by the mid-2020s, Sudan's foreign policy had shifted dramatically, and in 2016, Khartoum cut ties with Tehran, which severed Iranian access to military bases and transit routes.[141] In 2019, the Bashir regime was overthrown and replaced by the Transitional Sovereignty Council (TSC) led by General Abdel Fattah al-Burhan. Under Burhan, Sudan joined the Abraham Accords, ending the boycott of Israel. In return, Sudan's designation in the United States as a state sponsor of terrorism was removed.[142]

When the civil war between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) escalated, intelligence reports noted that Iranian-made drones similar to systems supplied to the Houthis had found their way into Sudan's battlefields.[143] Frustrated by the lack of engagement from either Jerusalem or Washington, the Sudanese leadership accepted Iran's offer to reestablish diplomatic relations and military cooperation.[144] Given Sudan's strategic location on the Red Sea, this renewed Iranian presence poses a threat to Africa, Israel, and the global commons.

Africa: The Polisario Front. In 2018, Morocco cut ties with Iran because of Iran's assistance to the Polisario Front, which was provided by Hezbollah's external operations units and the Iranian embassy in Algiers.[145] This support included the training of Polisario fighters in guerrilla tactics and the use of advanced weaponry, transfer of man-portable

air-defense systems (MANPADS) and other weapons via Lebanese or Algerian intermediaries, and assistance in developing drone capabilities.[146] Western intelligence assessments have confirmed that some level of communication and technical transfer may indeed have taken place, particularly in the realm of drone know-how and tactical training.[147]

In 2025, citing threats made by the Polisario to Morocco and the United States, Representatives Joe Wilson (R–SC) and Jimmy Panetta (D–CA) introduced bipartisan legislation to designate the Polisario Front as a Foreign Terrorist Organization.[148] In 1988, Polisario missiles had brought down two U.S. Agency for International Development aircraft, killing five Americans—and the U.S. had failed to respond with sanctions.[149] Designation of the Polisario Front as an FTO would help to weaken Iranian aggression and reduce the threats it poses both to Africa and to the world generally.

Threat to the U.S. Homeland

Nuclear. Tehran has invested tens of billions of dollars since the 1980s in a nuclear weapons program that it sought to conceal within its civilian nuclear power program. It built clandestine but subsequently discovered underground uranium enrichment facilities near Natanz and Fordow and a heavy-water reactor near Arak that would generate plutonium to give it a second potential route to nuclear weapons.[150]

The July 2015 Iran nuclear agreement—formally known as the Joint Comprehensive Plan of Action—lifted nuclear-related sanctions on Iran in January 2016, gave Tehran access to approximately $100 billion in restricted assets, and allowed Iran to expand its oil and gas exports, the chief source of its state revenues.[151] Relief from the burden of sanctions helped Iran's economy and enabled Iran to enhance its strategic position, military capabilities, and support for surrogate networks and terrorist groups.

In 2018, President Trump decided to withdraw from the JCPOA and established the "maximum pressure campaign."[152] His decision to withdraw from the nuclear agreement marked a return to long-standing U.S. nonproliferation policy. However, during the Biden years, that pressure was lifted, and Iran's nuclear program accelerated once again. In April 2021, Iran began to enrich its uranium to 60 percent, a short step away from the weapon-grade level of 90 percent.[153] By June 2022, Iran's breakout time had fallen to zero. It had acquired enough highly enriched uranium to arm a bomb within weeks if further enriched and could acquire enough for five bombs within six months.[154] General Mark Milley, then chairman of the Joint Chiefs of Staff, testified before the House Appropriations Subcommittee on Defense on March 23, 2023, that "[f]rom the time of an Iranian decision…Iran could produce fissile material for a nuclear weapon in less than two weeks, and would only take several more months to produce an actual nuclear weapon."[155]

On June 12, 2025, the International Atomic Energy Agency's Board of Governors adopted a resolution formally urging Iran to cooperate and effectively declared Iran to be in breach of its non-proliferation obligations.[156] In accordance with the Non-Proliferation Treaty, President Trump made it clear in a Truth Social post that in any future deal with Iran, enrichment will not be permitted.[157]

Later in June, Israel initiated Operation Rising Lion, followed by America's Operation Midnight Hammer, which combined for the Twelve-Day War that targeted Iran's ability to produce and launch ballistic missiles and develop its nuclear program. In these strikes, Iran's three main nuclear facilities—Fordow, Isfahan and Natanz—were significantly damaged or destroyed.[158] Israeli strikes on Arak, a heavy water reactor, destroyed the facility's concrete dome and nearby laboratory, making its reconstruction difficult.[159] This site was also where the headquarters of the SPND nuclear project was located and where Iran stored its nuclear archives.

However, Iran claimed that it took proactive measures to protect its nuclear material and may still possess more than 400 kilograms of near-bomb-grade highly enriched uranium that survived the attacks.[160] Additionally, satellite imagery shows considerable movement and construction around Pickaxe Mountain, a hidden fortress under construction near Natanz and a suspected location of Iran's hidden uranium stores. As of this writing, there has been no significant activity around Fordow or Isfahan according to satellite imagery.[161] Construction on Pickaxe Mountain began in September 2025, but the facility may lack the planetary mixers that are needed to produce solid-fuel propellant.[162]

Cyber. Iran's cyberterrorism has long blended espionage, disruption, and psychological operations. By the mid-2020s, Tehran was using cyberspace

increasingly to support proxy groups, exert coercive pressure on adversaries, and target civilian infrastructure in ways that blurred the line between cyber warfare and cyberterrorism. Although Iran seldom claims direct responsibility, its intelligence services—particularly the IRGC and the Ministry of Intelligence (MOIS)—have been linked repeatedly to operations intended to intimidate civilian populations, create social fear, or disrupt essential services.[163]

Iran-linked groups have targeted water systems, power grids, medical networks, transportation systems, and municipal services in such countries as Israel, the United States, Bahrain, and Albania. While most attempts are thwarted, the intent to disrupt civilian life includes attacks attempting to alter water treatment chemical levels, ransomware deployed against hospitals and health networks, and denial-of-service attacks on emergency services or government portals.[164]

Iran-linked groups have conducted operations aimed at public exposure of sensitive personal information. These leaks are often accompanied by online threats or mass messaging campaigns. Targets have included Iranian political dissidents abroad, U.S. and Israeli government employees, private citizens, and other influential figures. By weaponizing stolen data, attackers aim to intimidate both individuals and institutions such as was tried with the 2024 U.S. presidential election.[165] Iran and its proxies also have conducted cyber intimidation campaigns such as defacement of government websites with threatening messages, localized attacks on energy or telecommunications providers, and phishing and surveillance targeting specific individuals of influence.[166]

Iran-linked actors have frequently attempted disruptive intrusions into Israel's civilian water and transportation systems. Similarly, though not large-scale, Tehran's actions against Albania, including the shutdown of government services, have been intended to send a broader message: Supporting Iranian opposition groups may carry consequences for a country's civilian population. Saudi Arabia, Bahrain, and the UAE have experienced recurring cyber disruptions aimed at financial institutions, airlines, and logistics-center sectors that are critical to public confidence and daily life.[167]

Terrorist and Criminal Activities in the United States. Iran has sought the kidnapping or targeted assassination of political figures in the United States. In 2022, according to the U.S. Attorney's Office for the Southern District of New York, Iran hired two "high-ranking members of an Azeri faction of the Russian Mob" and another member of the Russian Mob for $500,000 to kidnap or kill human rights activist Masih Alinejad.[168] In September 2024, Naji Sharifi Zindashti, an Iranian drug lord operating with Iranian intelligence, paid two Canadian Hells Angels $350,000 to commit a contract killing of an IRGC defector living in Maryland.[169]

In 2024, an Iranian agent named Farhad Shakeri promised to pay Carlisle Rivera and Jonathon Loadholt $100,000 to assist in surveillance and assassination plots assigned by Tehran.[170] Chief among these plots was a plan to assassinate President Donald Trump. An Iranian dissident activist, Jewish Americans, and Israeli tourists were also on Shakeri's hit list. Shakeri, formerly incarcerated in the U.S., recruited fellow criminals and ex-convicts for his assassination network.[171] Other officials from the first Trump Administration also have received credible threats on their lives.[172]

Iran has also funded civil unrest and protests across the United States since Hamas's attack on Israel on October 7, 2023.[173] According to the Director of National Intelligence:

> Iranian government actors have sought to opportunistically take advantage of ongoing protests regarding the war in Gaza, using a playbook we've seen other actors use over the years. We have observed actors tied to Iran's government posing as activists online, seeking to encourage protests, and even providing financial support to protesters.[174]

Networks in the Western Hemisphere. In the broader Western hemisphere, Hezbollah has a growing presence throughout Latin America and supporters in Canada. The proximity of these networks to the U.S. also poses a threat to the homeland. Members of Hezbollah in Canada have been involved in activities linked to illicit financing for the group, including cigarette and weapons smuggling.[175] In Latin America, Hezbollah's networks, presence, and state support from countries such as Venezuela continues to pose an increasing and dynamic threat.

Threats: Iran

	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
Behavior	✓				

	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
Capability				✓	

Hezbollah's well-established presence in Latin America provides a series of safe havens—zones to aid the organization financially and potentially strike at the U.S. and American interests. According to the RAND Corporation, the tri-border region linking Argentina, Brazil, and Paraguay "hosts a substantial Lebanese-Muslim population" and "is home to individuals who sympathize with and facilitate the organization's operations."[176] In South America, "the Venezuelan government has created an environment that allows Hezbollah to maintain active cells engaging in drug trafficking, money laundering, and illicit smuggling."[177] Writing for the Atlantic Council, Joseph M. Humire has noted that "[the] Lebanese terrorist group has helped to turn Venezuela into a hub for the convergence of transnational organized crime and international terrorism."[178] Mexican drug cartels also have worked closely with Hezbollah in the trafficking of drugs and as a means for Iran to attempt to assassinate dissidents and other foes in the United States.[179]

Great-Power Partnership: Russia and China. Russia and China see Iran as a critical partner in their efforts to challenge Western influence: Russia views Iran as a key actor in consolidating its military and political reach across the Middle East, Africa, and Europe, and China sees Iran as a cornerstone of its Belt and Road Initiative (BRI) and a crucial energy supplier. The signing of the 25-year China–Iran Comprehensive Strategic Partnership in 2021 and Iran's entry into the Shanghai Cooperation Organization (SCO) in 2022 formalized these trends, embedding Iran into a broader Eurasian bloc centered around Beijing and Moscow.[180]

By 2025, the Tehran–Moscow relationship had matured into a robust strategic alliance, particularly in the military and energy sectors. Iran has supplied Russia with drones, including the Shahed-136 loitering munitions that have played a critical role in Russia's operations in Ukraine.[181] In exchange, Moscow has provided Iran with advanced air defense systems, satellite technology, and aircraft components. Intelligence cooperation has also expanded with both nations sharing surveillance data and electronic warfare techniques.[182]

Iran and Russia have coordinated oil export strategies to manage global market disruptions caused by sanctions. Russian oil rerouting to Asia led to competition, but by 2025, both countries were working through informal mechanisms to prevent price undercutting. Joint ventures in the Caspian Sea and agreements to expand Iran's nuclear energy capabilities through Rosatom have deepened the partnership.[183]

In addition to purchasing Iranian oil, Chinese state-owned enterprises have continued to invest in Iranian transport, telecommunications, and industrial projects under the BRI.[184] The development of the Chabahar–Zahedan railway and expansion of Iranian ports have integrated Iran further into China's westward trade routes, making the country a logistical hub connecting Central Asia, the Persian Gulf, and Europe.[185]

China has also assisted Iran in developing digital surveillance systems and internet infrastructure modeled on Beijing's "Great Firewall." This partnership has enhanced the Iranian regime's internal control, especially amid waves of domestic unrest and conflicts with other countries.

Conclusion

Iran has faced pressure, suffered major leadership losses, and either used or lost much of its missile stocks. In addition, with the setback and potential loss of its nuclear program, a major element of Tehran's ability to threaten its neighbors has been significantly diminished. Nevertheless, the regime has not relinquished its intent to dislodge

any U.S. influence from the Middle East, destroy Israel, and bring other Middle Eastern states under its influence.

Decades of antagonistic relations with its Arab neighbors, active involvement in attacks on Israel, and continued involvement in attacks targeting U.S. forces demonstrate that the Islamic Republic will likely return to an aggressive posture once it believes it can gain enough time to rebuild its proxies and resupply its weapons stocks. In the near term, this could lead Iran to adopt terroristic methods that utilize more plausible deniability.

Iran's overall capability, damaged from Israel's 2024–2025 strikes along with the joint Israel–U.S. nuclear strikes, has been degraded and is rated "aspirational." Iran's 2025 behavior was still quite aggressive, with repeated missile attacks against Israel and its proxies also launching their own attacks. Iran also responded to the American and Israeli strikes on Iran's nuclear facilities, although the response was smaller and more targeted. With the new regional dynamics settling in following the Twelve-Day War and the ceasefire in Gaza, Tehran's current posture is rated "hostile."

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North Korea

Robert Peters

Introduction

North Korea is the world's last Stalinist state and a de facto monarchy. Ruled absolutely by the Kim family, now in its third generation of despotism, North Korea operates concentration camps, keeps its people enslaved, and regularly threatens the United States and its allies with nuclear annihilation. An economic dwarf, North Korea engages in large-scale counterfeiting, weapons sales, murder for hire, and narcotics distribution.[1] Its conventional military is a relic of the Cold War and fields Soviet equipment from the 1970s and 1980s, but it also has a mature and capable missile and nuclear force that makes it a very significant threat both to America's allies in East Asia and to the American homeland.

The Threat

North Korea's ever-expanding nuclear weapons capability and maturing and increasingly capable missile force constitute a formidable threat to the United States and its forces, citizens, and bases in the Indo-Pacific as well as its allies in the region.

Conventional Forces. North Korea's conventional capabilities—its navy, air forces, and ground forces—largely use Cold War–era equipment and are poorly trained. As an example, the backbone of the North Korean Air Force, the MiG-21, first flew in 1955.[2] North Korea has an army of 1.3 million men and another 6 million men in reserve, but its T-34, T-55, and T-62 tanks are relics of the post–Korean War era.[3] The most significant conventional threat posed by North Korea includes the thousands of Cold War–era long-range artillery pieces positioned on the Kaesong Heights, that can range—and cause significant damage to—Seoul.

North Korea has long sought and is ostensibly building submarines that can launch both cruise and ballistic missiles that could be armed with strategic or tactical nuclear weapons, but progress on such efforts remains slow, and these systems do not currently present a credible threat to the United States or its allies. It is unclear whether North Korea is able to get any significant number of attack submarines out to sea, much less a ballistic missile submarine that can launch a missile without either the missile or the submarine being destroyed.[4]

In a conventional conflict with the South Korean military, North Korea's forces would be outmatched. Pyongyang's only asymmetric response to South Korea relies on its enormous quantities of Cold War–era artillery, its millions of reservists, and its nuclear weapons.[5] Pyongyang's history of provocation and intimidation is a consistent indicator of the regime's intent to achieve its political objectives through the threat or execution of force—despite the fact that from a conventional perspective, it is qualitatively and decisively outgunned by South Korea.

Assessment: *Weak*.

Missiles. Since the beginning of his dictatorial rule approximately 15 years ago, Kim Jong-un has overseen an expansive diversification of North Korea's nuclear arsenal and accelerated missile development. New weapons are more capable—and therefore more credible—than their predecessors and now pose a far greater threat to allied forces. In particular, the maturation of North Korean missiles creates ever greater challenges for existing missile defense systems.

Pyongyang's continuing development of nuclear and missile programs—which include theater-range systems, cruise missiles, and intercontinental ballistic missiles capable of carrying multiple nuclear warheads—suggests that the regime is seeking

an arsenal that will provide a nuclear warfighting capability, not just a strategic deterrent capability. This would further increase the military threat and could incentivize North Korea, believing that its actions were protected by a "nuclear shield," to engage in ever more provocative behavior.

In 2025, the U.S. Intelligence Community assessed that "Pyongyang is expanding its capacity for coercive operations and using new tactics as it becomes more confident in its nuclear deterrent."[6] Pyongyang has repeatedly declared that it will never abandon its nuclear arsenal and that "only fools will entertain the delusion that we will trade our nuclear deterrent for petty economic aid."[7]

In September 2022, Pyongyang promulgated a law that codified long-standing nuclear doctrine but also disturbingly lowered the threshold for its use of nuclear weapons.[8] The new law affirmed a decade of North Korean statements that threatened preemptive nuclear attacks on the United States and its allies in response even to *perceived* preparations for an attack. North Korea has warned that "any military conflict on the Korean Peninsula is bound to lead to an all-out [nuclear] war" that will be an "ultra-harsh war of reaction targeting the entire U.S. mainland."[9]

In January 2021, Kim Jong-un announced an ambitious five-year strategic plan to augment and refine North Korea's nuclear and missile arsenals. He directed the regime to develop solid-fueled and multiple-warhead ICBMs, hypersonic glide warheads, tactical nuclear weapons, military reconnaissance satellites, and a long-range nuclear-powered submarine capable of launching nuclear strategic weapons.[10] North Korea is currently seeking all of these capabilities.

ICBMs. North Korea has developed a series of ICBMs capable of attacking the entire continental United States. In November 2022, North Korea conducted the first successful test of the massive Hwasong-17, the world's largest road-mobile ICBM. The Hwasong-17 may be capable of carrying up to four nuclear warheads.

In April 2023, North Korea tested the three-stage Hwasong-18 solid-fueled ICBM, which can be launched more quickly than liquid-fueled ICBMs.[11] The regime's depiction of a subsequent December 2023 missile firing as the "launching drill of an ICBM unit" indicates that Pyongyang now regards the Hwasong-18 ICBM system as operationally deployed.[12]

Liquid propellant is highly corrosive and cannot be maintained in a missile; it can be loaded only after deployment to the field and shortly before launch. The fueling itself is an hours-long process. By contrast, the Hwasong-18's solid fuel is loaded during manufacture, leaving the missile able to launch quickly. This shortens the time the missile is exposed and vulnerable to detection and targeting by allied forces. The fact that a solid-fueled missile does not require fuel and oxidizer trucks further reduces its observable signature to overhead satellites.

In October 2024, Pyongyang test-launched the Hwasong-19, an even larger solid-fuel ICBM.[13] The solid-fuel Hwasong-18 can already target all of the United States, but a larger missile would also be able to carry multiple warheads and possibly penetration aids designed to confound missile defense systems. The regime declared that the Hwasong-19 would operate alongside the smaller Hwasong-18[14] and, presumably, the liquid-fueled Hwasong-17.[15]

Pyongyang has also revealed that it can indigenously produce large mobile ICBM transporter-erector-launchers. Previously, the number of ICBMs the regime could deploy had been constrained by the small number of large logging vehicles purchased from China and converted to carry missiles.[16] In time, Pyongyang's ability to deploy more missiles on mobile launchers with multiple warheads could overwhelm existing U.S. missile defenses meant to protect the American homeland.

Hypersonic Maneuverable Warheads. Since 2021, North Korea has tested several missile variants, particularly the Hwasong family of missiles, that are equipped with hypersonic maneuverable warheads. Hypersonic missiles fly at least five times the speed of sound.[17] More important than the speed, however, is that many hypersonic missiles have detachable, maneuverable warheads that can fly at lower altitudes than standard ballistic missiles, which follow a more predictable parabolic trajectory. These characteristics make radar tracking more difficult and enable the weapons to evade allied missile defense interceptors. How effective and reliable these missiles are, however, is unknown given the unreliability of North Korean pronouncements of advanced technology.

Pyongyang has developed the Hwasong-12 liquid-fueled and Hwasong-16 solid-fueled intermediate-range ballistic missiles (IRBMs), each of which has variants with a hypersonic wedge-shaped

maneuverable glide vehicle and a hypersonic conical maneuverable warhead. In 2024, North Korea conducted its first test of a MIRV using the first stage of a Hwasong-16.[18] In June 2024, North Korea claimed the first successful test of MIRV technology using the first-stage engine of a solid-fuel hypersonic IRBM. Pyongyang announced that warheads were guided to three separate targets.[19]

Assessment: *Strong*.

Nuclear Weapons. North Korea has conducted six tests of nuclear weapons over the past 20 years, including a test in 2017 of a powerful hydrogen bomb, but it is also seeking lower-yield theater-range non-strategic nuclear weapons for potential battlefield employment.[20] In March 2023, Kim displayed what was reported to be 10 Hwasan-31 tactical nuclear weapons.[21] A wall poster behind Kim claimed that the weapons are compatible with eight different types of delivery systems including short-range ballistic missiles, close-range ballistic missiles, the Haeil underwater nuclear system, and cruise missiles.[22]

North Korea's 2022 Nuclear Law indicates that, if the command and control of nuclear weapons becomes vulnerable to hostile forces, a nuclear strike "shall be launched *automatically* and immediately to destroy the hostile forces including the starting point of provocation and the command according to the operation plan decided in advance."[23] Pyongyang announced that an April 2024 missile exercise included testing of the Haekbangashoe ("nuclear trigger") command-and-control system's ability to switch rapidly to a nuclear counterattack.[24] North Korea probably fields a total of 50 to 90 strategic and non-strategic nuclear weapons.[25]

Assessment: *Marginal*.

Chemical and Biological Weapons. For decades, analysts have estimated that North Korea maintained between 2.5 and 5 metric tons of chemical weapons, including nerve, choking, blister, and blood agents, along with a suspected but never verified or otherwise substantiated biological weapons capability. Whether North Korea even has an active chemical weapons production capability is unclear, in addition to which these estimates are difficult and virtually impossible to confirm with any degree of precision. Moreover, given that most estimates assume that much of North Korea's stock of chemical weapons is loaded into artillery shells and has a short lifespan, it is unlikely that North Korea's chemical weapons pose much of a danger to anyone other than the North Korean military personnel who may be handling them.[26]

Assessment: *Weak*.

Military Reconnaissance Satellite. In November 2023, North Korea launched its Malligyong-1 military reconnaissance satellite after two previous failures. The regime announced that the satellite surveilled U.S. military bases in Guam, including Andersen Air Force Base, and the U.S. Naval Station at Apra Harbor.[27] While Pyongyang maintains a capable and diverse missile magazine, it lacks a sophisticated remote reconnaissance capability to identify, track, and target U.S., South Korean, and Japanese military assets. In public statements, Kim Jong-un emphasizes the importance of having "several reconnaissance satellites on different orbits [for] securing real-time information about the hostile forces' military scenario and moves."[28]

Assessment: *Weak*.

Threat to the U.S. Homeland and Regional Allies

Pyongyang is producing a new generation of advanced mobile missiles that supposedly, in addition to being more accurate, mobile, and difficult to detect and target, have an enhanced ability to evade allied missile defenses. North Korea's evolving nuclear and missile forces increasingly provide the regime with the ability to conduct a preemptive first strike, retaliatory second strike, and battlefield counterforce attacks. Pyongyang has an extensive and diversified military force that it could employ to attack targets in South Korea and Japan, U.S. bases in the Pacific, and the continental United States.

Targeting the U.S. Homeland. North Korea could use any number of its estimated ICBMs such as the Hwasong-17, armed with one or multiple independent warheads, to hit targets in the U.S. homeland.[29] Such targets might include American cities, nuclear bases, or conventional military bases. In recent years, North Korea has expanded and refined manufacturing facilities for fissile material, nuclear weapons, missiles, mobile missile launchers, and reentry vehicles.

By 2027, according to a RAND analysis, "North Korea could have 200 nuclear weapons and several dozen intercontinental ballistic missiles (ICBMs) and hundreds of theater missiles for delivering the nuclear weapons."[30] However, several additional

tests of longer duration and higher altitude will likely be needed before such capability is deployed. This is particularly true for ICBMs loaded with multiple independent warheads. Ensuring that an ICBM can get close to a target and shower it with survivable warheads that are able to detonate on target is no small feat. Before North Korea has a credible nuclear capability that can threaten the American homeland, it will likely test multiple ICBMs loaded with multiple dummy warheads that are able to get close to a target.

Attacking U.S. Bases in Guam. North Korea could use the Hwasong-12 liquid-fueled and Hwasong-16 solid-fueled IRBMs, each with two variants of maneuverable warheads, to conduct theater nuclear strikes against U.S. bases in Guam to prevent the flow of forces and logistics to the Korean Peninsula. Pyongyang could also use the Hwasal-1/2 long-range ground-launched cruise missile and Bulwhasal-3-31 sea-launched cruise missile.

In November 2023, as noted previously, North Korea successfully launched its first military reconnaissance satellite after two previous failures. Pyongyang announced that the satellite surveilled Andersen Air Force Base, Apra Harbor, and other major U.S. military bases in Guam.[31]

Targeting South Korea. To prevent the United States from augmenting forces in South Korea during a conflict, North Korea could use nuclear weapons to attack South Korean ports and airfields to interrupt force flow. Alternatively, North Korea could try to use or threaten to use nuclear weapons against the American homeland in an attempt to decouple the United States from South Korea. Pyongyang could threaten South Korean leadership and military targets with a nuclear attack to coerce Seoul to surrender or abandon a counteroffensive attack on North Korea. U.S. bases in South Korea—such as Osan Air Force Base and the U.S. Army's Camp Humphreys—would likely be high-priority targets.

The United States and its allies have assessed for a decade that North Korea has nuclear weapons for short-range and medium-range Scud and No-dong missiles that could target South Korea and Japan. In January 2021, Kim Jong-un declared that the regime had created "ultra-modern tactical nuclear weapons including new-type tactical rockets."[32] While it is unlikely that North Korean weaponeers have created unique breakthroughs in either weapons or rocket design, it is clear that North Korea has slowly but steadily been advancing its non-strategic nuclear capabilities, particularly over the past two years.[33]

It should be remembered that most North Korean missiles would be conventionally armed to enable Pyongyang to saturate missile defenses with large numbers of conventionally armed missiles and make follow-on attacks with nuclear-tipped missiles. North Korea has demonstrated the ability to fire a mixed salvo of several types of missiles at once, which could overwhelm allied missile defense systems.[34] The regime also has deployed more capable, longer-range artillery and multiple rocket launchers to augment missile attacks.

Removing Japan from the Equation. Pyongyang could threaten nuclear attacks to intimidate Tokyo into rejecting the use of Japanese ports, airfields, and bases for U.S. and U.N. Command operations against North Korea. In 2017, North Korea threatened to "reduce the U.S. mainland into ashes and darkness" and warned that "[t]he four islands of the [Japanese] archipelago should be sunken into the sea by [our] nuclear bomb.... Japan is no longer needed to exist near us."[35] North Korea also identified the Japanese cities of Tokyo, Kyoto, Nagoya, Osaka, and Yokohama as targets.[36]

Collaboration with Russia

North Korea is fast becoming a weapons supplier of choice for malign actors around the world and almost certainly sees opportunity in a closer relationship with Russia. Such a relationship undoubtedly includes hard currency, food, and raw materials in exchange for North Korean weapons, but it could also include technical assistance with Pyongyang's missile and nuclear weapons programs.

For decades, North Korea has sold military equipment to some of the world's most unsavory actors, including Libya, the Palestine Liberation Organization, Zimbabwe, Sudan, Yemen, Hamas, and Hezbollah.[37] Such exports have proved to be an important source of hard currency that has enabled the North Korean regime to maintain power on the peninsula. Over the past two decades, North Korea has expanded such exports and has become the arsenal of autocracies around the world. North Korea now counts China, Iran, Russia, and Syria among its most important trading and diplomatic partners. It is therefore not surprising that when Russia needed

munitions to fuel its invasion of Ukraine, North Korea was willing to provide them.[38]

By 2023, it had become clear that North Korean munitions were showing up in Russia by the tens of thousands. In February 2024, South Korean officials asserted that North Korean support to the Russian military had been considerable and included 6,700 containers of military equipment, which could accommodate more than 3 million rounds of 152 mm artillery shells or more than 500,000 rounds of 122 mm multiple rocket launchers.[39] Such weapons may be produced by the approximately 300 military factories in North Korea that produce a variety of munitions.[40] Additional evidence suggests that North Korea is expanding its military production lines so that it can increase its arms sales to Russia and potentially to other countries as well.[41] There is also some evidence that the number of rounds North Korea has provided to Russia for use in Ukraine is well over 5 million.[42] Such support goes to private military contractors employed by Russia, including the Wagner Group, in addition to Russia's armed forces.[43]

North Korea also could be providing Russia with large amounts of antiquated but still effective multiple rocket launchers, antitank and antiaircraft missiles, short-range ballistic missiles, tank artillery rounds, and field artillery pieces.[44] In a sense, this would be a strategy of compensating for a lack of modern, high-quality weapons with large quantities of antiquated, low-quality systems from North Korea. There is strong evidence of the low quality of North Korean munitions, including reports that the munitions North Korea has provided do not operate at high levels of effectiveness. By some estimates, only half of the munitions provided by North Korea work according to military requirements; the other half end up as "duds" in some shape or composition.

With little to offer for legitimate trade, North Korea's illicit weapons allow it to acquire hard currency that it can then funnel into its own weapons programs and, most critically, that the Kim regime can use to maintain control of North Korea. This trade of weapons for cash further allows the regime to expand its relationship with existing trading partners, seek new clients that it can support through expanded production lines, and gain access to restricted technologies. Part of the recent Kim Jong-un–Vladimir Putin summit occurred at a Russian spaceport,[45] where Putin strongly suggested that there would be ever greater North Korean–Russian military cooperation and said that Kim showed a "big interest in rocket technologies."[46]

In addition to the hard currency, there is some evidence that Russia is providing raw materials and food support to North Korea, thereby enabling greater munitions production.[47] Some reports suggest that Russia is providing thousands of tons of corn and wheat as part of a package of support for the regime.[48] Much of this support would align with North Korea's long-standing "second economy" with illicit transfers of weapons and capabilities in exchange for currency and food aid conducted through channels that lie outside normal global trade markets, which in many ways are cut off because of sanctions against North Korea.[49]

Another benefit for North Korea is diplomatic support in the United Nations and beyond as Russia and North Korea seek not only to evade existing sanctions and produce "sanctions-proof trade" relationships, but also to provide mutual support in various international venues with the explicit goal of undermining existing sanctions.[50] As one author has noted, "[t]he current China-Russia-DPRK trajectory, particularly as evidenced by Russia's Panel of Experts veto at the UN Security Council and the Chinese abstention, indicates that coordinated operations to undermine the status quo in Northeast Asia are already well underway."[51]

One of the consequences of Kim's newfound access to hard currency and diplomatic support is that North Korea may no longer want or even need improved relations with the United States, which it may well view as a power in decline while the autocrats in Beijing, Moscow, and Pyongyang are on the rise. An additional consequence could be a modernized military—especially more modern military hardware. Pyongyang almost certainly would like to upgrade its conventional military capabilities, which have languished since the end of the Cold War. In many ways, North Korea's conventional military equipment is a relic of a bygone era. Logically, therefore, Pyongyang would seek more modern fighter aircraft, surface-to-air missiles, and armored vehicles, as well as missile production capabilities, in exchange for rockets, missiles, and mortars. Put another way, Pyongyang may be seeking to exchange older equipment in the short term for more modern (and more effective) Russian equipment in the longer term.

If the relationship between Russia and North Korea continues to progress, the two parties conceivably could sign a formalized mutual defense treaty. Such a treaty could well strengthen military and security cooperation between Moscow and Pyongyang and lay the foundation for long-term military cooperation beyond mere arms trades.[52] Such longer-term military cooperation that resulted from a mutual defense treaty could include joint military drills and exercises, potentially on the peninsula itself.[53]

In this way, the Cold War relationship of Beijing as the military guarantor of North Korea and Moscow as the economic guarantor of North Korea could be reversed: "China will stay on as Pyongyang's primary economic benefactor and diplomatic protector, while Russia could play the part of the North's main military partner. Moscow will be happy with such a role if only because it already has little to lose with Washington, Seoul and Tokyo."[54]

Of primary concern for the United States and South Korea is the likelihood that Russia could assist North Korea in developing the technologies it needs to advance its missile programs and nuclear warhead efforts. Specifically, there is concern that North Korea could receive technologies that would enable it to launch large quantities of maneuverable cruise missiles to overwhelm U.S. and South Korean missile defenses, miniaturize nuclear warheads to go on its ballistic or cruise missile inventory, and thereby field capabilities to target locations at a variety of ranges with accuracy and high rates of effectiveness by advancing its ICBM and submarine-launched ballistic missile (SLBM) programs.

Maneuverable Cruise Missiles. It is very possible that Russian assistance could include helping North Korea to develop and produce a new generation of maneuverable cruise missiles. In particular, Russia could provide assistance for the development of the next generation of the Hwasal family of "strategic" land-attack cruise missiles (LACMs). The North Koreans tested the Hwasal-2 in 2023 and described it as being capable of carrying "tactical nuclear weapons."[55] The LACM is a type of missile that, while capable of carrying small nuclear warheads, is itself small and can maneuver at low altitudes. Such capabilities augment North Korea's ability to target South Korea and the United States with ballistic missiles.

Russia could help North Korea to mature its Hwasal family of LACMs by increasing the system's range, speed, accuracy, and maneuverability. The Russian SS-N-30A (Kalibr), an LACM used extensively by Russia during the war in Ukraine, could be a useful source of technology for the North Koreans, as it can be launched from a surface ship or a submarine or modified to be a ground-launched system and has a claimed range of over 4,000 km.[56] Alternatively, Russia could transfer technology from existing SSC-8 ground-launched cruise missiles (the system that triggered the American withdrawal from the Intermediate Nuclear Forces Treaty).[57] In either case, Russia's extensive and decades-long history of building effective and reliable missiles capable of carrying nuclear weapons could help North Korea to modernize its Hwasal family of missiles, which currently has an estimated range of only 1,500–2,000 km.[58] A North Korean version of the Kalibr could be an additional, highly effective means of hitting targets in South Korea and Japan with a nuclear weapon.

Without question, South Korean and American missile defenses have matured in recent years with the deployment of Terminal High Altitude Area Defense (THAAD)[59] to the region as well as with South Korea's indigenous missile defenses. The ability to overwhelm these defenses depends in part on North Korea's ability to launch large salvos of mixed ballistic and cruise missiles, which means that sheer quantities of missiles are useful, but more modern, accurate, and potentially maneuverable cruise missiles could also go far toward overcoming missile defenses stationed in South Korea. Consequently, Russian assistance could enable North Korea at least to make it harder for Seoul and Washington to limit its ability to hit targets in the region with a nuclear weapon. This would require that the United States put more emphasis on the threat of retaliation to deter a North Korean nuclear attack.

Warhead Miniaturization. The ability to miniaturize nuclear warheads so that they may be carried by North Korean cruise or ballistic missiles is another critical concern. There is modest evidence that North Korea has mastered the high degree of technical sophistication needed to miniaturize nuclear weapons to the point where they could fit on a missile—a breakthrough achieved by Russia decades ago.

According to two senior U.S. military commanders, General William Gortney and Admiral Cecil Haney, there is some evidence that North Korea may have the ability to miniaturize a nuclear weapon to the point at which it could be loaded onto a rocket or missile capable of hitting a number of targets in East Asia and potentially in North America.[60] Until there is a test, an inspection, or some other, more recent public declaration by a knowledgeable U.S. authority, the national security community should maintain that North Korea may possibly have the ability to miniaturize a nuclear warhead for placement on a missile.

In recent years, Russia has invested heavily in producing miniaturized warheads capable of going onto cruise missiles, modernized ballistic missiles, and hypersonic boost glide vehicles such as the Avangard.[61] In addition, Russia's deployment of the SSC-8 LACM in the past decade is quite troubling and ultimately triggered the U.S. withdrawal from the Intermediate Nuclear Forces Treaty. The SSC-8 cruise missile, which can be fired from mobile launchers, each of which is able to carry six missiles, can carry a highly sophisticated miniaturized warhead. If Russia were to supply North Korea with the technology to develop and build a highly miniaturized warhead akin to what is carried on the SSC-8, the long-term implications for the security of Northeast Asia and North America would be significant:

> By itself, North Korea now has the theoretical capacity to attempt to simultaneously deter the US with ICBMs—a capability Pyongyang continues to refine through continued missile and satellite launches—while compelling South Korea with shorter-range ballistic missiles and tactical nuclear weapons. All that is missing is a transformative change in the international order capable of creating a disruption to the US–ROK alliance—a strategic inflection point that would alter the status quo of international relations. This is where China and Russia come in. Together, the three nuclear-armed countries produce an asymmetric nuclear capability—strategic depth creating a potentially dominant position in a tit-for-tat escalation spiral—that could stretch US hub and spoke extended deterrence commitments with the ROK and Japan.[62]

Although North Korea has tested and fielded increasingly reliable and accurate cruise and ballistic missiles in recent years, there is only modest evidence that it has succeeded in miniaturizing nuclear warheads to the point at which they could fit on top of ballistic or cruise missiles. Russia is ideally situated to aid North Korea in this endeavor, which would be the "crown jewel" of technology assistance that it could provide in exchange for North Korean munitions. Technically difficult, miniaturization that enabled Pyongyang to put a nuclear warhead on a modern cruise missile or multiple warheads on an ICBM would be what North Korea most desires from Russia, and Russia might not hesitate to transfer a technology it mastered decades ago in exchange for continued North Korean support in the Ukraine war.

If North Korea did receive this technical know-how from Russia, the security situation in Northeast Asia would change fundamentally because North Korea would be able to target sites across East Asia and North America with salvos of nuclear-tipped cruise and ballistic missiles. Such salvos, if initiated, would likely come after large numbers of cheap, conventionally armed ballistic and cruise missiles were fired at targets in South Korea, Japan, and the United States to overwhelm and exhaust allied missile defenses. Once these missile defenses were exhausted, combined salvos of nuclear-armed high-speed ballistic missiles and low-altitude maneuverable cruise missiles could target—and likely hit—key sites.

In this event, the deterrence dynamic would shift from one that is centered on deterrence by denial (through missile defenses that can intercept and destroy incoming missile threats) to one that is centered on deterrence by punishment (through offensive weapons capable of causing widespread destruction in North Korea). Such a dynamic in Northeast Asia might not be as stable as the one that exists today, which could mean that crises involving North Korea could escalate more rapidly and in more unforeseen ways than is the case today.

ICBM and SLBM Assistance. North Korea has been advancing its ICBM force in recent years. In 2017, Pyongyang demonstrated that its Hwasong-14 and Hwasong-15 missiles could range the continental United States. In 2020, North Korea revealed the massive Hwasong-17 missile, which is assessed to have the ability to carry three to four nuclear warheads.

In 2023, North Korea tested the Hwasong-18, a solid-fuel, road-mobile ballistic missile capable of hitting targets in North America. The Hwasong-18 is a three-stage missile and large enough to carry MIRVs, to include nuclear warheads.[63] Over the past several months, it has become clear that the Hwasong-18 is a capable delivery vehicle that would create real dilemmas for the United States and South Korea. A road-mobile, solid-fuel missile gives North Korea a second strike capability that can be launched with little warning and few support vehicles, making it easy to conceal and highly reliable. It is a significant step and could become the backbone of North Korea's strategic deterrent. North Korea's continued production of ICBMs risks overwhelming the limited number of U.S. missile interceptors protecting the American homeland.

Russia could provide North Korea with additional technical assistance to build larger versions of the Hwasong missile, one that potentially can carry up to eight nuclear warheads to targets virtually anywhere in the Northern Hemisphere. If Russia did assist North Korea in building heavy, large-payload ICBMs, North Korea could credibly threaten the United States with large-scale attack, thus escalating any crisis or conflict almost from the outset.

Some U.S officials have speculated that Moscow could also provide North Korea with the technical know-how to build nuclear-capable submarines—a capability that Kim Jung-un has sought for more than a decade.[64] There is some precedent for technology-sharing when it comes to submarines and ballistic missiles. North Korea's *Hero Kim Gun-ok* submarine, launched in 2023, is a refurbished Soviet *Romeo*-class submarine capable of launching 10 ballistic missiles.[65] It is possible that Russia could assist North Korea in building or fielding additional missile submarines that could launch nuclear-armed cruise or ballistic missiles.

Cybercrime. Because of North Korea's isolation and relatively small economy, its cyber program is often underestimated, but from 2023–2025, Pyongyang continued to punch above its weight in cyberspace. North Korea's cyber operations primarily serve two purposes: illicit revenue generation and disruptive espionage. U.S. Cyber Command (USCYBERCOM) reports that Pyongyang's hackers focus heavily on cryptocurrency theft and financial cybercrime as ways to fund the regime's nuclear weapons and missile programs. This was starkly demonstrated in 2023 when North Korean cyber thieves were implicated in the $600 million hack of a global cryptocurrency exchange, draining digital wallets in what cybersecurity experts called one of the largest heists on record. Such funds directly bolster Kim Jong-un's strategic arsenal. North Korean hackers (often referred to as the Lazarus Group, APT38, etc.) also have targeted banks, the Society for Worldwide Interbank Financial Telecommunication (SWIFT) financial network, and even online gambling platforms, showing remarkable agility in finding new moneymaking avenues online.

North Korea has also engaged in cyberattacks against South Korean and U.S. defense networks. In 2023, a North Korean unit attempted to breach a major South Korean defense company's email servers and was caught infiltrating a software supply chain used by South Korean government agencies. North Korea also deploys cyber for psychological operations; for example, it has planted fake bomb threats and hacking incidents to intimidate activists and defectors abroad.

While Pyongyang's operations have not directly caused damage to U.S. critical infrastructure, the risk of escalation or miscalculation exists. A notable event occurred in 2024 when USCYBERCOM discovered North Korean malware on the network of a health care provider in the U.S. This discovery of what was probably an unintended spillover from a ransomware campaign triggered a rapid interagency response to ensure patient data safety and highlighted that even North Korea's financially motivated hacks can impact U.S. citizens.

Given North Korea's extreme isolation, cyber operations offer an attractive, deniable tool that the regime can use to project power and earn hard currency. The global threat environment therefore must account for Pyongyang's continued forays, which USCYBERCOM counters through close collaboration with the FBI and Treasury to sanction and impede the regime's cybercrime apparatus.

U.S. Force Presence

The United States maintains 28,500 military personnel on the peninsula in South Korea.[66] These components include the U.S.-led United Nations Command; the Combined Forces Command, which controls U.S. and South Korean forces in times of

Threats: North Korea

	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
Behavior			✓		

	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
Capability			✓		

war; and U.S. Forces Korea as well as smaller components such as the 8th Army and 7th Air Force.[67] Impressive though they sound, these are primarily headquarters components, meant to command and control larger numbers of American forces as they flow into theater.

The majority of personnel assigned to combat operations are found in the 51st Fighter Wing at Osan Air Base (location of the Combined Air Operations Center) and the 8th Fighter Wing at Kunsan Air Base.[68] The U.S. 2nd Infantry/South Korean Combined Division has one brigade's worth of soldiers assigned to it, but its primary focus is the elimination of North Korean weapons of mass destruction rather than combat operations.[69] In short, the U.S. Army's Camp Humphreys and U.S. Air Force's Osan and Kunsan Air Bases represent the infrastructure that can accommodate very large numbers of American ground and air forces, but they do not constitute large numbers of American combat power on the peninsula.

Overall Assessment

- **Conventional Capabilities: *Weak*.**
- **Missile Capabilities: *Strong*.**
- **Nuclear Capabilities: *Marginal*.**
- **Chemical and Biological Capabilities: *Weak*.**
- **Overall Behavior: *Testing*.**
- **Overall Capability: *Capable*.**
- **Threat to U.S. Vital Interests: *High*.**

Conclusion

North Korea's nuclear and missile forces represent its greatest military threat. Its naval and air forces would not be expected to last long in a conflict with South Korea and the United States. Pyongyang's ground forces, though consisting mostly of older weapons, are extensive and forward deployed. Thousands of artillery systems deployed near the demilitarized zone could inflict devastating damage on Seoul if the United States and South Korea used conventional means to attrit the North Korean artillery threat. If the long-range artillery were to become an existential threat to South Korea, the United States could employ nuclear weapons to destroy the North Korean artillery positions on the Kaesong Heights.

Greater North Korean nuclear capabilities and missile threats pose an increasing challenge for the United States and Seoul. A more survivable nuclear force could lead North Korea to perceive that it is immune to any international response. Pyongyang could feel emboldened to act even more belligerently and use nuclear threats to coerce Seoul into accepting regime demands. The regime could use threats of nuclear attack to force Tokyo to deny U.S. forces access to Japanese bases, ports, and airfields during a Korean conflict. Pyongyang might also assume that conditions for military action had become favorable if it believed the U.S. extended deterrence guarantee had been undermined.

North Korea is also aggressively pursuing military modernization along with Russian assistance, almost certainly in exchange for North Korean support for Russia's invasion of Ukraine. North Korea's missile and nuclear programs are almost certainly maturing and could become even more robust in the years to come.

The increasing rate and diversity of North Korea's missile launches show that Pyongyang is

making significant progress toward implementing a more capable and flexible nuclear strategy that includes preemptive strikes with strategic and non-strategic nuclear weapons. North Korea's leaders, however, probably understand that more effective missile defenses, coupled with American nuclear weapons, would not only deny them the benefits that they might hope to gain from such an attack, but also result in termination of the Kim family regime.

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Conclusion: Global Threat Level

America faces a range of challenges to its security and interests at home and abroad from a number of countries and organizations.

The government of the United States faces the challenge of employing—sometimes alone, sometimes with allies—the right mix of diplomatic, economic, intelligence, and military capabilities to defend American interests. Because the *2026 Index* focuses on the military instrument of power, its assessment of threats is an assessment of the military threat posed by each adversary addressed in this section.

China—the United States' primary adversary—remains "aggressive" in the scope of its behavior and earns the score of "formidable" for its capabilities. This is because of its modernization and expansion of its military and the particular attention it has paid to its nuclear and space capabilities. The People's Liberation Army continues to conduct military activities beyond its immediate region and engages in ever larger and more comprehensive exercises, including live-fire exercises in the East China Sea near Taiwan—which seem for all the world like dress rehearsals for an invasion—and aggressive naval and air patrols in the South China Sea and around Australia.

China is rapidly closing the capability gap between its forces and those of the United States and is no longer a distant competitor. Indeed, its navy now has more ships than the U.S. Navy and it has the largest concentration of missiles on the planet. China regularly probes 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, recent U.S. actions in Venezuela, and broader U.S. military developments and has been adjusting its own posture, training, and investments accordingly. It is and will remain, for the foreseeable future, America's primary and most capable adversary.

Russia remains the primary threat to American interests in Europe. While it does not present the same threat to U.S. interests that the Soviet Union once did, it threatens a number of key U.S. allies and interests in Europe. Russia's invasion of Ukraine reintroduced large-scale conventional war to Europe: It is the largest conflict on that continent since the end of World War II, and its economic and security repercussions are significant. Moscow also maintains the world's largest nuclear arsenal, which poses an existential threat to the U.S. homeland, and although a strike against the American homeland is unlikely at present, Russia's repeated attempts at nuclear coercion against our NATO allies using its 2,000 non-strategic nuclear weapons should not be dismissed.

The *2026 Index* assesses the threat emanating from Russia as "aggressive" for level of provocative behavior and "gathering" for level of capability. Although Russia remains aggressive, it has lost significant amounts of its combat power to Ukrainian forces and, while its manpower remains robust, has been forced both to conscript more forces and to rely extensively on foreign assistance from North Korea, Iran, and China. Russia is not the formidable power it once was, but it still retains its industrial capacity and has shifted its economy to a wartime footing.

Iran represents by far the most significant security challenge to the United States, its partners, and its interests in the greater Middle East. Its open hostility to the United States and Israel, sponsorship of terrorist groups like Hezbollah (among others), and history of threatening the commons underscore the problem it could pose. Today, Iran's provocations

Threats to U.S. Vital Interests: Summary

SEVERE	HIGH	ELEVATED	GUARDED	LOW

are of primary concern to the Middle East 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 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. However, the concerted campaign by the State of Israel against the leadership and capabilities of Hamas and Hezbollah as well as its efforts to destroy Iran's nuclear and missile capabilities, which have been carried out with support from the United States, have significantly degraded the threat from Iran even as it endures. The *2024 Index* assessed Iran's behavior as "aggressive" and its capability as "gathering." The extended military campaigns between Iran and Israel have caused Iran to be assessed as "hostile" for its level of provocative behavior in the *2026 Index*, but the severe degradation of Iran's combat power and nuclear capabilities have caused it to be rated "aspirational" for its level of capability.

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. In addition, North Korea's continued advancement of its nuclear program and its intercontinental ballistic missile capabilities make it an increasing threat to the American homeland. Indeed, North Korean officials are belligerent toward the United States, often threatening to turn the American homeland into "a sea of fire." 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 in an attempt to extract concessions from the United States in negotiations on its nuclear program. 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. The *2026 Index* therefore assesses the overall threat from North Korea, considering the range of contingencies, as "testing" for level of provocative behavior and "capable" for level of capability.

Just as there are lower-level American interests that are not covered by the *2026 Index*, there may also be additional threats to American interests that are not identified in this analysis. The *2026 Index* focuses on the most threatening adversaries to U.S. vital interests.

Based on our assessments of these threat sources, the *2026 Index* rates the overall global threat environment as "aggressive" for threat actor behavior and "gathering" for material ability to harm U.S. security interests. China's dramatic expansion of its power projection abilities (especially its investment in nuclear weapons) and 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 United States and Western allies, in addition to Iran's ongoing investments in its nuclear and ballistic missile programs, result in an overall score of "high" in the *2026 Index*.

Threats to U.S. Vital Interests

BEHAVIOR	HOSTILE	AGGRESSIVE	TESTING	ASSERTIVE	BENIGN
China		✓			
Russia		✓			
Iran	✓				
North Korea			✓		
OVERALL		✓			

CAPABILITY	FORMIDABLE	GATHERING	CAPABLE	ASPIRATIONAL	MARGINAL
China	✓				
Russia		✓			
Iran				✓	
North Korea			✓		
OVERALL		✓			

U.S. Military Power

An Assessment of U.S. Military Power

The United States military is at an inflection point. After two decades of counterterrorism operations and nation-building, the United States is attempting to rebuild its military power—particularly the platforms and munitions that are so needed for the current era of great-power confrontation.

While the United States military can execute breathtakingly flawless operations, as evidenced in Operation Midnight Hammer when American aircraft destroyed large portions of Iran's nuclear program and in Operation Absolute Resolve when the United States extracted Venezuelan dictator Nicolás Maduro, the military itself requires significant reinvestment if it is to be able to deter and, if necessary, defeat adversary aggression.

Fortunately, because of President Trump's proposed reinvestment in the American military—from new shipyards to new production lines, from Golden Dome missile defenses to modernizing America's strategic deterrent, and from new fighters like the F-47 to the next-generation B-21 stealth bomber—the United States will spend trillions of dollars over the next four years to enhance America's combat power. But this will take time, and that reinvestment must cover an enormous amount of ground.

The 2025 National Security Strategy articulates the importance of securing the Western Hemisphere and America's borders. It identifies China as America's primary foreign adversary while still recognizing the challenges posed by America's adversaries in Russia, Iran, and North Korea. This is a formidable set of challenges that in many ways is greater than those our nation faced in the Cold War.

Not only do America's new adversaries field more advanced capabilities and enjoy far more comparative wealth than the Soviets did, but they have demonstrated a willingness to engage in incredible acts of violence to achieve their aims. China threatens Taiwan and other neighbors on a routine basis, to include using force against neighboring ships operating in international waters. Russia has brutally invaded its neighbors and threatens NATO allies with nuclear annihilation on a regular basis. Iran not only has sought the nuclear bomb and attacked American forces across the Middle East, but also has tried repeatedly through missile and terrorist attacks to destroy America's most valuable partner in the region, Israel. North Korea continues to expand its nuclear arsenal and regularly threatens the American homeland as well as our allies in Korea and Japan with devastating strategic attack.

Consequently, the prospect of coordinated or sequential attack by one or more of America's adversaries is higher now than at any time since the end of the 1930s. This is not hyperbole: The United States and its allies in the Indo-Pacific, Europe, and the Middle East are confronted with multiple adversaries that seek—and have been preparing for many years—to overturn the free and open world order that has benefited the American people for decades.

Unfortunately, the strategic distractions of the 2000s and the 2010s have left the United States underprepared for the challenges at hand. Too much time was spent on the wrong issues and the wrong missions in the wrong parts of the world and focusing on far too many faddish social issues to prepare for the challenges posed by malign actors in the Western Hemisphere and by the dictators in Beijing, Moscow, Tehran, and Pyongyang.

The United States is not postured correctly and does not have sufficient ships, planes, and munitions to focus on all challenges in every theater simultaneously. As it rebuilds its military and refills its stockpiles, it will rely more heavily on allies in Europe and Asia. It must prioritize securing its interests in the Western Hemisphere, as it did with Operation Absolute Resolve, while still setting the Indo-Pacific theater to deter and, if necessary,

defeat a near-peer China that seeks to overturn the free and open world order.

The *2026 Index of U.S. Military Strength* posits that the military should build up to a force that can address two major regional contingencies (MRCs). As of now, it is underprepared to address a single MRC in the Indo-Pacific. The path that President Trump has set with the National Security Strategy, the National Defense Strategy, the One Big Beautiful Bill Act, and significant increases in defense spending in the coming years will go far to get the military back to where it needs to be—but much needs to be done in the years to follow.

The good news is that our allies—Japan, Australia, Germany, Poland, South Korea, and others—are taking significant steps to increase defense spending and field more credible combat capability to deter adversary aggression within their theaters. More actors such as the Philippines see that the United States remains committed to opposing revisionist actors from imposing their will on America's partners and have become more committed themselves to opposing America's adversaries.

The U.S. military is turning itself around. Within the first week of his Administration, President Trump announced the Golden Dome missile defense system designed to protect America and its allies from strategic attack. Subsequently, President Trump announced the Air Force's next-generation air dominance fighter, the F-47. The Department of War is addressing challenges in acquisition, shipbuilding, and personnel and ordering thousands of additional missile interceptors and long-range strike missiles.

Where to Start

The Department of War periodically conducts formal defense reviews to inform decisions on capabilities and capacities across the Joint Force relative to the threat environment (current and projected) and evolutions in operating conditions, the advancement of technologies, and aspects of U.S. interests that may call for one type of military response over another.

Major changes in the global threat environment cause significant reassessments of the capabilities and capacities required for the U.S. military to secure the interests of the American people. In 1993, for example, then-Secretary of Defense Les Aspin conducted the Bottom Up Review (BUR) in recognition that "the dramatic changes that [had] occurred in the world as a result of the end of the Cold War and the dissolution of the Soviet Union" had "fundamentally altered America's security needs" and were driving an imperative "to reassess all of our defense concepts, plans, and programs from the ground up."[1]

The BUR formally established the two-MRC standard, the requirement that U.S. forces should be able "to achieve decisive victory in two nearly simultaneous major regional conflicts and to conduct combat operations characterized by rapid response and a high probability of success, while minimizing the risk of significant American casualties."[2]

Since that study, the government has undertaken others as Administrations, national conditions, and world events have changed the context of national security. Quadrennial Defense Reviews (QDRs) were conducted in 1997, 2010, and 2014 and were accompanied by independent National Defense Panel (NDP) reports that reviewed and commented on them.

The QDR was replaced by the National Defense Strategy (NDS), released in 2018, 2022, and 2026,[3] and the independent perspectives of the formal U.S. Department of Defense (DOD) review by the Commission on the National Defense Strategy, which released its views on the NDS starting in November 2018.[4] Departing from their predecessors, neither document proposed specific force structures or end-strength goals for the services, but both were very clear in arguing that America's military should be able to address more than one major security challenge at a time. The commission's report in 2024, for example, even criticized the NDS for not making a stronger case for a larger military that would be capable of meeting the challenges posed by four named competitors—China, Russia, Iran, and North Korea—while also possessing the capacity to address lesser though still important military tasks that included presence, crisis response, and assistance missions.[5]

The Biden Administration's 2022 NDS echoed the general goal for the U.S. military to "deter and prevent adversaries from directly threatening the United States and our allies, inhibiting access to the global commons, or dominating key regions,"[6] all of which are themes that have remained remarkably consistent from one Administration to the next for several decades.

The new 2025 NSS likewise prioritizes the threat posed by China but, while naming other threats that include Russia, Iran, North Korea, and terrorist groups, advocates dealing with them by improving the forward posture of U.S. forces, our national resilience to attack, and U.S. collaboration with regional allies. This approach will be paired with substantial increases in defense spending, as already seen in the fiscal year (FY) 2026 defense budget and probably will be seen in the FY 2027 budget as well. President Trump has made clear that his goal is to rebuild and revitalize the U.S. military as a necessary component of his National Security Strategy.

Balancing Investment in Procurement and Research and Development

It has become fashionable to argue that existing systems like aircraft carriers and main battle tanks are becoming obsolete. Critics question their value in an era of technological advancement when new capabilities such as advanced autonomous systems and hypersonic missiles increasingly render the U.S. Navy's biggest and most prominent ships too large and too slow to evade missiles and drones.[7]

Critics point to Ukraine's sinking of the Russian missile cruiser *Moskva* to claim that American carriers would stand little chance of survival during a conflict with China.[8] The U.S. Navy, they insist, should instead invest in various experimental drones and autonomous surface vessels.

These critics, however, are comparing apples to oranges. They are drawing conclusions far beyond the lessons of the war in Ukraine—conclusions that have no bearing on U.S. military requirements in a potential conflict with China in the Pacific. Further, they ignore decades of successful U.S. power projection operations, including the recent Operation Midnight Hammer and Operation Absolute Resolve—flawless tactical successes that utilized legacy American military platforms. The United States already has the world's most technologically advanced military, and the biggest concern for planners considering a conflict with China in the Indo-Pacific should be capacity, not capability. Quality has a quantity all its own, and China's investment in deep stores of precision-guided munitions and the shortages of these same munitions on the American side is a serious concern. Likewise, even though the U.S. Navy still has a qualitative edge over the People's Liberation Army Navy, the PLAN's numerical superiority in battle force ships is a cause for concern.

New spending in the defense budget therefore needs to be focused on expanding capacity, procuring larger numbers of platforms and munitions that currently exist, with block buys of precision-guided munitions to include long-range anti-ship missiles (LRASM); extended-range joint air-to-surface standoff missiles (JASSM-ER); precision strike missiles (PrSM); and Standard Missile-6s (SM-6). For platforms, the U.S. military needs more ships and aircraft with larger procurement orders of *Virginia*-class submarines, *Arleigh Burke*–class destroyers, F-35 strike fighters, and B-21 bombers.

Our systems and troops also need sustainment, and the vast operating distances of the Indo-Pacific necessitate thinking on airlift, sealift, and sustainment that military planners have largely ignored since the end of the Cold War. To get our troops and weapons systems to the fight, the Air Force and Navy desperately need to be investing in larger procurement orders of dry cargo ships, fueling ships, KC-46 tankers, and C-17s, C-130J/KC130J, and C-5M for air transport.

This is not to say that the United States should not be investing in next-generation technologies. Quite the contrary: Keeping the American technological edge requires the development of new, modernized systems like the B-21 bomber and the F-47 air superiority aircraft. Wherever possible, however, research and development dollars should be spent on next-generation systems that are meant to be procured, and not on generalized research. For more general research, the Department of War has rightly realized that leveraging America's incredible private sector makes more sense than funding generalized Pentagon research and development programs. If the United States is going to beat China in the race to develop higher and higher levels of artificial intelligence, for example, Silicon Valley is far more likely to do so than a government agency is.

In short, the Department of War needs to be focusing new spending on purchasing new ships, planes, and munitions so that China's quantitative edge does not cancel out America's qualitative edge.

The U.S. Joint Force and the Art of War

This section of the *2026 Index* assesses the adequacy of military capabilities defined as the ability of American forces to engage and defeat an enemy's

forces when called upon to do so. In conducting this assessment, we accounted for both quantitative and qualitative aspects of military forces, informed by an experience-based and scholarly understanding of military operations.

What Is Not Being Assessed

In assessing the status of America's military forces, the *2026 Index* uses the primary measures used by the military services when they discuss their ability to employ combat power.

- The Army's unit of measure is the brigade combat team (BCT).
- The Marine Corps structures itself by battalions.
- The Navy measures itself by the number of battle force ships.
- The Air Force measures the total number of aircraft, sometimes broken down into fighters and bombers.

Obviously, this is not the totality of service capabilities and is not everything needed for war. Even the services would argue that "what they bring to the fight" is more than these simple metrics. Discussions about military power that take place among career professionals are endless and can be incomprehensible to most people who have not spent years studying such issues. Nevertheless, measures must be found. Vitally important capabilities also must be taken into account as critical enablers of combat forces. For example:

- Combat forces depend on a staggeringly large logistics system that supplies everything from food and water to fuel, ammunition, and repair parts.
- Military operations require engineer support, and the force needs medical, dental, and administrative capabilities.
- The military also fields units that transport combat power to and sustain it wherever they may be needed anywhere in the world.

The scope of the *2026 Index* does not extend to analysis of everything that makes hard power possible. It also does not assess the Reserve and National Guard components, although they account for roughly one-third of the U.S. military force and have been essential to operations for decades.[9] As with other elements that are essential to the effective employment of combat power—logistics, medical support, strategic lift, training, and more—the U.S. military could not handle a major conflict without the Reserve and Guard forces. Nevertheless, to make the challenge of assessing the status of military strength manageable, the *2026 Index,* like its predecessors, looks at factors directly associated with the active component of each service: the baseline requirement for a given amount of combat power that is readily available in the event of a conflict.

The Defense Budget and Strategic Guidance

How much a nation spends on defense does not determine a military's capability, readiness, or capacity. How much is allocated to defense does not tell us much about the capacity, modernity, or readiness of the forces. Proper funding is a necessary but insufficient variable in determining a military's health. A larger defense budget, for example, is useless if the money is allocated inappropriately or wasted on useless programs. Nevertheless, there is a rough correlation between the percentage of the federal budget or national gross domestic product (GDP) that is spent on defense and the military's capabilities.

The U.S. government will always compare spending on defense with spending in other areas of government activity. In an ideal world, defense requirements are determined by identifying national interests that might need to be defended; assessing the nature of threats to those interests and what would be needed to deter and, if necessary, defeat those threats; and then determining what the country can afford or is willing to spend in order to field the military required to address these challenges. *Any difference between assessed requirements and the amount of money spent on military capabilities would constitute risk to American security interests.*

The *2026 Index* adopts this approach of weighing interests, threats, requirements, required military capabilities, and the associated budget. The composition of the force and the understanding of military risk have become more salient issues with the

shift toward confrontation with China and Russia. Certainly, Russia's war against Ukraine has revealed the reality of war: its appetite for resources and the relative effectiveness of military units possessing various types of equipment, munitions inventories, and histories of training.

Assessments of potential conflict between the United States and China tend toward theory in peacetime and can underestimate what would be needed to prevail in war. The 2017 National Security Strategy,[10] 2018 National Defense Strategy, 2021 Interim National Security Strategic Guidance,[11] 2022 National Security Strategy,[12] 2022 National Defense Strategy,[13] 2025 National Security Strategy,[14] and 2026 National Defense Strategy all have recognized that meeting the challenges posed by great-power competitors requires a U.S. force that is modern, ready, and effective in all domains of warfare with a focus on high-end conflict with Communist China.

Purpose as a Driver in Force Sizing

The Joint Force is used for a wide range of purposes, by far the most important of which is major combat operations. Fortunately, such events are rare.[15] Between (and even during) major combat operations, the military is used for a variety of non-combat missions, to include support to regional engagements, crisis response activities, deterrence operations, and humanitarian assistance, as well as to support civil authorities and diplomacy. One must ask, of course, whether the overreliance on the military for a variety of operations that fall well outside the realm of major combat operations undermines the military's ability to be prepared for major combat operations.

All of the U.S. Geographic Combatant Commands, or COCOMS[16]—Northern Command (NORTHCOM); European Command (EUCOM); Central Command (CENTCOM); Indo-Pacific Command (INDOPACOM); Southern Command (SOUTHCOM); and Africa Command (AFRICOM)—have engaged with countries in their regions. Such engagements range from small unit training events to larger bilateral and multilateral military exercises. Such efforts foster working relationships with other countries, help participants acquire an understanding of regional political–military dynamics and on-the-ground conditions, and signal U.S. security interests to friends and competitors. As confrontation with China becomes more acute, planning across all COCOMS will need to account for the possibility of high-end protracted conflict with Communist China.

To support these efforts, the military Services provide forces that are based permanently in their respective regions or that operate in them on a rotational basis. To make these regional rotations possible, the Services maintain forces that are large enough to train, deploy, support, receive back, and again make ready a stream of units that can meet force requirements in a variety of scenarios.

The ratio between time spent at home and time spent on deployment is known as OPTEMPO (operational tempo), and each military Service attempts to maintain a ratio that both gives units enough time to educate, train, and prepare and allows individuals to maintain a semblance of a healthy home life. This ensures that units are fully rested and prepared for the next deployment cycle and that servicemembers do not become "burned out" or suffer in their personal lives because of excessive deployments.

Experience has shown that a ratio of at least 3:1 (three periods of time at home for every period deployed) is sustainable. If a unit is scheduled to deploy for six months, for example, it will be home for 18 months before again deploying. Thus, the size of the total force must be significantly larger than any sampling of its use at any point in time.

By contrast, sizing a force for major combat operations is an exercise informed by history—how much force was needed in previous wars—and then shaped and refined by analysis of current threats, a range of plausible scenarios, and expectations about what the military can do given training, equipment, employment concepts, and other factors. Inevitably, compromises are made that account for how much military the country is willing to buy. Generally speaking:

- **The Army** sizes to major warfighting requirements.
- **The Marine Corps** focuses on crisis response and the ability to fight one major war.
- **The Air Force** attempts to strike a balance that accounts for historically based demand across the spectrum because air assets can be shifted from one theater of operations to

another, and any peacetime engagement typically requires some level of air support.

- **The Navy** is driven by global presence requirements. To meet COCOM requirements for a continuous fleet presence at sea, the Navy must have three to four ships in order to have one at sea on patrol. A commander who wants one U.S. warship stationed off the coast of a hostile country, for example, needs the use of four ships from the fleet: one on station, one that left station and is traveling home, one that just left home and is traveling to station, and one that is otherwise unavailable because of major maintenance or modernization work.

The *2026 Index* focuses on the forces required to win two major wars as the baseline force-sizing metric for the Army, Navy, and Air Force and the one-war paradigm for the Marine Corps. The three large services are meant to be sized for global action in more than one theater at a time; the Marines, by virtue of overall size and most recently by direction of the Commandant, focus on one major conflict in the Indo-Pacific while ensuring that all Fleet Marine Forces are globally deployable for short-notice, smaller-scale actions.[17] The military's effectiveness, both as a deterrent against opportunistic aggressors and as a valued training partner in the eyes of other countries, derives from its military effectiveness.

Our Approach

With this in mind, we assessed the state of America's military forces as it pertains to their ability to deliver hard power against an enemy in three areas:

- Capability,
- Capacity, and
- Readiness.

Capability. Examining the capability of a military force requires consideration of:

- The proper tools with the design, characteristics, technological advancement, and suitability that the force needs to perform its function of defeating America's enemies.
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons to defeat the enemy.
- The appropriate diversity of options to mitigate strategic vulnerability and give flexibility to commanders.
- The degree to which elements of the force mutually support one another, minimizing weaknesses, maximizing strengths, and gaining greater effectiveness.

A modern "major combat operation"[18] along the lines of those upon which Pentagon planners base their requirements should feature a capable near-peer opponent possessing modern integrated air defenses; naval power (surface and undersea); advanced combat aircraft (to include bombers); a substantial inventory of short-range, medium-range, and long-range missiles; current-generation ground forces (tanks, armored vehicles, artillery, rockets, and anti-armor weaponry); cruise missiles; and a variety of strategic and non-strategic nuclear weapons. Such a situation involving an actor capable of threatening vital national interests would present a challenge that is comprehensively different from the challenges that the U.S. Joint Force has faced since the successful conclusion of the Cold War.

In the years since publication of the 2018 National Defense Strategy, the military has focused on its readiness for major conventional warfare, primarily against Communist China.[19] In general terms, this focus was sustained through the release of the 2022 NDS, 2025 NSS, and the 2026 NDS, no doubt reflecting the realities of China's rapid expansion of its military capabilities and activities.

- The Army has invested in units and systems that are relevant to deterring China in the Indo-Pacific, especially the Multi-Domain Task Force (MDTF).
- The Marine Corps has undertaken a dramatic restructuring to posture itself more effectively for high-end warfare against a major opponent, focusing specifically on China and the littorals of the Indo-Pacific through Force Plan 2030.

U.S. Military Power: Summary

VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG

- Both the Navy and the Air Force have acknowledged the evolved threat environment that will demand more of them in the coming decade than they have had to deal with during the past 20 years; however, both services face significant challenges, as will be shown in the assessments for these services

The *2026 Index* ascertains the relevance and health of military service capabilities by looking at such factors as the average age of equipment, military capabilities and capacity as compared to those of America's adversaries, and the status of modern replacement programs. While some of the information is quantitative, some of the assessments are based on judgment calls made by experts in the relevant areas of interest or addressed by senior service officials.

It must be determined whether the Services possess capabilities that are relevant to deterring and, if necessary, defeating America's adversaries.

Capacity. The U.S. military must have the right amount of effective capabilities. This *Index* employs the two-MRC metric as a benchmark for most of the force. This benchmark is the *minimum* standard for U.S. military capacity because one will never be able to employ 100 percent of the force at any given time. Some percentage of the force will always be unavailable because of long-term maintenance overhaul, especially for Navy ships; unit training cycles; and the need to keep some portion of the force uncommitted to serve as a strategic reserve.

Summarizing the totals, this *Index* concluded that a Joint Force capable of dealing with two MRCs simultaneously or nearly simultaneously would consist of:

- **Army:** 50 BCTs.
- **Navy:** at least 400 ships and 624 strike aircraft.
- **Air Force:** 1,200 fighter/attack aircraft.
- **Marine Corps:** 30 battalions.

America's security interests require that the Services have the capacity to handle two major regional conflicts successfully.

Readiness. The consequences of the sharp reductions in funding mandated by sequestration from 2011 until 2021 caused military service officials, senior DOD officials, and even Members of Congress to warn of the dangers of recreating the "hollow force" of the 1970s when units existed on paper but were staffed at reduced levels, minimally trained, and woefully ill-equipped.[20] To avoid this, the Services traded quantity/capacity and modernization to ensure that what they do have is "ready" for employment.

Over the past several years, the services continued their effort to find an appropriate balance among capability, capacity, and readiness, at first benefiting from a reduction in combat operations and the easing of COVID-related restrictions and disruptions but then forced to contend with a loss in spending power caused by rising inflation. (In fact, accounting for the record-high inflation experienced under the Biden Administration has been one of the most potent arguments for the second Trump Administration's dramatic increases in defense spending.)

A nation must have the right capabilities to defeat the enemy in a single engagement; it also must have enough of those capabilities to sustain operations during a protracted conflict. But sufficient numbers of the right capabilities are meaningless if the force is not ready to engage.

Scoring. In our final assessments, we tried not to convey a higher level of precision than we think is achievable using unclassified, open-source, publicly available information and not to reach conclusions that could be viewed as based solely on one individual's opinion. We believe that the logic underlying our methodology is sound. The *2026 Index* draws from a wealth of public testimony from senior government officials, from the work of recognized experts in the defense and national security analytic community, and from historical instances of conflict that seemed most appropriate to this project. New capabilities such as unmanned systems, cyber

tools, hypervelocity weapons, and artificial intelligence have the potential to change military force posture calculations. At the present time, however, they are not realized in any practical sense. Moreover, such new capabilities should be seen as adding to, not as substituting for, legacy capabilities.

The *2026 Index* is focused on the primary purpose of military power—to deter and, if necessary, defeat an enemy, such as China, Russia, Iran, or North Korea, in combat. To this we added the two-MRC benchmark; on-the-record assessments of what the services themselves are saying about their status relative to validated requirements; and the analysis and opinions of various experts, both in and out of government, who have covered these issues for many years.

Taking everything together, we rejected scales that would imply extraordinary precision and settled on a scale that conveys broader characterizations of status that range from very weak to very strong. Ultimately, any such assessment is a judgment call informed by quantifiable data, qualitative assessments, thoughtful deliberation, and experience. We trust that our approach makes sense, is defensible, and is repeatable.

Endnotes

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10. *National Security Strategy of the United States of America*, The White House, December 2017, pp. 2–3, 25–26, and 28, https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf (accessed January 14, 2026).
11. Biden, *Interim National Security Strategic Guidance*, p. 14.
12. Biden, *National Security Strategy*, pp. 3, 20–21, and 23–27.
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14. President Donald J. Trump, *National Security Strategy of the United States of America*, The White House, November 2025, pp. 6–11 and 19–26, https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf (accessed January 14, 2026).
15. Since World War II, the U.S. has fought four major wars: the Korean War (1950–1953); the Vietnam War (1965–1973); the Gulf War/Operation Desert Shield/Desert Storm (1990–1991); and the Iraq War/Operation Iraqi Freedom (2003–2011). Operation Enduring Freedom (OEF), commenced immediately following the terrorist attacks of September 11, 2001, was focused primarily on combat operations in Afghanistan but included related actions against terrorist organizations worldwide. OEF was concluded in 2014 when combat operations in Afghanistan were shifted to advisory support operations under the name Operation Freedom's Sentinel. While OEF was not at the same level of intensity as the other named wars, its duration and demand for a constant rotation of forces, to include continuous airpower support, took a similar toll in terms of wear on equipment, consumption of fuel and ammunition, and repeated deployments by personnel.
16. U.S. Space Command (USSPACECOM) is also considered a geographic command, but within the context of this discussion, SPACECOM's interactions with other countries and the extent to which it must deal with units and peoples operating on its terrain are very different from those of terrestrial commands.
17. In previous editions of the *Index*, the capacity of the Marine Corps was assessed against a two-war requirement of 36 battalions: a historical average of 15 battalions for a major conflict (twice that for two) and a 20 percent buffer, bringing the total to 36. The Corps has consistently maintained that it is a one-war force and has no intention of growing to the size needed to fight two wars. Its annual budget requests and top-level planning documents reflect this position. Having assessed that the Indo-Pacific region will continue to be of central importance to the U.S., that China is a more worrisome "pacing threat" than any other competitor, and that the Joint Force lacks the ability to operate within the range of intensely weaponized, layered defenses featuring large numbers of precision-guided munitions, the Corps is reshaping itself to optimize its capabilities and organizational structures for this challenge. This *Index* concurs with this effort but assesses that the Corps will still need greater capacity to succeed in war in the very circumstances for which the Marines believe they must prepare. For a detailed examination of the current

state of the Corps, see Dakota Wood, "The U.S. Marine Corps: A Service in Transition," Heritage Foundation *Backgrounder* No. 3501, June 16, 2020, https://www.heritage.org/sites/default/files/2020-06/BG3501_0.pdf.

18. Defense references to war have varied over the past few decades from "major combat operation" (MCO) and "major theater war" (MTW) to the current "major regional contingency" (MRC). Arguably, there is a supporting rationale for such shifts as planners attempt to find the best words to describe the scope and scale of significant military efforts, but the terms are basically interchangeable.
19. Mattis, *Summary of the 2018 National Defense Strategy of the United States of America*, p. 4.
20. For more on the potential for a hollow force, see Association of the United States Army, "Preventing a Hollow Force Is Army's Top Priority," May 25, 2017, https://www.ausa.org/news/preventing-hollow-force-army%E2%80%99s-top-priority (accessed January 14, 2026), and J. V. Venable, "America's Air Force Is in Bad Shape," *National Review*, June 13, 2017, http://www.nationalreview.com/article/448556/us-air-force-weakened-funding-cuts-shrinking-workforce-aging-fleet-hurt-preparedness (accessed January 14, 2026).

U.S. Army

Wilson Beaver

Introduction[1]

On April 30, 2025, Secretary of Defense (now Secretary of War) Pete Hegseth issued a memorandum, "Army Transformation and Acquisition Reform," directing Secretary of the Army Dan Driscoll to begin to implement a "comprehensive transformation strategy" for the Army.[2] Consistent with this directive, on May 1, 2025, Secretary Driscoll and Army Chief of Staff General Randy George issued a "Letter to the Force: Army Transformation Initiative" to implement this strategy. The ATI consists of three primary lines of effort: "deliver[ing] critical warfighting capabilities, optimiz[ing] our force structure, and eliminating waste and obsolete programs."[3]

To accomplish these goals, excess ground vehicles that are more relevant to counterinsurgency operations will be eliminated, and planned procurement of obsolete systems, such as the Gray Eagle, will be canceled. At the same time, systems identified as relevant to future Army operations, including long-range missiles, modernized unmanned aircraft systems (UAS), the M1E3 tank, the Future Long-Range Assault Aircraft, and a wide range of counter-UAS (C-UAS) capabilities, will be prioritized. Just as important will be new methods of agile funding, shifting from program-centric to capability-based portfolios in an effort to field equipment faster and keep up with the pace of innovation, which is especially relevant for UAS and C-UAS procurement.

The Army is also seeking to define its role in the Indo-Pacific, which has been identified as the primary theater of operations for the foreseeable future as the entire military retools itself for deterring and, if necessary, defeating the threat posed by the People's Republic of China (PRC). New units like the Multi-Domain Task Force (MDTF) will play a crucial role in the Joint Force mission in the Indo-Pacific, deploying a wide range of new capabilities even as the Army's 31 Infantry Brigade Combat Teams continue to deploy and cross-train with allied and partnered militaries both in the Indo-Pacific and across the globe.

At the same time, the Army must not lose sight of the fact that the fundamentals of warfare have not changed and that, in pursuing innovation, one must avoid throwing out the proverbial baby with the bathwater. Drones, for example, have clear and proven combat and intelligence, surveillance, and reconnaissance (ISR) capabilities that, as demonstrated by the war in Ukraine, need to be developed and integrated. However, traditional infantry, armor, and artillery units have been just as instrumental in the conduct of the war, and the U.S. Army must remain at the forefront of these warfighting branches even while pursuing UAS and C-UAS dominance. The Army of the future must be innovative even as it is steeped in its own history and proven capabilities—capabilities that America's soldiers need to deploy, engage, and destroy the enemies of the United States of America in close combat.

Service Overview

The U.S. Army was established more than 250 years ago on June 14, 1775, and ever since then has served as America's primary agent for the conduct of land warfare. Although it is capable of all types of operations across the range of military operations and support to civil authorities, its chief value to the nation is its ability to defeat and destroy enemy land forces in battle.[4] According to U.S. law:

U.S. ARMY AT A GLANCE

EST. 1775

MOTTO
"This We'll Defend"



Daniel P. Driscoll
Secretary of the Army



Gen. Randy A. George
Chief of Staff

MAJOR BASES



1. Fort Wainright
2. Joint Base Lewis–McChord
3. Fort Bliss
4. Fort Hood
5. Fort Benning
6. Fort Gordon
7. Fort Bragg
8. USAG Stuttgart
9. Caserma Ederle
10. Camp Humphreys

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$184.4

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

448,000

RESERVE MILITARY

170,000

CIVILIAN

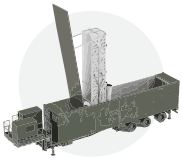
223,000

KEY EQUIPMENT (estimated current inventory)


Patriot Battalions (15)


THAAD Batteries (7)


M142 HIMARS (368)


Typhon Batteries (2)


UH-60 Black Hawk (2,100)


AH-64 Apache (750)


Stryker ICV (4,500)


M1 Abrams MBT (2,640)


JLTV (15,000)


CH-47 Chinook (465)


M109A7 (300)


Bradley Fighting Vehicles (4,500)

SOURCE: Heritage Foundation research.

heritage.org

> [The Army] shall be organized, trained, and equipped primarily for prompt and sustained combat incident to operations on land. It is responsible for the preparation of land forces necessary for the effective prosecution of war except as otherwise assigned and, in accordance with integrated joint mobilization plans, for the expansion of the peacetime components of the Army to meet the needs of war.[5]

More than any other U.S. military service, the Army has felt the impact of the past several decades of counterinsurgency operations in the Middle East. The Army prioritized funding and planning for counterinsurgency operations in Iraq and Afghanistan, and units were reorganized to support this mission. Modernization measures not considered to be in line with this priority, such as air defense systems, were cut. Now the Army is reorganizing once again to prepare itself for great-power competition, looking to align its funding and planning with a national security strategy that identifies competition with China as the primary security challenge facing the United States.

The Army Transformation Initiative

Secretary Hegseth's April 2025 memorandum initiated a comprehensive transformation strategy for the Army. The Army had already begun transformation and modernization initiatives in 2024 with its development of new MDTFs; Indirect Fire Protection Capability (IFPC) battalions; new capabilities in counter–small UAS (C-sUAS); and Maneuver Short-Range Air Defense (M-SHORAD) battalions. Under the ATI, these efforts will be built on and augmented with a series of reforms and new initiatives to transform the Army into a "leaner, more lethal force by adapting how we fight, train, organize, and buy equipment."

Secretary Hegseth's directive requires the Army to cut waste, increase lethality, reform force structures, and employ innovative processes and systems to keep pace with the rapidly evolving battlefield technologies observed in the Russo–Ukrainian war and other conflicts. As part of President Donald Trump's agenda to build a military that is fit for purpose in America's New Golden Age, Secretary Hegseth has sought to refocus the military on warfighting and to build out capabilities relevant to America's most pressing national security interests. The U.S. Army specifically needs to attain the lethality necessary to compete in an ever-evolving and dangerous global environment, especially in terms of contending with the stunning growth of the Chinese military and the clearly expanding scope of Beijing's ambitions.[6]

As noted, the Army Transformation Initiative comprises three lines of effort: delivering critical warfighting capabilities, optimizing force structure, and eliminating waste and obsolete programs.[7]

- **Delivering Critical Warfighting Capabilities.** The ATI builds on the Transformation in Contact (TiC) concept, in which emerging technologies and innovative organizational structures are integrated into formations in training, giving soldiers the ability to "innovate, learn, refine requirements, and develop solutions faster."[8] General George has elaborated on this concept:

  > We have been watching what's happening on the battlefield in Ukraine and the Middle East and, really, around the world.... We've been doing something called transforming in contact, where we're actually getting bottom-up innovation from our troops, but it's not a lesson learned unless you've actually done something to change how you train and operate.[9]

  This also means changing how the Army procures equipment. General George has commented on this as well, saying that programs of record for some capabilities may be outdated: "I'm not a fan when anybody talks about a program of record. What that means is you buy something and keep it forever." Instead, the systems the Army procures should be "modular, open systems architecture."[10] As part of delivering capabilities to the warfighter, long-range missiles, a wide array of modern UAS, the new M1E3 tank, C-sUAS capabilities, and Future Long-Range Assault Aircraft will all be integrated into the Army.

- **Optimizing Force Structure.** The focus is on "filling combat positions with Soldiers. Every role must sharpen the spear or be cut away."[11] To achieve this goal, staff positions are being

cut, commands are being merged, and general officer positions are being reduced. Combat Aviation Brigades (CAB) will lose one Aerial Cavalry Squadron, and all Infantry Brigade Combat Teams will be converted to "Mobile Brigade Combat Teams" to emphasize mobility and lethality.

- **Eliminating Waste and Obsolete Programs.** Programs that are deemed outdated or redundant are being cut. This includes "the AH-64D, excess ground vehicles like HMMWV and JLTV, and obsolete UAVs like the Gray Eagle."[12]

The Army in the Indo-Pacific

The Indo-Pacific is primarily a maritime theater. Strategically important countries in the region are separated by hundreds or even thousands of miles of open ocean. The United States is a treaty ally of Japan, Australia, South Korea, and the Philippines, nations that are threatened primarily by the naval, air, and missile forces of China. As a result, the U.S. Navy and Air Force would play the lead roles in a conflict with China. The Army, however, also has a critical role to play in the region, both with its existing assets and with new capabilities currently under development. In World War II, the U.S. Army played a crucial role in both theaters even though its role in the Pacific Theater has often been downplayed. The liberation of the Philippines, for example, was primarily a U.S. Army operation.

The Army's two main roles in a modern Indo-Pacific conflict would be to provide logistics and air defense for forward airfields (a familiar role) and to provide shore-based anti-access capabilities—a relatively new role for which the Army began to ready itself only recently.[13] The Army will need to operate in a contested logistics environment in which soldiers will rapidly have to secure and defend land in support of air defense, logistics and sustainment, and MDTFs.[14] The ability to conduct these operations is, however, inherently joint. The Army will not be able to forward deploy in support of the joint mission without airlift and sealift to get soldiers into theater. Navy and Air Force planners need to invest far more in airlift and sealift capabilities to ensure that the right systems for military movement are available.

Secretary Driscoll and General George outlined the role the Army is already playing in the Indo-Pacific in their May 2025 testimony before a subcommittee of the House Appropriations Committee:

> In the Indo-Pacific we have forward-deployed formations almost continuously, participating in exercises like Super Garuda Shield 2024, an Indonesia-hosted exercise that actively involved 11 nations this year, and Balikatan 2025, a full-scale battle simulation alongside the Armed Forces of the Philippines. Army formations in the Indo-Pacific also stand prepared to provide the Joint Force with critical support—command and control, medical, intelligence, and logistics—through all stages of competition, crisis, and conflict.[15]

The Navy and Air Force will play the leading roles in a conflict in the Indo-Pacific and therefore draw the bulk of new funding for the near future. Given the difficulties involved in expanding the defense budget in a meaningful way, the Army may even be asked to downsize to further fund the acquisition of the ships, planes, and munitions that would be most critically needed if the United States were ever again engaged in a war in the Indo-Pacific. Given these difficulties, the Army may need to narrow its ambitions and commitments around the world to focus more on its role in the Indo-Pacific.[16]

The Marine Corps has already done something similar in a plan called Force Design 2030, divesting itself of equipment, cancelling planned purchases that would be irrelevant to a conflict in the Indo-Pacific, and reshaping the service away from how it was structured for counterinsurgency in Iraq and Afghanistan and toward near-peer adversary conflict in the Pacific.

The Army would have at least five core tasks in the Indo-Pacific if war were to break out. It would:[17]

- Serve as the "linchpin" service by establishing and protecting staging areas and joint operating bases for air and naval forces, including providing air and missile defense;
- Provide logistics for the joint force, especially in terms of secure communications;
- Provide command-and-control capacity;

- Use ground-based, long-range fires to interdict enemy missiles, suppress enemy air defense, and provide counter fires against mobile enemy targets; and

- Provide counterattack capability with ground combat forces.

In the Indo–Pacific, the U.S. Army must operate in a primarily naval theater of operations against an adversary that has the home field advantage. China is only a few hundred miles away from the potential conflict zones—as opposed to the United States' main Pacific nodes of San Diego and Hawaii, which are thousands of miles away from the potential conflict zones—and has protected interior supply lines and numerical superiority in terms of equipment and munitions in theater.[18]

The Army can draw lessons from the outsized success of both the Ukrainians and the Houthis in land-based targeting of ships in recent years. The Ukrainians, with almost no navy to speak of and only short-range and intermediate-range missiles, have sunk Russian ships, targeted Russian port infrastructure, and largely denied the Russians the use of the Ukrainian littoral for offensive operations against Ukraine. The Russians have withdrawn most warships from Crimea and now keep them safely out of range—but also out of the fight. Likewise, the Houthis are threatening international commerce and targeting Western warships with nothing more than cheap drones and land-to-sea missiles.

Until 2019, the United States had been unable to construct ground-based missiles with a range between 300 miles and 3,400 miles because of the Intermediate-Range Nuclear Forces (INF) Treaty, which restricted both the United States and the Soviet Union (later Russia). The Chinese were never a party to this agreement and have been engaged in a substantial buildup of missile capabilities over the past several decades. China's most recent national security white paper states that it is "strengthening its intermediate and long-range precision strike forces... so as to build a strong and modernized rocket force."[19]

Since the end of the INF Treaty in 2019, the U.S. Army has been free to develop and field ground-based intermediate-range missiles. These missiles, coupled with air defense systems such as the Patriot missile battery, could make it exceedingly difficult for the Chinese to operate in certain contested straits—including the waters between the northernmost tip of the Philippines and Taiwan. China has designed its existing anti-access/area denial (A2/AD) capabilities to counter American warships and aircraft and may have a more challenging time targeting and destroying mobile land-based assets. In the event of a conflict in the region, land-based air defense and anti-ship missiles distributed throughout the region would give the Chinese a complex problem to solve and add another layer of deterrence.

New Weapons and Units in the Army's Arsenal

In 2021, the Army committed to fast-tracking and delivering multiple new fires systems by 2023. The Army has done a respectable job of meeting this target, surprising many doubters who were familiar with the Army's failed modernization programs in the early 2000s.

Most of the new weapons and systems discussed below have been tested successfully and have begun to deploy, first to the Indo-Pacific and then to Europe, in recent years. The Army is further developing these new weapons and systems to improve its capability to deliver long-range precision fires that would be especially relevant to a conflict in the Indo-Pacific.

The Precision Strike Missile (PrSM). The PrSM is the next-generation surface-to-surface missile being developed by the Army to replace the Army Tactical Missile System (ATACMS).[20] Lockheed Martin, the missile's developer, says the missiles have a range of up to 310 miles. Like the ATACMS missile, the PrSM will be launched from the mobile High Mobility Artillery Rocket System (HIMARS), although the launcher will now be capable of carrying two PrSM missiles, whereas previously it could carry only one ATACMS missile.

Hypersonic missiles, traveling at least five times the speed of sound, are a huge challenge for traditional air defense measures that the United States has yet to address adequately. If the Army could field a Long-Range Hypersonic Weapon (LHRW) battery successfully in the near future, that would go a long way toward addressing this capability gap.

The Multi-Domain Task Force. The Army has introduced a new type of unit, the MDTF, to accommodate these and other precision fires systems. The Army describes the MDTF as "theater-level

maneuver elements designed to synchronize precision effects and precision fires in all domains against adversary A2/AD networks in all domains, enabling joint forces to execute their operational plan (OPLAN)-directed roles."[21]

The 1st MDTF was established in 2017 at Joint Base Lewis–McChord in Washington State, the 2nd MDTF was established in 2021 in Germany, and the 3rd MDTF was established in 2022 in Hawaii. Two more Army MDTFs will be established, with one to be stationed at Fort Carson and one rapidly deployable from Fort Bragg.[22] In 2025, the Army announced that it would be building Multi-Domain Commands to oversee and direct MDTFs: Multi-Domain Command–Pacific, Multi-Domain Command–Japan, Multi-Domain Command–Europe, and Multi-Domain Command–Army.[23]

The Strategic Mid-Range Fires System. This system, also called the Typhon missile system, has been developed to fire anti-ship missiles, air defense missiles, and land-to-land mid-range missiles. The system is mobile and therefore difficult for enemy forces to target, and its range varies by missile type.[24]

The Long-Range Hypersonic Weapon (LRHW). The LRHW, also known as Dark Eagle, is a long-range hypersonic missile with a range of more than 2,000 miles.[25] In August 2025, the Army's 3rd MDTF deployed an LRHW system outside of the continental U.S. for the first time as part of the Talisman Sabre 25 exercise in Australia.[26]

The Army's Indo-Pacific Role in Peacetime

To shape the region and establish an enduring advantage, the Army is deeply engaged in building allied and partner capabilities, especially through joint exercises and training. The U.S. military's strategy in the Indo-Pacific necessitates building up capable partners and allies in the region to deter China from launching a war of aggression against its neighbors. The stronger that Japan, South Korea, Australia, Taiwan, and the Philippines—and to a lesser extent, Vietnam, India, and Indonesia—are, the more constrained China is in its ability to solve political questions in the region by force. The Army's campaigning strategy in the Pacific demonstrates to Beijing the ability of the United States and its partners and allies to operate jointly, whether it is technically, procedurally, or simply at the human level. To further complicate matters for Chinese military planners, the Army should consider expanding joint training and exercises to newer partners, especially Vietnam, Indonesia, and India.

The Army recently opened its first regional training complex in 50 years—the Joint Pacific Multinational Readiness Center (JPMRC)—with the goal of training both U.S. and allied forces in a Pacific environment.[27] This center maintains two permanent campuses, one in Hawaii and one in Alaska, and one mobile campus that cycles between allied and partnered countries for joint training. Over the past several years, the JPMRC has been hosted in Indonesia, Australia, and the Philippines.

The United States has long maintained bases in Europe where joint training exercises can take place, and this new center has filled a critical gap in allied readiness in the Pacific. The Army also conducts exercises such as Operation Pathways to practice establishing supply lines and command-and-control networks in the Western Pacific. Army units such as the Fifth Security Force Assistance Brigade deploy in support of joint exercises, acting as integrators between U.S. and allied troops.

These sorts of exercises are exactly what the Army should be doing at this point. The primary issue is that the U.S. commitment of troops and resources in the Pacific does not match the Indo-Pacific's status as the primary region of concern in the National Defense Strategy (NDS). The Army continues to devote as many or more troops and resources to other theaters, especially to the U.S. European Command and U.S. Central Command. Thus, it is struggling with fully manning its units as a result of the recruiting crisis experienced during the Biden Administration. If the Army wants to be decisive in the joint effort to deter China in the Indo-Pacific, it will need to shift personnel and resources away from other theaters and to the Indo-Pacific.

The Army deserves praise for moving quickly on these new systems, for being proactive in its engagements with partnered and allied nations in the Pacific, and for being responsive to policymakers who are pushing it to reorient its procurement and force structure around the Indo-Pacific.

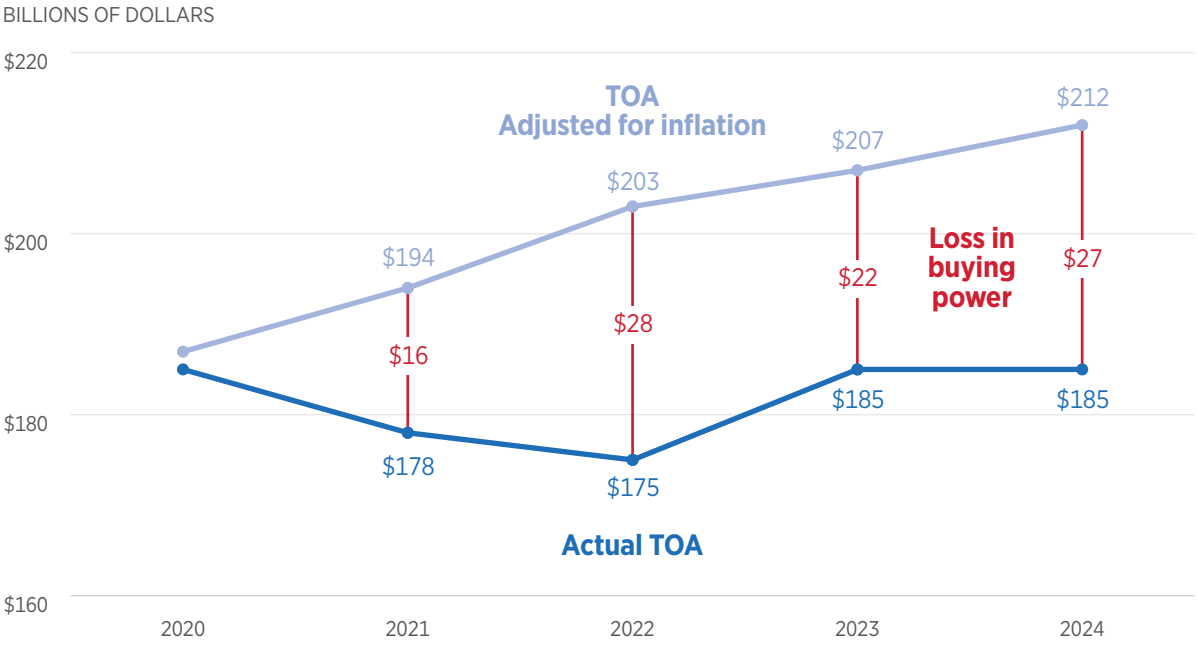
Budget

Chronic Underfunding. The U.S. Army is currently the world's most powerful army in terms of the equipment it uses and the combat effectiveness of its formations, but it is also insufficiently modern

CHART 12

Army Budget Hit by Both Cuts and Inflation

Because of declining total obligation authority (TOA) in real terms and record high inflation during the Biden Administration, the Army experienced a substantial loss of buying power from 2020 to 2024. Combined losses from 2020 to 2024 totaled $93 billion.



SOURCES: Honorable Gabe Camarillo, Under Secretary of the Army, "Army Fiscal Year Budget Overview 2024," PowerPoint Presentation, p. 14, https://www.asafm.army.mil/Portals/72/Documents/BudgetMaterial/2024/pbr/Army%20FY%202024%20Budget%20Overview%20Briefing.pdf (accessed January 20, 2026), and Table S-9, "Economic Assumptions," in Executive Office of the President, Office of Management and Budget, *Budget of the U.S. Government, Fiscal Year 2024*, p. 167, https://www.govinfo.gov/content/pkg/BUDGET-2024-BUD/pdf/BUDGET-2024-BUD.pdf (accessed January 20, 2026).

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to meet even the modest requirements of the 2022 NDS, much less to handle two major regional contingencies (MRCs) simultaneously.[28]

Even though the conflict in Iraq has ended and the military was withdrawn from Afghanistan, the Army's focus on counterinsurgency from 2001 to 2016 essentially precluded the service from modernizing the key combat capabilities that it needs now for near-peer competition. In 2011, for example, the Army cancelled its only mid-tier air defense program, the Surface Launched Advanced Medium-Range Air-to-Air Missile (SLAMRAAM), based on its assessment that it would not face a threat from the air in the foreseeable future.[29] In 2022, the Army contracted to buy from Norway largely the same system, the National Advanced Surface-to-Air Missile System (NASAMS), that it cancelled in 2011.[30] The Army's last major modernization occurred in the 1980s with the fielding of the M-1 Abrams Tank, the M-2 Bradley Fighting Vehicle, and the Blackhawk and Apache helicopters.

The Army's ability to transition from counterinsurgency operations was further constrained by a period of fiscal austerity that began with the Budget Control Act (BCA) of 2011. The inability to fund what was needed led to difficult across-the-board trade-offs in equipment, manpower, and operations accounts. Downward budget pressure drove the

Department of Defense (DOD) in 2014 to consider cutting the Army's Active component end strength from more than 500,000 to 420,000. Also as a result of these funding cuts, multiple equipment modernization programs for the Army were canceled, including some that would have been relevant for the return of great-power competition in recent years.

The change of Administrations in 2017 forestalled those cuts in end strength. The addition of billions of dollars by Congress and the Trump Administration served to arrest the decline of the Army and significantly improve unit readiness, unfortunately, however, it proved insufficient to reverse the decline that began during the Obama years, and modernization efforts and end strength remained stalled.

Loss of Buying Power. Of all the services, the Army has fared the worst in terms of resources. Its funding levels plateaued with the FY 2020 budget and since then have declined in constant dollars. The Army received approximately $181 billion in FY 2019, $186 billion in FY 2020, $177 billion in FY 2021, $185 billion in FY 2022, $185 billion in FY 2023, $186 billion in FY 2024, and approximately $186 billion again in FY 2025, amounting to a relatively flat budget over the past half-decade while the costs of manpower, matériel, and energy have increased. The second Trump Administration looks set to begin reversing this trend, with an FY 2026 request of $197 billion for the Army, a 6.9 percent increase over the FY 2025 budget.[31]

Testifying before the House Appropriations Committee's Subcommittee on Tactical Air and Land Forces in April 2023, Lieutenant General Erik Peterson, then Army Deputy Chief of Staff for Programs, summarized the situation in starkly candid terms:

> Several years of ruthless prioritization, eliminating, reducing and deferring lower priority and less necessary modernization efforts, as well as divesting of legacy capability affords virtually no further flexibility in our fiscal top line. [¶] We have made the easy choices, the difficult choices, and the hard choices over the past several years. We are now down to the excruciating choices....[32]

Former Army Chief of Staff General James McConville's more than $1.9 billion Unfunded Priority List for FY 2024, containing dozens of critical items, is testament to what the Army was not able to include in its budget request: air defense systems, organic industrial base modernization, and helicopter replacement—among many other programs.[33]

Capacity

Capacity refers to the sufficiency of forces and equipment needed to execute the National Defense Strategy. One of the ways the Army quantifies its warfighting capacity is by its number of Brigade Combat Teams (BCTs).

Brigade Combat Teams. BCTs are the Army's primary combined-arms, close-combat force. They often operate as part of a division or joint task force, both of which are the basic building blocks for employment of Army combat forces. BCTs are usually employed within a larger framework of U.S. land operations but are equipped and organized so that they can conduct limited independent operations as circumstances demand.[34]

BCTs range between 4,000 and 4,700 soldiers in size. There are three types: Infantry, Armored, and Stryker. At its core, each of these formations has three maneuver battalions enabled by multiple other units such as artillery, engineers, reconnaissance, logistics, and signal units.[35]

The simplest way to understand the status of hard Army combat power is to know the readiness, quantity, and modernization level of BCTs. With respect to the number of BCTs in the force, the Army announced in 2013 that because of end strength reductions and the prior Administration's priorities, the number of Regular Army BCTs would be reduced from 45 to 33.[36] Subsequent reductions reduced the number of Regular Army BCTs from 33 to 31, where they remain today.

When the Trump Administration and Congress reversed the planned drawdown in Army end strength and authorized personnel growth beginning in 2018, instead of "re-growing" the numbers of BCTs, the Army chose to "thicken" the force and raise the manning levels within the individual BCTs to increase unit readiness. Army end strength was reduced during the Biden Administration, but the second Trump Administration's first President's Defense Budget request reversed this trend in 2025, increasing Army Active Component end strength from the 442,300 authorized for FY 2025 to the 454,000 authorized for FY 2026.[37]

TABLE 2

Major Army Combat Formations

Brigade Combat Teams	Regular Army	Army National Guard	Total
Infantry Brigade Combat Teams	14	20	34
Stryker Brigade Combat Teams	6	2	8
Armored Brigade Combat Teams	11	5	16
Total	**31**	**27**	**58**

Aviation Brigades	Regular Army	Army National Guard	Total
Combat Aviation Brigades	11	–	11
Expeditionary Combat Aviation Brigades	–	8	8
Theater Aviation Brigades	–	2	2
Total	**11**	**10**	**21**

SOURCES:

- U.S. Department of the Army, *Department of the Army Fiscal Year (FY) 2026 Budget Estimates, Volume I, Operation and Maintenance, Army, Justification of Estimates*, June 2025, pp. 3, https://www.asafm.army.mil/Portals/72/Documents/BudgetMaterial/2026/Discretionary%20Budget/Operation%20and%20Maintenance/Regular%20Army%20Operation%20and%20Maintenance%20Volume-1.pdf (accessed Janaury 23, 2026).
- U.S. Department of the Army, *Department of the Army Fiscal Year (FY) 2026 Budget Estimates, Volume I, Operation and Maintenance, Army National Guard, Justification Book*, June 2025, pp. 42 and 98, https://www.asafm.army.mil/Portals/72/Documents/BudgetMaterial/2026/Discretionary%20Budget/Operation%20and%20Maintenance/National%20Guard%20Army%20Operation%20and%20Maintenance.pdf (accessed January 23, 2026).

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President Trump deserves significant credit for ending the recruiting crisis of the past several years with the last month of 2024 after his election victory seeing the highest recruiting numbers for the Army in 15 years.[38]

Combat Aviation Brigades. The Regular Army also has a separate air component that is organized into Combat Aviation Brigades. CABs are made up of Army rotorcraft such as the AH-64 Apache and perform various roles including attack, reconnaissance, and assault. The number of Army aviation units also has been reduced. The Regular Army now has 11 CABs.[39]

Functional or Multifunctional Support Brigades. In addition to the institutional Army, a number of functional or multifunctional support brigades provide air defense; engineering; explosive ordnance disposal; chemical, biological, radiological, and nuclear protection; military police; military intelligence; and medical support among other types of battlefield support. Special operations forces such as the 75th Ranger Regiment, six Special Forces Groups, and the 160th Special Operations Aviation Regiment are also included in these numbers.

New Concepts and Supporting Force Structure. At the same time that it faces the need to cut units to meet its new end strength, the Army is also trying to adapt its force structure to meet the anticipated new demands of near-peer competition. The foundations for these changes are contained in the Army's Multi-Domain Operations (MDO) concept, published in December 2018, which describes how the Army views the future.[40]

In January 2022, the Army announced that it planned to modify its force structure for MDO under the designation "Army 2030." Other than that announcement, the Army has been silent on future

force structure, and its plans are seemingly in flux as it grapples with recruiting shortfalls from the past Administration. As part of its adaptation to MDO, the Army did reactivate V Corps Headquarters on October 16, 2020, to provide operational planning, mission command, and oversight of rotational forces in Europe.[41] On June 8, 2022, the Army reactivated the 11th Airborne Division in Alaska as an element of its arctic strategy.[42]

To relieve the stress on the use of BCTs for advisory missions, the Army has activated six Security Force Assistance Brigades (SFABs), one in the National Guard and the other five in the Regular Army, although the Army announced in 2025 that it plans to eliminate two SFABs.[43] These units, each one of which is composed of 816 soldiers, are designed specifically to train, advise, and mentor other partner-nation military units. The Army had been using BCTs for this mission, but because train-and-assist missions typically require senior officers and noncommissioned officers, a BCT comprised predominantly of junior soldiers was a poor fit. Other than the National Guard SFAB, the five active SFABs are regionally aligned to combatant commands.[44]

Force Too Small to Execute the National Defense Strategy. Army leaders have consistently stated that the Army is too small to execute the NDS at less than significant risk. For FY 2026, the Defense Budget Request has requested a total authorized end strength of 954,000 for the U.S. Army:

- 454,000 in the Regular Army,
- 172,000 in the Army Reserve, and
- 328,000 in the Army National Guard (ARNG).[45]

In March 2021, General McConville stated that "I would have a bigger...sized Army if I thought we could afford it, I think we need it, I really do.... I think the regular Army should be somewhere around 540–550 [thousand]," and "we're sitting right now at 485,000." (Of course, the Army is "sitting" now at 452,000.) He further observed that "I've probably already had to give up the growth that we're going to have planned" and that "[w]e're probably not going to grow the Army even though I'd like to, more, because end strength is something we have to take a look at."[46]

Overall end strength dictates how many BCTs the Army can form, and by cutting end strength, the service not only will be unable to add more combat units or other in-demand units such as air and missile defense units, but also will have to reduce manning levels in the units it possesses. This will drive a higher operational tempo (OPTEMPO) for Army units and increase risk both for the force and for the Army's ability to carry out its mission.

Many outside experts agree that the U.S. Army is too small. In 2017, Congress established the National Defense Strategy Commission to provide an "independent, non-partisan review of the 2018 National Defense Strategy." Among its findings, the commission unanimously reported that the NDS now charges the military with facing "five credible challengers, including two major-power competitors, and three distinctly different geographic and operational environments." The commission assessed that "[t]his being the case, a two-war force sizing construct makes more strategic sense today than at any previous point in the post–Cold War era." In other words, "the United States needs a larger force than it has today if it is to meet the objectives of the strategy."[47]

In addition to the increased strategic risk of not being able to execute the NDS within the desired time frame, the combination of an insufficient number of BCTs and a lower-than-required Army end strength has resulted in a higher-than-desired level of OPTEMPO. Former Assistant Deputy Chief of Staff, G-3/5/7, Major General Sean Swindell recently stated that the Army had tried to reduce the demands on the force but that this "effort has been going in the opposite direction."[48] The Army will either need to have its OPTEMPO reduced or need to grow in strength.

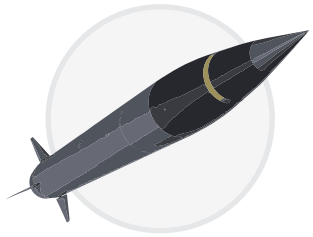
Army Force Posture

The Army also has transitioned from a force with a third of its strength typically stationed overseas, as it was during the Cold War, to a force that is based mostly in the continental United States. An average of 311,870 troops were stationed in Europe from 1986 to 1990, and the majority were Army soldiers. After the Berlin Wall fell, that number decreased to 109,452 from 1996 to 2000, and the numbers have continued to drop to approximately 84,000 U.S. troops as of early 2025.[49]

In 2025, the 173rd Airborne Brigade in Italy and the 2nd Cavalry Regiment and 12th Combat

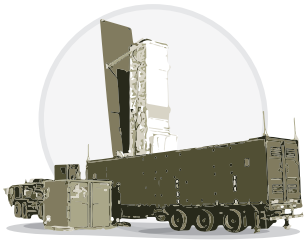
FIGURE 1

Army Weapons Systems to Be Deployed to the Indo-Pacific



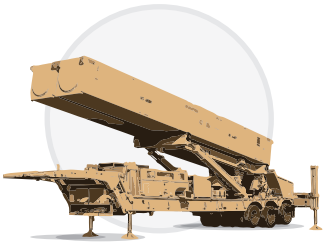
Precision Strike Missile (PrSM)

A next-generation, long-range precision strike surface-to-surface missile. It replaces the ATACMS missile system and provides increased range and survivability. Its reported range is 310+ miles and will soon be extended.



Strategic Mid-Range Fires (SMRF)

Also known as the Typhon. This mobile fires system is capable of carrying surface-to- surface missiles, including anti-ship and surface-to-air missiles. Its range varies depending on the missile type.



Long-Range Hypersonic Weapon (LRHW)

A ground-launched, long-range hypersonic weapon designed to defeat enemy anti-access/area denial (A2/AD) capabilities, enemy long-range fires, and other targets. Still in testing, its reported range is 1,725+ miles.

SOURCE: Heritage Foundation research.

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Aviation Brigade in Germany are all permanently stationed in Europe. Army units are also forward deployed to Poland, the Baltics, Romania, and Bulgaria contributing to collective deterrence alongside NATO allies.[50] Despite likely shifts in forces to the Indo-Pacific, some Army units are likely to remain in Europe and continue to contribute to collective deterrence in NATO. As a general rule, these troops should be forward positioned to decrease logistics issues involved in getting them to Poland or the Baltic states. Given their role within NATO planning, the Army's units stationed in Europe need to be among the most interoperable of any Army units and maintain a high training operational tempo with allied militaries.

Army units are actively contributing to the mission to defend the homeland, with more than 9,000 Active, Reserve, and National Guard troops deployed to the border to support the Department of Homeland Security with its mission as of May 2025.[51]

Among Army units that deploy periodically are Armored Brigade Combat Teams (ABCTs) and Stryker Brigade Combat Teams (SBCTs) and Patriot Battalions that rotate to and from Europe, Kuwait, and Korea. Rather than relying on forward-stationed BCTs, the Army currently rotates ABCTs to Europe and Kuwait and Stryker BCTs to Korea on a "heel-to-toe" basis so that there is never a gap.

Proponents of rotational BCTs argue that they arrive fully trained, that they remain at a high state of readiness throughout their typically nine-month overseas rotation, and that the cost of providing for accompanying military families is avoided. Those who favor forward-stationed forces point to a lower overall cost (when their equipment remains in place), forces that typically are more familiar with the operating environment, and a more reassuring presence for U.S. allies. Both types of force postures have merit, depending on strategic intent, not only for the reasons mentioned, but also because the mechanisms by which a unit is deployed, received into theater, and integrated with the force stationed abroad should be practiced on a regular basis.

In 2025, the strategic consensus among American conservatives is that the Army's footprint abroad needs to be further reduced with more funding made available to the Navy and the Air Force. In Europe, this will likely mean a reduction both in the number of permanently stationed troops and in

the number of rotational forces, although it is very likely that some Army forces will remain.[52]

Capability

Capability in this context refers to the quality, performance, suitability, and age of the Army's various types of combat equipment. In general, the Army is using equipment developed in the 1970s, fielded in the 1980s, and incrementally upgraded since then. This "modernization gap" was caused by several factors: the predominant focus on the wars in Iraq and Afghanistan after 9/11; pressures caused by budget cuts, especially those associated with the BCA; and failures in major modernization programs like the Future Combat System, Ground Combat Vehicle, and Crusader artillery system.

Army leaders today clearly view this situation as a serious challenge. General James Rainey, former head of Army Futures Command, has said that "[w]e need to approach 2040 with a sense of urgency now" because "[t]ransforming the Army to ensure war-winning future readiness...is the best guarantee that our successful materiel modernization efforts will produce lethal formations that will deter our enemies, and, if required, dominate the land domain in conflict."[53]

The Army embarked on an ambitious modernization program to put 24 new systems into the hands of soldiers in FY 2023. Among these systems were hypersonic missiles, a precision strike missile, a directed energy air defense capability, and the Lower Tier Air and Missile Defense Sensor.

Loss of Competitive Advantage. As an example of how Army equipment had been falling behind that of U.S. competitors, the Army Tactical Missile System (ATACMS), first introduced in 1991, had been the Army's only ground-launched precision missile with a range greater than 100 kilometers (km). Because of restrictions in the Intermediate Range Nuclear Forces Treaty and other factors, it was limited to a maximum range of 300 km. The INF, however, expired in 2019, and the Army's development and production of the PrSM missile since then has gone some way toward correcting this deficiency.[54]

China and Russia have much more substantial inventories of conventional and precision ground-launched missiles and rockets. China has nine major ground-launched missile systems and more than 425 launchers. These capable systems can range from 600 km (DF-11A and DF-15) to 4,000 km (DF-26).[55] Russia, on the other hand, at least before the war in Ukraine, had the world's widest inventory of missiles: at least four conventional ground-launched missile systems that can range from 120 km (SS-21) to 2,500 km (SSC-8).[56]

Similarly, the U.S. Army's Patriot missile system is an excellent system, but Saudi Arabia, Turkey, and India have either purchased or recently expressed interest in buying the Russian competitor system, the S-400.[57] Why would they do this? One answer is that the Patriot system is tremendously expensive. A Patriot battery (one-fourth of a battalion) costs about $3 billion for the launchers and a basic load of missiles; an S-400 battery has been estimated to cost $500 million.[58]

Combat Systems

Within the Army's inventory of equipment are thousands of combat systems, including small arms, trucks, aircraft, soldier-carried weapons, radios, tracked vehicles, artillery systems, missiles, and drones. The following sections provide updates on some of the major systems as they pertain to Armored, Stryker, and Infantry BCTs and Combat Aviation Brigades.

Armored Brigade Combat Team (ABCT). The ABCT's role is to "close with the enemy by means of fire and movement to destroy or capture enemy forces, or to repel enemy attacks by fire, close combat, and counterattack to control land areas, including populations and resources."[59] The Abrams Main Battle Tank (most recent version in production: M1A2 SEPv3, first unit equipped in FY 2020[60]) and Bradley Fighting Vehicle (most recent version: M2A4, first unit equipped in April 2022[61]) are the primary ABCT platforms.

The M-1 tank and Bradley Fighting Vehicle first entered service in 1980 and 1981, respectively. An ABCT has 87 M-1 Abrams tanks and 152 Bradley Fighting Vehicle variants. Despite upgrades, the M-1 tank and the Bradley are now at least 40 years old, and their replacements will not arrive until the platforms are at least 50 years old.

Optionally Manned Fighting Vehicle (OMFV). The Army's replacement program for the Bradley, the OMFV, was on an aggressive timeline, but the Army cancelled the request for proposals (RFP) in January 2020 and rereleased an RFP for what it called a "concept design" in December

2020. In 2025, American Rheinmetall and General Dynamics Land Systems (GLDS) were approved to continue designing the replacement for the Bradley, which has now been dubbed XM30, after the Army approved Milestone B, the engineering and manufacturing development (EMD) phase of the process.[62]

A New Tank? A potential clean-sheet replacement for the M-1 tank is even further down the road. Major General Glenn Dean, Program Officer for Ground Combat Systems, reportedly has said that "funding to pursue what could be next for Abrams would likely not appear in a budget cycle until fiscal 2025 at the earliest."[63] Meanwhile, the Army has another upgrade for the Abrams platform in the works: the M1A2 SEPv4, which would incorporate a "3rd Generation Forward Looking Infrared (3GEN FLIR)" in addition to "new color cameras to the gunner/commander primary sights" as well as "an improved laser range finder, integration of a laser warning receiver system, improved lethality via Fire Control System (FCS) digital communication with a new Advanced Multi-Purpose round, improved accuracy via integration of a meteorological sensor, and improved onboard diagnostics."[64]

Armored Multi-Purpose Vehicle (AMPV). The venerable M113 multi-purpose personnel carrier is also part of an ABCT and fills multiple roles such as mortar carrier and ambulance. It entered service in 1960 and is being replaced by the new AMPV, which after numerous delays entered low-rate initial production on January 25, 2019. The system's first fieldings took place on March 13, 2023.[65] The Army's FY 2024 budget includes a request for procurement of 91 AMPVs. At that rate of procurement and given prior year procurements, it will take the Army at least 25 years from 2024 to meet its objective of 2,897 AMPVs (putting it in FY 2049).[66]

Stryker Brigade Combat Team (SBCT). The SBCT "is an expeditionary combined arms force organized around mounted infantry" and is able to "operate effectively in most terrain and weather conditions" because of its rapid strategic deployment and mobility.[67] SBCTs are equipped with approximately 321 eight-wheeled Stryker vehicles.[68] These vehicles are among the Army's newest combat platforms, having entered service in 2001.

In response to an Operational Needs Statement, the SBCT in Europe received Strykers fitted with a 30 mm cannon to provide an improved anti-armor capability.[69] Based on the success of that operation, the Army decided to outfit at least three of its SBCTs that are equipped with the Double V-hull, which affords better underbody protection against such threats as improvised explosive devices (IEDs), with the 30 mm autocannon. The Army is also integrating Javelin anti-tank missiles on the Stryker platform and began to train crews on this capability in May 2022.[70]

Infantry Brigade Combat Team (IBCT). The IBCT "is an expeditionary, combined arms formation optimized for dismounted operations in *complex terrain*," which the Army defines as "a geographical area consisting of an urban center larger than a village and/or of two or more types of restrictive terrain or environmental conditions occupying the same space."[71] IBCTs have fewer vehicles and rely on lighter platforms such as trucks; High Mobility Multipurpose Wheeled Vehicles (HMMWVs); Joint Light Tactical Vehicles (JLTVs); and Infantry Squad Vehicles (ISVs) for mobility.

Joint Light Tactical Vehicle (JLTV). The JLTV aspires to combine the protection offered by Mine Resistant Ambush Protected Vehicles (MRAPs) with the mobility of the original unarmored HMMWV. The vehicle features design improvements that increase its survivability against anti-armor weapons and IEDs. As part of the Army Transformation Initiative, the Army is canceling procurement of excess ground vehicles like the JLTV and HMMWV, considering them outdated, and shifting to lighter, more agile platforms.[72]

Infantry Squad Vehicle (ISV). Airborne BCTs are the first IBCTs to receive a new platform to increase their speed and mobility. The ISV provides enhanced tactical mobility for an IBCT nine-soldier infantry squad with equipment. The ISV is the big winner among ground combat vehicles in the Army Transformation Initiative, with increased orders of ISVs coming along with divestment of JLTVs and HMMWVs. ISVs offer greater deployability and lower costs than the JLTV, although there has been some concern about the ISV's minimal armor. The ISV is also an Army Transformation Initiative poster child in that it features 90 percent commercial off-the-shelf parts and is based on the Chevrolet Colorado ZR2 platform.[73] Army planners hope that investments in commercially available options like this will lower costs and shorten supply chains across the board.

Mobile Protected Firepower (MPF). The Army had developed a light tank, previously called Mobile Protected Firepower (MPF) and then officially named the M-10 Booker, to provide IBCTs with the firepower to engage enemy armored vehicles and fortifications.[74] The M-10 Booker was among the ground combat vehicles canceled under the ATI. Army Secretary Driscoll explained the decision: "The Booker is a classic example of sunk cost fallacy, and the Army doing something wrong.... We wanted to develop a small tank that was agile and could be dropped into places our regular tanks can't. We got a heavy tank."[75]

Combat Aviation Brigade (CAB). CABs are composed of AH-64 Apache attack, UH-60 Black Hawk medium-lift, and CH-47 Chinook heavy-lift helicopters. The Army has been methodically upgrading these fleets for decades, but the FY 2024 budget request continued the reduction in legacy aircraft procurement that began in FY 2022, presumably to create "budget room" for the planned introduction of two new aircraft: the Future Long-Range Assault Aircraft (FLRAA) and Future Attack Reconnaissance Aircraft (FARA). The reduction in legacy aircraft procurement is a continued reflection of downward budget pressure and incurs additional risk for the Army as its legacy helicopters are expected to be around for decades.[76] In 2025, the FARA was cancelled, but the FLRAA was funded and continued.[77] The ATI pledges to "consolidate aviation sustainment requirements and increase operational readiness."[78]

UH/HH-60. The Army is upgrading its fleet of Black Hawks, including by equipping some with the ability to launch drones. Long-term, however, the Army is likely to begin divesting itself of Black Hawks. Long-range assault missions currently covered by the Black Hawk will be carried out by the new tiltrotor helicopters in development, and some missions currently carried out by the Black Hawk are likely to be handled by drones in the future. According to Secretary Driscoll, "I see Black Hawks are going to be with us for a while, but I do think we're going to have to adapt what we're doing. There just may be less Black Hawks."[79]

CH-47. There is no planned replacement on the horizon for the CH-47F Chinook, a rebuilt variant of the Army's CH-47D heavy-lift helicopter, which is expected to remain the Army's heavy-lift helicopter for the foreseeable future.

AH-64. The Army is divesting itself of up to half of its Apache fleet with attack squadrons remaining but recon battalion being cut and their mission reassigned to drones. One Aerial Cavalry Squadron per CAB in the active component will be cut.[80] This change is seen as permanent with the Army planning to cut 6,500 aviation jobs from the active-duty ranks as part of the divestment and restructuring.[81]

Overall, the Army's equipment inventory, while increasingly dated, is maintained well. Under its current modernization plans, "the Army envisions all three vehicles [the M-1 Abrams Tank, M-2/M-3 Bradley Fighting Vehicle (BFV), and M-1126 Stryker Combat Vehicle] to be in service with Active and National Guard forces beyond FY2028."[82]

Future Programs. In addition to seeing to the viability of today's equipment, the military must look to the health of future equipment programs. Although future modernization programs do not represent current hard-power capabilities that can be applied against an enemy force today, they are a leading indicator of a service's overall fitness for future sustained combat operations. In future years, the service could be forced to engage an enemy with aging equipment and no program in place to maintain viability or endurance in sustained operations.

The U.S. military services are continually assessing how best to stay a step ahead of competitors: whether to modernize the force today with currently available technology or wait to see what investments in research and development produce years down the road. Technologies mature and proliferate, becoming more accessible to a wider array of actors over time. After 20 years of a singular focus on counterinsurgency followed by concentration on the current readiness of the force, the Army is now playing catch-up in equipment modernization.

New Organizations and Emphasis on Modernization. In 2017, the Army established eight cross-functional teams (CFTs) to improve the management of its top modernization priorities, and in 2018, it established a new four-star headquarters, Army Futures Command, to lead modernization efforts. Army Futures Command is now being merged with Training and Doctrine Command (TRADOC) as part of the ATI in an effort to streamline efforts and reduce overhead.[83]

Even though it has been six years, it is still too early to assess whether these new structures,

commands, and emphasis will result in long-term improvement in the Army's modernization posture. The Army aspires to develop and procure an entire new generation of equipment based on its six modernization priorities: "long range precision fires, next generation combat vehicles, future vertical lift, network, air and missile defense, and Soldier lethality."[84]

Although the Army has put in place new organizations, plans, and strategies to manage modernization, the future is uncertain, and Army programs remain in a fragile state with only a few in an active procurement status. The Army has shown great willingness to make tough choices and reallocate funding for its modernization programs, but this has usually been at the expense of end strength or reduction in the total quantity of new items purchased.

As budget challenges such as nuclear deterrence programs, inflation, rising personnel costs, health care, and the need to invest in programs to respond to China's increasingly aggressive activities continue to present themselves, the Army desperately needs time and funding to modernize its inventory of equipment. Recent modernization programs seem generally to be on track with some exceptions like the Self-Propelled Howitzer Modernization (SPH-M) program[85] and the Improved Turbine Engine Program (ITEP),[86] which have suffered some setbacks. The Army also is experiencing some success, one example being the number of Stryker vehicle-mounted Maneuver Short Range Air Defense (M-SHORAD) systems that have been delivered to Europe.[87]

Readiness

BCT Readiness. Over the past four years, the Army has made steady progress in increasing the readiness of its forces. Its goal is to have 66 percent of the Regular Army and 33 percent of National Guard BCTs "at the highest levels of readiness."[88]

As of July 14, 2023, the Army reported that "83 percent of Active Component Brigade Combat Teams are at the highest levels of tactical readiness."[89] This is 17 percentage points above its goal and two percentage points above last year's reported level. This means that 25 of the Army's 31 active BCTs were at either C1 or C2, the two highest levels of tactical readiness, and ready to perform all or most of their wartime missions immediately.

There also are 27 BCTs in the Army National Guard: five Armored, 20 Infantry, and two Stryker. The Army has allocated two Combat Training Center (CTC) rotations for two National Guard BCTs. These two BCTs "are resourced to achieve company-level proficiency, while the remaining 25 BCTs and enabler units are on a path to platoon minus-level proficiency and will meet Directed Readiness Table requirements."[90] These training levels usually reveal the extent to which additional training time would be required before the unit could be deployed. Given the paucity of data provided by the Army, it is hard to assess the current readiness of ARNG units.

Steady Decline in Training Resources. When measuring resourcing for the training of BCTs, the Army formerly used full-spectrum training miles (FSTMs), which represents the number of miles for which formations are resourced to drive their primary vehicles on an annual basis. In FY 2024, the Army changed the terminology to Composite Training Miles but explained that they are the same thing. Since FY 2019, these training resources have been declining. In FY 2021, the Army budgeted 1,598 FSTMs to train BCTs to 100 percent of the requirement.[91] In FY 2024, only 1,137 composite training miles were funded for non-deployed units.[92] This is a cut of 28 percent, suggesting that unless the Army's training strategy radically changed, BCTs are funded only to 72 percent of the training requirement.

Uncertain Training Level Goals. Starting with the FY 2022 budget justification books, the Army began to omit the Unit Proficiency Level Goal, which for years has been to train a BCT to operate as a BCT; it is now likely training to operate as a battalion or company. This implies that brigade combat teams will not be effective in executing brigade-level or brigade-size tasks if called into action. Having competent companies or battalions is one thing; being able to orchestrate their actions to achieve higher-order tactical and operational tasks is another thing entirely.

CTC Rotations. The Army uses Combat Training Centers to train its forces to desired levels of proficiency. Specifically, this important program "requires Soldiers to perform individual and collective tasks and missions in a realistic environment under mental and physical stress that approaches conditions found in combat."[93] The institutional

training domain "is a key enabler for unit readiness."[94] For FY 2024, the Army resourced 22 BCT-level CTC rotations: eight at the National Training Center, eight at the Joint Readiness Training Center, four at the Joint Multinational Readiness Center, and two exportable rotations. Two of these 22 rotations were for Army National Guard Brigades.[95]

New Readiness Model. The Army has transitioned from one readiness model to another. Its Sustainable Readiness Model, implementation of which began in 2017, was intended to give units more predictability. Its new Regionally Aligned Readiness and Modernization Model (ReARMM) is designed to "better balance operational tempo (OPTEMPO) with dedicated periods for conducting missions, training, and modernization."[96] ReARMM features units that spend eight months in a modernization-training-mission cycle while preparing to deploy to a specific part of the world. The Army shifted to this new model on October 1, 2021. Since announcing the model in 2021, the Army has been silent on the topic.

In general, the Army continues to be challenged by structural readiness problems as evidenced by too small a force attempting to satisfy too many global presence requirements and Operations Plan (OPLAN) warfighting requirements.

Scoring the U.S. Army

Capacity Score: Weak

Historical evidence shows that, on average, the Army needs 21 BCTs to fight one major regional conflict. Based on a conversion of roughly 3.5 BCTs per division, the Army deployed 21 BCTs in Korea, 25 in Vietnam, 14 in the Persian Gulf War, and approximately four in Operation Iraqi Freedom—an average of 16 BCTs (or 21 if the much smaller Operation Iraqi Freedom initial invasion operation is excluded).

In the 2010 Quadrennial Defense Review, the Obama Administration recommended a force capable of deploying 45 Active Component BCTs.[97] Previous government force-sizing documents discuss Army force structure in terms of divisions and consistently advocate for 10 to 11 divisions, which equates to roughly 37 Active Component BCTs.

Considering the varying recommendations of 35 to 45 BCTs and the actual experience of nearly 21 BCTs deployed per major engagement, our assessment is that 42 BCTs would be needed to fight two MRCs. Taking into account the need for a strategic reserve, the Army force should also include an additional 20 percent of the 42 BCTs, resulting in an overall requirement of 50 BCTs.

Previous editions of the *Index of U.S. Military Strength* counted a small number of Army National Guard BCTs in the overall count of available BCTs. Because the Army no longer mentions Army National Guard BCTs at the highest state of readiness, they are no longer counted in this edition of the *Index*. Increasing the readiness levels of Army National Guard BCTs could go a long way toward fixing this issue and helping the Army to reach the two-MRC benchmark. The Army has 31 Regular Army BCTs with a two-MRC construct requirement of 50. The Army's overall capacity score therefore remains unchanged from 2022.

- **Two-MRC Benchmark:** 50 Brigade Combat Teams.
- **Actual FY 2025 Level:** 31 Regular Army Brigade Combat Teams.

The Army's current BCT capacity equals 62 percent of the two-MRC benchmark and is therefore scored as "weak."

Capability Score: Marginal

The Army's aggregate capability score remains "marginal." This aggregate score is a result of "marginal" scores for "Age of Equipment," "Size of Modernization Programs," and "Health of Modernization Programs." The Army is scored "weak" for "Capability of Equipment."

Readiness Score: Very Strong

The Army reports that 83 percent of its 31 Regular Army BCTs are at the highest state of readiness.[98] The Army's internal requirement is for "66 percent... of the active component BCTs [to be] at the highest readiness levels."[99] Using the assessment methods of this *Index*, this results in a percentage of service requirement of 100 percent, or "very strong."

U.S. Military Power: Army

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability			✓		
Readiness					✓
OVERALL			✓		

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

Overall U.S. Army Score: Marginal

The Army's overall score is calculated based on an unweighted average of its capacity, capability, and readiness scores. The unweighted average is 3.33; thus, the overall Army score is "marginal." This score was derived from the aggregate score for capacity ("weak"); capability ("marginal"); and readiness ("very strong"). This score is the same as the assessment in the 2024 *Index*, which rated the Army as "marginal" overall.

Policy Recommendations

In view of the above scores and what they indicate about the Army's current capacity and capability, as well as its overall rating of "marginal," the U.S. Army needs to:

- **Maintain its modernization programs.** The Army must not lose sight of the fact that the fundamentals of warfare have not changed and that in pursuing innovation, one cannot abandon tried-and-true warfighting concepts. Drones, for example, are critical new capabilities that have clear and proven combat and ISR capabilities, as demonstrated by the war in Ukraine. However, traditional infantry, armor, and artillery units have been just as instrumental in the conduct of the war, and the U.S. Army must remain at the forefront of these warfighting branches even while pursuing UAS and C-UAS dominance.

- **Prioritize MDTFs and Long-Range Fire Battalions.** Given how critical they are to

deterring Chinese aggression against Taiwan, equipping and fielding MDTFs and Long-Range Fire Battalions should be among the Army's highest priorities. These units should either be rotated or forward deployed to the Western Pacific as much as possible.

- **Emphasize joint planning.** If the Army is to succeed in its identified role in the Indo-Pacific, it will need to be brought into theater by the airlift and sealift capabilities that the Air Force and Navy provide. The Navy and Air Force need the Army to secure and defend airfields and logistics and sustainment hubs and need to invest far more in airlift and sealift systems.
- **Maximize interoperability.** The U.S. Army should be as interoperable as possible with its allies in both the Indo-Pacific and NATO, and cross-training with these allies to increase interoperability should be a continuing and high-level priority.

Endnotes

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U.S. Navy

Brent D. Sadler

Introduction

The U.S. Navy is not where the nation needs it to be, and President Donald Trump has signaled a break from past decades in his repeated commitment to revive the nation's maritime power. Most notable was Congress's commitment (with the President's backing) to include a substantial $8.4 billion increase in shipbuilding funding in the annual National Defense Authorization Act (NDAA)[1] and the one-time reconciliation bill known as the One Big Beautiful Bill Act (OBBA).[2] At the time of the *2024 Index*, the Navy's fleet included 297 warships; now the number is 287 and shrinking well below what threats dictate. Compounding this is a growing deficit of 30,395 sailors and officers; closing this gap will require maintaining this year's hugely successful recruitment into the next *Index*.

The Navy, as the foremost element of national power, cannot be allowed to degrade further if China is to be deterred. This year marks another sad assessment of the Navy's capacity, capability, and readiness for winning a modern major war: Reversing this trend is a national imperative. The worldwide demand for warships has not slackened; it has increased as the world has grown more violent with active combat in the Red Sea and the Caribbean as of the time this edition of the *Index* was being prepared. Yet despite fewer warships and sailors, compared to the operational tempo (OPTEMPO) of the Cold War's 600-ship Navy, the fleet has continued to operate by as much as 15 percent above the 17 percent historic levels.

This *Index* makes clear that conventional approaches have not worked in the past decade, as witnessed year after year in past assessments. There is no more time for modest modifications. Bold actions are needed to operate the fleet we have today in new ways, expand the industrial capacity to build and sustain the larger fleet that we need, and invest in future capabilities.

Congress and naval leadership must never forget the lives lost in the 2017 collisions of the USS *John S. McCain* (DDG 56) and USS *Fitzgerald* (DDG 62). Findings of subsequent investigations revealed that overwork of green crews and overconfidence regarding operational risk were contributing factors—a lesson that remains relevant today. Incidents like the October 2021 grounding of the submarine *Connecticut* in the South China Sea and the September 2024 grounding of fleet oiler *Big Horn* make clear that life at sea is dangerous and requires vigilance and high competence even in peacetime. This *Index*, as have those since 2021, reminds readers of this reality and that success at sea is not cheap.

Being witness to increasingly aggressive Chinese military operations, it is clear that we are losing our ability to deter China—and with perilous consequences. This year's *Index* reminds us again of where we stand and what we must do.

Service Overview

Navies exist to assure access to markets and influence events on land for political ends and to prevail in maritime combat when war occurs. To these ends, the U.S. Navy, Marine Corps, Coast Guard, and Merchant Marine (known collectively as the sea services) have enabled America to project power across the oceans, controlling activities on the seas whenever and wherever needed.

According to the Department of the Navy's annual budget briefing for fiscal year (FY) 2026, the service's "enduring priorities" have been updated by the Secretary of the Navy and include:

U.S. NAVY AT A GLANCE

EST. 1775

MOTTO
"Always Courageous"



John C. Phelan
Secretary of the Navy



Adm. Daryl Caudle
Chief of Naval Operations

MAJOR BASES



1. Naval Station Pearl Harbor
2. Naval Base San Diego
3. Naval Base Kitsap–Bremerton
4. Naval Station Norfolk
5. Naval Submarine Base King's Bay
6. Naval Support Mayport
7. Naval Support Activity Naples
8. Naval Support Bahrain
9. Commander Fleet Activities Yokosuka
10. Naval Base Guam

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$210.4

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

333,000

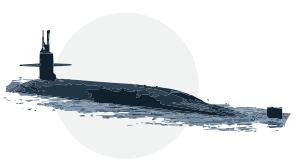
RESERVE MILITARY

58,000

CIVILIAN

202,000

KEY EQUIPMENT (estimated current inventory)



Nuclear Ballistic Missile Submarines (14)



Nuclear Attack Submarines (47)



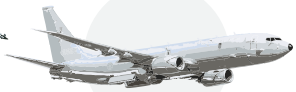
Guided Missile Destroyers (74)



F-35C (100+)



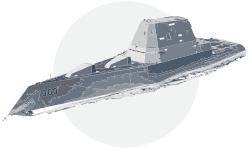
F/A-18E/F (416)



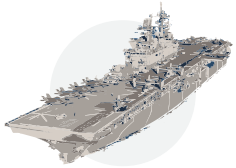
P-8A Poseidon (118)



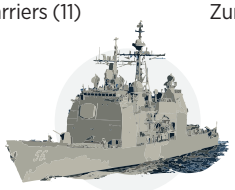
Aircraft Carriers (11)



Zumwalt (2)



Amphibious Warfare Assault Ship (9)



Ticonderoga Class Cruiser (7)



Littoral Combat Ship (28)

SOURCE: Heritage Foundation research.

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- "Strengthen Shipbuilding and the Maritime Industrial Base," which is a change from "Strengthening Maritime Dominance" used since FY 2024;

- "Foster an Adaptive, Accountable and Innovative Warfighter Culture," which updates the Administration's earlier "Building a Culture of Warfighting Excellence" that replaced the Biden-era "Taking Care of People through Building a Culture of Warfighting Excellence" and aligns more with the new Trump Administration's focus on lethality; and

- "The Health, Welfare and Training of Our People and Their Families," which emphasizes the well-being of the sailors and the quality of their readiness.[3]

The Biden-era "Enhancing Strategic Partnerships" has been removed.

Given the comprehensive threat from China, the Navy has introduced a new strategic framework for its operations and investment called maritime statecraft. This draws heavily from the book *U.S. Naval Power in the 21st Century* and a concept called naval statecraft. The concept was first introduced by the Secretary of the Navy Carlos Del Toro in a speech calling for a new statecraft founded on a strong naval force, backed by a robust commercial maritime industry, to execute a successful strategic comprehensive competition in today's new cold war with China.[4] The prioritization of rebuilding the nation's maritime strength was amplified by President Donald Trump before Congress and the establishment of a new office dedicated to this end.[5] Given the state of the nation's navy and maritime services, this will be a herculean task.

All told, it will take years to recover from the past 36 years of naval decline. For the Navy, the so-called peace dividend after the collapse of the Soviet Union resulted in more than $1.32 trillion in deferred investments and reduced spending from 1989–2025, antiquated infrastructure, and too many shuttered shipyards to build and sustain today's too-small fleet. The flight of experienced naval architects who are needed to oversee design, building, and repair of warships has contributed to cost overruns and delays that the Navy cannot sustain.

To strengthen the nation's maritime power, outgoing President Joseph Biden's proposed $257.6 billion Navy budget for FY 2025 was $1.83 billion more than the FY 2024 enacted budget—an increase of 0.7 percent.[6] This amount was relatively anemic in view of the need to recapitalize infrastructure, expand the supply base, recruit more sailors, and increase the number of warships necessary to deter a rapidly metastasizing threat from Communist China. However, this may be changing with the one-time reconciliation bill and a total increase of 11.1 percent over last year's Navy budget.[7] If these dollars are used to deliver the capacity, capability, and readiness outputs that are needed, the long, slow decline of the Navy's ability to deter and win a major war should be reversed, but this will require years of increased resourcing matched with aggressive and smart execution of those funds.

At the same time, investment in "wonder weapons" is not a solution to all of the Navy's ills. Unmanned platforms, future-generation fighters, and long-range weapons are necessities, but their delivery and effectiveness remain in question until they can be proven in combat at-sea. Today's fleet is needed to operate where required and as the training platform for crews. It must operate within range of the enemy's weapons and continually refine concepts of operations for winning tomorrow's wars.

The Navy therefore remains under immense strain to maintain readiness for combat while also conducting daily peacetime operations to counter the activities of China and Russia. Since publication of the *2024 Index of U.S. Military Strength*, there have been several significant developments that are important to the Navy. For example:

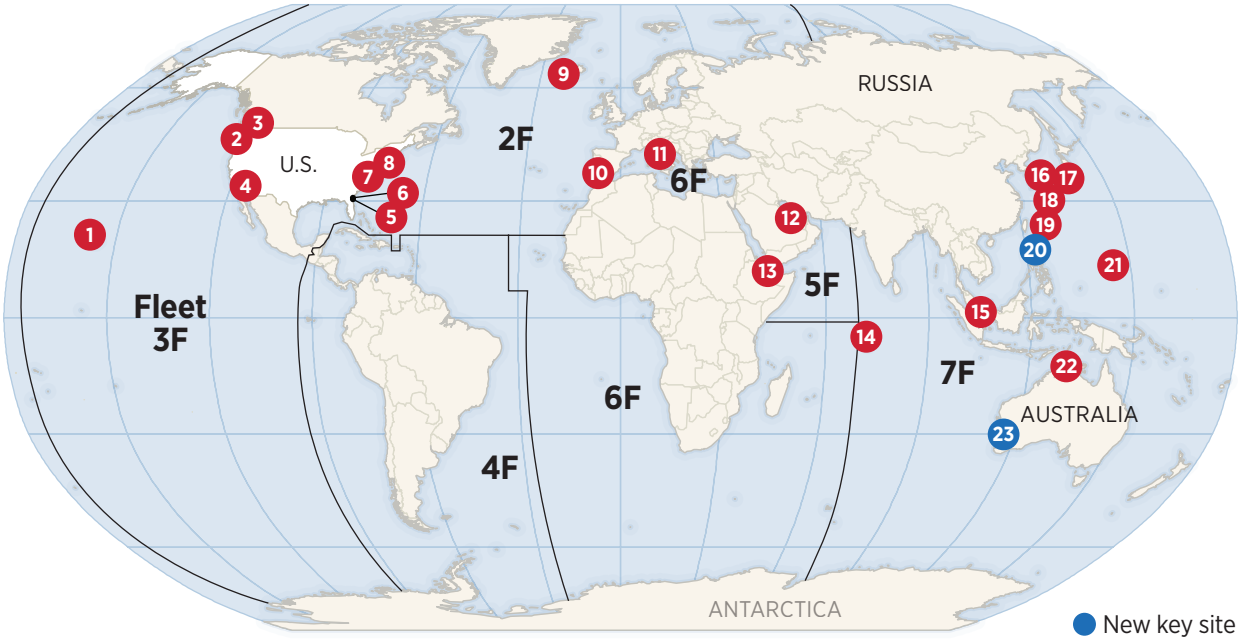
- In its first year, the Navy's Maritime Industrial Base staff certified a cold spray welding technique avoiding the need to dry dock, used additive manufacturing techniques to produce and install three chill water valves on an operational warship, and helped to place more than 10,000 new maritime industrial workers.[8]

- During combined exercise Balikatan in April 2025, the U.S. Marine Corps deployed elements of the 3rd Marine Littoral Regiment with Navy-Marine Expeditionary Ship Interdiction System (NMESIS) to the Batanes island group in the Luzon Strait.[9]

MAP 13

Key U.S. Naval Installations

The U.S. Navy's global operation has been bolstered in recent years by the addition of key installations: 10 sites in the Philippines, most notably Naval Base Camilo Osias, and a nuclear submarine and support ship site in Perth, Australia.



1. **Joint Base Pearl Harbor-Hickham, HI**
   U.S. Pacific Fleet headquarters
2. **Naval Base Kitsap**
3. **Naval Station Everett, WA**
4. **Naval Base San Diego and Naval Base Coronado, CA**
   U.S. Third Fleet headquarters
5. **Naval Station Mayport, FL**
   U.S. Fourth Fleet headquarters
6. **Naval Submarine Base King's Bay, GA**
7. **Naval Base Norfolk and Joint Expeditionary Base Little Creek, VA**
   U.S. Fleet Forces Command and U.S. Second Fleet headquarters
8. **Naval Submarine Base New London, CT**
9. **Keflavik, Iceland—Expeditionary Maritime Operations Center**
10. **Naval Station Rota, Spain**
11. **Naval Support Activity Gaeta, Italy**
    U.S. Sixth Fleet headquarters
12. **Naval Support Activity, Bahrain**
    U.S. Fifth Fleet headquarters
13. **Lemonnier, Djibouti—Camp Lemonnier**
14. **Diego Garcia—Navy Support Facility Diego Garcia**
15. **Singapore—Commander Logistics Group Western Pacific**
16. **Buson, South Korea—Fleet Activities Chinhae Navy Base**
17. **U.S. Fleet Activity Yokosuka, Japan**
    U.S. Seventh Fleet headquarters
18. **U.S. Fleet Activity Sasebo, Japan**
19. **Okinawa, Japan—Naval Base White Beach**
20. **Luzon Island, Philippines—Naval Base Camilo Osias**
21. **Naval Base Guam—Navy Expeditionary Force Command Pacific headquarters**
22. **Darwin, Australia—Marine Rotational Force Darwin**
23. **Perth, Australia—Submarine Rotational Force West**

NOTE: Fleet boundaries are approximate.
SOURCE: Heritage Foundation research.

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- Admiral Lisa Franchetti was relieved as Chief of Naval Operations (CNO) on February 21, 2025, and replaced by Admiral Daryl Caudle six months later, signaling a break with past conventions.

- In September 2024, the Navy oiler *Big Horn* ran aground, sustaining significant damage and ending its provisioning of fuel to sustain ongoing combat operations against the Houthis.[10]

- In July 2024, the Navy demonstrated an at-sea method to rearm warship vertical launch cells that are used to launch cruise missiles and air and missile defense munitions.[11] The method is called Transferrable Rearming Mechanism (TRAM) and is a limited means to mitigate a long-known deficiency in sustaining warships within striking distance of enemy forces without executing prolonged transits to rear-area ports to restock.

- On February 22, 2024, the Navy established the Robotics Warfare Specialist for enlisted ratings with the goal of developing deep expertise in the maintenance of autonomous platforms.[12]

- On January 16, 2024, the Navy completed its first Western Pacific deployment of a flotilla of four unmanned vessels that included the USV *Ranger*, which had launched a Standard Missile-6 at a target successfully in 2021.[13]

- In January 2024, following a series of reports of significant delays in numerous naval shipbuilding programs, the Secretary of the Navy ordered a 45-day review.[14] This review determined that the top-priority strategic missile submarine *Columbia* is 12–16 months behind, the aircraft carrier *Enterprise* is 18–26 months behind schedule, *Virginia*-class submarines are 24 to 36 months late, and the new frigate *Constellation* is three years behind schedule.[15]

- On October 19, 2023, Iran's proxy in Yemen, the Houthis, began attacks on shipping in the Red Sea in support of Hamas's war against Israel, which had begun on October 7. Houthi attacks on shipping continue into 2025. A mid-July 2024 report gave a rare insight into the scale of those combat operations: 155 standard missiles, 125 tomahawk cruise missiles, 60 air-to-air missiles expended.[16]

Strategic Framework. In December 2020, to address today's maritime competition more effectively, the sea services released a naval strategy titled *Advantage at Sea*.[17] It has not yet been fully executed, but there has been some progress regarding forward presence operations that challenge Chinese maritime coercion.[18]

The Navy also apparently continues to adjust its deployment patterns to meet new demands caused by the war in Ukraine and combat operations against the Houthis. Since June 2023, these demands have slowed the trend toward more presence in the Western Pacific and a reduced carrier and large amphibious force presence in the North Atlantic and the Eastern Mediterranean in order to fuel a return to the Indian Ocean.[19]

As the U.S. military's primary maritime arm, the Navy is charged with providing the enduring forward global presence that this strategy requires while retaining war-winning forces. The Navy therefore continues to focus its investments on several functional areas: power projection, control of the seas, maritime security, strategic deterrence, and domain access. This approach is informed by several key documents. In addition to the Trump Administration's 2025 National Security Strategy (NSS) and 2026 National Defense Strategy (NDS), they include:[20]

- The December 2020 Advantage at Sea naval strategy, and

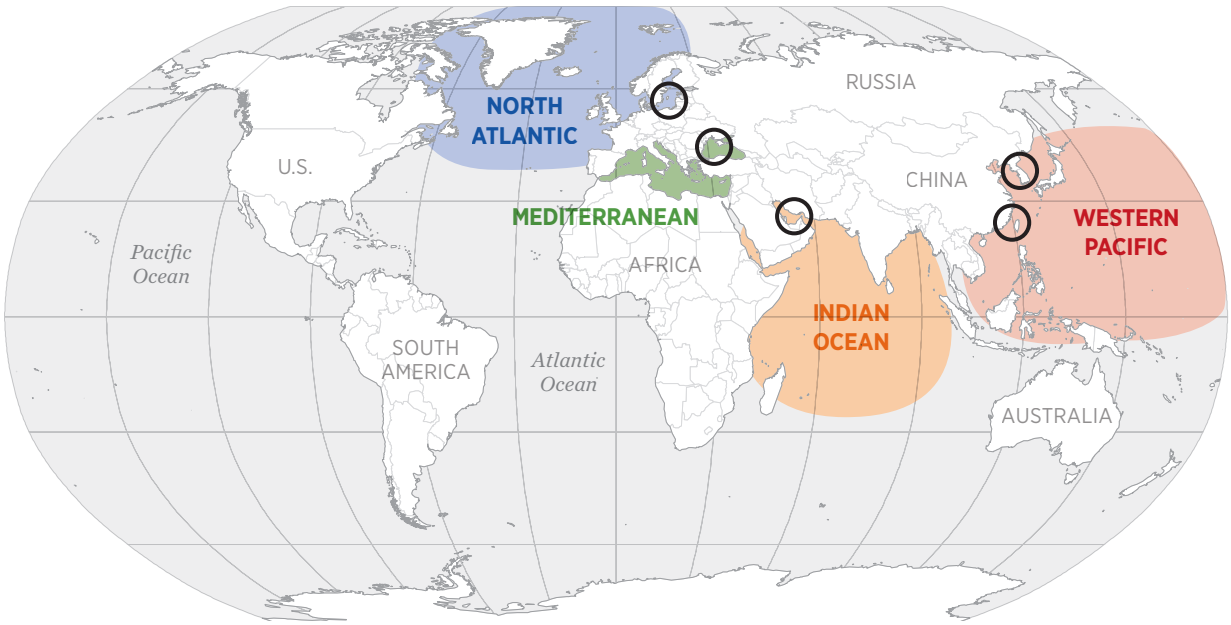
- The Global Force Management Allocation Plan (GFMAP).[21]

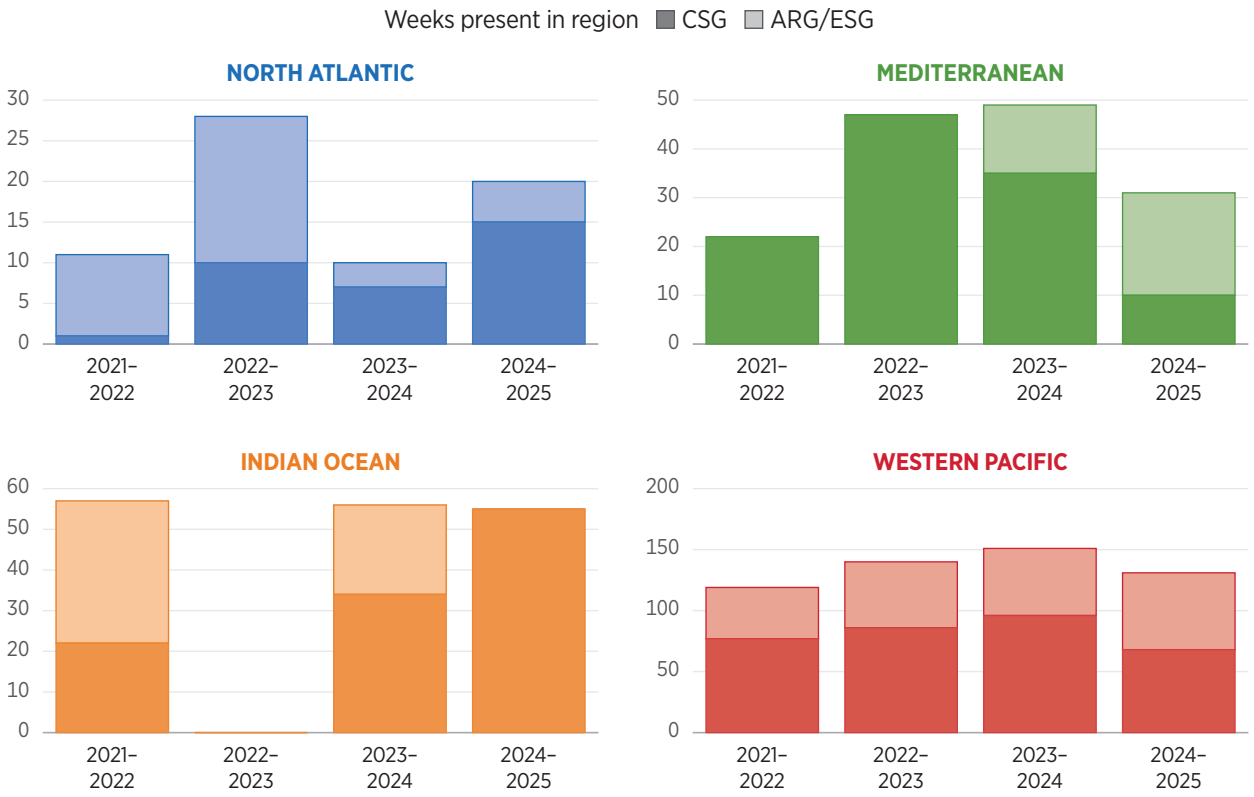
In addition, in the summer of 2025, the Trump Administration issued an Interim National Defense Strategic Guidance that has been informing FY 2026 and reconciliation budgets. It provides that:

- The United States faces one of the most dangerous strategic environments in our Nation's history characterized by:

MAP 14

U.S. Navy Global Presence





NOTES: Time frames are June to June. CSG — Carrier Strike Group, ARG — Amphibious Ready Group, ESG — Expeditionary Strike Group.
SOURCE: Heritage Foundation research based on data from U.S. Naval Institute Staff, "Fleet Tracker," U.S. Naval Institute News, https://news.usni.org/category/fleet-tracker (accessed January 21, 2026).

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  - **A vulnerable homeland** arising from years of unsecured borders and increasingly capable air and missile threats;

  - **China's unprecedented military buildup** and the direct threat that it poses to America's security and economy; and

  - **A range of other threats**, including Russia, Iran, North Korea, and select terrorist organizations.

- **President Trump has charged the Department with supporting his America First defense policy agenda and achieving his vision of peace through strength.**

- To do so, the Strategic Guidance is built around **three priority lines of effort**:

  - **Defend the Homeland**

  - **Deter China in the Indo-Pacific**

  - **Empower allies and partners to do more**

- **Success demands clear prioritization, strategic discipline, and fiscal responsibility.**

U.S. official strategic guidance requires the Navy to act beyond the demands of conventional warfighting. China and Russia use their fleets to establish a physical presence in regions that are important to their economic and security interests in order to influence the policies of other countries. To counter their influence, the U.S. Navy similarly sails ships in these waters to reassure allies of U.S. commitments and signal to rivals that they do not have a free hand to impose their will. This means that the Navy must balance two key missions: ensuring that it has a fleet that is ready for war while also using that fleet for peacetime "presence" operations. Both missions require crews and ships that are materially ready for action and a fleet that is large enough to maintain presence and marshal enough combat power to win in battle.

On September 18, 2024, the Chief of Naval Operations released an update to Navigation Plan 2022 (NAVPLAN 2022).[22] NAVPLAN provides guidance for the Navy's contribution to the execution of the National Defense Strategy. Today, the CNO continues to emphasize forward presence in the United States' daily competition with rivals like China and prioritizes investments in key capabilities. New and notable in NAVPLAN 2024 is a goal to achieve 80 percent combat surge readiness by 2027; the current rate is approximately 67 percent.[23]

All of this reflects a continuation of demands stemming from the Distributed Maritime Operations concept that has been deemed critical to defeating Chinese anti-access/area denial (A2/AD) capabilities. Prior NAVPLANs lacked a clear timeline; now the deadline for delivering capabilities and meeting readiness goals is set as no later than January 1, 2027.[24] This date is picked explicitly to meet China's own goal of being ready to prevail in a war over Taiwan.[25] To pace this threat, NAVPLAN 2022 offered a plan calling for a fleet of 350 manned and 150 unmanned warships along with 3,000 naval aircraft. This was revised upwards in June 2023 to 381 battle-force manned ships and incorporated into NAVPLAN 2024. Seven goals called Project 33 include achieving 80 percent readiness, field operations centers for distributed combat operations, greater numbers of field unmanned platforms, and restoration of critical infrastructure like aging shipyards.[26] The new CNO, Admiral Daryl Caudle, so far has not signaled an intent to change direction.

Admiral Caudle's first message to the fleet as CNO does indicate that several changes are coming. In this message, he signaled new potentially traditional naval uniforms, better living conditions during extended maintenance periods, and better facilities and platforms resourced to national needs, his mantra being "Built in the Foundry—Tempered in the Fleet—Forged to Fight."[27] While little detail is given in his public statements since becoming CNO, past comments as Fleet Forces Commander indicate an awareness that nuclear maintenance capacity is inadequate and that we need additional public shipyards.[28]

All told, NAVPLANs have neither galvanized political support nor delivered actionable long-range shipbuilding plans to Congress. Considering current trends, it seems unavoidable that the fleet will reach a nadir of 280 warships in 2027—exactly when a larger fleet is required.[29] Despite some progress in NAVPLAN 2024, the disconnect between strategy, plans, and resourcing persists with the latest Battle Force Ship Assessment and Requirement, which

indicates that the Navy is short 80 warships (rather than 50 per earlier plans) with which to execute the National Defense Strategy.[30] During the years since 2016's 355-fleet goal was memorialized in law by Congress, the threat from China has continued to grow, pressurizing the Navy to revise upward its assessed fleet composition and needs.

Numbers alone in warships do not capture the needed composition of various warship classes—the fleet design. Both the Secretary of the Navy and the CNO have indicated that a new fleet design is forthcoming.[31] As of February 24, 2026, the annual congressionally mandated 30-year shipbuilding plan had not been released, and the congressionally mandated annual report on *Military and Security Developments Involving the People's Republic of China*, a critical resource for responsible officials charged with defining the threat as a rationale for the new fleet design and long-range build plan, was not released until December 2025.

This *Index* focuses on the following elements as the primary criteria by which to measure U.S. naval strength:

- **Sufficient capacity** to defeat enemies in major combat operations and provide a credible peacetime forward presence to maintain freedom of shipping lanes and deter aggression,
- **Sufficient technical capability** to ensure that the Navy is able to defeat potential adversaries, and
- **Sufficient readiness** to ensure that the fleet can "fight tonight" given proper material maintenance, personnel training, and physical well-being.

Capacity

Force Structure. The Navy is unique relative to the other services because its capacity requirements must meet two separate objectives:

1. During peacetime, the Navy must maintain a global presence in distant regions both to deter potential aggressors and to assure allies and security partners.
2. The Navy must be able to win wars. To this end, the Navy measures capacity by the size of its battle force, which is composed of ships it considers directly connected to combat missions.[32]

This *Index* continues the benchmark set in the *2019 Index*: 400 ships for combat operations against China, as well as adequate response to opportunistic adversaries with a 20 percent strategic reserve, and historical levels of 100 ships that are forward deployed in peacetime.[33] This 400-ship fleet is centered on providing:

- 13 Carrier Strike Groups (CSGs);
- 13 carrier air wings with a minimum of 624 strike fighter aircraft;[34] and
- 15 Expeditionary Strike Groups (ESGs).[35]

Unmanned platforms are not included because they have not matured as a practical asset. They hold great potential and will likely be a significant capability, but until they are developed and fielded in larger numbers, their impact on the Navy's warfighting potential remains speculative. The same holds true across the fleet when it comes to new classes of ships. The Navy is investing in research, modeling, war gaming, and intellectual exercises to improve its understanding of the potential utility of new ship and fleet designs, but until new ships are added to the fleet, it is hard to know how they will affect the Navy's ability to perform its missions. Consequently, this *Index* measures what is known and can be known in naval affairs, assessing the current Navy's size, modernity, and readiness to perform its most important missions today.

Relative to the above metric, the Navy's fleet of 287 warships as of October 1, 2025[36]—10 ships *less* than the figure cited in the *2024 Index*—is inadequate and places greater strain on the ability of ships and crews to meet existing operational requirements. To alleviate the operational stress on an undersized fleet, the Navy has attempted since 2016 to build a larger fleet. However, for myriad reasons, it has been unable to achieve sustained growth and in fact has underdelivered by approximately 10 ships each year since 2016.[37] In the past, the Navy has had some success in meeting operational requirements with fewer ships by posturing ships forward as it has done in Rota, Spain; on Guam; and potentially as part of AUKUS (the trilateral

Australia–United Kingdom–United States security pact) in Australia.

At a February 2022 naval conference, the Chief of Naval Operations stated, "I've concluded—consistent with the analysis—that we need a naval force of over 500 ships."[38] The Navy's subsequent June 2023 Battle Force Ship Assessment and Requirement report specified that the fleet needed to include:

- 12 aircraft carriers (the Navy currently has 11);
- 87 large surface warships (CG, DDG) (the Navy currently has 85);
- 73 small warships (LCS) (the Navy currently has 27);
- 31 large amphibious warships (LSD, LPD, LHA, LHD) (the Navy currently has 32);
- 66 attack submarines (SSN) (the Navy currently has 47);
- 12 ballistic missile submarines (SSBN) (the Navy currently has 14);
- 46 combat logistics ships (T-AO, T-AOE, T-AKE, NGLS) (the Navy currently has 34); and
- 54 command and support ships (LCC, AS, T-ESD, T-EPF, T-ESB, LSM, ARS/ATF, and T-AGOS) (the Navy currently has 30).[39]

Based on the CNO's military advice and Heritage Foundation analysis, today's fleet remains too small to meet today's threats with maximum effectiveness.

Posture/Presence. Although the Navy remains committed to sustaining forward presence, it has struggled to meet the requests of regional Combatant Commanders. The result has been longer and more frequent deployments to meet a historical steady-state forward presence of 100 warships.[40] In 1985, at the height of the Cold War, less than 15 percent of the nation's 571-ship fleet was deployed, and throughout the 1990s, deployments seldom exceeded the six-month norm: Only 4 percent to 7 percent of the fleet exceeded six-month deployments on an annual basis.[41]

Using the Navy's aircraft carrier fleet—the most taxed platform—as a sample set, for the past 20 years, approximately 25 percent of the aircraft carrier fleet has been deployed. Following the 2017 deadly collisions involving USS *McCain* and USS *Fitzgerald*, overall fleet deployment dropped temporarily to less than 20 percent, but it surged again to almost 30 percent in 2020.[42] High operational tempo (OPTEMPO) remains an issue as the Navy works to secure U.S. interests against China's distant naval deployments and provocations, North Korea's ballistic missile submarine, Iranian attacks on and interdiction of commercial shipping in the Persian Gulf, and an active Russian Navy.

The numbers reported by the Navy on September 8, 2025, are typical for a total battle force of 287 deployable ships with 105 warships at sea for an OPTEMPO of 36.1 percent, well above Cold War levels of approximately 20 percent.[43] Given Combatant Commanders' requirements for naval presence, there is impetus to have as many ships forward deployed as possible by:

- **Homeporting.** The ships, crew, and their families are stationed at the port or based abroad (for example, a CSG in Yokosuka, Japan).
- **Forward Stationing.** Only the ships are based abroad, and crews are rotated out to the ship.[44] This deployment model is currently used for Littoral Combat Ships (LCS) and *Ohio*–class guided missile submarines (SSGNs) manned with rotating blue and gold crews, effectively doubling the normal forward deployment time (for example, LCS in Singapore).

These options allow one forward-based ship to provide a greater level of presence than four ships based in the continental United States (CONUS) can provide by offsetting the time needed to transit ships to and familiarize their crews with distant theaters.[45] This is captured in the Navy's GFM planning assumptions: a forward-deployed presence rate of 19 percent for a CONUS-based ship compared to a 67 percent presence rate for an overseas-homeported ship.[46] To date, the Navy's use of homeporting and forward stationing has not mitigated the reduction in overall fleet size's effect on forward presence.

Shipbuilding Capacity. To meet stated goals for fleet size, the Navy must build faster and maintain more ships, exceeding its current capacity. However, significant shortfalls in both government and

commercial shipyards make it hard to accomplish either task—and inconsistent planning and inconsistent defense budgets make it even more difficult. Given the limited ability to build ships, the Navy will struggle to meet the congressionally mandated 355-ship goal,[47] to say nothing of the 400-ship goal advocated in this *Index*.

Congress overrode smaller shipbuilding plans for FY 2022 and FY 2023 that were submitted by the Biden Administration and added funding for new orders each year that exceeded 20 warships. Despite this, subsequent procurement and delivery rates have not kept pace with the threat from China. Nor have congressional mandates reversed this trend: The Navy last met a congressionally mandated goal of 12 aircraft carriers in 2006[48] and is meeting its mandated fleet of no fewer than 31 large amphibious warships only after strenuous protests by Senator Dan Sullivan (R–AK) in 2023.[49]

World events demonstrated the danger of having inadequate amphibious forces in April 2023 when Americans were stranded amid factional war in Sudan.[50] Despite such consequences, the current long-range shipbuilding plan does not reverse downward trends in the fleet and will result in a drop to 280 manned ships by FY 2027.[51]

Meanwhile, a combination of misaligned congressional willingness to fund a larger fleet, a former Administration loath to resource it, and a Navy unable to control its requirements has resulted in shipbuilders that too often are unwilling to invest in needed workforce and delay capital investments. From 2005 to 2020, the Navy's procurement of new warships increased the size of the fleet from 291 to 296 warships; at the same time, China's navy grew from 216 to 360 warships.[52] If the Navy is to build a larger fleet, more shipbuilders will have to be hired and trained—a lengthy process that precedes any expansion of the fleet. The Navy estimates that to meet its demand for nuclear submarines, it will need to hire an additional 100,000 new workers over the next 10 years.[53]

Complicating matters is that, according to the most recent labor statistics, wages in the nation's shipbuilding sector have not consistently kept pace with inflation and wider labor wages. In 2021, wages in the shipbuilding and repair sector shrank by 2.7 percent; they then exceeded national averages for two years only to fall behind again in 2024.[54] As a consequence, the sector's labor pool shrank 1.5 percent in the third quarter of 2024.[55] This pattern does not appear to have abated in 2025.

A critical concern is the urgency of the need to increase production of nuclear-powered warships, most notably nuclear-powered submarines that would be vital in any conflict with China. Limited nuclear shipbuilding capacity[56] will constrain the Navy's plans to increase the build rate from two attack submarines per year to three while concurrently building one ballistic missile submarine.[57]

To support a larger nuclear-powered fleet, the Navy has sought assistance for relevant public shipyards to increase their workforce, awarding a $503 million contract to Blue Forge Alliance.[58] While this contract was supported by the Navy, a dubious $2.4 billion contract was awarded to Deloitte Consulting to expand submarine industrial capacity.[59] So far, these efforts have yet to yield a return on the investment as the *Virginia*-class attack submarine program remains behind schedule and continues to contend with rising labor costs that resulted in a stopgap $1.95 billion to cover the cost of keeping two boats under construction.[60]

Moreover, since 2023, the Navy has reported *Virginia*-class labor deficits that have contributed to cost overruns and production delays, causing the Navy to miss its stated goal of a delivery rate of 1.5 boats a year by October 1, 2024, and raising concerns that it may not be able to meet its goal of two per year by 2028 if conditions do not change.[61] This is exacerbating concerns about whether the AUKUS nuclear submarine production effort with Australia and the United Kingdom, which will require the delivery of 2.33 boats per year, will prove to be executable.[62]

A key element of the AUKUS effort is the forward "rotational" basing of American nuclear submarines in HMAS Stirling, Australia. The first of these submarines are due to arrive per the so-called optimal pathway in 2027, which will have a multiplicative effect on U.S. submarine presence: Each forward-based warship is equivalent to four based in the continental U.S. Failing to deploy American nuclear submarines according to this plan would further degrade the capacity needed to deter China.

It still remains true that current funding will not build or maintain the larger fleet that both the Navy and this *Index* say is needed and that Congress has mandated. Nothing has changed to alter CNO Admiral Michael Gilday's 2021 assessment that

current budgets can only "sustain a Navy of about 300 to 305 ships."[63] In addition, the Government Accountability Office (GAO) has noted that a brittle defense industrial base continues to drive up costs and create delays.[64]

Manpower. In 2018, the Navy assessed that its manpower would need to grow by approximately 35,000 to achieve an end strength of 360,395 sailors to support a 355-ship Navy.[65] The last time the Navy had a similar number of ships was in 1997 when it had 359 ships and 398,847 personnel.[66] As of February 22, 2026, the Navy consisted of 340,000 active-duty officers and sailors,[67] up by 4,813 from the 335,187 reported in the *2024 Index* but still significantly below what is needed to meet its 2034 fleet goal.

After several negative years of recruiting and retention efforts, things are beginning to reverse course. Four months into the 2025 fiscal year, the Navy announced that it was already on track to meet recruiting goals for the second consecutive year.[68] Despite this good news, however, budgeted total end strength fell from 344,441 in FY 2022 to 332,300 in FY 2025, which might limit the Navy's ability to take advantage of better recruiting.[69] Because authorized manning numbers should reflect the fleet needed rather than what can be recruited today, it remains to be seen whether retention rates can be sustained to meet long-range manning needs. According to statements made in late 2024 by the Secretary of the Navy and Chief of Naval Operations, the service's retention rates have been at historic highs—perhaps an indication that the Navy has made a long-overdue course correction in its outreach to potential new recruits.[70]

Despite recent improvement in recruitment, missed past recruitment goals and lackluster retention have left a legacy of overworked sailors at sea, as evidenced by unfilled billets aboard ship. This places greater demand on a smaller active-duty end strength, and the consequences will be seen in the fleet's operational capabilities.

The GAO has reported persistent crew manning shortfalls. A GAO report published in May 2021 revealed that some ships had crew shortfalls as high as 15 percent, which compounded crew fatigue as smaller crews had to make up the workload. This was a contributing factor in several fatal collisions in 2017.[71] The problem persists with the number of gapped billets rising to 22,000 for junior enlisted sailors in 2023 on top of a persistent deficit of 10,000 stretching back as far as 2016.[72] In January 2025, Navy leadership indicated that in order to fill the remaining 20,000 gapped at-sea billets, it will have to meet recruitment and retention goals for three consecutive years—and this would not guarantee meeting the 355-ship crew requirements.[73]

Finally, the effort to attract people to join the Navy is made more difficult by wages that are not keeping up with inflated costs of living. In the battle for people, pay raises in recent years have consistently lagged behind inflation. In an effort to address this pay gap, a 14.5 percent pay raise for the most junior sailors went into effect on April 1, 2025.[74]

The U.S. Coast Guard. This year, the *Index of U.S. Military Strength* for the first time examines the contribution of the U.S. Coast Guard. In wartime, the Coast Guard would become part of the Navy and support specific combat roles. The Navy therefore expects the Coast Guard to be ready for nine specific wartime missions, which are detailed in a 2008 memorandum of agreement between the Department of Homeland Security (DHS) and the Department of Defense (DOD). These nine missions include "Maritime interception/interdiction operations," "Military environmental response," "Theater security cooperation," "Coastal sea control operations," "Rotary wing air intercept operations," "Combatting terrorism operations," "Maritime operational threat response," "Military cyberspace operations," and "Port operations, security and defense."[75]

A critical mission is escort of shipping that sustains military operations across the Pacific, which the current fleet of cutters is not designed to execute.[76] With appropriate modification, the current fleet of 20 National Security Cutters could be able to support this critical mission.[77] Overall, however, the wartime contribution and training routines for the U.S. Coast Guard today make it unlikely that it will contribute appreciably to combat operations.

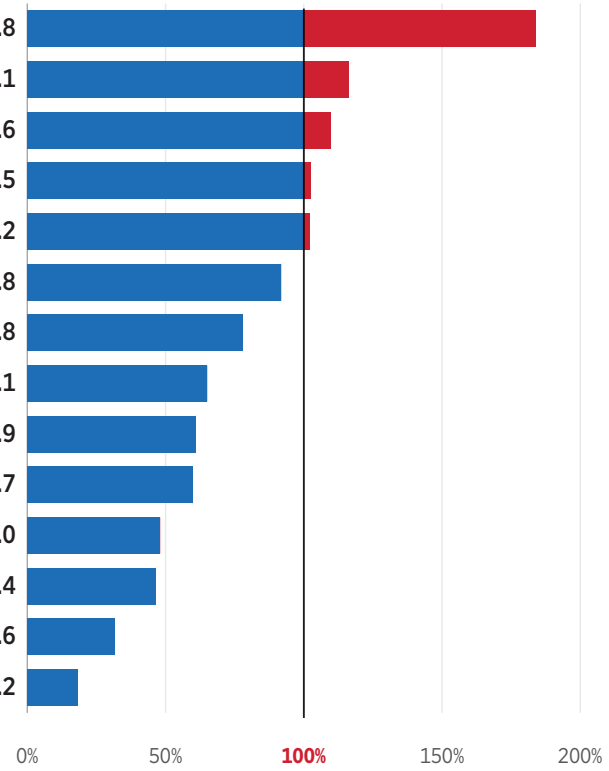
Capability

A complete measure of naval capabilities requires an assessment of U.S. platforms against enemy weapons in plausible scenarios. The Navy routinely conducts war games, exercises, and simulations to assess this, but insight into its assessments is limited by their classified nature. This *Index* therefore assesses capability based on

CHART 13

Navy Ships Nearing—or Past—End of Service Life

Description	Active Ships	Average Age	Average Age as Percentage of Service Life Expectancy
Command Ship	2	55.2	183.8
Submarine Tender	2	46.5	116.1
Mine Countermeasures Ship	4	32.9	109.6
Guided Missile Submarine	4	43.1	102.5
Guided Missile Cruiser	7	34.5	102.2
Ballistic Missile Submarine	14	35.1	91.8
Dock Landing Ship	10	33.5	77.8
Aircraft Carrier	11	32.5	65.1
Amphibious Assault Ship	9	24.4	60.9
Submarine	49	20.0	59.7
Expeditionary Sea Base	5	15.4	48.0
Guided Missile Destroyer	78	20.5	46.4
Amphibious Transport Dock	13	12.6	31.6
Littoral Combat Ship	28	5.1	18.2



NOTE: Figures are based on calculations through February 3, 2026.
SOURCE: U.S. Navy, Naval Sea Systems Command, Naval Vessel Register, "Fleet Size," http://www.nvr.navy.mil/NVRSHIPS/FLEETSIZE.HTML (accessed February 3, 2026).

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remaining hull life, mission effectiveness, payloads, and the feasibility of maintaining the platform's technological edge.

Most of the Navy's fleet consists of older platforms: Of its 20 classes of ships, only eight are in series production.[78] The FY 2025 shipbuilding budget of $32.4 billion was 0.7 percent higher than the FY 2024 budget: 12.6 percent of the Navy's budget of $257.586 billion and a slackening of past increases that have been as high as 4.5 percent.[79] The current proposed FY 2026 budget plus the enacted reconciliation bill would represent a 22 percent increase over FY 2025 with new orders of 19 warships.[80] The following are highlights by platform.

Ballistic Missile Submarines (SSBN). The *Columbia*-class submarine will relieve the aging *Ohio*-class SSBN fleet. Because of the implications of this change for the nation's strategic nuclear deterrence, the *Columbia*-class SSBN remains the Navy's top acquisition priority. To ensure the continuity of this leg of the U.S. nuclear triad, the first *Columbia*-class SSBN must be delivered on time for its first deterrent patrol in 2031.[81] In November 2020, the Navy signed a $9.47 billion contract with General Dynamics Electric Boat for the first-in-class boat and advanced procurement for long-lead-time components of the second hull.[82] The lead ship's keel-laying ceremony occurred on

June 4, 2022.[83] The FY 2025 budget completes the payments for procurement of the second boat, but anticipated delays of as many as 16 months stand to jeopardize the viability of the nation's assured second strike nuclear deterrent force.[84]

However, concerns persist in Congress that the U.S. Department of War may not be fully utilizing special authorities granted to the Navy to ensure that this critical program is adequately resourced. Specifically, the National Sea-Based Deterrence Fund (NSBDF) established by Congress in 2024 has saved more than $1.4 billion using flexible funding but "has yet to utilize the core function of the NSBDF—namely, to provide increased flexibility to repurpose funds into it to buy down the fiscal impact of the program on our other shipbuilding priorities."[85] Because this priority program is currently facing extended delays, its utility must be reviewed and its full utilization must be ensured.

Nuclear Attack Submarines (SSN). SSNs are multi-mission platforms whose stealth enables clandestine intelligence collection; surveillance; anti-submarine warfare (ASW); anti-surface warfare (ASuW); insertion and extraction of special operations forces; land attack strikes; and offensive mine warfare. The newest SSN class, the Block V *Virginia* with the Virginia Payload Module (VPM) enhancement, is important to the Navy's overall strike capacity, enabling the employment of 28 more Tomahawk cruise missiles than were employed in earlier SSN variants.[86] Construction of Block V submarines began in September 2019 with the *Oklahoma* (SSN 802) to be delivered in May 2027 and three more boats to be delivered before the end of the decade.[87] As noted previously, a limited shipyard workforce is causing this program to be delayed by as many as two years.

Aircraft Carriers (CVN). The Navy has 11 nuclear-powered aircraft carriers: 10 *Nimitz*-class and one *Ford*-class. The Navy has been making progress in overcoming nagging issues involving several advanced systems, notably advanced weapons elevators, and stemming from the *Ford*'s first operational deployment in the fall of 2022 to the North Atlantic.[88] Further bolstering confidence in this new class, the *Ford* deployed to the Mediterranean in May 2023 to sustain a persistent carrier presence there following Russia's February 2022 invasion of Ukraine.[89] The *Ford* began a planned deployment cycle in June 2025 and has conducted allied naval operations in the high North Atlantic region.[90]

The second ship in this class, the *John F. Kennedy* (CVN 79), was christened on December 7, 2019, but its scheduled delivery to the Indo-Pacific theater has slipped from 2022 to 2027 to support late modifications for fifth-generation fighters like the F-35; the Navy's carrier fleet will drop to 10 during 2026–2027.[91] The most recent reporting indicates that the *Kennedy* will arrive at its new homeport, Naval Base Kitsap in Bremerton, Washington, no earlier than FY 2029.[92] The *Kennedy* is to be followed by the *Enterprise* (CVN 80), which is in early construction with delivery planned for 2028.

The U.S. lead in this category of naval power may be waning as China completes construction of its first super carrier. As the U.S. Navy struggles to build, maintain, and crew a fleet of 11 aircraft carriers, China is rapidly catching up both in numbers and in platform capability. Its newest carrier, the Type-003, like the *Ford*-class, will utilize electromagnetic catapults that give its air wing greater range and sortie rates, thus significantly narrowing the capability gap.[93] The Type-003 is China's second indigenously built carrier and a significant engineering milestone. There had been renewed emphasis on having the ship delivered before the October 2022 Chinese Communist Party (CCP) Congress,[94] and after a sprint by the shipyard, the new 80,000-ton Type-003 aircraft carrier was launched in June 2022.[95] U.S. Department of Defense reporting indicated that the Type-003 would enter service in 2025; the first two carriers have engaged in routine deployments and intimidation operations against Taiwan.[96]

In a further indication of the rising threat to American naval dominance, speculation has mounted over a new Type-004 super carrier spotted in satellite imagery under construction in Dalian shipyard, potentially nuclear powered, and with up to four electromagnetic catapults, matching the *Ford* class.[97] China's growing naval aviation and aircraft carrier capabilities place added stress on U.S. naval aviation and air defenses.

Large Surface Combatants. The Navy's large surface combatants consist of the *Ticonderoga*-class cruiser, the *Zumwalt*-class destroyer, and the *Arleigh Burke*–class destroyer. The President's FY 2024 budget decommissioned five aged *Ticonderoga*-class cruisers.[98] Current plans had the Navy decommissioning four more cruisers in FY 2025, decommissioning another three the next

year, and retiring the final two in 2027.[99] These decommissionings represent a significant decrement of the Navy's sea-launched firepower with the loss of a total of 1,342 vertical launch tubes. Attempts to repurpose or extend the life of the aging *Ticonderoga*-class cruisers has not progressed after years of deferred upgrades and past incomplete maintenance.[100]

Since publication of the *2024 Index*, the Navy has added four *Arleigh Burke*–class DDG 51 destroyers, bringing the total on active duty in the fleet to 74. In 2008, the Navy declined to pursue a new cruiser to provide air and missile defense for carrier strike groups, choosing instead to pursue a final iteration of the *Arleigh Burke* class, Flight III.[101] This will remain a stopgap measure until a more capable new destroyer, the DDG(X), joins the fleet, probably in the next decade. The DDG(X) will include the capability to launch long-range hypersonic strike missiles in new larger vertical launching system (VLS) cells.[102]

The Navy's other modern destroyer, the *Zumwalt* class, was never intended as a cruiser replacement and continues operations and testing to employ it as a long-range strike platform. The *Zumwalt* class was envisioned as bringing advanced capabilities to the fleet, but the program has suffered technological problems and cost overruns, and the Navy has ended future procurement. The three that have already been purchased and are being built include the *Zumwalt* (DDG-1000) and *Michael Monsoor* (DDG-1001), which have been commissioned into service, and the *Lyndon B. Johnson* (DDG-1002), which is completing checks and installation of hypersonic missile capable–VLS.[103] In September 2022, the *Zumwalt* had conducted its first (albeit truncated) deployment to Seventh Fleet's Western Pacific area of operations.[104] The *Michael Monsoor* has completed combat system installation, and the Navy had been planning to deploy her to the Western Pacific by the end of 2025.[105]

To reach 355 ships by 2034, the Navy plans several class-wide service life extensions, notably the extension of the DDG-51–class's service life from 35 to 40 years and modernization of older hulls. The FY 2020 budget included $4 billion for modernization of 19 destroyers from FY 2021 through FY 2024.[106] Since publication of the *2024 Index*, the Navy has expanded this to a 20-ship $17 billion modernization plan that includes a major electronic warfare upgrade (AN/SLQ-32(V)7 Block III). The first destroyer undergoing this upgrade is the *Pinkney*, which was nearing completion in late 2024, to be followed by *James E. Williams* (DDG-95); *Chung Hoon* (DDG-93); and *Halsey*.[107] These electronics and sensor upgrades would be critical for combat operations in the Western Pacific against China's modern military.

Small Surface Combatants. The Navy's small surface combatants consist principally of the *Avenger*-class mine countermeasures (MCM) ship; the Littoral Combat Ship (LCS); and the *Constellation*-class frigate (FFG), which began production in 2021. In January 2021, the Navy halted production of the mono-hull LCS *Freedom* variant until issues involving the design of its propulsion system could be resolved. After that decision was made, in April 2023, the final *Freedom* variant was launched.[108] In the meantime, the top speed of affected ships (currently 40-plus knots) is reportedly limited to 34 knots.[109] Under the Navy's FY 2020 30-year shipbuilding plan, the fleet of 23 LCSs was expected to grow to 34 and be joined by 18 frigates by FY 2034.[110] Since then, the Navy has reversed course and terminated the LCS anti-submarine mission module program (10 units originally planned) and plans to decommission the remaining nine *Freedom* mono-hull variants.[111]

On August 20, 2020, the Navy decommissioned three of its aging *Avenger*-class MCM ships, leaving eight in service overseas in Sasebo, Japan, and Manama, Bahrain. These represent the only ship class dedicated to countering the mine threat.[112] The current long-range shipbuilding plan confirms that the Navy intends to operate four of these aged MCMs through FY 2027; four MCMs based in Bahrain are to be decommissioned in FY 2025.[113]

As the MCMs are retired, the Navy is relying on the development of LCS mine countermeasure mission packages to provide this capability. At an April 2022 webinar, the CNO indicated that these mission modules were on track to reach initial operational capability (IOC) by the end of 2022.[114] Since then, the Navy has canceled its ASW mission modules because of insurmountable engineering challenges, and on May 1, 2023, it announced that the MCM modules had achieved IOC.[115] In March 2025, two LCS (*Santa Barbara* and *Canberra*) deployed for the first time with operational ASW mission modules.[116] In an unanticipated move, the

Navy began to arm LCS with the naval strike missile, giving these ships a long-range anti-ship capability that they had lacked despite notable operations by the class in the South China Sea.[117] On December 9, 2021, the San Diego–based *Independence*-variant *Oakland* received this new capability.[118]

Installation and procurement of surface warfare modules and associated surface-to-surface missile modules (LCS SSMM) are progressing; the procurement of 18 LCS SSMM planned for FY 2024 included offensive and defense systems and associated munitions.[119] In fall 2024, the Navy executed a rapid upgrade to the LCS SSMM capable of countering unmanned aircraft systems (C-UAS) drones. The Navy stated that "[r]ecent events in the U.S. 5th Fleet Area of Responsibility (AoR) underscore the importance of equipping our warships with up-to-date C-UAS systems to keep emerging threats at bay."[120]

Rather than procuring additional LCS, the Navy has been focused on a new frigate. On April 30, 2020, the Navy awarded Fincantieri a $795 million contract to build the lead ship of the new *Constellation*-class frigate at its Marinette Marine shipyard in Wisconsin based on a proven design that is currently in service with the French and Italian navies.[121] Plans are for the frigate to perform as a multi-mission warship with 32 VLS cells, as many as 16 containerized naval strike missiles (NSM), and one helicopter.[122] In June 2023, 90 percent of functional design and 80 percent of detail design work had been completed despite construction having already begun, adding risk to the program that is now seen in delays and cost increases.[123]

In May 2021, the Navy contracted for the second ship in the class, the USS *Congress* (FFG-63).[124] The Navy purchased a third ship in FY 2022 with a total of six procured through FY 2024. The plan is for 20 frigates built at two shipyards,[125] but the Navy has yet to decide on a second shipyard to begin construction of frigates that was supposed to begin in FY 2023.[126] Early in 2024, the Secretary of the Navy directed a 45-day shipbuilding review in large part because of reports of significant delays with the frigate program; the review confirmed a three-year delay with delivery likely in 2029.[127]

Amphibious Ships. Then-Commandant of the Marine Corps General David Berger issued his "Commandant's Planning Guidance" in July 2019 and "Force Design 2030" in March 2020. Both documents signaled a break with past Marine Corps requests for amphibious lift, specifically moving away from the requirement for 38 amphibious ships to support an amphibious force of two Marine Expeditionary Brigades (MEB).[128] The Commandant envisioned a larger yet affordable fleet of smaller, low-signature amphibious ships—the Landing Ship Medium (LSM)[129]—that enable littoral maneuver and associated logistics support in a contested theater.[130] As of February 2026, the Secretary of the Navy had indicated that he intends to cancel the *Constellation*-class frigate.

However, the amphibious fleet remains centered on fewer large ships, and the Commandant's vision still remains years away from being realized with Congress holding the line at "not less than 31 operational amphibious warfare ships."[131] The Marine Corps did not provide an annual report in 2024 regarding the progress of Force Design 2030, but the Commandant of the Corps did commit to the effort on May 16, 2024, before Congress.[132] The reconciliation bill passed on July 3, 2025, included orders for nine Medium Landing Ships (formerly known as the LSM), which are intended to meet Marine Corps requirements for littoral regiments operating in the first island chain.[133] Regardless of such commitments, however, until the Navy can provide the Marine Corps with needed sealift, whether Force Design will be fully implemented will remain an open question.

The Navy's Future Naval Force Study (FNFS)[134] and December 2020 30-year shipbuilding plan acknowledged the growing importance of the LSM, which will have to be produced rapidly and in sufficient numbers to actualize the naval forces' distributed concepts of operations (for example, Marine Littoral Regiments and Distributed Maritime Operations). The need for 18 LSM was further affirmed in June 2023 with the most recent Battle Force Ship Assessment and Requirement (BFSAR), also called Force Design 2045.[135]

According to the most recent long-range shipbuilding plan, issued in March 2024, the Navy is developing the LSM. This is a change from plans referenced in the *2024 Index* to purchase the first LSM in FY 2025.[136] The Marine Corps had intended to have the ship under contract by the summer of 2022, but because of delays, it has begun to use alternative platforms to train and work out operational concepts so that it will be ready when the ship eventually is delivered.[137]

As of October 1, 2025, the Navy had nine amphibious assault ships in the fleet (seven *Wasp*-class LHD and two *America*-class LHA); 13 amphibious transport docks (LPD); and 10 dock landing ships (LSD).[138] The FY 2021 budget included $250 million in additional funds to accelerate construction of LHA-9 following the July 2020 catastrophic fire on *Bonhomme Richard* (LHD-6).[139] The decision to decommission the damaged ship further exposed limitations in shipyard capacity, as repairs would have had a negative effect on other planned shipbuilding and maintenance.[140]

In December 2022, construction began on the USS *Fallujah* (LHA-9), which, like the *Bonhomme Richard*, is to be configured for F-35B joint strike fighters and MV-22 Osprey tilt-rotor aircraft at a cost of $2.4 billion.[141] The employment of advanced F-35B fighter jets is limited to two *America*-class amphibious warships (one homeported in Japan) and is a critical capability against Chinese advanced weapon systems.[142]

The Navy's LSDs, the *Whidbey Island*–class and *Harpers Ferry*–class amphibious vessels, are scheduled to reach the end of their 40-year service lives beginning in 2025. The USS *Harrisburg* (LPD-30), Flight II of the *San Antonio*–class Landing Platform Dock amphibious ships, began construction in April 2020 and when delivered will be the first of 13 ships to replace the legacy LSD ships. The 12th Flight I *San Antonio*–class ship (LPD 28) was delivered six months later than reported in the *2022 Index*.[143] LPD-32 is the most recently purchased of the 13 originally envisioned *San Antonio*–class Flight IIs.

Decisions made in 2014 and 2018 committed the Navy to building less capable and cheaper Flight II LPDs to replace the aging *Harpers Ferry*–class and *Whidbey Island*–class amphibious warships.[144] The Marine Corps has sought procurement of LPD-33 and had kept it at the top of its unfunded requirements list.[145] A three-way dispute involving the then-Secretary of Defense's staff, the Navy, and the Marine Corps over the future of the large amphibious warship fleet remains contentious and unresolved,[146] but three of these Flight II two LPDs are nevertheless currently under contract.[147]

Unmanned Systems. The Navy does not include unmanned ships when counting the size of its battle force. Previous long-range shipbuilding plans envisioned the purchase of 13 Large Unmanned Surface Vessels (LUSV); one Medium Unmanned Surface Vessel (MUSV); and eight Extra Large Undersea Unmanned Vessels (XLUUV) by FY 2026.[148] That plan has been shelved, but the Navy continues to test and evaluate numerous prototype unmanned platforms.

The FY 2025 budget deferred procurement of LUSV for two years to FY 2027 with procurement increasing to three per year by FY 2029.[149] On May 18, 2021, an experimental LUSV, the *Nomad*, transited the Panama Canal on its way to Surface Development Squadron (SURFDESRON) 1 based in California.[150] SURFDESRON 1 operates MUSV *Sea Hunter* prototypes, LUSV, and the *Zumwalt* destroyer to advance the Navy's unmanned surface warship capabilities.[151] Since publication of the *2024 Index*, the Navy has continued to make notable progress with its unmanned fleet to include a months-long deployment to the Western Pacific with stops in Japan, Guam, and Australia by a flotilla of four unmanned vessels.[152]

The Navy reached a significant milestone in September 2021 when its small fleet of unmanned surface ships launched and hit a target with an SM-6 interceptor missile.[153] After years in a laboratory and in controlled at-sea navigational tests, unmanned ships are now deploying in operational settings. That same month, Task Force 59, based in the Persian Gulf and comprised of smaller unmanned drones and vessels, conducted International Maritime Exercise 2022 (IMX22), an exercise in the Red Sea that involved 10 nations and more than 80 unmanned platforms.[154] In a sign of growing confidence, the Navy announced that it will establish a similar unmanned vessel task force at Fourth Fleet based in Mayport, Florida.[155] While reporting does not indicate that this task force has been established, Fourth Fleet has conducted its first manned-unmanned platform exercise called Southern Spear to refine tactics important in monitoring and interdicting such illicit maritime activities as drug trafficking and illegal fishing.[156]

Logistics, Auxiliary, and Expeditionary Ships. Expeditionary support vessels are highly flexible platforms of two types: those that are used for prepositioning and sustaining forward operations and others that are used for high-speed lift in uncontested environments. The Navy has five of the former (Expeditionary Sea Base [ESB] vessels) and 14 of the latter (shallow-draft Expeditionary Fast Transport [EPF] vessels).

In March and April 2022, ESB *Hershel Williams* (ESB 4) demonstrated the versatility of these ships during maritime security missions with African coast guards and navies. In August 2021, it conducted a counter-piracy exercise with the Brazilian navy. At the same time, China was attempting to secure a base in Equatorial Guinea.[157] The Navy christened ESB 6, USNS *John L. Canley*, on June 25, 2022.[158] ESB 7, USNS *Robert E. Simanek*, began construction in San Diego, California, with its keel laid in October 2021.[159] *Canley* entered service with the Navy on February 17, 2024, and *Simanek* joined the fleet on September 12, 2024.[160]

With their shallow draft and versatile cargo capacity, EPFs offer unique capabilities that are well suited to austere but uncontested waters. Specifically, these ships can transport 600 short tons of military cargo (for example, main battle tanks) 1,200 nautical miles at 35 knots. In March 2021, the Navy revised its contract with Austal USA for $235 million to modify EPF 14 and the future EPF 15 to enable them to serve as high-speed hospital ships with the capability of embarking a V-22 tilt-rotor aircraft.[161] The keel for EPF 14 configured as a hospital ship was laid on January 26, 2022, and construction of EPF 15 in the same configuration commenced the same month.[162] EPF 14, USNS *Cody*, was launched on March 20, 2023, and as of January 11, 2024, was in active service with the Military Sealift Command.[163]

The Navy's Combat Logistics Force (CLF) includes dry-cargo and ammunition ships (T-AKE); fast combat support ships (T-AOE); and oilers (AO). The CLF provides critical support, including at-sea replenishment, that enables the Navy to sustain the fleet at sea for prolonged periods. The Navy's future oiler *John Lewis* (T-AO 205) was procured in 2016 and launched five years later on January 12, 2021; 20 ships of this class are planned.[164] However, because of a flooding incident at the graving dock, delivery of *John Lewis* was delayed, and this caused cascading delays of 12 to 15 months in construction of the second through sixth ships.[165] The lead ship of the class, *John Lewis*, was delivered to the Navy in July 2022[166] and conducted its first at-sea refueling in March 2025.[167] As of February 24, 2026, four oilers of this class had been delivered.[168]

The capability of oilers has increased in importance since Secretary of Defense Lloyd Austin's March 7, 2022, decision to dismantle Red Hill fuel storage facilities in Hawaii. A plan specifying how the Navy will mitigate the loss of these massive Pacific fuel storage facilities was due by May 31, 2022, but details are scant.[169] Given the delays in construction of oilers and the increased demand for them without Red Hill, it remains unlikely that the Navy could meet the fleet's operational energy needs in a high-tempo crisis.[170] This risk was made clear on September 25, 2024, by the grounding of the oiler *Big Horn* and its impact on combat operations against the Houthis by the *Abraham Lincoln* carrier strike group, which was being supported by the *Big Horn*.[171]

Strike Platforms and Key Munitions. The FY 2025 budget continues the Navy's focus on long-range offensive strikes launched from ships, submarines, and aircraft. A notable capability enhancement, Conventional Prompt Strike (CPS), a maneuverable hypersonic non-nuclear weapon for long-range strikes, was set to deploy initially in FY 2025 on the *Zumwalt*–class destroyer but has been delayed until FY 2027.[172] Block V Maritime Strike Tomahawk (MST) kits with improved targeting procurement are entering their sixth year.[173] In late 2024, the Navy revealed its plan to procure 1,345 of these anti-ship cruise missiles.[174]

To counter the threat posed by the Chinese PL-15 long-range air-to-air missile, which has an operational range of 186 miles, the Navy is working with the Air Force to develop the AIM-120 Advanced Medium-Range missile, the operational range of which has not been made public.[175] In March 2021, the Air Force reported a record long-range kill of a drone target by this developmental missile from one of its F-15C fighters.[176] Development of such a capability appears to be progressing. The Navy and Air Force are working on an extended range AIM-120E missile, and photos online point to even more capable weapons like the so-called AIM-260 or the modified SM-6 for air launch called the AIM-174B.[177]

Shore-Based Anti-Ship Capabilities. Following the August 2019 U.S. withdrawal from the Intermediate-Range Nuclear Forces (INF) Treaty, new intermediate-range (500–1,000 miles) conventional ground-launched strike options became politically viable. This is especially important in Asia where such capable missiles deployed to the first island chain would have great relevance in any conflict with China. In March 2025, the Secretary of Defense announced the Marine Corps' deployment

to the Philippines of an anti-ship land launch cruise missile, the Naval Strike Missile (NSM) known as NMESIS, with its sensors and launcher.[178] The development of such capabilities is driven by the need to hold at risk China's rapidly modernizing and growing Navy.

A first step was taken with the FY 2020 budget that included $76 million to develop ground-launched cruise missiles.[179] The FY 2021 budget included an additional $59.6 million to procure 36 ground-based anti-ship missiles.[180] Confidence spiked when a photo of the launch of a U.S. Marine Corps truck-mounted Naval Strike Missile—ostensibly part of NMESIS—was released in April 2021.[181] The FY 2023 budget funded low-rate initial production of 115 Naval Strike Missiles and associated development of Marine Corps platoon-level targeting systems.[182] The FY 2025 budget continues to support procurement of these weapon systems: 12 NSM missiles for the Navy and 90 for the Marine Corps along with 22 shore-launched tactical Tomahawk missiles.[183] Ukraine's use of shore-based anti-ship missiles to sink Russia's Black Sea flagship, the *Moskva*, in April 2022 has sparked renewed interest in such systems.

Electronic Warfare (EW). The purpose of electronic warfare is to control the electromagnetic spectrum (EMS) by exploiting, deceiving, or denying its use by an enemy while ensuring its use by friendly forces. It is therefore a critical element of successful modern warfare. The final dedicated EW aircraft, the EA-18G Growler, was delivered in July 2019, meeting the Navy's requirement to provide this capability to nine carrier air wings (CVW), five expeditionary squadrons, and one reserve squadron.[184] Anticipating the EA-18G's retirement in the 2030s, the Navy has been exploring follow-on manned and unmanned systems, but no new developments have been reported since publication of the *2024 Index*.[185] To ensure that the EA-18G remains relevant on the battlefield until 2030, an anticipated upgrade or Block II modification with the improved Next Generation Electronic Attack Unit (NGEAU) is being pursued. A significant enhancement of the Navy's electronic warfare capability—IOC and combat use of a new jammer, AN/ALQ-249(V)1 (NGJ-MB)—was achieved in 2024.[186]

The Navy's earlier proposal to retire all of its expeditionary electronic attack squadrons by FY 2025 came as a surprise.[187] Unless there is a replacement capability, retirement of these aircraft removes the EW coverage provided by these units from forward airfields, shifting the support burden to nearby naval platforms and the other services. Given this uncertainty, Congress stipulated in the FY 2023 NDAA that the Secretary of the Navy may not retire an EA-18G aircraft until September 30, 2027, and required that no later than 180 days after the NDAA's enactment, "the Secretary of the Navy and the Secretary of the Air Force shall jointly submit to the congressional defense committees a report that includes a strategy and execution plan for continuously and effectively meeting the airborne electronic attack training and combat requirements of the joint force."[188] The status of that report is unknown, and the most recent Defense Department Strategic Management Plan includes few details.[189]

Air Early Warning. The E-2D forms the hub of the Naval Integrated Fire Control Counter Air (NIFC-CA) system and provides critical theater air and missile defense capabilities. The Navy's FY 2021 budget supported the procurement of four aircraft with an additional 10 to be procured over the following two years.[190] The FY 2023 budget completed this plan by including procurement of the final five new E-2D aircraft, which are important air control platforms.

High Energy Laser (HEL). More than a year of sustained naval combat operations against the Houthis, who have used drones and cruise missiles to attack vessels in the Red Sea, has demonstrated the value of laser defense systems. These HEL systems provide the potential to engage targets or shoot down missiles without being limited by how much ammunition can be carried onboard ship. An early milestone was achieved when USS *Portland* (LPD-27) used its HEL Weapon System Demonstrator to shoot down an unmanned aerial vehicle (UAV) over the Pacific on May 16, 2020.[191] This was followed by the Navy's decision to begin installation of a HEL system—the 60 kW High-Energy Laser with Integrated Optical Dazzler and Surveillance (HELIOS)[192]—on destroyers in 2021 beginning with the USS *Preble*.[193]

HELIOS is a scalable laser system that is integrated into the ship's weapons control and radar systems and can dazzle and confuse threats, disable small boats, or shoot down smaller air threats. The Navy's FY 2024 budget sustained the installation of HELIOS on the USS *Preble* and development of a

100 kW HEL demonstrator system on the USS *Portland*.[194] The FY 2025 budget continues modest investments in this capability: $5.7 million to include at-sea testing on *Preble*.[195]

In April 2022, the Navy demonstrated the ability of its Layered Laser Defense HEL system to shoot down a drone simulating a cruise missile.[196] Successful tests of this sort and the ongoing deployment of HELIOS on the destroyer *Preble* will be followed by installation of a much stronger 100 kW laser on *Portland* (LPD-27) that approaches the power needed for missile defense.[197] However, until field testing against meaningful threat platforms is conducted across a range of weather conditions, the effectiveness of such systems will remain unproven. This effort is further complicated by the Navy's lack of a range on which to test these systems under real-world combat conditions until the Army's White Sands Missile Range updates are completed.[198]

Command and Control. Networked communications are essential to successful military operations. The information passed over these networks includes sensitive data on such subjects as targeting and logistics, and this makes cyber security, communications, and the information systems that generate and relay this information critical elements of the War Department's information enterprise.

On October 1, 2020, the CNO signed two memos establishing Project Overmatch. The goal of Project Overmatch was to achieve situational awareness and effective command and control of a geographically dispersed naval force. In his two memos, the CNO directed that investments be made to deliver network architectures, unmanned capabilities, and data analytics to ensure that the Navy can operate and dominate in a contested environment.[199] The CNO also directed the Navy to leverage related Air Force efforts on the Joint All-Domain Command and Control program (JADC2),[200] now a Joint Force effort involving all of the military branches.

Remarkably, despite the significance of this effort, little has been publicly released on Project Overmatch. It is known to involve three classified funding lines with initial deployment or program capabilities slated for 2023, but no updates have been provided.[201] In unofficial venues, it has been hinted that the first platform to employ JADC2 capabilities will be an aircraft carrier, but public statements indicate that the objective is to connect all platform data flows from across the U.S. Joint Force (potentially including partner forces), analyze them for classification, and make predictive targeting recommendations.

Since those reports in 2023, there has been no verified reporting to indicate that this deployment has occurred, although Rear Admiral Doug Small, Commander of Naval Information Warfare Systems Command, declared in April 2024 that the Navy "is ahead of the [CNO's] objectives" for Project Overmatch.[202] If successful, artificial intelligence paired with resilient communications and "big data" analytics might enable a key element of Distributed Maritime Operations (DMO).

Readiness

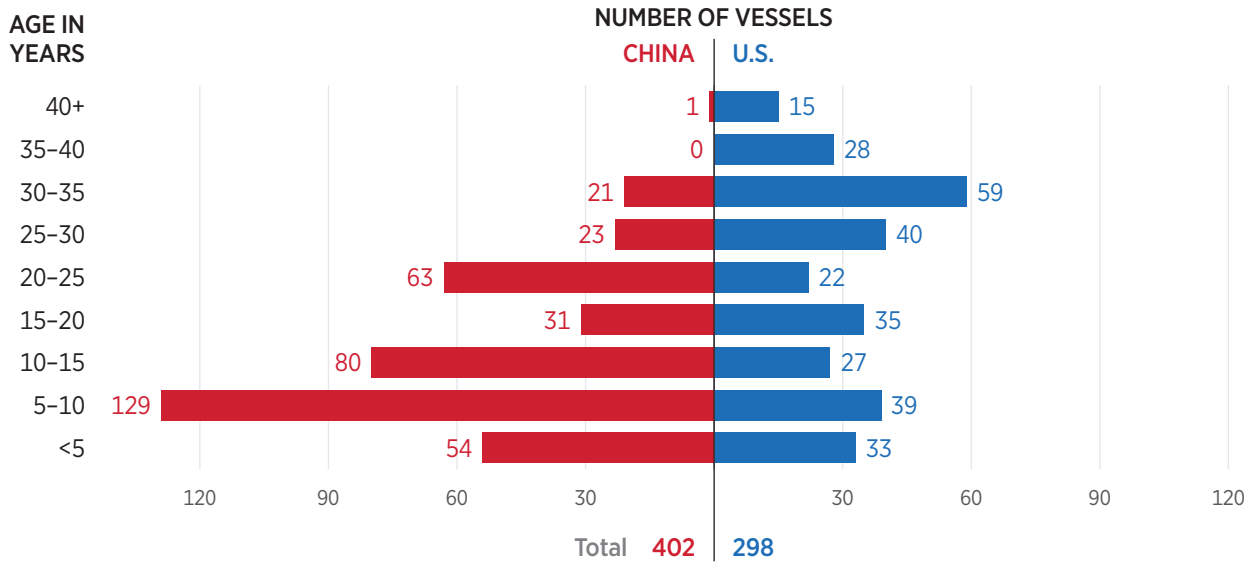
In the 1980s, the Navy had nearly 600 ships in the fleet and kept roughly 100 (17 percent) deployed at any one time. On February 2, 2026, the fleet's OPTEMPO was 19.5 percent. With fewer ships carrying an unchanging operational workload, training schedules become shorter and deployments become longer. The commanding officer's discretionary time for training and crew familiarization is a precious commodity that is made scarcer by the increase in operational demands on fewer ships.

FY 2019 marked the first time in 10 years (and the last as of this edition of the *Index*) that DOD and the Navy did not have to operate under a continuing resolution for at least part of the fiscal year.[203] Having a full fiscal year to plan and execute maintenance and operations helped the Navy to continue on its path to restoring fleet readiness. CNO Admiral John Richardson explained to the Senate Armed Services Committee in April 2018 that it would take until late 2021 or 2022 to restore fleet readiness to an "acceptable" level if adequate funding was maintained; without "stable and adequate funding," it would take longer.[204] Unfortunately, the Navy began FY 2020 under another continuing resolution that delayed planned maintenance for the USS *Bainbridge* (DDG 96) and USS *Gonzalez* (DDG 66), revealing yet again that for the Administration and Congress, the need to correct deficiencies in America's naval power was not enough to ensure that they delivered a budget on time.[205]

Given this recent history and the demands of unplanned and urgently needed ship repairs brought about by such incidents as the October 2021 grounding of the submarine *Connecticut*, the Navy remains deficient in its ability to return ships to sea.

CHART 14

Comparison of Chinese and U.S. Naval Fleets in the Pacific



SOURCES:

- Manfred Meyer, *Modern Chinese Maritime Forces, 2nd ed.* (Lancaster, Pa.: Admiralty Trilogy Group, April 2022).
- U.S. Department of Defense, *Military and Security Developments Involving the People's Republic of China, 2024: Annual Report to Congress*, https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF (accessed January 21, 2026).
- Werner Globke, ed., *Warships of the World 2020–2022* (Bonn: Bernard & Graffe, 2020).
- U.S. Navy, "Fact Files," https://www.navy.mil/Resources/Fact-Files/ (accessed January 21, 2026).
- U.S. Navy, Naval Sea Systems Command, Naval Vessel Registry, "Ship Battle Forces," https://www.nvr.navy.mil/nvr/getpage.htm?pagetype=shipbattleforce (accessed January 21, 2026).

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Impact of COVID-19. The eruption of the COVID-19 pandemic in 2020 caused many problems for the U.S. Navy. The USS *Theodore Roosevelt* (CVN 71), for example, was forced to quarantine for 55 days in Guam; the major biannual international Rim of the Pacific Exercise (RIMPAC) was scaled down; 1,629 reservists were called to active duty to backfill high-risk shipyard workers conducting critical maintenance; and the Navy was restricted to using "safe haven" COVID-free ports. In May 2020, the CNO said that "shipyards saw productivity drop to about 70 percent during March and April because many of the workers there are older and more vulnerable to the COVID-19 disease."[206]

Given vaccination rates and the ebbing danger, the Navy appears to be past the COVID epidemic, and its response to account for and mitigate the effects of COVID-driven restrictions has been a success overall. According to the Navy's February 10, 2023, final COVID report, total cumulative COVID cases among active-duty uniformed Navy personnel numbered 109,310 with 17 deaths, 3,350 unvaccinated servicemembers remaining on active duty, and a total of 1,878 sailors separated for refusing the vaccine.[207] Previous reporting indicated that 214 religious waivers were granted. Ideally, the Navy would implement lessons learned from this experience to prepare for future pandemics and biological attacks, but there is as yet little evidence that the service has conducted such a study, implemented new pandemic guidelines, or sought new capabilities to combat a future pandemic.

Maintenance and Repairs. Naval Sea Systems Command completed its Shipyard Optimization

CHART 15

Total Launch Capacity for Long-Range Strike or Anti-Ship Missiles

CATEGORY	U.S.	CHINA	ADVANTAGE %
Anti-Ship/Strike Missiles	9,194	3,782*	U.S. 158%
Torpedo Tubes	288	476	China 65%
Submarine Launched Ballistic Missiles	280	72	U.S. 289%
Troop Transport	30,623	16,640	U.S. 84%
Fixed Wing Aircraft	857	131	U.S. 554%



* Includes 550 launchers for DF–21D (CSS–5 mod 5); DF–26 (CSS–18); and DF–27 (under development).

NOTES: For U.S. vertical-launch systems, figures shown above assume all cells are carrying long-range strike weapons; actual load-out of strike weapons would be less because ships would have significant additional air and missile weapons loaded. For troop transport, figures reflect totals only for naval amphibious warships and do not include repurposed commercial shipping vessels.

SOURCES:

- Manfred Meyer, *Modern Chinese Maritime Forces, 2nd ed.* (Lancaster, Pa.: Admiralty Trilogy Group, April 2022).
- U.S. Department of Defense, *Military and Security Developments Involving the People's Republic of China, 2024: Annual Report to Congress*, https://https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF (accessed January 21, 2026).
- Werner Globke, ed., *Warships of the World 2020–2022* (Bonn: Bernard & Graffe, 2020).
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and Recapitalization Plan in September 2018.[208] Seven years later, the improvement of public shipyard capacities is not progressing as rapidly as it should. According to the Navy's Shipyard Infrastructure Optimization Program (SIOP), as of August 2025, "[n]early 50 facilities projects, valued at more than $1 billion, [had] been completed," "[o]ver 300 items of industrial plant equipment, valued at $700 million, [had] been delivered," and "[n]early 50 construction projects, valued at over $6 billion, [were] in progress, including three new dry docks." In addition, "Pearl Harbor's dry dock project will add a Virginia-class submarine dry dock capability in the Pacific Ocean."[209]

Attempts by Congress to accelerate this effort have not been effective.[210] At a May 10, 2022, Senate hearing, it became apparent both that the original costs were significantly underestimated and that timelines were slipping. There was measured improvement in 2024 with 67 percent of warship maintenance being completed on time, up from 41 percent in 2023 and 36 percent in 2022,[211] but a January 2025 GAO report emphasizes such "persistent challenges" as "limited spare parts, a lack of sufficient and qualified maintenance personnel, and a continual need to defer maintenance."[212] Overall, the capacity to sustain the fleet remains far from adequate.

Training, Ranges, and Live-Fire Exercises. Ship and aircraft operations and training are critical to fleet readiness. The Navy has sought to meet fleet readiness requirements by funding 58 underway days for each deployed warship and 24 underway days for each non-deployed warship per fiscal quarter.[213] As the Navy's limited fleet must contend with a daunting Chinese fleet, wartime contributions from the U.S. Coast Guard will have greater importance. However, GAO audits indicate that defense readiness is a consistently low priority. Between 2011 and 2020, the Coast Guard devoted only 4 percent of its operational hours to defense readiness at an average of 7 percent of total operational expense.[214]

As the *Big Horn* grounding makes clear, the Navy relies on logistics ships crewed by U.S. merchant

mariners. But here too there is high risk; due to a lack of ready merchant mariners, the Military Sealift Command has idled 17 logistics ships (oilers and dry-stores ships). To ensure that it is ready for a potential war in the Pacific, the nation will need a ready naval force to include the Navy, Coast Guard, and Merchant Marine.[215]

To improve warfighting proficiency, the Navy is expanding and updating instrumentation of the training range at Naval Air Station Fallon, Nevada, to enable practice with the most advanced weapon systems.[216] The National Defense Authorization Act for Fiscal Year 2023 details the way ahead with expectations of future resourcing to achieve the needed improvements.[217] This training range fits into the larger five-year Pacific Deterrence Initiative (PDI) that, led by Indo-Pacific Command, is intended partly to transform the way the Navy trains for high-end conflict and improve training with U.S. allies in the Pacific.[218]

Of particular importance to the Navy are PDI investments to modernize the Pacific Missile Range Facility (PMRF); the Joint Pacific Alaska Range Complex (JPARC); and the Combined/Joint Military Training (CJMT) Commonwealth Northern Mariana Islands in order to improve training for operations across all domains: air, land, sea, space, and cyber.[219] To this end, the FY 2025 request for PDI amounts to $9.9 billion, which includes funding to improve training and testing ranges such as those in Guam, Alaska, and Kwajalein Atoll.[220] This continues the FY 2024 budget's $9.1 billion for PDI ($3 billion more than in FY 2023). Especially important are long lead time infrastructure projects in Guam and Tinian in the northern Marianas.

Finally, not forgotten are the 2017 collisions of the USS *John S. McCain* (DDG 56) and USS *Fitzgerald* (DDG 62) in which 17 sailors were lost. Findings of the subsequent investigations, which highlighted the importance of operational risk management and unit readiness, remain relevant.[221] To ensure that these tragic events are not repeated, the Secretary of the Navy's *Strategic Readiness Review* made several broad institutional recommendations:

- "The creation of combat ready forces must take equal footing with meeting the immediate demands of Combatant Commanders."
- "The Navy must establish realistic limits regarding the number of ready ships and sailors and, short of combat, not acquiesce to emergent requirements with assets that are not fully ready."
- "The Navy must realign and streamline its command and control structures to tightly align responsibility, authority, and accountability."
- "Navy leadership at all levels must foster a culture of learning and create the structures and processes that fully embrace this commitment."[222]

A reminder that the above recommendations remain relevant was the October 2021 grounding of the submarine *Connecticut* in the South China Sea and the September 2024 grounding of fleet oiler *Big Horn*. The subsequent investigation found that the *Connecticut* incident was avoidable even while operating in poorly surveyed waters—a reminder of the risk as well as the vigilance required at sea.[223] As of the time this edition of the *Index* was being prepared, the Navy has not made public any statement regarding the causes of or remedies for the conditions that contributed to the grounding of *Big Horn*.

Scoring the U.S. Navy

Capacity Score: Very Weak

This *Index* assesses that the Navy needs a battle force consisting of 400 manned ships to do what is expected of it today. The Navy's current battle force fleet of 287 ships and intensified operational tempo combine to reveal a service that is much too small relative to its tasks. Contributing to a lower assessment is the Navy's persistent inability to arrest and reverse the continued diminution of its fleet as adversary forces grow in number and capability. If it continues on its current trajectory, the Navy will shrink further to 280 ships by 2027. Depending on the Navy's ability to realize aggressive growth, reverse early decommissioning plans, increase its end strength, and develop creative service life extensions, its capacity score will probably remain "very weak" for the foreseeable future.

Capability Score: Marginal

The Navy's overall capability score remains "marginal" with downward pressure as the Navy's technological edge narrows against peer competitors China and Russia. The combination of a fleet that is aging faster than old ships are being replaced and the rapid growth of competitor navies with modern technologies has only intensified the danger for U.S. naval power. Without meaningful progress in fielding systems that are able to defend against an array of threats, greater integration of unmanned systems into the fleet, and development of a family of new long-range weapons, especially in air-to-air combat, the Navy's capability score could well decline to "weak" in the next *Index*. However, the Navy appears to be poised for rapid progress, at least with unmanned systems, with the standing up of operational units in Fourth Fleet and Third Fleet.

Readiness Score: Very Weak

The Navy's readiness score is decremented to "very weak." This is due to the Navy's persistent struggle to recapitalize antiquated, inadequate maintenance infrastructure and expand its shipyard workforce to meet current needs. The effectiveness of training and exercises measured against China will be an increasingly critical metric in this score, with particular importance assigned to how the Navy applies combat lessons from the Red Sea to a war against China. Finally, the decrement to "very weak" is due in large part to the sidelining of 17 logistic ships that are critical to sustaining combat operations. Should current positive trends in recruitment continue, added emphasis on fleet-level exercises be realized, and operational lessons from combat in the Red Sea be implemented across the Navy for a China threat, then this score will begin to trend upward. But achieving this needed improvement will require considerable Department of War and congressional action in the near term.

Overall U.S. Navy Score: Weak

The Navy's overall score in the *2026 Index* remains "weak," driven by lower scores in capacity and readiness. To correct this trend, the Navy will have to eliminate several readiness and capacity bottlenecks while seeing to it that America has an operational fleet with the numbers and capabilities postured to counter Russian and Chinese naval advances. There is added urgency given both that China is aggressively posturing itself to obtain maximum advantage over Taiwan and that it will be several years before the U.S. Navy's efforts to improve itself can achieve the desired results.

Policy Recommendations

As already stated, resources in the form of budgets are critical but alone will not improve the Navy's capacity, capability, and readiness to win the next major war—a war that by all accounts appears to be becoming more and more likely with China over the fate of democratic Taiwan. This potential as well as the Chinese Communist Party's military threat must inform action to put more firepower in Asia by 2027. With this in mind, the United States needs to:

- **Reestablish First Fleet** focused on waging a maritime counterinsurgency in the South China Sea, bolstering the U.S. military presence and access that are needed to sustain a prolonged wartime effort, and provide oversight to accelerate the arrival of the first American submarine at HMAS Stirling as part of the AUKUS initiative.[224]

- **Commit to a sustained and assured procurement plan** for growing the fleet while also expanding naval shipbuilding industrial capacity.[225]

- **Execute a national shipbuilding program.** Getting the shipyards and workforce needed to build and repair warships requires a national effort. The Navy must integrate its efforts with those of the U.S. Coast Guard, the Merchant Marine, and the commercial shipping industry. Ensuring that this expanded industrial capacity is ready and secure will necessarily require better efforts to secure the associated supply chains—a task critical to the Navy but also requiring teamwork across government and with industry.[226]

- **Open needed new shipyards.** It was originally planned that a second shipyard would be named to build *Constellation*-class frigates in order to meet the Navy's urgent need for this class of warship. The Navy has planned to procure at least 20 of these vessels. At this

U.S. Military Power: Navy

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity	✓				
Capability			✓		
Readiness	✓				
OVERALL		✓			

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

time, the program is facing severe delays, but the design has matured. Construction should begin at a second yard as construction also progresses at the current shipyard in Marinette, Wisconsin. It is also time to break ground on a fifth public shipyard. Until 1996, the Navy had eight public shipyards that conducted all nuclear maintenance on submarines and aircraft carriers. Today, there are four, and nuclear maintenance is behind schedule despite efforts since 2018 to modernize and optimize these yards as part of the Shipyard Infrastructure Optimization Program (SIOP). The Secretary of the Navy would have to notify Congress when a site was selected, and it is estimated that the initial cost of a fifth shipyard would be $10 billion.[227]

- **Get firepower to sea.** China is arming so that it can be ready to wage and win a war with America by 2027—the same time that, unless something is done, the Navy's at-sea firepower will reach its nadir. At present, there are few options to redress this danger: specifically, rapid deployment of Army and Marine Corps littoral combat forces with long-range weapons to East Asian allies and rapid fielding of armed unmanned platforms. The most viable option today is a ship like the USV (unmanned surface vehicle) *Ranger* that deployed to the Western Pacific in 2023 and in 2021 demonstrated a capability to launch weapons like the SM-6. Orders should be placed at two shipyards of similar design based on lessons learned from the *Ranger*. Arming these platforms and meeting urgent munitions needs will require a block

buy of key naval munitions: Standard Missile-3 (SM-3); Standard Missile-6 (SM-6); Advanced Capability (ADCAP) heavyweight torpedoes; and Tomahawk cruise missiles. The U.S. military's precision-guided munition inventory is classified, but recent expenditures in the Red Sea and in defending Israel from Iranian attack indicate that these inventories are obviously under pressure.[228]

- **Accelerate the building of needed submarine tenders and cruisers.** The existing two submarine tenders (AS), both of which are based in Guam, are years beyond their design lifetime, and replacements are critically needed to sustain a forward operating nuclear submarine force in the Western Pacific. The Navy will be retiring its aged submarine tenders *Frank Cable* and *Emory S. Land* in 2029 and 2030, respectively, but it has only just begun to design replacements, which means that the Navy must find assets that can execute the submarine tender mission until a replacement is put to sea, most likely in the next decade. It will also be necessary to accelerate design and begin advance procurement of long lead-time components for CG(X). The Navy's remaining nine *Ticonderoga*-class cruisers will reach the end of their lifespans by 2038. Since 2000, the Navy has attempted to build a replacement that can provide air defense for carrier strike groups, but the newest *Arleigh Burke*–class destroyers (Flight III) with limited weapons load and space constraints for embarked air defense component command staff at best provide a partial cruiser replacement.[229]

- **Execute new fleet-level operations and exercises.** The Navy will fight not as independent units or just as carrier strike groups, but increasingly at a numbered fleet scale comprising over a dozen warships to include robust logistics ships. It is essential that new tactics be practiced and that those tactics and the platforms needed to execute them in war be refined. During the interwar years of the 1920s and 1930s, a series of such exercises ensured that the fleet was ready and able to defeat Imperial Japan in the Pacific. In fact, these exercises ensured that the fleet and its sailors were ready and able to adapt rapidly to every enemy adaptation as the Pacific War progressed.[230]

To be clear, aggressive execution of the above recommendations is not a panacea and will only begin to reverse a too-long slide into operational irrelevance. Reviving the nation's Navy and ensuring that peace is sustained with a fleet that is ready and armed to prevail in a war against China will be a decade-long endeavor. A dangerous condition of competition and contest with China is upon us in a new cold war that has no clear endpoint.

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U.S. Air Force

Jason Camilletti

Introduction

Air superiority is a precondition for all U.S. military operations, and while each airman takes pride in his or her contributions to and in being part of the great air superiority legacy, today's readiness and capacity for that mission are nowhere close to what America needs. Unfortunately, the Air Force's lack of readiness and capacity is not limited to its air superiority portfolio. For far too long, we have asked the Air Force to do too much with too little. For years, budgets have been insufficiently scoped, and strategic risk has accumulated quietly but dangerously.

As a result, the Air Force is now the oldest, smallest, and least ready it has ever been, despite the determination of countries like China and Russia to challenge the status quo. The more risk the Air Force is forced to absorb, the more likely it becomes that a competitor will choose to act against America. A properly sized, capable, and ready Air Force is essential to reducing strategic risk and deterring peer conflict.

During President Trump's first term, his National Defense Strategy (NDS) called for America's military to prepare to fight a peer competitor. But for our servicemembers to be prepared for such an eventuality, we must properly resource and equip our military.

Unfortunately, at programmed funding levels, the Air Force cannot sustain today's operational tempo while also building the capability and capacity needed to compete with China. The strategic environment no longer permits delay: Continued underinvestment will only deepen the problem. Thankfully, the reconciliation bill, or One Big Beautiful Bill Act (OBBBA), that Congress passed in July 2025 is an important step toward resourcing the Air Force so that it can execute the nation's missions and be ready to "fly, fight, and win" anytime and anywhere.[1]

History

Congress established the U.S. Air Force in 1947 and charged it with the fundamental role of controlling and exploiting the air domain. Space's rise to prominence in the early 1950s brought with it a host of capabilities that would expand the service's portfolio over time. When Congress created the Space Force in December 2019, the Air Force was able to return to its air-breathing roots and refocus its efforts on the air domain.

Despite this refocus, however, the U.S. Air Force is smaller, older, and less ready today than at any other point in its history. This matters because America's military advantage is predicated on its ability to own the skies and hold adversary targets at risk across the globe with timely and pinpoint accuracy, using either conventional or nuclear weapons. No other military service is uniquely charged with achieving air superiority and executing global strike. The Air Force's responsibility to America is to field an appropriately sized, capable, and ready force that can execute these critical, Joint Force–enabling military functions.

Yet for decades since the end of the Cold War, this responsibility has gradually been marginalized. The current situation for the Air Force is not due to any single mistake or decision; it is the cumulative result of insufficient resourcing, force structure divestments, trade-offs favoring efficiency over effectiveness, and continual demand on the service for lower-end support rather than high-end warfighting readiness.

In March 2025, then-Lieutenant General Adrian Spain, who is now the four-star commander of

U.S. AIR FORCE AT A GLANCE

EST. 1947

MOTTO
"Aim High ... Fly-Fight-Win"

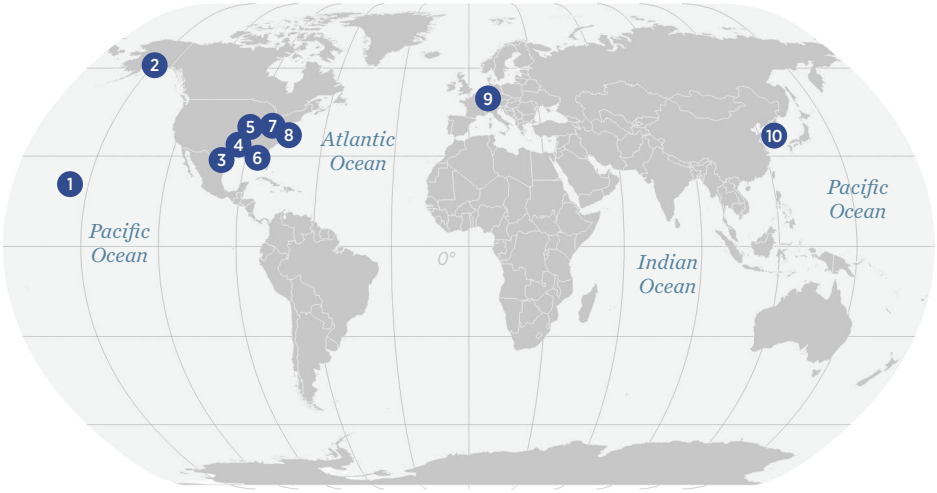


Dr. Troy E. Meink
Secretary of the Air Force



Gen. Kenneth S. Wilsbach
Chief of Staff

MAJOR BASES



1. Hickam Air Force Base
2. Elmendorf Air Force Base
3. Randolph Air Force Base
4. Barksdale Air Force Base
5. Scott Air Force Base
6. Hurlburt Field
7. Wright-Patterson Air Force Base
8. Langley Air Force Base
9. Ramstein Air Base
10. Osan Air Base

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$184.1

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

317,000

CIVILIAN

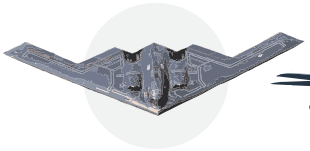
176,000

KEY EQUIPMENT (estimated current inventory)


F-35A (526)


F-16C/D (830)


B-52H (78)


B-2 (19)


B-1B (42)


KC-135R/T (370)


KC-46A (96)


C-5M (52)


C-130J (165)


F-22A (153)


MQ-9/B5 (231)

SOURCE: Heritage Foundation research.

heritage.org

the Air Force's Air Combat Command, said that the "strategic environment, mostly permissive and without a significant challenger, allowed the luxury of segmented attention, priority, and risk."[2] These trends began at the end of the Cold War, were accelerated following the September 11 terrorist attacks, and were further intensified by the budgetary and operational impacts of sequestration.

For example, after the collapse of the Soviet Union, the United States emerged as the world's policeman, conducting operations in such countries as (among others) Kuwait, Bosnia and Herzegovina, and Somalia. The United States soon embarked upon a global war on terrorism. During this time, the service was skewed toward intelligence, surveillance, and reconnaissance (ISR) missions and counter-terrorism operations. Unfortunately, while combatant commanders' demand for Air Force supporting capabilities soared, supply dwindled and got older, particularly for higher-end warfighting functions.

To fulfill operational requirements without causing budgets to soar, the Air Force traded a larger inventory of aging aircraft for a smaller, more modern fleet while maintaining a high level of readiness. This was arguably the right decision at the time, balancing the immediate demands of a permissive conflict with the long-term need to remain prepared for high-end, contested warfare. The service hoped to keep decades-long modernization programs on track while sustaining global operational commitments. Initially, this strategy worked as the service sustained operations, kept modernization on track, and the force was ready.

With the arrival of sequestration in 2013, the Air Force made greater cuts.[3] As a consequence, by 2016, the Air Force was left with just 55 total force fighter squadrons—the aggregate of Active Component (AC) and Reserve Component (RC) squadrons—and the readiness levels within those squadrons were very low. Only four of the Air Force's 32 active-duty fighter squadrons were ready for conflict with a near-peer competitor.[4]

Sequestration was not the only problem. Over the past 20 years, funding has been inconsistent with Congress adopting 58 continuing resolutions (CRs) from FY 2010–FY 2024.[5] In his March 2025 testimony to the Senate Armed Services Committee, General Spain stated that without anomalies, the impact of the March 2025 CR would be, practically speaking, a $4 billion cut to the Air Force and could reach approximately $14 billion if one included the impact of the 2023 Fiscal Responsibility Act.[6] To put the magnitude of the budgetary impact into perspective, $14 billion is nearly double the Air Force's fiscal year (FY) 2025 nuclear recapitalization total.

Furthermore, while these budgetary pressures were significant, something more significant was happening within the service. During the early years of the war on terrorism, the U.S. Department of Defense (DOD) leadership increasingly directed the Air Force to prioritize support for low-end conflict over its foundational mission to deter and, if necessary, set conditions to win major combat operations by achieving air dominance. Over time, the Air Force drifted away from a service focused primarily on achieving dominance in major combat and drifted toward a service focused primarily on supporting the Joint Force. Given the strategic and budgetary environment, trade-offs had to be made. Nowhere was this reality felt more than it was in the fact that air superiority—the ability to operate without the threat of airborne attack and a precondition upon which all U.S. military operations rest—was taken for granted during the war on terrorism's permissive air environment. This shift in emphasis resulted in a misalignment with the far more contested and competitive strategic environment the United States faces today.

An overemphasis on cost efficiency over combat effectiveness was another consequence for the Air Force during the war on terrorism. One such example was the transformation of the Reserve Component, which includes the Air National Guard and Air Force Reserves, from an actual "reserve" of forces to "more of" an operationally ready force. The reason for adding the qualifier "more of" is deploy-to-dwell differences between the Active and Reserve Components. The RC operates on a 1:5 deploy-to-dwell ratio, meaning that for every year deployed, members remain home for five years. By contrast, the AC deploys at a 1:2 ratio. Over a 10-year span, the RC can contribute roughly two years of deployment time compared to five years for the AC. The AC and RC cannot be considered equally ready from an operational standpoint, but the AC no longer has the resources to go it alone.

Additionally, mobilizing takes longer for the RC than it does for the AC. Longer RC mobilization timelines have always been a planning

consideration, but the impact is more acute in today's strategic environment. During the Cold War, the AC was more robust and therefore capable of absorbing delays as the RC mobilized. During the war on terrorism, the Air Force compensated for RC mobilization times by forecasting deployments months or even years in advance. By contrast, AC operational units must be ready to go within days. In today's strategic context, the AC is not big enough to fight a peer without the RC, but the RC cannot respond with the immediacy that modern threats demand.

One final example of the prioritizing of cost efficiency over effectiveness is Total Force Integration (TFI) units, which blend Active and Reserve Components. TFI does offer cost efficiencies on paper, but in practice, it disproportionately burdens junior active-duty officers with essential non-flying duties and strains readiness.

In total, these critiques are not critiques of the RC; the RC is an invaluable repository of talent and experience upon which America has always depended and will always depend. But these critiques are examples of the cost-driven decisions made in the previous era that compromise effectiveness in today's era. In other words, some war on terrorism–era efficiencies have become liabilities in today's strategic context.[7]

During President Trump's first term, the Administration finally said what many experts already knew: China is the only potential adversary that can change the U.S.-led free and open world order, and America needs to focus on strengthening its military to address the evolving threat environment. Specifically, the 2018 National Defense Strategy (NDS) directed the services to prepare for a large-scale, high-intensity conventional conflict with a peer adversary.[8] To support the NDS, the Air Force released "The Air Force We Need" (TAFWN) concept later that year. TAFWN was a study of the capacity the service would need to fight and help the U.S. win a war in this changing threat environment. Based on thousands of war-game simulations, TAFWN found that to execute that strategy, the service needed to grow by 25 percent from 312 to 386 squadrons.[9] The focus on China is also foundational in the 2022 NDS and 2026 NDS,[10] indicating that the recent emphasis on China crosses party lines.

Unfortunately—and despite clear guidance from the NDS—China has yet to become the strategic focal point it should be. One persistent impediment to China's becoming the Air Force's focus has been the continued deployment of Air Force assets to the Middle East even when it is well understood that this undermines the service's ability to deter China and meet Indo-Pacific operational plan (OPLAN) requirements. The decisions to deploy assets are often accompanied by little more than a footnote on a briefing slide with something like "this SDOB (Secretary of Defense Orders Book) presents high risk to [insert OPLAN]" rather than driving a meaningful discussion or course correction.

One cumulative effect of decades of incremental cuts and risk acceptance is that Air Force mission-capable rates are very low, which suggests that aircrew are flying less. The data support the claim. In fact, over the past 20 years, the Air Force has reduced its fleet size by 12 percent but its annual flight hours by 37 percent. Additionally, in the first decade of the 2000s, service fighter pilots averaged more than 15 flight hours per month each year (except for FY 2008, when the average was 14.4 flight hours), but since 2011, there has not been a single year in which Air Force fighter pilots reached 15 flight hours per month on average. This kind of risk remains abstract until the shooting starts. As noted, the more risk the Air Force is forced to absorb, the more likely it becomes that a competitor will choose to act against America.

Yet despite this bleak reality, the Air Force continues to deliver results and combat wins in lower-intensity conflicts alongside its Joint Force teammates. A few recent examples: In April 2024, Air Force F-15Es helped to defend Israel against a barrage of drones; in June 2025, the Air Force led the way on Operation Midnight Hammer, when B-2 stealth bombers obliterated Iranian nuclear facilities; in January 2026, the Air Force did its part in Operation Absolute Resolve and supported the successful capture of Venezuelan leader Nicolás Maduro. Despite the great skill and airmanship required to perform so remarkably, these missions were still nowhere close to the challenge that China could present. The Air Force is not sufficiently prepared to fight China when it is older, smaller, and less ready than it has ever been.

Thankfully, encouraging signs suggest that Congress will sufficiently resource defense for today's strategic environment. For example, passage of President Trump's OBBBA was an immediate shot

in the arm for the military services, and it provided billions of dollars for aircraft development, production, and maintenance. The OBBBA also provided significant funding for recapitalizing the service's nuclear portfolio. Unfortunately, it will take several years of OBBBA-like funding for the Air Force to fully rebuild and compete with China as the demand for air power will remain high and unrelenting.

Capability

The *Index of U.S. Military Strength* evaluates military capability based on several key factors: whether the force possesses the right tools to succeed in combat; whether it has enough aircraft, spare aircraft, parts, equipment, and weapons to prevail against an adversary; whether it offers a diverse set of options to avoid strategic vulnerabilities; and how well its various components complement one another to mitigate potential weaknesses. Although the *2026 Index* measures Air Force capacity primarily by the number of fighter aircraft, it is appropriate to begin a broader capability assessment with the service's nuclear forces, given their strategic significance and substantial budgetary impact, followed by an analysis of fighter aircraft, supporting aircraft, and munitions.

The Air Force's contribution to nuclear deterrence is ready and capable with programmed help on the way, albeit later and at a much greater cost than originally planned. The service has 400 intercontinental ballistic missiles (ICBMs) in service, but the LGM-30 Minuteman III is over 40 years old and beyond its planned service life. The Air Force "expects the [LGM-30] system will begin falling below readiness standards as early as 2026 if not replaced."[11] The good news is that the Air Force is preparing to replace the Minuteman III with the LGM-35A Sentinel; the bad news is that the Sentinel has slipped to no earlier than 2029, and the first flight tests have slipped from 2023 to 2026.[12] The Sentinel will arrive later and cost considerably more than planned, but given its strategic importance to national security, it is a must-pay bill.

The other leg of the nuclear triad for which the Air Force is responsible is the nation's strategic bombers. In addition to 20 B-2s and 76 B-52s, the B-21 is a top-priority program. The B-21 first flew in November 2023, and the Air Force has said repeatedly that the program is moving along nicely.[13] Then-Chief of Staff General David Allvin said in May 2025 that 100 B-21s were the "absolute minimum," and the former commanders of U.S. Strategic Command and U.S. Global Strike Command have said that 145 is the new target.[14] The FY 2026 budget requests $4.739 billion for the B-21, an increase of 76 percent from FY 2025.[15] For context, roughly half of the B-21 funding for FY 2026 is from the OBBBA that Congress passed in July 2025.

The Air Force is proceeding with the B-2 until enough B-21s are in service and plans to ensure that this penetrating bomber remains viable in highly contested environments, keeping it fully mission-capable until it is replaced by the B-21.[16] The B-52s average more than 60 years old, and modernization efforts are also underway to keep them flying and relevant. The FY 2018 budget funded the re-engineering of this fleet with upgrades that include a new nuclear-armed Long-Range Stand-Off cruise missile, improved radar, new computers, new communication links, and a new suite of electronic warfare countermeasures. The aircraft will remain in the inventory through 2050,[17] at which time a significant portion of the U.S. bomber fleet will be more than 80 years old.

To round out the nuclear forces, another priority program is the Survivable Airborne Operations Center (SAOC). The SAOC is the Air Force's planned replacement for the E-4B, or National Airborne Operations Center. The mission for the E-4B and soon for the SAOC is to keep the government running in the event of a nuclear attack. The Air Force awarded a $13 billion contract in spring 2024 for the SAOC to replace the aging E-4B.[18]

With respect to fighter jets, the Air Force has placed greater importance on capability as it has downsized the fleet. The capability-over-capacity strategy is based on the idea that we need to develop and maintain a *more* capable force that can win against the advanced warfighting capabilities such as stealth fighters, ballistic and cruise missiles, electronic warfare, and surface-to-air missile systems that are now being developed by potential adversaries like China and Russia.

The air superiority fleet is severely strained: The FY 2026 budget request would result in zero F-15Cs and 169 F-22As for the total force.[19] The F-22's availability is also affected by low mission capability rates. The stealthy air superiority fighter fleet will be further strained until 2031 by a program that is intended to refurbish the low-observable coatings

on the F-22's engine inlets and overhaul the aircraft's flight control system.[20] As discussed in the next section, the *Index of Military Strength* does not define a specific requirement for the number of air superiority fighters, but numbers have a quality of their own, and the Air Force's air superiority portfolio is extremely thin. For example, while the F-22 is very capable, the Air Force had at least 650 dedicated air superiority fighters in 1987, the last time it was prepared to fight major combat against a peer adversary.[21]

Even though the Air Force has not officially designated it as such, the F-15EX should also be included in discussions surrounding the air superiority fleet.[22] The F-15EX possesses significant aerial combat capabilities that may potentially include integrating Collaborative Combat Aircraft (CCA). The FY 2026 budget requests an additional 21 F-15EXs (all funded by the OBBBA).[23] Furthermore, even though the F-35A is dual-role, its fifth-generation faculties will also be formidable in an air-to-air role, allowing it to augment the F-22 in many scenarios.

While much of the CCA program remains classified, it would be a disservice to assess Air Force capability without mentioning it. In the words of former Air Force Chief of Staff General Allvin, the Air Force is "leaning into a new chapter of aerial warfare."[24] Additionally, the service has said that CCA will have a larger combat radius than the F-22 or F-35, which will be well suited for a potential conflict with China in the Pacific.[25] General Allvin has repeatedly referred to CCA as a "fighter" with the first two prototypes designated YFQ-42A and YFQ-44A.[26] The FY 2026 budget requests nearly $800 million in RDT&E funding for CCA.[27]

Another top-priority program is Next Generation Air Dominance (NGAD). In March 2025, General Allvin unveiled a depiction of what the Air Force is calling one element of NGAD: the F-47, which will be the service's first sixth-generation fighter.[28] On the same day, the Air Force released an official message saying that prototype F-47 aircraft have been flying hundreds of hours for five years, implying that the service should be able to procure the aircraft relatively rapidly. Similarly, officials have said the F-47 will fly "before the end of the Trump Administration."[29] In May 2025, the Air Force announced on social media that the F-47 will have a significantly larger combat radius than previous fighters, which, like the CCA, is timely given today's strategic context.[30] The FY 2026 RDT&E budget request of $3.479 billion funding ($2.579 billion discretionary and $900 million mandatory) increases the F-47 funding by 43.5 percent over FY 2025 enacted.[31]

The dual-role fighter fleet is in a slightly better position than the air superiority fleet, largely because new F-35s continue to roll off the production line. However, the F-35 is not without its challenges, and some are significant. For example, Tech Refresh 3 (TR-3), originally slated to field in spring 2023, is currently not scheduled to release until late summer 2026.[32] TR-3 is a set of hardware and software improvements to improve the F-35's combat capability. Unfortunately, the delay in TR-3 is "having cascading effects on subsequent improvements to the F-35—particularly another modernization program called Block 4—which is intended to allow the jet to carry more weapons, better recognize targets and improve its electronic warfare capabilities."[33] The FY 2026 budget request halves the number of F-35s for the Air Force from 48 to 24, which is partly why the OBBBA increases the F-15EX buy. Given the F-35's programmatically poor performance to date, reducing the buy and hedging with a formidable alternative is a prudent move. The F-35 is a dynamic aircraft when it is available, so the pressure of reducing the 2026 buy could move the program in the right direction.

The F-15E is a dependable dual-role aircraft with an upgraded radar and Eagle Passive/Active Warning and Survivability System (EPAWSS),[34] but the need to install system upgrades will reduce aircraft availability over the coming years. The Air Force has started to divest the oldest (and most heavily flown) F-15Es; it divested 26 in FY 2025 and plans to retire 21 in FY 2026.[35]

The Air Force is also working to extend the life of 300 F-16Cs by executing a major service life extension program (SLEP) that will allow them to fly through 2050.[36] It also is "undergoing the largest modification work in [the F-16's] history with the Post Block Integration Team project" to "improve lethality and ensure the fourth-generation fighter remains effective in meeting current and future threats."[37] However, despite service life extensions, there is still a direct correlation between aircraft age and the maintainability of those platforms. The dual-role fighters, other than the F-35 (and the F-15EX if counted as dual-role), continue to age to

the point where the Air Force must either invest significant funding to keep them operationally relevant or divest them.

Acquisition of the KC-46A air refueling tanker is a critical enabler for the service. The KC-46 has experienced a series of problems and delays, the most recent of which grounded the fleet for nearly three months "after cracks were found in brand new aircraft."[38] The cracks and their root cause were repaired relatively quickly, but it is estimated that the tanker's remote vision system (RVS) will not be fielded until the summer of 2027, "nearly two years longer than previously anticipated, and four years later than originally expected."[39] Although the RVS had prevented the tanker from being able to refuel during combat operations, "[a]irmen have developed workarounds and the Air Force has cleared the KC-46 for operations worldwide."[40] The Air Force plans to procure 15 KC-46s in FY 2026, which would bring the total to 110.[41] That will leave the service with more than 350 aging KC-135s (already averaging 61 years old) that still need to be recapitalized.[42]

The Air Force is maintaining the status quo for its strategic airlift fleet while modestly improving its tactical fleet by replacing C-130Hs with newer C-130Js.[43] The average age of the C-17 is approximately 22 years, and the demands of the war on terrorism significantly exceeded planned flight hours.[44] Given these factors, if other portfolios were on a more solid footing, the Air Force would likely be recapitalizing strategic airlift, but it remains a lower near-term priority compared to other more urgent readiness and modernization needs. However, this is a bill the Air Force will soon have to pay, particularly when considering the logistical challenges in the Pacific.

The Air Force's ISR capabilities face problems that affect both capability and capacity. Many of the Air Force's ISR aircraft are now remotely piloted aircraft (RPA). The service divested the last of its MQ-9 Block-1 aircraft last year and plans to scale back its Block-5 fleet from 231 to 189 in FY 2026.[45]

For manned ISR, the service needs to replace its aging E-3 AWACS (Airborne Warning and Control System) and the already divested E-8 J-STARS (Joint Surveillance Target Attack Radar System), but efforts to realize JADC2 (Joint All Domain Command and Control) are complicated. Through JADC2, the War Department is moving away from a platform approach to command and control to disaggregated sensors (a system of systems) with the Advanced Battle Management System (ABMS) as the Air Force's contribution to the effort.[46] The Department of the Air Force has already stated that the E-8's ground moving target indicator (GMTI) mission will be moving to the Space Force.

As debate on the FY 2026 budget continues, there is significant discussion of whether the Air Force should acquire the E-7 Wedgetail as a gap filler or whether space-based assets are ready to fully execute the AWACS' mission. In August 2025, Lieutenant General Deanna M. Burt, U.S. Space Force Deputy Chief of Operations, stated that "[a]n analysis of alternatives for air moving target indication is 'supposed to deliver this fall.'"[47] The Air Force's FY 2026 budget request does not include any E-7 aircraft, but nearly two dozen retired general officers, including General Kevin P. Chilton, former head of Air Force Space Command and U.S. Strategic Command, are encouraging Congress to fund the E-7, "arguing that space-based targeting is not ready for prime time."[48]

Any discussion of capability must include an assessment of the ability of the service's weapons to complete the kill chain and destroy the intended target whether in the air, on the ground, or on the sea.

As recent air actions have demonstrated, the venerable AIM-120 air-to-air missile still has formidable beyond-visual-range capabilities, and the Air Force has continued to update it over the years. The service is also working on the AIM-120's replacement, the AIM-260. Details of the AIM-260 are limited, but reporting suggests that the new missile is well suited to competing with China.[49] The FY 2026 budget request—the first time the missile has been identified in the unclassified budget—seeks to acquire 112 AIM-260 missiles.[50]

From an air-to-surface perspective, jamming of Global Navigation Satellite Systems (GNSS) like the Global Positioning System (GPS) has advanced significantly over the past two decades. Russia has used these increasingly capable and widespread systems extensively since its 2022 invasion of Ukraine to disrupt the effectiveness of Ukrainian (allied) GPS-guided weapons. The ability of such systems to degrade the accuracy of smart munitions would make them a substantial advantage in any conflict with a peer adversary.

The U.S. military and its supporting research arms have done significant work focused on making munitions less susceptible to the effects of GPS jammers, and the Air Force has been buying munitions and sensors with this in mind for more than a decade. However, inventories of advanced munitions remain limited, and GPS degradation will reduce strike precision, which means that more weapons and sorties will be needed to achieve desired effects. On the plus side, modern GPS antennas are more resistant to jamming, and multi-mode seekers such as those using laser, infrared, or optical guidance help to reduce reliance on GPS. For instance, the GBU-53 SDB (Small Diameter Bomb) II uses "Link 16 and ultra-high frequency datalinks, along with infrared guidance, to provide course corrections"[51] and is an example of a multi-pronged effort to mitigate GPS jamming.

Munitions such as the AGM-158 Joint Air-to-Surface Standoff Missile (JASSM), AGM-154 Joint Standoff Weapon (JSOW), and AGM-158C Long Range Anti-Ship Missile (LRASM) are top-priority munitions for the service and are reflected as such in the FY 2026 budget request. They will be critical elements in the kill chain in future high-end contested fights. Overall, the OBBBA was a major boost for Air Force air-to-air and air-to-surface weapons, "but without detailed budgetary information beyond fiscal 2026, it's unclear whether the growth in stockpiles will be sustained."[52]

Capacity

The *Index of U.S. Military Strength* assesses capacity against 1,200 active-duty "combat-coded" fighter aircraft in order to meet the baseline requirement for two major regional conflicts (MRCs).[53] The *Index* metric lines up well with TAF-WN's fighter requirement, which the Commander of Air Combat Command has reaffirmed is the capacity requirement for today's Air Force.[54] Two of the more important factors that inform capacity are aircraft age and mission-capable (MC) rates.

Aircraft Age. Because they require increased maintenance as they age, older aircraft are generally less available than newer ones. Reduced material support or DMSMS (diminishing manufacturing sources and material shortages) also plays a significant role with aging aircraft. With time, aircraft reach thresholds that trigger inspections, overhauls, and component replacements, many of which can be performed only at centralized depot facilities. According to the Office of the Assistant Secretary of Defense for Sustainment, "depot-level maintenance entails materiel maintenance requiring the major repair, overhaul, or complete rebuilding of weapon systems, parts, and assemblies; manufacture of parts; technical assistance; and testing."[55]

Mission-Capable Rates. MC rates are defined as the percentage of a unit's aircraft that can execute its mission set. Multiplying MC rates by the actual number of aircraft within a particular fleet yields that fleet's physical operational capacity. However, MC is the percentage of a unit's possessed aircraft that are fully mission capable (FMC) or partially mission capable (PMC). The number of possessed aircraft does not include the portion of the fleet that is in depot-level maintenance and/or long-duration aircraft modernization.

Thus, using MC as a metric can mask problems if a unit does not possess large numbers of aircraft. Aircraft availability (AA) is a better measure because it is the percentage of FMC or PMC aircraft in a unit's total aircraft inventory (TAI). Unfortunately, the data that follow are based on MC and not on AA; nevertheless, as low as MC rates are for the Air Force, the reality is much worse because a consequential portion of the fleet is in depot-level maintenance and/or modernization.

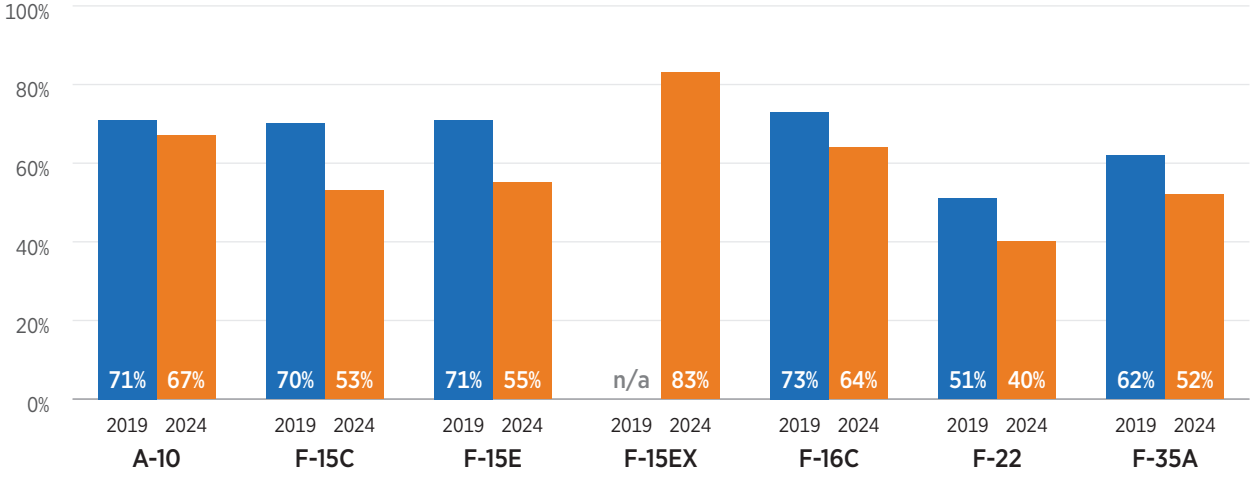
In 2018, Secretary of Defense James Mattis directed the Air Force to boost F-16, F-22, and F-35 MC rates to 80 percent by September 2019 to improve aircraft availability.[56] When the service fell short, Chief of Staff General David Goldfein asserted in the FY 2020 Posture Statement that "[m]ore than 90 percent of our 'pacing squadrons' [were] ready to 'fight tonight' with their lead force packages" and "on track to reach 80% readiness" by year's end.[57] This signaled that only a few, select frontline units had achieved sufficient readiness.

With the rollout of the President's budget for FY 2026, the service announced its plan to continue reducing the size of the fighter fleet. The FY 2026 request would leave the service with 1,706 fighters with an average age of 21.7 years (down from 1,907 with an average age of 26.4 years at the end of FY 2025).[58] The largest adjustments between the two years are the requested divestitures of the A-10 and the F-15C. It is difficult to see the size of the fleet continue to shrink, but it is positive to see the fleet age trending slightly younger.

CHART 16

Air Force Fighters: Mission-Capable Rates

MISSION-CAPABLE RATE BY FIGHTER MISSION DESIGN SERIES



NOTE: Figures shown are end-of-year totals.
SOURCES: "Air Force & Space Force Almanac 2020," *Air Force Magazine*, Vol. 103, No. 6 (June 2020), p. 65, https://www.airandspaceforces.com/app/uploads/2020/06/June2020_Fullissue5.pdf (accessed January 20, 2026), and "Air Force & Space Forces Almanac 2024," *Air & Space Forces Magazine*, Vol. 108, Nos. 5 and 6 (May/June 2025), p. 67, https://www.airandspaceforces.com/app/uploads/2025/06/Almanac2025_fullissue_V6.pdf (accessed January 20, 2026).

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Combat-coded aircraft and squadrons have assigned wartime missions and do not include aircraft used for training, testing, or other roles. Other jets like those in training or test units often lack the software and/or hardware capabilities that are needed for combat, and this makes them less effective or survivable.

Despite the fact that the Air Force would not provide the number of combat-coded aircraft or a breakout of total Active Component and Reserve Component aircraft, a reasonable approximation is that the number of combat-coded fighter aircraft in the active-duty force is 800.[59] If that approximation is off, the actual number of active-duty combat-coded fighter aircraft is likely lower. While 800 is well short of 1,200, it is also worthwhile to compare the fleet in 2024 to the fleet in 1987, the last time the U.S. was prepared to face a peer competitor. In 2024, the Air Force's air-to-air fighter fleet was 78 percent smaller than the fleet in 1987 and more than twice as old on average; the dual-role fleet was 30 percent smaller and nearly three times as old on average; and the air-to-ground fleet was 82 percent smaller and nearly four times as old on average.[60]

Unfortunately, such a comparison of the size and age of the aircraft yields only part of the picture; there are also far fewer squadrons today, and that has created additional readiness challenges. Historically, for example, because of aircraft and spare availability, reliability, and limited support equipment, it has taken three active-duty fighter squadrons to deploy two forward. By drawing jets and personnel from the third squadron, a wing could quickly deploy two full-strength squadrons while retaining a small cadre at home for training and pilot replacement (such as for combat losses). During the Cold War, the Air Force typically structured wings with three squadrons to meet this need and facilitate the ease of "plussing up" the deploying squadrons with people, jets, and parts. Post–Cold War downsizing, however, has reduced many wings

to one or two squadrons, and this makes it harder to assess true deployable capacity.

Guard and Reserve units have traditionally been single-squadron wings and therefore face similar challenges, often more acutely. The predictability of the war on terrorism era helped to mitigate these issues, allowing reservists and guardsmen to adjust civilian commitments in advance. Because of potential imbalances between preparing the fleet and pilot readiness, these single-squadron wings that self-generate add a level of complexity that affects both deployability and readiness leading up to their deployments.[61]

Capacity also relies on the stockpile of available munitions and the munitions industry's production capacity. The actual number of munitions within the U.S. stockpile is classified, but there are indicators that make it possible to assess the overall health of these critical assets. The inventory of precision-guided munitions (PGM) was severely stressed by nearly 18 years of sustained combat operations in Iraq, Afghanistan, Syria, and elsewhere. Since 2017, funding for munitions has been relatively robust as the service has worked to restock inventories.

Although the current munitions stockpile may be sufficient to support a war on terrorism–era surge, it would fall short in sustaining a peer-level conflict lasting more than a few weeks. For context, during Operation Desert Storm, the U.S. military dropped more than 88,000 tons of bombs[62]—probably equivalent to more than 100,000 individual munitions—despite the operation's being relatively short and not against a peer.

Typically, there is a 24-month to 36-month lag between funding and the delivery of new munitions. Rapid expansion of production is theoretically possible, but it is difficult to envision such an increase happening quickly enough to outpace consumption before existing stockpiles were exhausted in a high-intensity conflict.

Readiness

There are many reasons why it is difficult to assess readiness, particularly in an unclassified format, but a foundational question to ask is, "ready to do what?" Before 2018, the answer was somewhat vague, but the 2018 NDS clearly stated that "long-term strategic competitions with China and Russia are the principal priorities."[63]

Service leaders' testimony to Congress informs readiness trends. In 2017, for example, Secretary of the Air Force Heather Wilson and Chief of Staff General Goldfein informed Congress that "[w]e are at our lowest state of full spectrum readiness in our history."[64] In 2024, Secretary Frank Kendall stated that "[w]e are not as ready as we need to be for a war with a peer competitor like China."[65]

It is also noteworthy that the Air Force has tried to reshape the narrative surrounding readiness in recent years. For example, rather than enduring benchmarks for flying squadron readiness such as sortie rates, MC rates, and pilot flight hours, the service moved to highlight the readiness of fighter, bomber, or tanker "force elements" while arguing that MC rates do not tell the entire story.[66] General Goldfein touted the rapid deployment of a "task force" of four B-52s to the Middle East in May 2019 as an example of service readiness.[67]

Similarly, during his tenure as Chief of Staff, General Charles Brown largely avoided assigning a qualitative grade to the service's readiness and instead communicated the need to redefine the term.[68] He initiated a force presentation model called AFFORGEN (Air Force Generation) to replace the Air Expeditionary Force construct model because the service "lacked the ability to present an easily understood model that reflected all facets of air power and the ability to clearly articulate readiness impacts." Now, however, "after nearly two decades of demanding rotational deployments, we are shifting to a model that builds high-end and sustainable readiness toward future missions by balancing elements of current availability, modernization and risk."[69]

More recently, in February 2024, the Air Force announced "sweeping changes...amid Great Power Competition."[70] Through its Reoptimization for Great Power Competition initiative, the Air Force is once again shifting the narrative and declaring that the unit of action is a wing, not the flying squadron. In addition to being a fundamental departure from the service's beginnings, this does not make sense from a warfighting perspective. The real problem the Air Force is trying to solve is not in a model or presentation but in resourcing and force generation for integration into the Joint Force.

Because of the seemingly ever-moving goalposts of the service's force presentation and readiness measurements, any assessment of Air

Force readiness is difficult. However, regardless of the model, flying readiness depends on having the right mix of aircraft,[71] maintenance capability, and aircrew that are trained and qualified as well as the right infrastructure and logistics to sustain operations.

Maintenance Capability. Maintenance capability is the sum of the right number of people with the right training and the right equipment who are armed with the parts necessary to perform and keep the airplanes ready to fly. Maintenance manning remains relatively healthy across the three broad training and experience levels.[72] However, due to the age of the fleet, more maintenance touch time and greater cost are needed to keep the jets flying.

As the fleet has aged, the Air Force has had to spend increasing amounts of money on depot maintenance. It plans, for example, to spend more than four times as much money on depot-related activities in FY 2025 (inflation adjusted) as it spent in FY 2011.[73] Another concern is that the subcontractors that manufacture many of the parts needed for older weapons systems often are small businesses that last only a single generation.

Annual inflation-adjusted spending on weapons system sustainment (WSS) has remained relatively consistent at approximately 10 percent of the total annual budget. However, due to shrinking fleet sizes and fewer pilots who are flying less, it is hard to score consistent WSS spending as a win. As recently as FY 2022, in response to a senatorial inquiry about the cutback in flight hours, Lieutenant General David Nahom, Deputy Chief of Staff for Plans and Programs, said that "[WSS] is actually approaching $1 billion a year, just in increased costs. And this year, in [fiscal] '22, we were not able to fund that increase."[74] Similarly, in an April 2024 presentation to the Senate Armed Services Committee's Subcommittee on Readiness, Vice Chief of Staff General James Slife similarly stated that "the WSS portfolio continues to grow due to aircraft sustainment beyond design life, fielding new weapons systems with increased technical complexity, increasing requirements for Contract Logistics Support, and inflation above planned levels in labor and material costs."[75]

It is important to emphasize that the inflation-adjusted cost increases are to support a continually shrinking fleet. The Air Force continues to fight to balance its Operation and Maintenance portfolio; WSS funding in the FY 2026 budget request is 85 percent, down from 87 percent in the 2025 request,[76] but 85 percent funding means that the Air Force will likely be unable to fully execute its flying hour program. Execution of the full flying hour program will require significantly more maintenance man-hours because of the need to cannibalize parts from other jets to fix the jets they intend to fly.

Despite the maintainers' best efforts, getting the jets in the air is increasingly difficult, which is why the mission-capable rate and aircraft availability are so low. The low sortie availability has compelled some fighter squadrons to hot-pit refuel more frequently.[77] Hot-pitting is one tool that units use to overcome fleet health issues, but it has a detrimental impact on pilot and unit readiness.

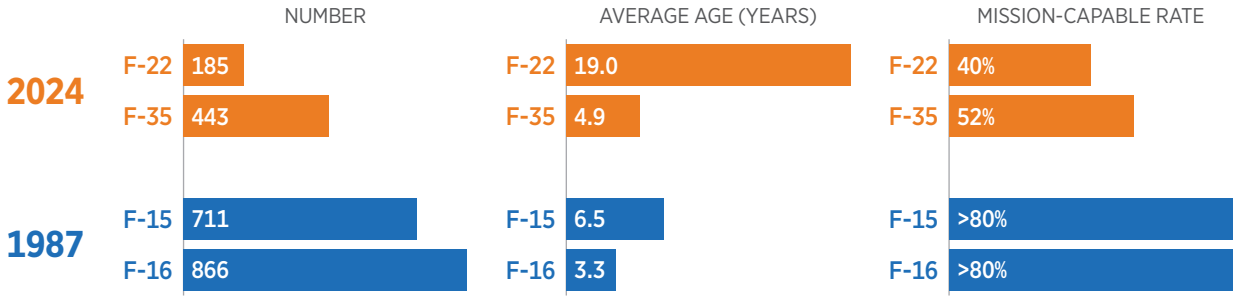
Hot-pit refueling is the practice of refueling an aircraft immediately after landing while keeping the engines running to minimize time spent on the ground. It allows sorties to be generated faster, which results in more sorties for a given amount of aircraft maintenance touch time.[78] Hot-pits should be in every commander's playbook, but they should not be overused to mask problems.[79] Not only is the practice physically demanding on the aircrew, but such sorties are less effective from a training perspective because hot-pits do not often afford sufficient time to debrief and capture lessons learned. Moreover, the Air Force's recent practice of overutilizing hot-pits has caused morale issues within the pilot force.

Aircrew. The pilot shortage may be the single most concerning challenge facing the Air Force today. It not only impacts the service from the tactical level to the operational and strategic levels, but also goes relatively unnoticed outside of the service. There are many reasons why the shortage has not received the attention that it requires, but the biggest is that the Air Force continues to execute superbly in lower-intensity conflicts despite the realities that it faces. For example, in April 2024, forward deployed F-15Es shot down more than 70 drones and missiles to protect Israel in what the Air Force called the "largest air-to-air enemy engagement in over 50 years."[80] More recently, in June 2025, the Air Force overwhelmingly struck Iranian nuclear facilities during Operation Midnight Hammer.

The airmen executing these missions performed remarkably, and all Americans should be proud of

CHART 17

Frontline Air Force Fighter Jets: Fewer, Older, and Less Ready



SOURCES: "An Air Force Almanac," *Air Force Magazine*, Vol. 70, No. 5 (May 1987), p. 87, https://www.airandspaceforces.com/app/uploads/1987/05/AFmag_1987_05.pdf (accessed January 20, 2026), and "Air Force & Space Forces Almanac 2025," *Air & Space Forces Magazine*, Vol. 108, Nos. 5 and 6 (May/June 2025), pp. 58 and 60, https://www.airandspaceforces.com/app/uploads/2025/06/Almanac2025_fullissue_V6.pdf (accessed January 20, 2026).

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them, but even though the challenges the airmen faced required great skill and airmanship, these missions took place in relatively permissive air environments. In other words, even if these missions were something different from the war on terrorism, they were still nowhere close to the challenge that China could present.

Despite the high operational tempo over the years, service leadership has continued to emphasize the need for more flight time for aircrews. In 2018, for example, Secretary Wilson "noted that even when aircrew go abroad and fly combat missions, such as those against violent extremists such as the Islamic State, they're not practicing skills that would be required for a high-end fight against an advanced adversary such as Russia."[81]

Even with Air Force leadership acknowledging the need for more high-end flight training, the number of flight hours executed has remained flat at best. In fact, a thorough review of Air Force budget requests for the past 20 years reveals that the number of budgeted flight hours has decreased much more sharply than the fleet size has. Over the past 20 years, the Air Force has reduced fleet size by roughly 12 percent, but it has reduced its annual flight hours by 37 percent.[82] Since the COVID-19 pandemic, the Air Force has not executed more than 1.1 million hours.[83] The 2024 budget request was a low-water mark with the service requesting only 877,000 hours.[84] The FY 2026 budget request seeks 1.098 million flight hours, down by 7.5 percent from the number in the FY 2025 budget request.[85]

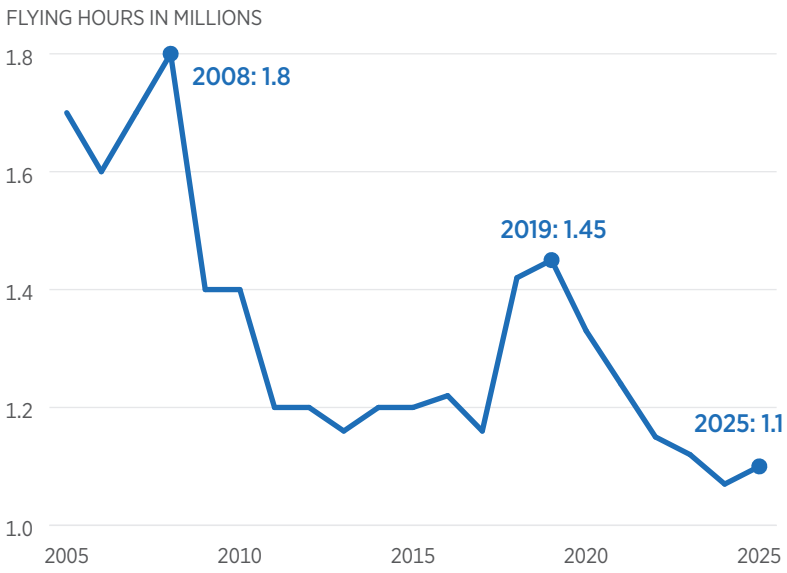
The 20-year data also reveal that the first time the Air Force caveated the number of requested flight hours was in 2017 when it stated that 1.16 million hours "caps flying hours at executable levels."[86] Since then, the service has made similar qualifying statements about capping hours in most subsequent budget requests. The 2017 flying hour alibi coincides with testimony from Lieutenant General Gina M. Grosso, Deputy Chief of Staff for Manpower, Personnel, and Services, that the Air Force had a shortfall of 1,555 pilots.[87]

Since declaring the pilot shortage, the Air Force has been trying to increase annual production to approximately 1,500 pilots per year, because the service considers that to be a healthy level of production.[88] However, 1,500 remains an elusive goal for reasons that include the training aircraft fleet's MC rates.[89] In fact, the Air Force continues to struggle to replace its T-38 training aircraft, which is nearly 60 years old. It was slated to receive its first production T-7, which is the T-38's replacement, in 2023, but now the new trainer will not begin to arrive at pilot training bases until 2026 at the earliest.[90] The Air Force is seeking to acquire eight T-7As in its 2026 budget request.[91]

Not inflexibly resistant to change, the Air Force has experimented by tweaking its pilot training

CHART 18

Air Force Flying Hours Down 24 Percent Since 2019



SOURCE: U.S. Air Force, Financial Management and Comptroller, "Department of the Air Force President's Budget Request," various years, https://www.saffm.hq.af.mil/FM-Resources/Budget/Air-Force-Presidents-Budget-FY25/ (accessed January 20, 2026).

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program. A few years ago, there was an attempt to use synthetic and simulated means to increase pilot training, but the service ultimately determined that this approach was flawed. In its latest innovation, the service is now looking to outsource the first 110 hours of pilot training to commercial flight schools at which point the Air Force would continue training to develop combat aviator skills.[92] Although it is too early for a definitive assessment, the service has said this approach is showing promise.

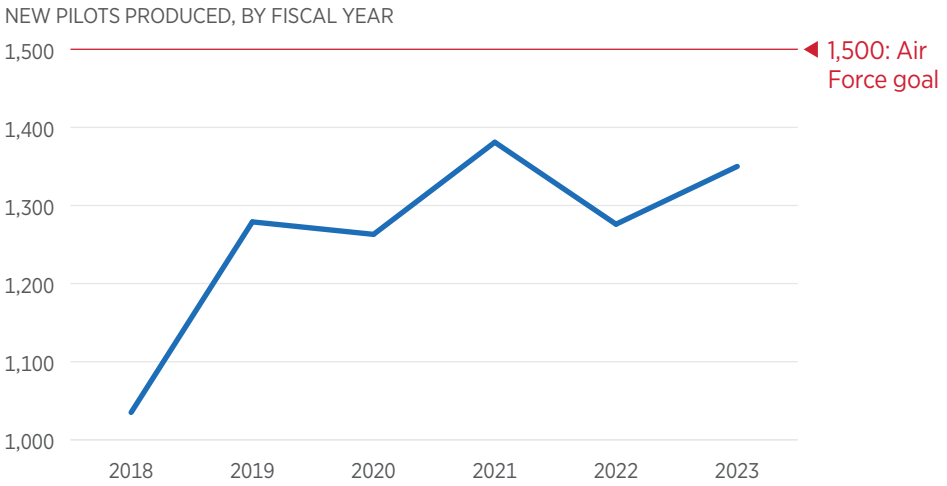
Until the pilot production problem is solved, the Air Force will continue to feel the shortage in several ways. For one thing, fighter squadron manning is below even peacetime requirements, which are themselves insufficient to meet the demands of sustained combat operations. The Air Force would not release fighter manning data, but these data are almost certainly below the standard peacetime ratio of 1.25 pilots per aircraft. In combat, however, the demands on flight hours, sortie rates, mission planning, and supervision increase significantly, and the manning ratios increase to at least 1.5 pilots per aircraft. Pulling pilots from other units and inserting them into the deploying squadrons could help to mitigate this shortfall, just as it helps to stretch limited aircraft, parts, and support equipment, but it is not currently a viable option. In the past, the Air Force could "plus up" by pulling experienced pilots from non-flying assignments, but because the service has already reassigned most available fighter pilots from non-flying billets back to operational units, there is no one left to pull. While not germane to tactical flying readiness, pulling the fighter pilots from staffs, even though necessary, comes at a cost to strategic readiness by leaving higher headquarters with critical shortfalls in rated officer expertise.

Finally, because of the relatively low availability of aircraft cockpits, increasing the number of pilots in each operational squadron after increasing pilot production merely trades one problem (not enough pilots) for another problem (too many pilots who subsequently fly too few sorties). The Air Force refers to this combination of factors as "absorption." Rather than pulling non-flying pilots from their staff positions to fill operational cockpits, one might suggest keeping them in place and instead assigning new pilots to those flying roles. However, that approach fails because squadrons require a balanced mix of experience levels and cannot function effectively if they are disproportionately saturated with unseasoned pilots.

CHART 19

Air Force Pilot Production Remains Below Stated Goal

The Air Force has been facing a pilot shortage since 2018, yet progress toward its 1,500-pilot goal remains meager.



SOURCES: Greg Hadley, "Hundreds of Airmen Stuck Waiting to Start Pilot Training as Shortage Persists," *Air & Space Forces Magazine*, September 11, 2023, https://www.airandspaceforces.com/airmen-waiting-pilot-training-shortage/ (accessed January 20, 2026); Bradley Bowman and Major Brian Leitzke, "Avoiding Empty Cockpits: Addressing the Air Force's Pilot Shortage Problem," *Breaking Defense*, August 25, 2022, https://breakingdefense.com/2022/08/avoiding-empty-cockpits-addressing-the-air-forces-pilot-shortage-problem/ (accessed January 20, 2026); and Amy Hudson, "The Pilot Shortage Quandary," *Air & Space Forces Magazine*, April 25, 2018, https://www.airandspaceforces.com/article/the-pilot-shortage-quandary/ (accessed January 20, 2026).

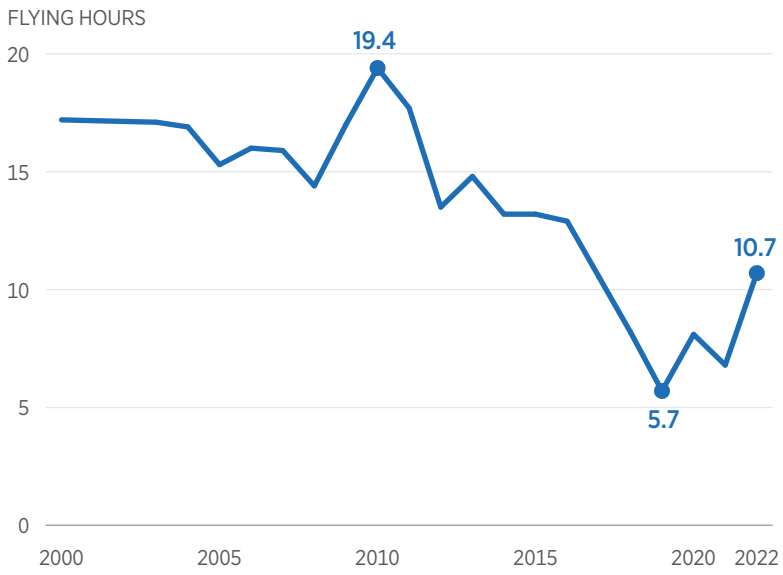
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Given the downsizing of the fleet, it makes sense that the Air Force has been flying less from a macro perspective, but each individual pilot has also been flying less—considerably less than was true for previous generations. As Chart 18 depicts, monthly fighter pilot flight hours have been down substantially for more than a decade. A review of data for the past 20 years reveals that from FY 2003 until FY 2011, the number of monthly flight hours per fighter pilot was never less than 15 per month (except for FY 2008 when the average was 14.4 hours per month). Since FY 2011, there has not been one year in which Air Force fighter pilots averaged 15 flight hours per month; the data for the most recent five years show that monthly average flight hours broke double digits only once: 10.7 in FY 2022. These trends were corroborated by General Mark Kelly, Commander, Air Combat Command, on September 21, 2022, when he stated in a speech that the average fighter pilot received just 6.8 hours of flying time per month for a total of 81.6 hours in 2021.[93]

This flying time has become a reality despite the fact that Air Force regulations set minimum thresholds for sorties based on experience levels, and the Ready Aircrew Program (RAP) dictates that inexperienced fighter pilots must fly nine sorties a month (experienced must fly eight).[94] At a notional 1.3 hours per sortie, which is conservative, nine flights would equate to a monthly average flight time of 11.7 hours if each pilot was flying the minimum number of RAP-required flights. Some will say that simulators are offsetting the shortage of flight hours, but the numbers directed by the RAP account for simulators (RAP requires three simulator "sorties" per month). These numbers, combined with numerous interviews of current fighter squadron and fighter wing commanders, reflect an Air Force in which aircrews are not receiving enough quality training sorties. While the factors driving the low hours and therefore low readiness are many, the poor health of the fleet is the most significant contributor to this problem.

CHART 20

Air Force Fighter/ Attack Aircraft, Monthly Flying Hours per Pilot



NOTE: Some figures have been interpolated.
SOURCE: "USAF Almanac 2017," *Air Force Magazine*, Vol. 100, No. 6 (June 2017), p. 62, https://www.airandspaceforces.com/app/uploads/2017/06/AF_June2017.pdf (accessed January 20, 2026); "Air Force & Space Forces Almanac 2022," *Air & Space Forces Magazine*, "Vol. 105, Nos. 6 and 7 (June/July 2022), https://www.airandspaceforces.com/app/uploads/2022/07/Almanac2022-Fullissue_V2.pdf (accessed January 20, 2026); and "Air Force & Space Forces Almanac 2024," *Air & Space Forces Magazine*, "Vol. 107, Nos. 5 and 6 (May/June 2024) p. 60, https://www.airandspaceforces.com/app/uploads/2024/06/Almanac2024_Fullissue_V11.pdf (accessed January 20, 2026).

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Scoring the U.S. Air Force

Capacity Score: Weak

As part of its overall assessment of capacity, the *2026 Index* looks for 1,200 active-duty combat-coded fighter aircraft to meet the baseline requirement for two major regional conflicts.[95] As previously noted, that number lines up well with the 2018 TAFWN's fighter requirement.

The actual number of active-duty combat-coded fighters projected for the end of FY 2025 is roughly 800, or 67 percent of the two-MRC/TAFWN benchmark. These forces are sufficient to fight and win a single MRC, but given their low mission capability rates, it would take global sourcing to field the combat fighter force required for that MRC. The rest of the world would be largely uncovered, and virtually no active-duty forces would remain to respond to a second MRC. For these reasons, the Air Force scores "weak" for capacity, unchanged from the *2024 Index*.

Capability Score: Strong

The Air Force's capability score is "strong," based on scores of "strong" for "Size of Modernization Program" and "Health of Modernization Programs," "marginal" for "Capability of Equipment," and "weak" for "Age of Equipment." This assessment is improved from the *2024 Index's* rating of "marginal" due to efforts to recapitalize the nuclear portfolio to include the B-21, the prospects of the F-47 teamed with Collaborative Combat Aircraft, and acquisitions of the F-35 and F-15EX.

Readiness Score: Very Weak

The Air Force scores "very weak" for readiness, the same grade it received in the 2024 *Index* and the lowest on the five-grade scale. The Air Force's sustained pilot deficit certainly contributes to this assessment, but aircraft age and availability, as well as low sortie rates and flight hours for its aircrew,

strongly suggest that the service is not ready for peer conflict. The FY 2025 Air Force Posture Statement states explicitly that:[96]

- "Today, the Air Force is accepting risk...in order to maintain minimally acceptable near-term operational readiness."
- "This places additional risk on the Air Force's ability to deter and defeat any adversary going forward."
- "The Air Force's operational readiness is near the minimum level acceptable for the service to meet the Nation's demands."

Overall U.S. Air Force Score: Weak

This score is a result of the Force's three scores: a capability score of "strong," a capacity score of "weak," and a readiness score of "very weak." While some positive trends are encouraging, the size and age of the fleet, coupled with low flight training hours and mission-capable rates, demand continued attention and resourcing to ensure the Air Force's ability to compete with China and deliver on what the 2026 NDS directs.

Policy Recommendations

America's ability to own the skies and hold targets at risk against a peer adversary has steadily eroded. As a result, the United States is accepting more strategic risk than it should—risk not just of conflict or not being able to deter a conflict, but risk of *losing* a conflict. Conversely, a properly sized, capable, and ready Air Force reduces strategic risk, deters conflict, and ensures that the nation can prevail if deterrence fails.

The Air Force has been on a rough glide path since the turn of the century and at programmed funding levels cannot sustain today's operational tempo while also building the capability and capacity needed to compete with China. The strategic environment no longer permits delay: Continued underinvestment will only deepen the problem. Congress must therefore significantly increase funding for the Air Force to a level that enables the service to meet both present and future mission requirements. If Congress fails to act, then the Administration must choose between prioritizing near-term readiness at the expense of future capability or shifting focus to long-term preparedness by reducing current operational commitments.

Thankfully, even though the FY 2026 budget is still being debated, encouraging signs suggest that Congress will sufficiently resource defense for today's strategic environment. For example, passage of President Trump's OBBBA was an immediate shot in the arm for the military services. For the Air Force, the OBBBA "provides billions of dollars for aircraft development, production, and maintenance, urging the Air Force to speed assembly of its new B-21 stealth bombers and buy more F-15EX fighters, as well as accelerate development of the next-generation F-47 fighter."[97] If the service gets its full request, combined with the OBBBA funding, the result will be an FY 2026 budget that is approximately 17 percent higher than the FY 2025 budget.[98]

The recommendations that follow are aligned with the 2026 National Defense Strategy and assume a necessary increase in Air Force funding to enable the service to meet today's operational demands and compete effectively with China. With sufficient funding, Congress should:

- **Significantly increase the Air Force's budget to account for the immense cost of nuclear modernization.** America's nuclear deterrent has helped to prevent global conflict on the scale of World War II. Because the readiness of America's nuclear forces is a true no-fail mission, the Air Force needs to deliver on its two legs of the triad. However, the Air Force's nuclear recapitalization bill is crippling and has forced the service to accept greater risk than it should accept in many nuclear and non-nuclear areas. For example, in its FY 2025 budget request, the Air Force prioritized the following nuclear-related programs: $3.7 billion for the Sentinel, $2.7 billion for the B-21, $1.7 billion for the SAOC, and $243 million for the ABMS for a total of $8.343 billion. For context, $8 billion would fund acquisition of approximately 80 additional F-35s per year.

  Given U.S. military defense spending's zero-sum nature, Congress should acknowledge these exorbitant costs and temporarily enhance the Air Force's budget to cover its nuclear obligations. Once the nuclear enterprise is fully recapitalized, Congress could readjust

the Air Force's topline accordingly. This action would free resources for the service to pursue the other key budgetary efforts required to deter and defeat China. The OBBBA was a step in the right direction as it significantly increased funding for the B-21 and Sentinel ICBM, but recapitalizing the service's nuclear portfolio will take multiple years of significantly increased funding. One way Congress could fulfill this recommendation is to extend the nuclear-related OBBBA funding increases until the Air Force's nuclear capitalization is completed.

With sufficient funding, the Air Force should:

- **Prioritize funding of the core missions the service is uniquely tasked to do: air superiority and global strike.** This includes accelerating the F-47 and B-21 programs along with the munitions required to maximize their effectiveness. Recent history has shown that aircraft requirements have continually been reduced to solve budgetary challenges. For example, the number of F-22s the Air Force required in the early 1990s was 750, but production was halted in 2009 at a total of 187 aircraft. Similarly, the initial requirement for the B-2 was 132 aircraft, but the final buy was 21. Air Force leadership has stated that the minimum number of F-47s is 185 and the minimum number of B-21s is 145, but those numbers essentially only replace the existing number of F-22s, B-1s, and B-52s. Given the recent trends, it is not prudent to identify too small a number or too low a production schedule. In a June 2025 article, Shawn Barnes and Robert Peters made a compelling argument to double production capacity of the B-21; this recommendation supports the concept and recommends extending it to the F-47 so that the Air Force can acquire 400 F-47s and 250 B-21s. For context, the last time the Air Force was prepared to fight major combat against a peer (1987), the service possessed more than 650 air superiority fighters and 300 bombers.

- **Increase the size of the fleet to meet the requirements the Air Force laid out in 2018 in "The Air Force We Need" for a 2030 conflict with China.** In 2018, the service defined the requirement for such a conflict as 386 operational squadrons; it reaffirmed that requirement in 2022. The foregoing analysis further supports that requirement, which would increase the size of the fleet by one-fourth. Unfortunately, even after factoring in the OBBBA, the FY 2026 budget request continues the trend of downsizing the Air Force's fleet. Halting the drawdown would alleviate pressure on the pilot absorption pipeline, and over time, a larger, younger fleet would lower sustainment costs while improving force capacity, capability, and readiness. The Air Force must also deliver air power across the range of military operations, which makes its latest move to procure the F-15EX and F-35 simultaneously a prudent one.[99] Additionally, because the Air Force cannot have global reach without sufficient air refueling capacity, addressing persistent issues with the KC-46 should remain a priority. Aircraft divestitures cannot continue to outpace procurements. Ideally, new aircraft would exceed retirements, but even maintaining current numbers would be progress of a sort.

- **Be transparent about readiness.** The Air Force should communicate its readiness challenges clearly and stop the seemingly annual changes in its force presentation and readiness models. These changes distract from the fundamental issue: The Air Force is too small and inadequately resourced to do what America needs it to do.

- **Improve the readiness of its combat units.** History has shown that building a capable air force takes time, and readiness of both people and equipment is the foundation of air power. As observed previously, flying readiness depends on having the right mix of jets, maintenance capability, and aircrew. Pilots and aircrew need to fly to gain and maintain proficiency. As the Air Force climbs its way out of the pilot shortage by producing new pilots, it must be able to provide aircraft and flight hours to the newly created pilots. The current fleet age complicates the balance. The most cost-effective solution is to acquire new aircraft. Until it

U.S. Military Power: Air Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability				✓	
Readiness	✓				
OVERALL		✓			

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:
- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:
- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):
- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

can lower the age of its fleet through recapitalization, the Air Force must fully resource the maintenance enterprise with sufficient weapons systems sustainment funding so that it can trend back toward an acceptable number of monthly flight hours for each of its pilots.

- **Start to rebuild strategic depth.** This will require action in three areas:

  1. **Pilot Production.** The pilot shortage is ubiquitous because it touches many aspects of the service. The Air Force should continue to work toward producing 1,500 pilots per year, but that will not completely solve the problem. The Air Force needed the T-7 yesterday and must take the requisite steps to ensure that the program does not slip any further than it already has.

  2. **Industrial Surge Capacity.** Investments in the infrastructure and supply chains that are needed to enable the rapid scaling of aircraft and munitions production during a conflict are essential. Surge capacity will not materialize on demand; current lead times are measured in dozens of months.

  3. **Maintenance.** The maintenance and logistics enterprise must recognize and utilize the capabilities of field-level maintenance units. Reducing reliance on depot-level work will increase aircraft availability, which is especially critical with

today's older and smaller fleet. This is not to minimize the value of the outstanding work done by the professionals in the depot maintenance community, but to be effective, the service's maintenance policies and procedures must reflect the realities of an older fleet and limited depot bandwidth.

Endnotes

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81. Stephen Losey, "Pilots Are Flying 17 Hours per Month, but It's Still Not Enough, Air Force Secretary Says," *Air Force Times*, March 1, 2018, https://www.airforcetimes.com/news/your-air-force/2018/03/01/secaf-air-force-pilots-are-flying-17-hours-per-month-but-its-still-not-enough/ (accessed October 31, 2025).
82. In FY 2005, the active-duty fleet numbered 4,273 aircraft, and the service budgeted 1.7 million flight hours. In FY 2024, the fleet numbered 3,759 aircraft, and the service budgeted 1.07 million flight hours. The changes reflect a 12 percent drop in fleet size and a 37 percent drop in budgeted flight hours. For context, the total force fleet size (Active and Reserve Components) dropped 16 percent. Data were pulled from official Air Force budgeting data and Air & Space Force Almanac data over multiple years. See, for example, Table 2, "United States Air Force Budget Request

Summary," in U.S. Department of the Air Force, *Department of the Air Force Fiscal Year 2024 Budget Overview*, p. 4, https://www.saffm.hq.af.mil/Portals/84/documents/FY24/Budget/FY24%20Budget%20Overview%20Book.pdf?ver=JjFXW89XqB_YsIGx1wx4IA%3d%3d (accessed November 2, 2025), cited hereinafter as DAF FY 2024 Budget Overview, and table, "Total Number of Active Duty Aircraft in Service over Time (As of Sept. 30, 2024)," in 2025 Almanac, p. 66.

83. The flying hours funded within the service's budget dropped from 1.33 million in FY 2020 to 1.24 million in FY 2021 to 1.15 million in FY 2022, and even then, the service was able to fly only 1.097 million hours before the account ran out of money. The number of hours funded fell again to 1.13 million in FY 2023 and further to 1.07 million in FY 2024. The request for FY 2025 went back to 1.1 million and fell slightly in the FY 2026 request to 1.098 million. It should be noted that the service budgeted for more flying hours in 2013 (1.165 million), the year sequestration drove draconian cuts in DOD's budget, than it has in any of the past five years. Data pulled from United States Air Force Budget Overview volumes for various years: for example, U.S. Air Force, *United States Air Force FY 2013 Budget Overview*, February 2012, https://www.saffm.hq.af.mil/Portals/84/documents/FY13/AFD-120209-052.pdf?ver=2016-08-24-090344-023 (accessed November 2, 2025).
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99. The Air Force cannot focus solely on high-end conflict and should avoid repeating errors such as F-22s doing interdiction missions or B-1s doing close air support missions.

U.S. Marine Corps

Mike Jernigan

Introduction

The United States Marine Corps (USMC) serves as America's expeditionary force positioned for rapid response to international crises. The Corps delivers a unique capability to deploy on short notice with an inherent flexibility that is based on its employment of integrated Marine Air Ground Task Forces (MAGTFs). After 20 years of counterinsurgency, the Marine Corps is four years into reorganizing itself to improve its ability to prevail against the military forces of the People's Republic of China (PRC) and challenges posed by other high-capability adversaries. This modernization is based in part on the F-35 Lightning fifth-generation aircraft, the MQ-9 Reaper unmanned aircraft, and the development of Marine Littoral Regiments (MLRs).

Evaluated against the two existing requirements for the Marine Corps—to provide three Marine Expeditionary Units every day of the year and to support one major regional contingency (MRC)—the Marine Corps is evaluated as "strong" both overall and for capacity, capability, and readiness. The capacity rating is an increase from the *2024 Index of Military Strength* and is largely due to changing the unit of measure from single infantry battalions to composite MAGTFs and not measuring the Marine Corps against the other services' directive to support two MRCs.

However, capacity, capability, and readiness are all affected by a shortage of amphibious shipping, recurring budget uncertainty, and an austere recruiting environment. The shortages of amphibious shipping, sealift, long-distance transportation, and sustainment, while addressed in other chapters, particularly affect the Marine Corps but not to the point that they prevent the Corps from completing its assigned missions. Additionally, the technological gains being made by the PRC and other potential adversaries pose challenges to the entire Joint Force, not just the Marine Corps.

Service Overview

2025 marked the 250th anniversary of the United States Marine Corps. On November 10, 1775, the Second Continental Congress directed that two battalions of Marines be established to seize and defend advanced naval bases. In the days of wooden sailing ships, the ability to go ashore to get fresh water and food was critical, as was the ability to board other ships and repel boarders, and the Marines were able to perform all of those essential tasks for the nascent United States Navy. Five months later, the Marines conducted their first amphibious landing, capturing cannons, muskets, and ammunition from the British garrison at Nassau in the Bahamas. George Washington would later use those captured arms and munitions against the British at the battles of Trenton and Lexington.

From that start, Marines have earned distinction in every American war. Their defense of Washington, DC, in the War of 1812 earned such respect from the British that, as a sign of admiration for fellow warriors, they did not burn the Commandant's house when they sacked the city. Marines served on both sides during the American Civil War and notably fought each other at both battles for Fort Fisher. The Marines seized key objectives in the 1898 Spanish–American War, and all remain today as part of America. World War I found the Marines assigned in desperation to the most difficult areas. Blanc Mont, Soissons, and Belleau Wood went from nearly lost causes to legendary Marine victories. For their tenacity at Belleau Wood, their adversaries named them "devil dogs" because they fought like hounds

U.S. MARINE CORPS AT A GLANCE

EST. 1775

MOTTO
***Semper Fidelis*, "Always Faithful"**



John Phelan
Secretary of Navy



Gen. Eric Smith
Commandant

MAJOR BASES



1. Camp Pendleton
2. MCAS Miramar
3. Marine Corps Air Ground Combat Center Twentynine Palms
4. Marine Corps Air Station Yuma
5. MCB Quantico
6. Camp Lejeune
7. Camp Foster

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$52.7

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

170,000

RESERVE MILITARY

33,000

CIVILIAN

18,000

KEY EQUIPMENT (estimated current inventory)



LAV-25 (488)



Amphibious Combat Vehicle (324)



JLTV (6,100)



M142 HIMARS (47)



NMESIS (18)



MV-22B Osprey (297)



F-35 (171)



F-18 (110)



MQ-9 Reapers (18)

SOURCE: Heritage Foundation research.

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from hell. The nickname remains today. World War II found the Marines adding to their renown with key victories at Guadalcanal, Saipan, Tarawa, Iwo Jima, and Okinawa. The Korean War is famous for the Marines' actions at the Chosin Reservoir and the epic amphibious landing at Inchon. One of the high points of the Vietnam War was the Marines' successful Combined Action Program with their South Vietnamese allies. In the Persian Gulf War, the Marines captured the Kuwaiti airport while simultaneously conducting one of the largest amphibious feints in history. In Iraq, Marines liberated Baghdad, Tikrit, and Fallujah. In Afghanistan, Marines were again sent to and excelled in the most dangerous place on the planet at that time, Helmand Province.

Throughout its 250-year history, the United States Marine Corps has gone where others could not or would not go and has excelled in the most austere environments. It remains the nation's expeditionary force and ready to deploy again on short notice anywhere in the world, wherever America's enemies choose to threaten American interests. As the 34th Commandant of the Corps, General James T. Conway, has said, "The Greeks had their Spartans. The Romans had their Centurions. The French had their Imperial Guard. America has her Marines."[1]

Current Construct

The United States is a maritime nation, flanked by two oceans, and "the seas are the lifeblood of our economy, our national security, and our way of life."[2] The United States Marine Corps, in the words of 39th Commandant General Eric M. Smith, serves "as our Nation's expeditionary force in readiness and as its elite soldiers from the sea."[3] Consequently, many of the USMC's challenges are tied to the Navy's plan for amphibious shipping.

In 2020, 38th Commandant General David Berger realized that "the Marine Corps [was] not organized, trained, equipped, or postured to meet the demands of the rapidly evolving future operating environment."[4] Accordingly, he directed that the Marine Corps' structure and capabilities be revised to ensure that the Corps was better aligned to support the National Defense Strategy and Defense Planning Guidance. Force Design 2030 directed change away from "20 years of operations in the Middle East" to "preparing to counter a near-peer adversary in the Indo-Pacific: China,"[5] an adversary that "continues to grow in capability, capacity, and boldness."[6] The essence of—and inherent challenge posed by—Force Design is "[a]ccepting near-term risk for long-term gain."[7]

Something that has not changed is that Marines prefer to deploy and fight as composite units known as Marine Air Ground Task Forces. A MAGTF is built around a ground combat unit with supporting aviation and logistics units and a command element (a single commander) over the top of the organization. When combined in this fashion, a MAGTF's effectiveness and combat power are more than the sum of its components, bringing a synergy of combined arms "to create single-battle effects."[8] "The greatest strength of this warfighting system," according to General Smith, "is its ability to be rapidly tailored-to-purpose and subsequently scaled in accordance with the changing operating environment or threat."[9] At the tactical level, MAGTFs are commanded by colonels (O6).

When these MAGTFs are assigned to Amphibious Ready Groups (ARGs), they are known as Marine Expeditionary Units (MEUs). MEUs have been called the "crown jewel" of the Marine Corps and are in high demand because they "respond to crises all over the globe and prevent crises from turning into a larger conflict."[10] MEUs form the primary source of strategic advantage to Combatant Commanders and assure allies and partners.[11] According to General Smith:

> When an ARG/MEU is not present, it puts Americans at risk.... [E]very time you have a gap, you as an American citizen, a gap in an ARG/MEU off the coast of Africa, you have to consider is now the time to take the safari to Kenya? Is now the time that I want to go into West Africa? America should not have to pick and choose what windows its citizens travel. It should be able to evacuate its citizens from war torn countries 24x7x365. And that's what we do as Marines.[12]

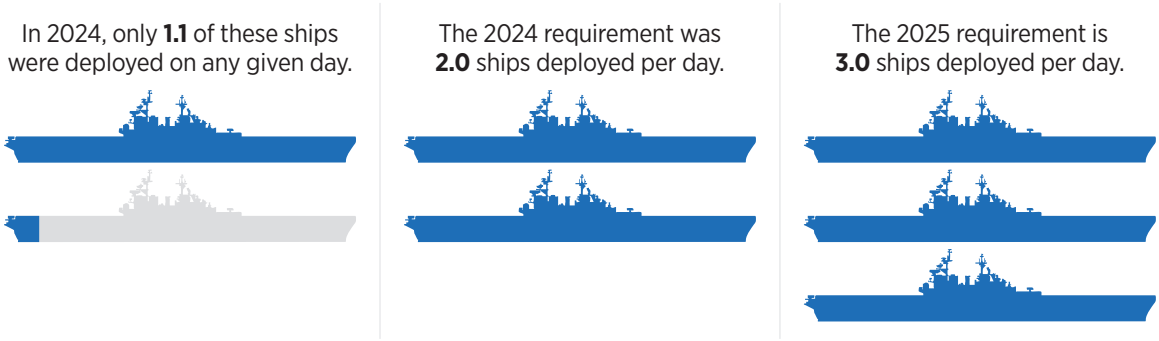
Challenges

Amphibious Shipping. If ARG/MEUs are "the coin of the realm,"[13] they are having some problems with exchange rates. Force Design 2030 (now known as Force Design) specifies that "[a]mphibious warfare ships are the cornerstone of maritime crisis response, deterring adversaries, and building partnerships."[14]

FIGURE 2

Amphibious Assault Ships: Availability vs. Requirement

The U.S. Navy has 9 amphibious assault ships (LHDs and LHAs) currently in inventory.



SOURCE: Lieutenant Colonel James W. Hammond III, "U.S. Marine Corps Year in Review," U.S. Naval Institute *Proceedings*, Vol. 151/3/1,465, March 2025, https://www.usni.org/magazines/proceedings/2025/march/us-marine-corps-year-review (accessed January 21, 2026).

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One of the main challenges the Marine Corps faces is the dearth of capable and reliable amphibious shipping. Other parts of this *Index* examine in detail how and why the United States is at this point and what a get-well plan could look like. With respect to the Marine Corps, "We can't employ what we don't have ready."[15] The Corps would benefit from more amphibious shipping and a level of maintenance that ensures its ability to meet existing, scheduled commitments.

Congress has "demonstrated its support for the Marine Corps" and its continued role in crisis response by establishing a minimum requirement of 31 amphibious ships: 10 Landing Ships, Helicopter Assault (LHA) or Landing Ships, Helicopter Dock (LHD) (known as "big decks") and 21 smaller Landing Ships, Platform Dock (LPD) and Landing Ships, Dock (LSD).[16] As General Smith has stated, anything less than 31 amphibious ships means "we risk being caught short when the Nation calls."[17] Yet the U.S. amphib program faces considerable challenges.

ARG/MEUs are designed to relieve each other "heel to toe," which means there always is an ARG/MEU on station in a particular part of the world, allowing no opportunity for a potential adversary. However, there are not enough amphibs ready to meet that requirement. For example, there was a gap of two months between ARG/MEUs in the Mediterranean in the spring of 2024.[18] Did this gap embolden Hamas in their continuing conflict with Israel? Did the lack of an MEU/ARG off the coast discourage the Israelis? It can't be known for certain, but deterrence and combat power have an effect, and their absence does as well.

In 2024, significant maintenance challenges affecting the USS *Boxer* (LHD-4) prevented the 15th MEU from deploying with its F-35 detachment, and maintenance issues affecting the USS *America* (LHA-6) similarly kept the 31st MEU from "fully support[ing] their presence and exercise commitments."[19]

Moreover, it looks as though the problem is going to become more serious. The challenge is twofold, and each aspect exacerbates the other: More ships are needed, and those that exist need better maintenance reliability. If maintenance reliability is not consistently maintained, we need more ships. If we don't have enough ships, we must cover the gap by increasing the use of our existing ships, which means extending the intervals between their scheduled maintenance.

An example of this shortage took place in 2024 when ARG/MEU deployments were only 50 percent of the Combatant Commanders' desired tempo; "of the eight amphibious assault ships (LHDs and LHAs) that form the core of deploying ARGs

from Norfolk, Virginia, and San Diego, California, on average, only 1.1 were deployed at any time during the year—less than the desired 2.0 and about 14 percent of the available CONUS-based force."[20] The 2025 requirement from the Geographic Combatant Commanders is 3.0, further underscoring these challenges.[21] As one analyst recently put it, amphibious ships form 64 percent of the Navy's remaining ship population that use antiquated, steam-powered technology from the 1980s.[22]

The drumbeat of warnings about the state of America's amphibious warships has been steady. The Government Accountability Office (GAO) reported in 2024 that "[h]alf of the Navy's amphibious ships are in poor condition" and "not currently on track to meet their expected service lives," and the Navy "is likely to face difficulties meeting a statutory requirement to maintain a fleet size of at least 31 operational amphibious warfare ships between 2032 and 2040."[23] Additionally, "[i]n some cases, ships within the amphibious warfare fleet have not been available to support Marine Corps operations and training for years at a time."[24] The Commandant of the Marine Corps testified in April 2024 that "steady procurement for our amphibs is...the most vital thing...for our expeditionary warfighting capability."[25]

While the shortage of amphibious shipping is a Navy problem, the consequences fall on the Marine Corps. Accordingly, the Corps is working to mitigate the shortage of amphibs. One potential option is to construct Landing Ship Mediums (LSMs). However, because of concerns about costs and survivability requirements, the LSM program is not currently active.[26] As the Commandant recently put it, "This is a wicked, hard problem because we're trying to find the knee in the curve between affordability and utility. I don't want something that's affordable that I can't use."[27] The Corps is currently experimenting with another option: stern landing vessels.[28] The need for such a transportation capability has been described by General Smith:

> I've evacuated two embassies in my life. One in Monrovia, Liberia; and one in Freetown, Sierra Leone and they happen when they happen. They required evacuation and they required it immediately. When an ARG/MEU is not present, it puts Americans at risk. It puts the combatant commander at a disadvantage because he doesn't have a credible, capable combat force that's capable of spanning the ROMO—the Range of Military Operations.[29]

Aside from the obvious transportation and employment challenges that a lack of amphibious shipping represents, the Marine Corps faces an additional maritime challenge: sustainment. The Maritime Prepositioning Force (MPF) is a program of ships that are filled with Marine equipment, stationed around the world, and able to respond rapidly to crises. These preloaded ships in their forward locations shorten the time needed to transport and equip Marines and are organized in two squadrons, each of which can support a Marine Expeditionary Brigade (MEB) of up to 16,000 Marines for 30 days.[30]

The challenge comes in the reduction of squadrons and corollary lack of support to MEBs. Since 2014, the MPF fleet has been reduced from 16 ships to seven, and the result has been nearly a million square feet of lift reduction and the loss of an entire squadron. As the Marine Corps has three standing MEBs and can field nine other MEB-equivalent units on any given day, there is an MPF shortage of up to 10 squadrons. In the past, each of the three standing MEBs had its own dedicated MPF squadron of ready equipment. Congress should therefore fund the construction of a third MPF squadron (four ships) to ensure that each of the Marine Corps' existing MEBs has the equipment needed to respond on short notice to crises anywhere in the world.

Congressional Funding. The Marine Corps also faces other challenges, chief among them being consistent funding from Congress. Congress's recent habit of approving continuing resolutions instead of budgets has deleterious effects on all of the services, but it is particularly acute for the Marine Corps as it works to enact Force Design, modernize, and conduct ongoing operations simultaneously. By law, continuing resolutions limit spending to the previous year's level and prohibit "any *new activities* not funded in the previous fiscal year."[31]

General Smith has been consistent in his request that Congress pass a budget and not rely on continuing resolutions. In May 2024, for example, he appeared before the House Armed Services Committee and was asked, "what can Congress do to help?" His response: "Congressman, the steady, reliable funding is—is really important, frankly.

When we go into…continuing resolutions…we have to spend at last year's rate. And…all of our advancements are in the current year." This "retards…our progress and it slows us down."[32]

In January 2025, he told a group of journalists that "[w]ith a continually delayed budget we're losing years on force design.… Whenever we have Continuing Resolutions we're capped at the previous year's spending numbers, and that doesn't get you ahead of the pacing threat of the PRC who is moving at a cyclic rate."[33] And in April 2025, he told the Sea-Air-Space Symposium that "we need predictable, on-time funding that only Congress can provide. Meaning, continuing resolutions aren't continuing anything, *they stop our progress*."[34] The 2026 Congress appears to be willing to address this liability.

The problem takes on a generational focus when one realizes that Congress has not passed a budget in seven of the past 15 fiscal years.[35] How many of those years were consecutive? If a continuing resolution limits spending to last year's amount and last year we had a continuing resolution, are we four years behind the PRC's military investment or seven? While Congress has authorized $1 billion more than the Marine Corps requested in the National Defense Authorization Act (NDAA) for fiscal year (FY) 2025,[36] robust appropriations are necessary to meet Marine Corps requirements. Congress's addiction to continuing resolutions must stop; it must pass the budget and appropriate the money the Marine Corps needs to do what Congress told it to do.

Recruiting. Not unique to the Marine Corps but perhaps affecting it more because of the Corps' higher physical standards for entry, fewer Americans are qualified to enter the military. In 2022, the U.S. Department of Defense found that 77 percent of Americans who were 17–24 years old were not eligible for military service because of "being overweight, medical/physical disqualifiers, and mental health;" also discouraging, these trends appear to be increasing with the largest change over a 10-year period being in mental health.[37] Not only are fewer people eligible to join the Marine Corps, but fewer people are even *interested* in joining the Corps (or other services). The Commandant of the Marine Corps recently explained the problem:

> What I know is you can't recruit a hundred percent of your force from [5[38]] percent of your population. The math just doesn't work. The propensity to serve is going down. It is going down. That's a fact. And that's an annual study, an annual survey that asks young people, would you consider the military as a career. That number is going down. Again, what I know is you can't get 100 percent of your force from [5] percent of the population. That math just doesn't work.…[39]

General Smith summed up the challenge succinctly: "Recruiting is existential to our Corps. If we don't recruit, then we don't have Marines, end of story."[40] The Marine Corps made its 2025 recruiting objectives and is on its way to making the 2026 goals, but the environment remains challenging.

Keeping Pace with Potential Adversaries' Developments. On top of these internal-to-America challenges, the Marine Corps must keep up with and prepare to defeat potential adversaries. In his last speech as Secretary of the Navy, Carlos Del Toro highlighted that the PRC, Russia, and Iran have all made "consistent strides" in their unmanned attack capability investment and that the Marine Corps and Navy team "must continue to do the same."[41] Current Secretary of the Navy Richard Phelan has said that America is operating "in one of the most dangerous strategic environments in our nation's history."[42] The Marine Corps Commandant has echoed these views:

> Every day the PRC practices illegal, coercive, aggressive, and deceptive tactics designed to slowly erode the international rules-based order and advance its own revisionist view of the world. The counter to these tactics requires a whole-of-government approach, in which our expeditionary forces play a critical role through campaigning, deterrence, rapid response to crisis, and contributing to joint and combined combat operations.[43]

At the close of 2024, the People's Liberation Army Navy (PLAN) launched its first big deck amphibious ship with great celebration.[44] This capability will be central to any PRC invasion of Taiwan.

Keeping pace with adversaries' development remains a necessary task for the United States Marine Corps. The PRC is both rapidly developing technological advantages and rehearsing their application. The Commander of U.S. Indo-Pacific Command

(INDOPACOM), Admiral Samuel J. Paparo, testified in April 2025 that:

> China continues to pursue unprecedented military modernization and increasingly aggressive behavior that threatens the U.S. homeland, our allies, and our partners. China is developing and integrating cutting-edge technologies—AI, hypersonic and advanced missiles, and space-based capabilities—at an alarming pace. China's anti-access/area denial capabilities are designed to prevent U.S. forces from operating within the first and second island chains. China is outpacing the U.S. in testing not only these critical technologies but also technologies from across their military industrial base.[45]

Similarly, "[the PRC's] aggressive maneuvers around Taiwan are not just exercises—they are dress rehearsals for forced unification. The PLA [People's Liberation Army] escalated military pressure against Taiwan by 300% in 2024."[46]

According to General Smith, "there's a saying... that if America sends her Army, they're going to change your zip code. We're just going to change your attitude if you send the Marines. They're there to change your attitude."[47] The Marine Corps is working to change the PRC's attitude about invading Taiwan. Other parts of this *Index* address the propensity of the Chinese to take what they want, coerce access under the guise of short-term payments, export their population to areas of interest to exert majority control, and disregard international laws and norms. When this becomes more than America and her allies are willing to stand, the United States Marine Corps likely will be called in to correct China's attitude. "What I do know," says General Smith, "is [that] every time you give China a foot they take a mile. They only understand one thing, which is a credible deterrent force. And that credible deterrent force has to be present to win, which to me means being in the First Island Chain."[48]

Admiral Paparo knows that China, Russia, and North Korea are cooperating and consequently increasing security threats in the Pacific.[49] Specifically, "China has provided 70% of the machine tools and 90% of the legacy chips to Russia to help Moscow 'rebuild its war machine.'"[50] Even "[m]ore troubling...is North Korea's deepening relationship with Russia. North Korea has supplied Russia with ballistic missiles, rockets, and thousands of containers of munitions since late 2022 to support Russia's war against Ukraine. North Korea expanded its support in October 2024 with at least 12,000 combat forces."[51]

Capacity

Former Secretary of the Navy James Forrestal has been quoted as saying that "[i]n the last and final analysis, it is the guy with the rifle and machine gun who wins the war and pays the penalty to preserve our freedom."[52] In past issues of the *Index*, the number and size of infantry battalions have been used as a measure of capacity. While infantry battalions remain important, perhaps a better measure of capacity are the MAGTFs that can be built around those infantry battalions.

There are 22 infantry battalions in the Marine Corps active-duty force.[53] Two of these, in the 3rd and 12th Marine Littoral Regiments, are constructed differently. Most of the Marine infantry battalions have 811 people in them and include specialists to conduct "persistent all-weather surveillance," "anti-armor and indirect fire," and "organic support and services."[54] The two outliers are in the Marine Littoral Regiments and named Littoral Combat Teams (LCTs). They are about the same size as typical infantry battalions but have their own engineer, reconnaissance, and surveillance platoons and a medium missile battery.[55] MAGTFs are built around these infantry-type battalions.

The aviation element of a MAGTF is purpose-built around attack and heavy lift helicopters (AH-1Z Vipers and CH-53E/K Super or King Stallions); long-range medium lift tilt-rotor aircraft (MV-22 Ospreys); long-range refueler and transport aircraft (C-130 Super Hercules), which support from ashore or are assigned to land-based MAGTFs; and fixed wing attack aircraft (AV-8B Harriers, F-18C/D Hornets, and F-35B/C Lightning). New to the Marine Corps inventory since the 2024 edition of the *Index* is the multi-role, attack, and reconnaissance unmanned aerial vehicle (MQ-9A Reaper).

Logistics elements of MAGTFs are frequently purpose-built and come in three types. Combat Logistic Battalions (CLBs) that support MEUs and their (mostly) scheduled deployments are standing headquarters with specialists and capability

sourced from Marine Logistic Groups (MLGs). These are known as "double-digit" CLBs (CLB-11, 22, 31, etc., named to match their supported MEUs). MLGs are commanded by brigadier generals and include battalions of specialists across all functions of logistics. Seven double-digit CLBs are commanded by lieutenant colonels. Seven single-digit CLBs average around 625 people and conduct direct logistic support to infantry regiments (whose name they match: CLB-5 goes with 5th Marines, for example). Two other logistic battalions are part of the Marine Littoral Regiments and are designated Littoral Logistics Battalions.[56]

Adding to the Corps' capacity is the Marine Corps Reserve (MARFORRES). The Marine Corps uses its reserve as a true operational reserve: to mitigate gaps or reinforce success by "augmenting and reinforcing the Active Component with trained units and individual Marines."[57] MARFORRES includes eight infantry battalions,[58] four CLBs,[59] and nine assorted squadrons of Super Cobras and Vipers, Super Stallions, Ospreys, and Hornets.[60]

Based on these numbers, the Marine Corps has the capacity to produce seven MEUs and nine other regiment-level MAGTFS simultaneously (counting the two MLRs as standing MAGTFs) with an ability to surge four more from the reserves. Regimental-level MAGTFs are defined as a colonel commander with an infantry battalion, a logistics support battalion of whatever type, and a composite squadron of the necessary aircraft. Current Marine Corps capacity is 16 simultaneous MAGTFs with a surge capability to 20.

Aside from the shortage of amphibious shipping, this meets the Combatant Commanders' stated requirement of a 3.0-MEU presence[61] and the ability to address one MRC. The problem, as General Smith has said, is that "there is one thing everyone wants more of: Our Marines."[62] The FY 2025 NDAA caps the Corps at 172,300 active-duty Marines, the same number authorized in the FY 2024 NDAA, and 32,500 reserve Marines, 500 more than authorized in the FY 2024 NDAA.[63]

Capability

The Marine Corps' prowess in combat is both legendary and historic. The reasons for this were aptly summed up many years ago by former Assistant Commandant General Michael Williams:

> No Service executes operationally better than the Marine Corps. In my opinion we are the best in the world at putting combined arms forces into the field with speed and precision. Once we are committed, we execute. Our reputation is that we can deliver on our promises. That's why the Combatant Commanders want Marines. I attribute this excellence to our expeditionary mindset. We arrive ready to go to work. We can sustain ourselves with what we bring to the fight. This is not a slam on any other Service. We cannot do what the Army or the Air Force do; but what we *can* do, we do better than any other force. Operational excellence is a hallmark of our Corps.[64]

At the same time, however, as the former chief executive officer of both The Home Depot and Chrysler has said, "the things that can derail us are arrogance and complacency. This isn't Hollywood; we don't get paid royalties for something that we already did."[65] Thus, the Marine Corps is working to avoid complacency and improve its lethality and effectiveness: It is not "watch[ing] warfare evolve—it is driving it forward."[66] "Investment is necessary," according to General Smith, "but innovation is mandatory."[67]

The *Oxford English Dictionary* defines "capability" as "the ability or qualities necessary to do something" and "the power or weapons a country has for war or military action."[68] Both definitions fit this discussion because the Marine Corps "does not have the luxury of focusing on a single threat, to the exclusion of all others."[69]

At the heart of any discussion of Marine Corps capability is the trade-off between capability and capacity: trading quantity for quality or "more" for "more capable." Generally, but consistently, Marine Corps leaders have chosen to trade on the side of "more capable but less of." Could the Marine Corps be more capable if it had more widgets? Probably. Could it have more capacity if it had more Marines? Absolutely. But the Marine Corps, with congressional endorsement, has chosen to structure itself as an eminently capable but relatively small force. The Corps is working to increase its capability by increasing the range of weapons systems, lowering electronic signatures, increasing lethality, and becoming more distributed and dispersed in its operations.[70] According to General Smith:

> To fight and win against a peer adversary, combined arms must now be all-domain, incorporating effects in and from cyberspace, space, and the electromagnetic spectrum.... This challenge will require a greater proliferation of capabilities that can provide those all-domain effects down to the lowest level. This requirement includes autonomous systems; precision fires; intelligence, surveillance, reconnaissance, and targeting (ISR-T); integrated command and control; and increased ground and maritime mobility.[71]

The Marine Corps tackles the capability-vs.-capacity trade-off by investing in select technologies and concepts to become more lethal and survivable. Marine Littoral Regiments, for example, are well on their way to becoming the most capable of MAGTFs. MLRs are designed to survive and thrive in the Weapons Engagement Zone (WEZ) with their organic air defense battalion, precision long-range fires, and anti-ship missile batteries. Littoral Anti-Air Battalions have the Marine Air Defense Integrated System (MADIS), which is built around a pair of Joint Light Tactical Vehicles, one with a turret-launched Stinger anti-aircraft missile and the other with the necessary radars, optics, and communications equipment. MADIS provides a "credible, integrated, layered defense against threats from unmanned aerial systems, fixed and rotary wing aircraft, and cruise missiles."[72] For threats with smaller cross sections (rockets, mortars, and artillery), the Corps uses a Ground/Air Task Oriented Radar (G/ATOR).[73] In 2024, the Marine Corps deployed the G/ATOR system on a Japanese island only 68 miles from Taiwan in "the kind of presence that gets noticed."[74]

In addition to the reinforced infantry battalion, an MLR has its own long-range strike capability in the form of HIMARS (High Mobility Artillery Rocket System) and the Navy–Marine Expeditionary Ship Interdiction System (NMESIS). HIMARS has a range of more than 300 miles,[75] and NMESIS can hold ships at risk from a distance of 100 miles.[76] In April 2025, the Marine Corps sent NMESIS "into the heart of one of the world's most strategic and tense bodies of water—the Luzon Strait," 220 miles from Taiwan, as part of the 40th anniversary of exercise BALIKATAN with the Philippines.[77] The exercise included live fire and a ship sinking exercise (SINKEX), and Marine Corps Forces Pacific Commander Lieutenant General James Glynn described it as a "full battle test...intended to take into consideration all of the regional security challenges that we face today, beginning with the South China Sea."[78]

As former Secretary of the Navy Carlos Del Toro told the House Armed Services Committee, "Our Marines need to move around long distances...in the Pacific as well as island to island and we need to give them the capabilities to do so."[79] In April 2025, the Congressional Research Service advised that the Landing Ship Medium "remains a critical requirement."[80]

The Marine Corps is increasing its aviation capability by adding two aircraft to every F-35 squadron with associated pilots and maintenance personnel.[81] Additionally, the Corps in 2025 positioned MQ-9 Reapers in all three Marine Aircraft Wings for worldwide availability.[82] As General Smith has stated, the Corps' Reaper capability "is growing quickly."[83]

Reinforcing General Smith's point that innovation is mandatory, the Deputy Commandant for Aviation has stated that "linear incremental change will not be sufficient"[84] and has directed investment in logistics, unmanned platforms, and aircraft survivability as well as manned-unmanned teaming in which pilots control detachments of unmanned aircraft and that send their sensor data to the pilots of manned aircraft. The challenge for the Corps continues to be "balancing crisis response and modernization," particularly in aviation.[85]

The Marine Corps is working to improve its capability in the logistics arena as well. Marines are modernizing and certifying World War II airfields in the Pacific[86] and investing in "unmanned platforms that support logistics."[87]

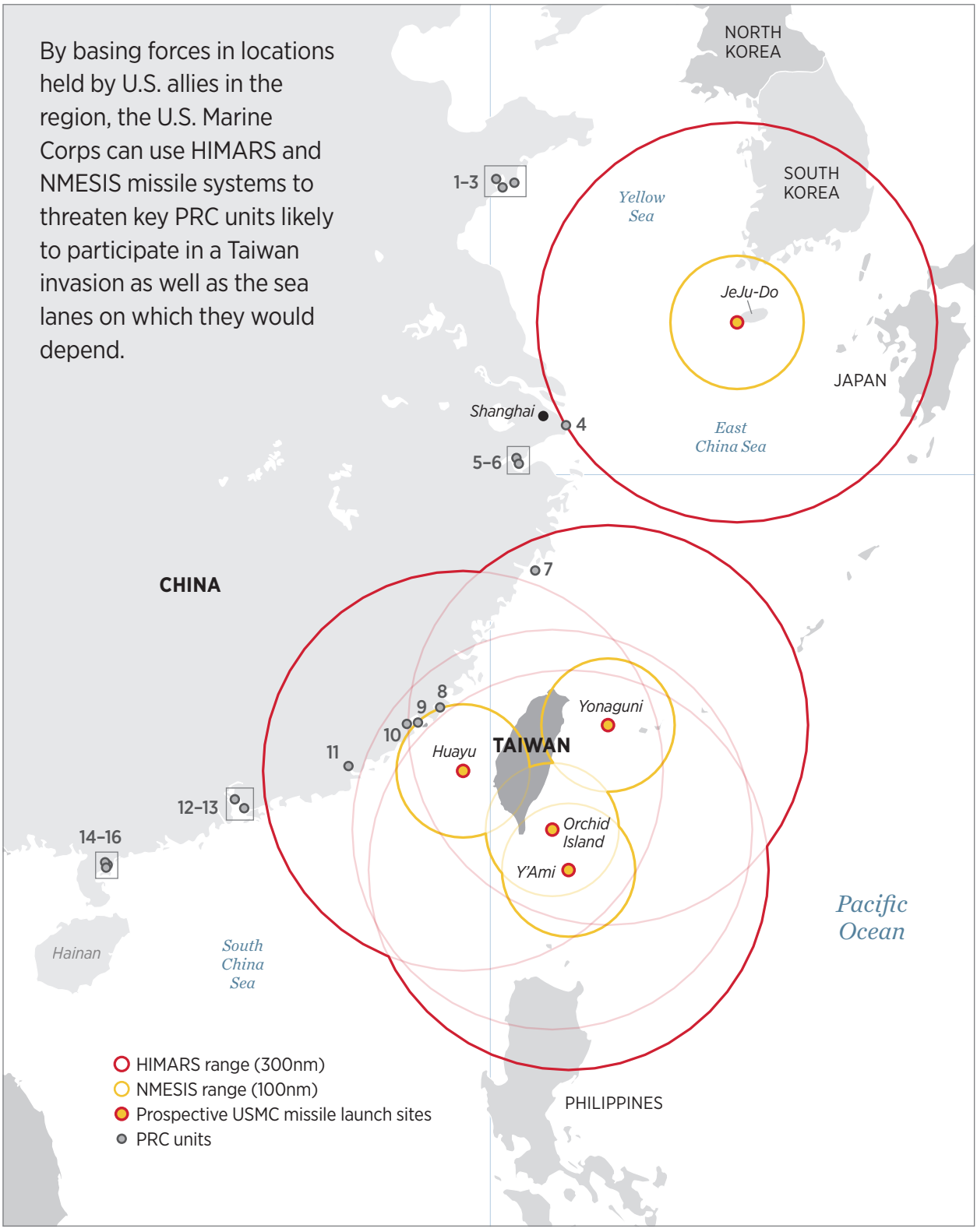
It is also worth noting that the Marine Corps has increased its portfolio investment in classified capabilities by 435 percent over the past four years.[88] These capabilities enhance the ability of the Corps to fight inside the WEZ, accelerate force modernization, and keep pace with rapidly changing battlefield technologies and "will only be apparent to our adversaries at a time and place of our own choosing."[89]

Readiness

As noted in 1997 by former Congressman Floyd Spence (R–SC), "The Marine Corps has followed congressional direction that it 'remain most ready

MAP 15

USMC Precision Missile Ranges and Likely PRC Participants in Defense of Taiwan Scenario (Page 1 of 2)



USMC Precision Missile Ranges and Likely PRC Participants in Defense of Taiwan Scenario (Page 2 of 2)

PRC UNITS

1 5th Marine Brigade
2 6th Marine Brigade
3 1st Landing Ship Group
4 5th Landing Ship Flotilla
5 5th Amphibious Combined Arms Brigade
6 124th Amphibious Combined Arms Brigade
7 3rd Landing Ship Group
8 3rd Marine Brigade
9 14th Amphibious Combined Arms Brigade
10 91st Amphibious Combined Arms Brigade
11 4th Marine Brigade
12 1st Amphibious Combined Arms Brigade
13 125th Amphibious Combined Arms Brigade
14 1st Marine Brigade
15 2nd Marine Brigade
16 6th Landing Ship Flotilla

PROSPECTIVE USMC MISSILE LAUNCH SITES

Yonaguni—Westernmost Japanese island
Y'Ami—Northernmost Philippine island
Orchid Island—Easternmost Taiwanese island
Huayu—Westernmost Taiwanese island
JeJu-Do—Southernmost Republic of Korea island

SOURCES: Andrew S. Erickson, Conor M. Kennedy, and Ryan D. Martinson, eds., *Chinese Amphibious Warfare: Prospects for a Cross-Strait Invasion* (Newport, RI: Naval War College Press, 2024), p. xxi; Lockheed Martin, "HIMARS: The Long-Range, Mobile, Precision Fires Launcher," https://www.lockheedmartin.com/en-us/products/himars.html (accessed January 21, 2026); and Raytheon, "Naval Missile Strike," https://www.rtx.com/raytheon/what-we-do/sea/naval-strike-missile (accessed January 21, 2026).

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when the nation is least ready.'"[90] Readiness is a function of how much, how frequently, and how quickly a capability needs to be repaired so that it can complete its assigned tasks. The Department of War has a standardized readiness reporting system, the outputs of which are necessarily classified.[91] It is helpful to understand that (1) the department measures readiness in general terms of resources and training and (2) the best time to plant a tree was 25 years ago, but the second-best time is today. With those concepts in mind, readiness can be defined as what you need to do today to fight today, continue to fight tomorrow, and fight again in the future.

Aviation. The Air Force tends to care only about "flying things," the Army evaluates its rotary-wing aircraft in terms of its appropriately preeminent ground combat mission, and the Navy has a high-yield aviation component but must split its focus to include the priority of "floating things." Only for the Marine Corps is the combination of air and ground power the focus of the optimal way to fight. Accordingly, aviation successes and concerns are essential to measuring Marine Corps readiness, and the F-35 aircraft is key to the readiness score. By the end of 2025, the Marine Corps will have taken delivery of 65 percent of its Program of Record allotment of F-35B (Vertical/Short Takeoff and Landing capable) and 37 percent of its F-35Cs (tailhook capable) for a total of 183 F-35B and 52 F-35C aircraft.[92] These will fill out two training squadrons and 11 fleet squadrons.[93] The F-35 now supports all MEU deployments from Japan and the West Coast that previously used AV-8B Harriers.[94]

The Marine Corps also flies F-18s and is phasing out its remaining AV-8Bs. "The Marine Corps F/A-18 inventory includes 161 F/A-18 aircraft," and Fleet Marine Force "will maintain four active squadrons and one reserve squadron through the end of FY25."[95] The Marine Corps has 39 AV-8Bs in two squadrons at Cherry Point, North Carolina, and both squadrons are scheduled to complete transition to F-35 squadrons by 2026.[96] Harrier squadrons support the East Coast MEUs and will continue to do so "until the platform's operational sunset in FY26."[97]

The KC-130J refueling aircraft is a critical enabler for forward deployed MAGTFs across all Combatant Commands; it increases MAGTF

mobility and enhances logistical capacity by operating from austere airfields.[98] "As the sole Marine Corps tactical fixed wing lift and aerial refueling platform," according to the Marine Corps Aviation Plan (AVPLAN), "demand for KC-130Js will remain high."[99] The 75 KC-130Js currently in the Marine Corps inventory are allocated in four active-duty squadrons, one reserve squadron, and one test squadron.[100] The Corps has 80 percent of its allocated KC-130Js and will receive the remainder by 2027.[101]

With respect to the Corps' rotary-wing aircraft, MV-22s and CH-53Ks provide transportation ability, and the AH-1Z viper provides close fire support. "The MV-22 Osprey provides medium lift assault support to ground forces in multiple theaters of operation from expeditionary sites and afloat. It also provides unmatched operational flexibility due to its combination of speed, range, payload, and aerial refueling capability."[102] MV-22B squadrons have conducted 109 operational deployments and flown over 588,000 flight hours since 2007. The MV-22 flies "approximately twice as many flight hours per year as any other Marine Corps rotary-wing aircraft."[103] There are 360 MV-22s across 15 active squadrons, two reserve squadrons, and assorted training squadrons.[104]

The CH-53K heavy lift helicopter's range and payload capacity are three times as great as those of its predecessor.[105] The Marine Corps has 127 CH-53K aircraft of 200 programmed with delivery of all 200 to be completed in 2032.[106] They are allocated in six active-duty squadrons, one reserve squadron, and assorted test and training squadrons.[107] The Corps' 349 AH-1Z Vipers are allocated in six active-duty squadrons, one reserve squadron, and the usual test and training squadrons.[108]

A recent addition to the Marine Corps' aviation capability is the MQ-9 Reaper. The Corps' 2025 Aviation Plan explains that "Unmanned Aerial Systems (UAS) have become essential assets as a force multiplier in modern military operations."[109] General Smith has said that "[w]e still don't have the volume of them we need, but…the MQ-9 is a vital part of our future."[110] One of the Secretary of the Navy's announced priorities is to "push for more investment in uncrewed systems and enabler technologies—such as autonomy, mission systems and communications—for manned-unmanned teaming by the Navy and jointly with the other military services."[111]

The MQ-9 Reaper is larger and more capable than the older and more famous MQ-1 Predator.[112] The Marine Corps has two active-duty squadrons of MQ-9s and one training squadron for a total of 12 aircraft with 20 more to be delivered by 2026.[113] Starting in 2029, the MQ-9s will be equipped with a "Detect and Avoid System,"[114] which is important because Houthis have shot down more Air Force MQ-9s in Yemen since October of 2023 than the Marine Corps has in its entire inventory.[115] The current Secretary of the Navy noted this fact during his confirmation hearing.[116]

Finally, the aviation community is not exempt from a shortage of appropriate shipping. The two existing aviation support logistics vessels (SS *Wright* and SS *Curtis*) are currently beyond their expected service lives and not planned for retirement until 2030–2033.[117] The Marine Corps has levied a requirement but will face "a critical shortfall" if they are not replaced.[118]

Personnel and Training. People remain the most valuable resource in organizations, and training is one of the best ways to enhance their contributions. The Marine Corps is modernizing and increasing the technical capabilities of its personnel, and the costs go beyond equipment price tags. Marine aviation adds an exponential level of capability to the MAGTFs, but it also adds complexity. Marines need to be trained to operate in complex environments. Similarly, expertise in the multi-domain, data-centric world of autonomous vehicles, satellite communications, cyber operations, and the requirements of massively distributed operations working inside a WEZ demonstrates a "mastery of…evolution in warfare" and allows Marines to "punch above our weight class."[119] As the Marine Corps as a whole and particularly its aviation component become more data-centric and data-enabled, this change will require "investment in infrastructure, personnel, and training"[120] and "a greater proliferation of capabilities that can provide those all-domain effects down to the lowest level."[121]

In 2020, recognizing training's impact on readiness, the Marine Corps elevated its Training and Education Command (TECOM) to a Lieutenant General–level command reporting directly to the Commandant.[122] If the Marine Corps has 18 lieutenant generals, then its investment in training and education represents 6 percent of the

total responsibility the Corps entrusts to its senior leadership.

TECOM has adjusted the training pipeline so that Marines will be better prepared and able to get to their units more rapidly with the necessary qualifications for all-domain operations.[123] The TECOM annual report explains that the Marine Corps does "not have the luxury to wait for the final answers" as it manages "fight tonight" while simultaneously developing new capabilities.[124] It is changing the training and education model to "develop experienced warfighters who are experts in multi-domain and all-domain combined arms" faster.[125]

This rapid maturation is occurring because TECOM is moving away from the "sage on the stage" historical model of platform instruction and "instead developing coaching and mentoring skills for instructors to serve as a 'guide on the side.'"[126] Specifically, TECOM is using technology to maximize instructors' student contact time[127] in order to "mature Marines' technical and leadership skills faster" while providing "them with increased opportunities to think, decide, and act earlier in their careers."[128] To this end, the Corps has launched a pilot program to deploy "digital transformation teams" to accelerate the adoption of "emerging technology."[129]

"[Q]ualified Marines remain key to our ability to meet operational requirements," and "[we] need to ensure the right Marine with the proper training and qualifications arrives to the right unit on time."[130] Marine talent managers fill aviation needs based on the Type/Model/Series (TMS) of aircraft; skillsets and the Marines who possess them are not interchangeable. An Osprey mechanic cannot work on the avionics in an F-35, and an F-18 pilot's qualifications are different from those of a CH-53 pilot. To ensure that each TMS is properly staffed with the necessary skills and experience, Marine Aviation is "reestablish[ing] a manpower analysis branch."[131]

A tiny subset of Marine Corps personnel is made up of its General Officers (GOs). At the beginning of 2025, according to the Defense Manpower Data Center, the Marine Corps had three four-star generals (two are permanent as the Commandant and Assistant Commandant of the Marine Corps,[132] and the third is a rotational joint assignment currently filled by a Marine as Combatant Commander of United States Africa Command) and 18 three-star lieutenant generals.[133] As a means of comparison, the Army has more two-star GOs (92) than the Marine Corps has total GOs (88). The Marine Corps' 88 GOs form 0.0001 percent of the total active-duty force in comparison to the other, larger services, in each of which GOs account for 0.0002% of the total force.[134]

Contested Logistics. A large part of readiness is logistics, which involves replacing, repairing, refueling, rearming, and remanning and the necessary transportation to get it all where it needs to be when it needs to be there. Logistics cannot be faked; these skills must be performed daily, whether at peace or at war. According to the Commandant of the Marine Corps, "[t]he ability to conduct logistics in a contested environment will underwrite the success of any future naval campaign."[135] Meeting logistics requirements in a counter-intervention environment therefore remains a Marine Corps priority that "will require a combination of solutions" from across the Joint Force, allies, and partners and "will take a monumental effort across all the services."[136]

The Marine Corps is experimenting with "over a dozen new manned and unmanned technologies and potential future capabilities focused on enabling logistics in a contested environment."[137] Other operational experiments include maximizing use of the CH-53K's heavy lift capability; stern landing vessels; the Tactical Resupply Unmanned Aircraft System (TRUAS); the Medium Aerial Resupply Vehicle for Expeditionary Logistics (MARV-EL); and an autonomous low-profile vessel.[138]

The TRUAS system "can detect obstacles along a delivery route without prior knowledge of the terrain" to "deliver supplies to limited-access environments."[139] It has a range of nine kilometers with a speed of 50 knots and can carry a payload of 120 pounds.[140] The 120 pounds of cargo is not coincidental: It is how much four cans of 5.56 ammunition weigh. The Marine Corps continues to plant trees for the future and is focused on readiness. As former Marine Forces Pacific Commander Lieutenant General Victor Krulak has cautioned, "being ready is not what matters. What matters is winning after you get there."[141]

Scoring the U.S. Marine Corps

Capacity Score: Strong

This score is raised from "weak" in the *2024 Index* to "strong" based on the following calculus. Two stated, simultaneous requirements exist for the Marine Corps. The first is to provide a 3.0-MEU presence for the Combatant Commanders.[142] It takes seven colonel-led MAGTFS built around infantry battalions to meet this obligation. The second requirement is to support one MRC. (The other military services are evaluated against a two-MRC construct.)

The 1st Marine Expeditionary Force (I MEF) has been designated as responsible for an MRC.[143] The ground combat element of I MEF is the 1st Marine Division (1MARDIV). 1MARDIV has 12 infantry battalions used as components to generate four colonel-led MAGTFs.[144] Therefore, these four MAGTFs are required to meet the Marine Corps' requirements for one MRC. Seven colonel-led MAGTFs (built around seven infantry battalions) complete the MEU requirement, and four MAGTFs (built around 12 infantry battalions) to address an MRC yield a commitment of 11 colonel-led MAGTFs to meet the Marine Corps' twin requirements of supporting one MRC and three simultaneous MEUs deployed every day around the world. This calculus accounts for 19 of the Marine Corps' 22 active-duty infantry battalions.

Two of those remaining are assigned to the colonel-led MLRs (which need an aviation squadron assigned to it to be counted as a "MAGTF"), yielding one unobligated active-duty infantry battalion to add to the eight reserve battalions around which other MAGTFs could be built as needed to contribute to surge operations. The Marine Corps currently has the capacity to meet its two designated tasks.

Capability Score: Strong

The Marine Corps' Capability score remains the same as the *2024 Index* assessment. This assessment is based on the Corps' modernization efforts and investment in critical weapons, technologies, and platforms. The Marine Corps has not yet missed any requirement levied on it by Combatant Commanders and is extremely averse to doing so in the future.

It is important to note that while the Marine Corps is disadvantaged by a lack of amphibious shipping and other transportation and sustainment challenges, it remains capable of accomplishing its assigned missions. The Marine Littoral Regiments are a key factor in maintaining and increasing the Corps' capability as are increases in the numbers and redistribution of F-35s, MQ-9s, and CH-53Ks. As the 20th Commandant of the Marine Corps, General Lemuel Shepherd, once explained:

> [T]he Marines…apply the old maxim: "Bite off more than you can chew—then chew it; promise more than you can do—then do it." It is this challenge and the Marines' ability to meet it that…[enables them to serve] as the nation's basic ready-to-act military organization, responsive specifically and directly to the President's call to meet the crises which occur in both peace and war.[145]

Readiness Score: Strong

This score is determined by the quality and effectiveness of the Marine Corps' personnel, equipment, training, and operational execution. It remains the same as in the *2024 Index*. The Marine Corps has upgraded its aviation fleet, has added new capability with the MQ-9 Reaper, and is addressing head-on the challenge of conducting logistics functions inside a WEZ. The Marine Corps is aggressively improving resilience in both units and individuals while continuing to maintain its traditions of rigorous unit training and high personal standards.

Overall Score: Strong

The Marine Corps' overall score is strong. The Marine Corps is comfortable in its assigned role within the Joint Force, knows its capabilities and gaps, and is actively enhancing its strengths and mitigating challenges. The paired ability of maintaining MEUs and standing up other, purpose-built and event-driven regimental-level MAGTFs allows Combatant Commanders enormous flexibility in responding to, shaping, and deterring world events. Although the MLRs are explicitly focused on the Pacific, their capability and "right fit for the problem set" have led Congress to ask whether they might be equally effective in other theaters as well.[146]

U.S. Military Power: Marine Corps

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity				✓	
Capability				✓	
Readiness				✓	
OVERALL				✓	

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

Conclusion

The 31st Commandant of the Marine Corps, General Charles Krulak, was famous for saying, "The two most important things the Marine Corps does for America [are] make Marines and win battles."[147] The 39th Commandant, General Eric Smith, has said, "We became Marines to do hard things."[148] And the 26th Secretary of Defense, James Mattis, has said, "When it's time to move a piano, Marines don't pick up the piano bench—we move the piano."[149]

As for making Marines, the Marine Corps is the only service that has met its annual recruiting goals *every year for the past 30 years*,[150] and it is on track to do it again in 2026.[151]

As for winning battles, only in one battle in 250 years of existence have the Marines taken more casualties than they have given—a little place called Iwo Jima.[152]

As for doing hard things, in 2024, the Marine Corps was the only service to pass an independent audit to ensure that its "financial records were accurate, complete, and compliant with federal law"—and then the Corps did it again for the second consecutive year.[153] "This repeat achievement reinforces the service's reputation for accountability, discipline, and leadership"[154] and confirms that when the Marine Corps is entrusted with "taxpayers['] money, it is money well spent and fully accounted for."[155]

As for the Marine Corps in 2026, just as a journalist cabled home 150 years ago, "the situation is well in hand."[156] Perhaps General Smith has said it best: "As we mark 250 years, we don't know exactly what the next fight will look like. But we know this... Marines will be there. We're still America's 911 force: first in, first to respond, and built to hold the line."[157]

Recommendations

Congress should:

- **Consistently pass** annual budgets to ensure that it does not retard the Marine Corps' transformation plan and innovation efforts.
- **Restore** the priority of amphibious ship construction by both providing Department of the Navy funds that cannot be applied to other expenses while simultaneously incentivizing American companies to accelerate ship construction.
- **Fund** the creation of a third Maritime Prepositioning Force squadron (and the equipment required to fully load out those ships) to restore support to the Marine Expeditionary Brigade in Japan.
- **Fund and incentivize** the accelerated construction of two aviation support logistics ships to replace the SS *Wright* and SS *Curtis*, which are already operating past their expected service lives.

The Department of the Navy should:

- **Resolve** the capabilities dispute regarding the Landing Ship Medium and submit the final design to Congress for funding.
- Once funding is secured, **accelerate** the construction of Landing Ship Mediums to provide the Corps with consistent operational and tactical transportation within the First Island Chain.

The United States Marine Corps should:

- **Continue to invest** in recruiting by assigning its best people to that mission.
- **Continue to experiment** with new technologies and concepts to match the gains made by potential adversaries.

Endnotes

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U.S. Space Force

Shawn Barnes

Introduction

Space capabilities are increasingly vital to our national security and to the Joint Force warfighter. The U.S. Space Force was formed pursuant to the fiscal year (FY) 2020 National Defense Authorization Act (NDAA) with an initial budget of approximately $15 billion. This year's budget request combined with funding in the *One Big Beautiful Bill Act* will provide the Space Force with over $40 billion in FY 2026—a dramatic increase that must be sustained for several more years.

Several factors are driving the need for continued robust funding growth for the Space Force.

- The Space Force must recapitalize existing capabilities providing strategic and tactical missile warning, global communication, weather forecasting, and position, navigation, and timing service. As it does this, new capabilities must also be made resilient to a variety of existing and emerging threats from China, Russia, and other state and nonstate actors.

- The Space Force must develop and field an extensive arsenal to deny our adversaries their access to space during conflict. China, Russia, and others must not be permitted to use their space systems to track, target, and conduct operations against our terrestrial warfighters.

- The Space Force is taking on missions, such as tracking ground-based moving targets, that historically have been performed by airborne platforms. New space-based sensing, information processing, and intercept capabilities are necessary for the Golden Dome missile defense system and will require significant additional resources.

- The Space Force must be prepared to protect the expanding commercial space capabilities that are driving rapid economic vitality on Earth. It is estimated that the global space economy will far exceed $1 trillion in the next decade. Commercial space will evolve from purely sensing and communicating and soon will include resource extraction, manufacturing, and power generation. Just as our blue-water Navy ensures maritime commerce, so must our Space Force be the guarantor of space commerce.

Today's Space Force provides extraordinary and essential support to the Joint Force warfighter. As our newest military branch moves into the second half of its inaugural decade, the nation will demand much more. The President must continue to request—and Congress must continue to provide—the resources necessary for our Space Force to answer the call of our nation's future. As General B. Chance Saltzman, Chief of Space Operations, has said, "The Space Force we have is still not the Space Force we need. We have come a long way, but I think we can all acknowledge there is still work to be done."[1]

Service Overview

Space has been important to U.S. national security and national pride since the late 1950s.[2] The Army, Navy, and Air Force all developed rockets that would serve as early Intercontinental Ballistic Missiles (ICBMs) and satellite launchers, including the Atlas and Titan.[3] The U.S. National Reconnaissance Office (NRO) flew a variety of electro-optical, radar, and signals intelligence satellites that helped to underwrite the nation's deterrence of nuclear war with the Soviet Union.[4] Since the fielding of the Global

U.S. SPACE FORCE AT A GLANCE

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MOTTO
***Semper Supra*, "Always Above"**

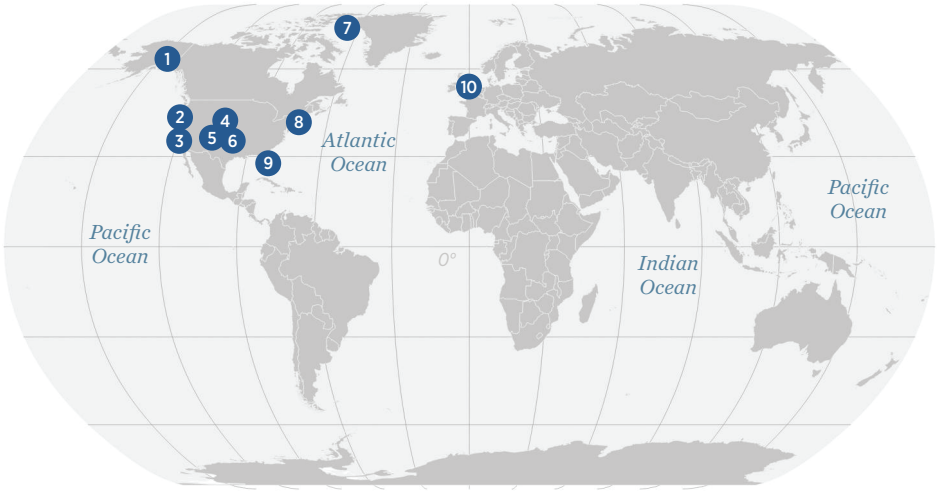


Dr. Troy E. Meink
Secretary of the Air Force



Gen. B. Chance Saltzman
Chief of Space Operations

MAJOR BASES



1. Clear Space Force Station
2. Beale Air Force Base
3. Vandenberg Space Force Base
4. Buckley Space Force Base
5. Peterson Space Force Base
6. Schriever Space Force Base
7. Pituffik Space Base
8. Cape Cod Space Force Station
9. Patrick Space Force Base, Cape Canaveral Space Force Station
10. RAF Fylingdales (UK)

CURRENT BUDGET

IN BILLIONS FOR FY 2025

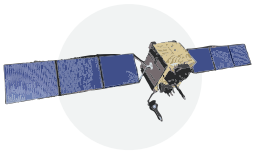
$28.6

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

9,450

KEY EQUIPMENT (estimated current inventory)



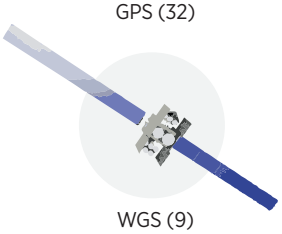
GPS (32)



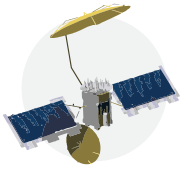
SBIRS (8)



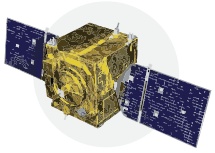
AEFH (4)



WGS (9)



MUOS (4)



GSSAP (4)



UEWR (5)

SOURCE: Heritage Foundation research.

heritage.org

Positioning System (GPS) in the mid-1980s, space capabilities have provided direct support to the terrestrial warfighter on the ground, at sea, and in the air. In recognition of the growing importance of space to U.S. national security, Congress directed the establishment of our nation's sixth military branch, the United States Space Force, in the FY 2020 NDAA. With respect to the new service's functions, the act specified that Title 10, Section 9801, of the U.S. Code should be amended to reflect that:

> "The Space Force shall be organized, trained, and equipped to provide—
>
> (1) freedom of operation for the United States in, from, and to space; and
>
> (2) prompt and sustained space operations."

With respect to the service's duties, the NDAA specified that the Code should be amended to reflect that:

> "It shall be the duty of the Space Force to—
>
> (1) protect the interests of the United States in space;
>
> (2) deter aggression in, from, and to space; and
>
> (3) conduct space operations."[5]

That same NDAA directed substantial changes within the Offices of the Secretary of Defense and Secretary of the Air Force to focus and improve support for space policy and acquisition. Specifically, the law directed creation of two new positions: Assistant Secretary of Defense for Space Policy and Assistant Secretary of the Air Force for Space Acquisition and Integration.[6]

The first few years of the Space Force were marked by organizational stand-up activities, internal reorganization, and consolidation. Like every other military branch, the Space Force is led by a four-star general officer, the Chief of Space Operations (CSO), and is headquartered in the Pentagon. The Space Force falls within the Department of the Air Force, just as the Marine Corps falls within the Department of the Navy. The CSO reports to the Secretary of the Air Force and is a member of the Joint Chiefs of Staff. The Space Force's headquarters staff is similar to but much smaller than those of the other branches. "In order to create a leaner, more agile force, the USSF eliminated two levels of command that exist within the Air Force and now consists of: USSF Headquarters (at the Pentagon with the other services), FIELDCOMs [Field Commands], Space Deltas (DELs); and Squadrons."[7]

Space Force uniformed military personnel, called Guardians, focus on a few key areas, including operations, acquisition, cyberspace, engineering, and intelligence. Additional necessary support such as legal, contracting, finance, human resources, medical/dental, security, chaplains, and many others are provided by civilians or uniformed members of the U.S. Air Force.

The Space Force has three Field Commands led by subordinate general officers: Space Systems Command (SSC); Combat Forces Command (CFC), formerly Space Operations Command (SpOC); and Space Training and Readiness Command (STARCOM).[8] Creation of a fourth, Space Futures Command, has been discussed, but prospects for its establishment are uncertain.[9]

The SSC is headquartered in Los Angeles, California, at the Los Angeles Space Force Base. The FIELDCOM is responsible "for acquiring, developing, and delivering resilient capabilities to outpace emerging threats and protect our Nation's strategic advantage in, from, and to space."[10] It also manages a $15.6 billion space acquisition budget.[11] The Space Force also has two other acquisition organizations assigned to it: the Space Development Agency (SDA) and Space Rapid Capabilities Office (Space RCO).

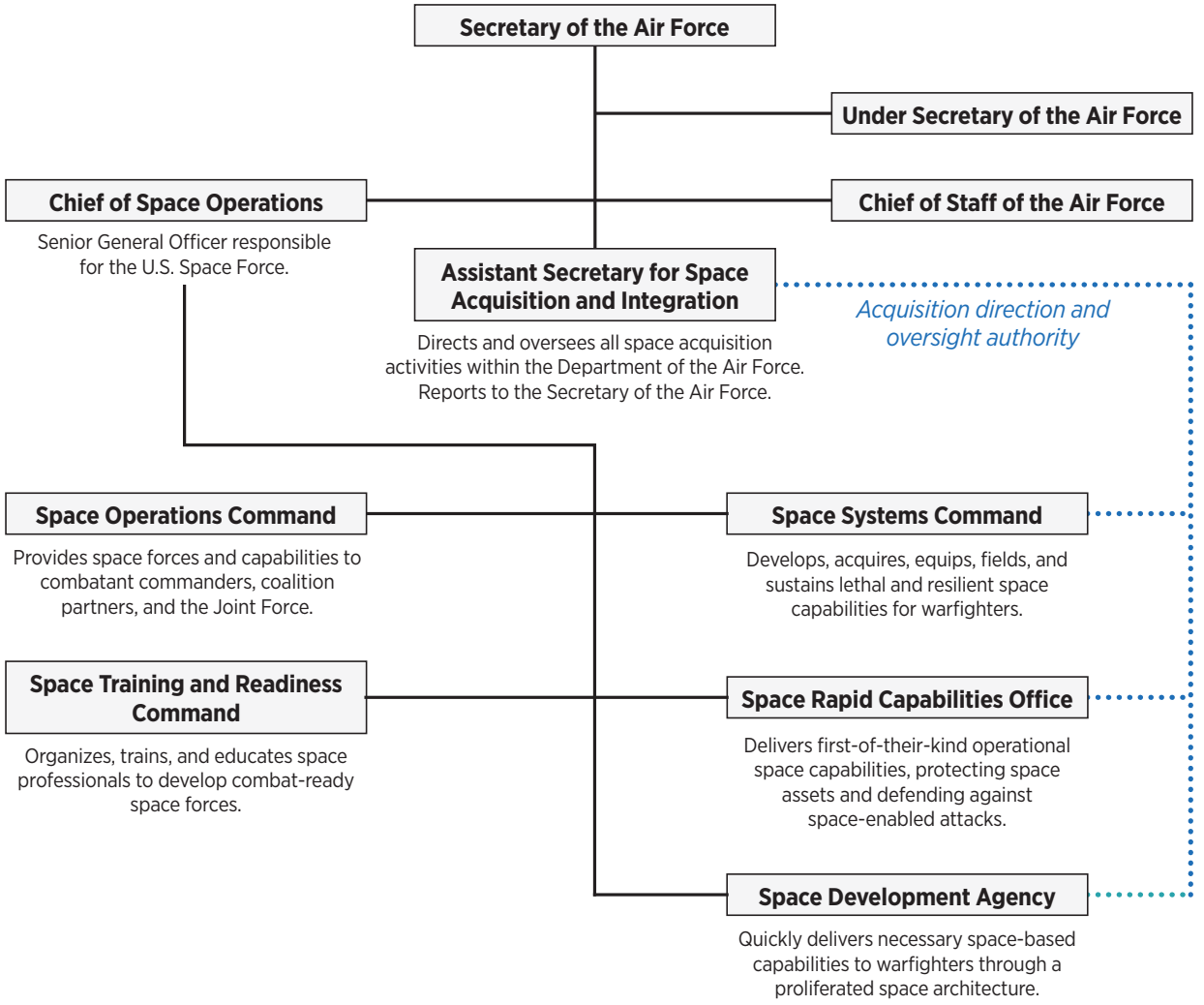
The CFC is headquartered in Colorado Springs, CO, at Peterson Space Force Base. The FIELDCOM generates and "present[s] combat-ready intelligence, cyber, space and combat support forces" to U.S. Space Command and the other combatant commands.[12]

The STARCOM is headquartered in Florida, at Patrick Space Force Base. The FIELDCOM "is responsible for the deliberate development, education, and training of space professionals in addition to the development of space warfighting doctrine, tactics, techniques, and procedures, and the operational test and evaluation of Space Force systems."[13]

The Space Futures Command has been proposed by the CSO. The location has not yet been determined. If established, it will "forecast the threat

FIGURE 3

Space Force Organizational Chart



SOURCE: Karl A. Bingen et al. "U.S. Space Force Primer," Center for Strategic and International Studies, Aerospace Security Project, December 22, 2022, https://aerospace.csis.org/us-space-force-primer/ (accessed January 21, 2026).

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environment, develop, and validate concepts, conduct experimentation and wargames, and perform mission area design."[14]

Space Force, Space Command, NRO, NASA, and NOAA

The focus of this assessment is on the United States Space Force. It is important to note, however, that there are other U.S. government organizations that support national security with their space capabilities, authorities, and responsibilities.

Space Force. As described earlier, the U.S. Space Force is the military branch responsible for space capabilities. The roles of the military branches (Army, Navy, Marine Corps, Air Force, Space Force, and Coast Guard) are to organize, train, equip, and present forces to the geographic and functional combatant commands.[15] As a military branch dedicated exclusively to space operations, the Space Force develops, trains, and sustains space professionals responsible for operating satellites, conducting space surveillance, and providing crucial

data for defense operations. They are tasked with enhancing the resilience of space systems against potential threats and ensuring uninterrupted access to and use of space for military operations.

Space Command. U.S. Space Command (USSPACECOM) is the geographic combatant command responsible for overseeing space operations. It provides command and control of space forces and coordinates with other combatant commands to integrate space capabilities into national defense strategies. U.S. Space Command "plans, executes, and integrates military spacepower into multi-domain global operations in order to deter aggression, defend national interests, and when necessary, defeat threats."[16] The relationship between U.S. Space Force forces and U.S. Space Command is essentially the same as the relationship between U.S. Air Force forces and other combatant commands such as U.S. Indo-Pacific Command (INDOPACOM) or U.S. Central Command (CENTCOM).

NRO. The National Reconnaissance Office designs, builds, and operates reconnaissance satellites that provide critical intelligence to national security leaders. NRO's high-resolution imaging, signals intelligence, and other surveillance capabilities are essential for monitoring global events, detecting threats, and supporting military operations. Its satellites offer real-time data that enhance situational awareness, inform decision-making, and support defense and intelligence missions. The NRO is not part of the U.S. Space Force, but the two organizations collaborate closely on a variety of acquisition programs and efforts. Additionally, approximately 800 Guardians are assigned to the NRO to support acquisition and operation of its reconnaissance satellites.[17]

NASA. The National Aeronautics and Space Administration (NASA) focuses primarily on civilian space exploration and research, but its contributions to national security are substantial. NASA's advancements in space technology, satellite communications, and Earth observation support military operations and national security objectives. NASA–Space Force–NRO collaborations enhance the capabilities of space systems used for reconnaissance, navigation, and communication. Additionally, NASA's research in space weather and its impact on satellite operations contributes to the protection and resilience of space infrastructure that is crucial for national defense.[18]

NOAA. The National Oceanic and Atmospheric Administration (NOAA) is tasked with monitoring and understanding environmental conditions, including space weather. NOAA's satellites provide essential data for weather forecasting, climate monitoring, and environmental assessments. This information is vital both for planning and executing military operations and for ensuring the safety and effectiveness of defense missions. NOAA's role in tracking space weather phenomena like solar flares and geomagnetic storms helps to protect space-based assets and communication systems from potential disruptions, thereby supporting national security.[19]

Key U.S. Space Force Capabilities

U.S. space capabilities, including those of the U.S. Space Force, NRO, NOAA, NASA, and a rapidly growing number of commercial space companies, are essential to the American way of war and the American way of life. Specifically:

> [Space-based capabilities] provide the backbone for more than half of our nation's infrastructure including communications, emergency services, energy, financial, agriculture and food, and transportation. Collectively, space-enabled applications account for hundreds of billions of dollars in U.S. economic activity. Moreover, the modern U.S. military is built around the assumption that spacepower will be there when needed. Military forces on land, in the air, and at sea rely on space capabilities to include global communication, command and control, navigation, precision targeting, missile warning and defense, and persistent battlespace awareness.[20]

Put simply, space is foundational to the Joint Force: National security depends on military spacepower. Admiral Samuel Paparo, Commander of USINDOPACOM, reinforced this sentiment in his written testimony to the House Armed Services Committee in April 2025:

> Space superiority is essential to our operations across all domains. U.S. adversaries are rapidly developing sophisticated counter-space capabilities, including direct-ascent anti-satellite weapons, co-orbital threats, and advanced

MAP 16

Strategic Missile Warning: Key Bases

The U.S. Space Force includes several facilities that use large phased-array radars designed to detect and provide launch and impact information from adversary ICBMs.



1. Beale AFB, CA (UEWR)
2. Clear Air Station, AK (UEWR)
3. Buckley Space Force Base, CO (Other)
4. Cavalier Space Station (PARCS), ND
5. Pituffik Space Base, Greenland (UEWR)
6. Cape Cod Air Station, MA (UEWR)
7. RAF Fylingdales, United Kingdom (UEWR)

NOTES: PARCS—Perimeter Acquisition Radar Characterization System; UEWR—Upgrade Early Warning Radar.
Buckley SFB is headquarters for Space Base Delta 2 and Mission Delta 4, which are responsible for global missile warning and situational awareness.
SOURCE: Heritage Foundation research.

heritage.org

jamming systems. To maintain our competitive advantage, USINDOPACOM and USSPACECOM require resilient space-based systems that operate through contested domains without capability degradation. This includes enhanced space domain awareness systems, combat credible defensive counter-space systems, and rapidly deployable satellite

constellations that provide redundancy and complicate adversary targeting.[21]

The importance of space to the U.S. way of war cannot be overemphasized. A key U.S. advantage is the ability to network an extensive variety of sensors, shooters, and decision-makers—Command, Control, Communication, Computers, Intelligence, Surveillance, and Reconnaissance (C4ISR)—across all domains. The warfighter requires that the network be resilient to myriad kinetic, electromagnetic, and cyber threats. Adversaries, particularly China, recognize this importance and are developing and fielding capabilities to deny the U.S. such an advantage. They intend to disrupt and destroy the satellites and ground stations critical to the U.S. C4ISR network. This is not a future problem: It is a "now" problem and one that requires resources and innovative capabilities, tactics, techniques, and procedures to improve resilience and constantly stay ahead of the threat.

U.S. Space Force capabilities include both satellites and a significant ground-based infrastructure. Satellites support the terrestrial warfighter with positioning/navigation/timing, missile warning and defense, communications, weather forecasting, and tactical surveillance/reconnaissance/tracking. Additionally, Space Force satellites provide space domain awareness. U.S. Space Force also flies experimental and developmental satellites in support of future space programs. Ground-based capabilities include launch facilities and related launch range support, satellite command and control, space domain awareness sensors, and missile warning and defense sensors. The Space Force does not control or operate the NRO's exquisite intelligence satellites, nor does it have manned capabilities (although Guardians have flown missions on the International Space Station).

Positioning, Navigation, and Timing (PNT). PNT includes three distinct functions:

- **Positioning**, the ability to accurately and precisely determine one's location and orientation two-dimensionally (or three-dimensionally when required) referenced to a standard geodetic system (such as World Geodetic System 1984, or WGS84);

- **Navigation**, the ability to determine current and desired position (relative or absolute) and apply corrections to course, orientation, and speed to attain a desired position anywhere around the world, from sub-surface to surface and from surface to space; and

- **Timing**, the ability to acquire and maintain accurate and precise time from a standard (Coordinated Universal Time, or UTC), anywhere in the world and within user-defined timeliness parameters. Timing also includes time transfer.[22]

PNT is provided by the U.S. Space Force's Global Positioning System (GPS). The GPS is operated by Delta 8 at Schriever Space Force Base in Colorado. The system includes satellites in nearly circular orbits approximately 12,550 miles above the Earth's surface, a Master Control Station, six dedicated monitor stations, four ground antennas, and receivers (or the user segment). The constellation requires a minimum of 24 operational satellites and can include as many as 32. Currently, there are 31 operational satellites in the constellation.[23]

GPS is indispensable to the terrestrial warfighter. It offers unparalleled precision in navigation, positioning, and timing. It also enables the accurate and economical delivery of precision munitions so that targets are hit with minimal collateral damage. This capability is vital in contemporary warfare, where accuracy is paramount for both tactical and strategic missions. Moreover, GPS supports the coordination of troops, vehicles, and aircraft, facilitating seamless movements and operations in complex environments. The integration of GPS with command-and-control systems enhances situational awareness and decision-making, thereby enabling forces to respond swiftly and effectively to emerging threats. In essence, GPS is foundational to all domains—land, air, sea, space, and cyberspace.[24]

Beyond its military applications, GPS holds immense value for civil and commercial functions. It drives significant economic activity both in the U.S. and globally, and GPS technology facilitates operations and improves efficiency in various industries, including transportation, agriculture, telecommunications, and finance. For instance, GPS enables precise navigation for commercial aviation and maritime shipping, which in turn enhances safety and reduces fuel consumption. In agriculture, GPS-guided equipment allows for optimized

planting and harvesting that lead to increased crop yields and reduced resource use. The telecommunications sector relies on GPS for network synchronization, which ensures reliable communication services. Financial markets use GPS timestamps for transaction accuracy to support high-frequency trading. Overall, GPS contributes hundreds of billions of dollars annually to the U.S. economy and trillions to the global economy. According to a 2019 study by RTI International, GPS "has driven $1.4 trillion in economic growth since 1983."[25]

Ensuring the resilience of PNT capabilities is paramount for both military and civilian operations. The inherent resilience of the GPS system is further bolstered through allied Global Navigation Satellite Systems (GNSS) such as the European Union's Galileo and Japan's QZSS. These systems not only provide redundancy, but also enhance the robustness and reliability of global PNT services. In a contested environment, the interoperability and combined resilience of these GNSS networks ensure that critical operations, from precision munitions delivery to synchronized financial transactions, remain uninterrupted.[26]

Missile Warning and Defense. Mission Delta 4, headquartered at Buckley Space Force Base in Colorado, operates and maintains a robust strategic missile warning system that includes both satellites and ground-based radars to detect and track missile launches worldwide. This system includes a network of satellites in geostationary and highly elliptical orbits that provide persistent global surveillance and early warning capabilities. Complementing these satellites are advanced ground-based phased-array radars in Alaska, California, Massachusetts, North Dakota, Greenland, and the United Kingdom that are strategically positioned to enhance detection and tracking accuracy, offering comprehensive coverage and resilience against potential threats. These same space-based and ground-based sensors provide tipping and cueing information to missile defense capabilities, enhance battlespace awareness to the geographic combatant commanders, and gather technical intelligence. Together, these capabilities ensure constant vigilance and preparedness, safeguarding national security and supporting strategic decision-making in a contested environment.[27]

Satellite systems include the Defense Support Program (DSP) and the Space-Based Infrared System (SBIRS). The notional constellation is four satellites in geosynchronous orbit (at approximately 22,500 miles altitude) and two sensors in highly elliptical orbits to provide coverage of the most northern latitudes. The DSP satellites, which have been a cornerstone of missile detection since the 1970s, feature infrared sensors to identify heat signatures from missile launches. These systems have been progressively enhanced by SBIRS, which offers improved surveillance, tracking, and missile warning capabilities through its constellation of geosynchronous satellites and sensors in highly elliptical orbit.

These enhanced capabilities result in improved prediction accuracy for global strategic and tactical warfighters. The ongoing evolution of the ground system includes improved mission processing software that increases event message accuracy and reduces manpower for support and operations of the DSP and SBIRS portfolio.[28] As missile threats continue to evolve, the Space Force is developing next-generation missile warning satellites to improve detection accuracy and resilience. These future systems will operate in low-Earth, mid-Earth, geosynchronous, and highly elliptical orbits. They will integrate advanced infrared technology, enhanced ground processing capabilities, and increased interoperability with allied missile warning networks.

Communications. Satellite communications provide critical infrastructure for both military and civilian applications. At geosynchronous orbit, satellites maintain a fixed position relative to the Earth's surface, ensuring continuous coverage and reliable communication links for strategic command and control and secure data transmission. Mid-Earth orbit satellites offer broader coverage and faster signal transmission, which are vital for real-time operations and global connectivity. Low-Earth orbit satellites, with their closer proximity to the Earth, support modern demands for rapid data exchange and internet services by enabling high-speed communication with minimal latency. Together, these satellite systems underpin such essential services as GPS, weather forecasting, telecommunications, and emergency response and help to promote significant economic activity and foster global trade.

The United States Space Force operates a variety of satellites in support of strategic and tactical

communication as well as broadcast service. The current strategic communication satellite systems include MILSTAR (Military Strategic and Tactical Relay); AEHF (Advanced Extremely High Frequency); ESS (Evolved Strategic SATCOM); and EPS (Enhanced Polar System).

Operated by Space Delta 8 at Schriever Space Force Base in Colorado, "MILSTAR provides the President, Secretary of Defense, and America's armed forces with assured, survivable satellite communications (SATCOM) with low probability of interception and detection, and is designed to operate through contested environments."[29]

AEHF is the follow-on to MILSTAR and provides survivable, global, secure, protected, and jam-resistant communications for high-priority military ground, sea, and air assets. AEHF enables the Department of War to control tactical and strategic forces through all levels of conflict. It provides connectivity across the spectrum of mission areas, including land, air, and naval warfare; special operations; strategic nuclear operations; strategic defense; theater missile defense; and space operations and intelligence. Multiple international partners support the AEHF program.[30]

ESS will eventually replace the AEHF satellite constellation. The new system is projected to provide critical jam-resistant communication channels for the National Command Authorities and deployed forces worldwide, even in the North Polar region—a capability that the current system lacks. The Space Force plans to start production in 2025 and field the constellation by 2030. The ESS constellation will include at least four satellites in geosynchronous and highly elliptical orbits.[31]

The Space Force's tactical SATCOM capabilities are essential for maintaining resilient and secure communication links in diverse operational environments. The Wideband Global SATCOM (WGS) system plays a pivotal role in this framework by providing high-capacity data transmission for military and government users worldwide. Currently, 10 WGS satellites, positioned in geosynchronous orbit, offer both X-band and Ka-band communication capabilities, enabling flexible and reliable connectivity for tactical and strategic missions. Two additional WGS satellites are in development. These satellites support a range of applications, including battlefield coordination, intelligence dissemination, and logistical support, to ensure that U.S. forces and their allies can maintain robust communications even in contested or remote areas. The WGS program is funded and supported by several allied nations including Canada, Australia, Denmark, Luxembourg, and the Netherlands.[32]

The WGS system consists of three principal segments:

- The Space Segment (satellites), a constellation of satellites in geosynchronous orbit;
- The Control Segment (operators), which consists of the Delta 8 squadrons and resources for the planning, management, and control of the constellation; and
- The Terminal Segment (users), which consists of thousands of fixed, transportable, ground-mobile, air-mobile, ship-based SATCOM terminals with antennas the diameters of which range from about half a meter to almost 20 meters in size.[33]

Narrow-band satellite communications are a crucial component of the Space Force's strategic and tactical communications architecture. They provide reliable and secure communication channels in bandwidth-constrained environments, a capability that is essential for a range of users, including ground troops, special operations forces, and maritime units, who require dependable communication links in diverse and often contested operational settings. The Space Force operates several narrow-band satellite communication programs, including FLEETSATCOM, UHF Follow-on (UFO), and the Mobile User Objective System (MUOS).[34]

FLEETSATCOM, the initial narrow-band SATCOM system, consists of a single operational satellite in geosynchronous orbit that provides vital communication links for naval and tactical forces. The operational satellites of the UHF Follow-on program, which succeeded FLEETSATCOM, offer enhanced reliability and coverage. These satellites support a wide array of users, from individual soldiers to entire fleet units, enabling coordinated and effective operations across the globe.[35]

The latest advancement in narrow-band communications is the MUOS program, which includes five operational satellites designed to provide next-generation capabilities. By enhancing communication

capacity and flexibility, MUOS ensures that users can maintain connectivity even in the most challenging environments.[36]

The Space Development Agency (SDA) is currently advancing its plans to develop and deploy a constellation of low-Earth orbit (LEO) satellites called the Proliferated Warfighter Space Architecture (PWSA). The initial instantiation of PWSA, Tranche 1, is planned to include over 150 satellites to provide tactical communication and missile warning. The SDA operates several test and prototype satellites in LEO, demonstrating essential communication links for strategic command, control, and secure data transmission.[37] Currently, the Department of the Air Force and U.S. Space Force are reassessing their SDA plans, and the future of the SDA effort is uncertain.[38]

In addition to dedicated military satellite communication systems, the U.S. military relies increasingly on commercial communication satellite services to enhance its operational capabilities.[39] These services include satellites in geostationary, medium-Earth, and low-Earth orbits, which offer various advantages in terms of coverage, latency, and data transmission rates. Approximately 40 percent of military communications is facilitated through commercial satellites, highlighting their crucial role in augmenting the military's capacity for resilient and secure communications across the globe.[40]

Weather. Weather satellites serve as indispensable tools for military, civil, and commercial activities by providing critical data that ensure safety, efficiency, and strategic advantage. For military operations, these satellites offer real-time weather information that is crucial for planning and executing missions, especially in diverse and challenging environments. Civil authorities, including disaster response agencies, rely on weather satellite data to predict and mitigate the impacts of natural disasters, which helps to ensure public safety and timely emergency response. Commercial enterprises, particularly those in sectors like agriculture, aviation, and maritime, use weather forecasts to optimize operations, reduce risks, and enhance productivity. The comprehensive insights offered by weather satellites not only aid in immediate decision-making, but also contribute to long-term planning and sustainability efforts across various fields.

The U.S. Space Force operates multiple weather satellites that provide vital support for both military and civil operations. These satellites are strategically positioned in geostationary and polar low-Earth orbits to deliver comprehensive and real-time meteorological data. Military users such as ground troops, aviation units, and naval forces use the indispensable insights into weather patterns, climate conditions, and environmental changes provided by the satellites to plan and execute their missions with precision and safety.

The Defense Meteorological Satellite Program (DMSP) includes two operational satellites in sun-synchronous, low-Earth polar orbits at an altitude of approximately 450 miles.[41] The primary weather sensor is an optical system that provides "continuous visual and infrared imagery of cloud cover over an area approximately 1,600 miles wide." The satellites provide global coverage of weather features every 14 hours. Additional DMSP sensors "measure atmospheric vertical profiles of moisture and temperature." Military weather forecasters use this information to detect weather patterns and track existing weather phenomena including fog, thunderstorms, dust and sandstorms, and tropical cyclones. Other DMSP sensors measure space weather such as charged particles, electromagnetic fields, and ionospheric characteristics to "track the impact of the natural environment on ballistic-missile early warning radar systems, long-range communications, and satellite communications."[42]

The first Weather System Follow-on–Microwave (WSF-M) satellite was launched in April 2024 and measures "ocean surface winds, tropical cyclone intensity, sea ice, soil moisture, and snow depth, as well as low Earth orbit (LEO) energetic charged particles."[43]

The Space Force also operates weather satellites in geostationary orbit that previously were operated by NOAA. The satellites use an existing Remote Ground Station in Western Australia that was put in place in 2020 to support the mission. NOAA operates the satellites on behalf of the Space Force from the NOAA Satellite Operations Facility in Suitland, Maryland, and Wallops Command and Data Acquisition Station in Wallops Island, Virginia.[44]

Tactical Surveillance, Reconnaissance, and Tracking. Historically, the Air Force and now the Space Force have not developed and operated ISR satellites. This mission has been within the purview of the NRO. More recently, the Space Force and the NRO have established a collaborative arrangement

to field and operate a constellation of satellites to develop the Ground Moving Target Indicator (GMTI), a mission previously met by the now-retired Air Force E-8C aircraft's Joint Surveillance Target Attack Radar System (JSTARS) program.[45]

Unrelated to the GMTI mission, the Space Force and the NRO are developing an arrangement to improve sharing of commercial satellite ISR products with the terrestrial warfighter.[46] Scores of existing commercial ISR satellites could provide support to U.S. and allied warfighters. Companies provide electro-optical, radar, and radio frequency geo-location.[47]

Space Domain Awareness. The U.S. Space Force conducts Space Domain Awareness to monitor and assess the space environment, supporting the safety and security of space operations and facilitating offensive and defensive space control operations. This mission is supported by a network of sophisticated ground-based and space-based systems. Key ground-based systems include a wide variety of geographically dispersed telescopes and radars.[48] Space-based systems include the Space-Based Surveillance System (SBSS)[49] and Geosynchronous Space Situational Awareness Program (GSSAP).[50] These ground-based and space-based capabilities comprise the Space Surveillance Network (SSN), which tracks space objects, predicts potential collisions, warns of potential hostile actions, and enables offensive action.

Offensive and Defensive Space Control. The Space Force's role in space control includes both offensive and defensive operations, providing freedom of action in space while also protecting U.S. space assets from adversary interference. Offensive space control aims to prevent adversaries from using space capabilities against the U.S.; defensive space control focuses on protecting U.S. space systems from attack or interference.[51] According to the current Chief of Space Operations, "Domain control is the special province of warfighters, a unique responsibility that only military services hold.... It is the thing that distinguishes the Navy from the merchant marine and the Air Force from Southwest Airlines. It is the purpose of the Space Force to achieve space superiority."[52]

Specific capabilities to control the domain are generally classified, but open-source reporting on the adversary sheds light on the types of offensive capabilities the U.S. Space Force might pursue. Such capabilities could include ground or sea-based direct ascent missiles; powerful lasers to dazzle or damage satellite sensors and components; on-orbit kinetic, electromagnetic, and directed energy weapons; and cyber tools to interfere with adversary satellite command and control. The Space Force acknowledges ground-based capabilities to jam adversary satellites.[53]

Launch. Space launch serves as the gateway to deployment of satellites that enable communications, navigation, weather forecasting, and surveillance capabilities that are vital to both civilian and military operations. These launches ensure that the United States maintains its strategic edge in space by allowing for the monitoring of potential threats, rapid response to emerging situations, and the advancement of technological innovations that drive economic growth.

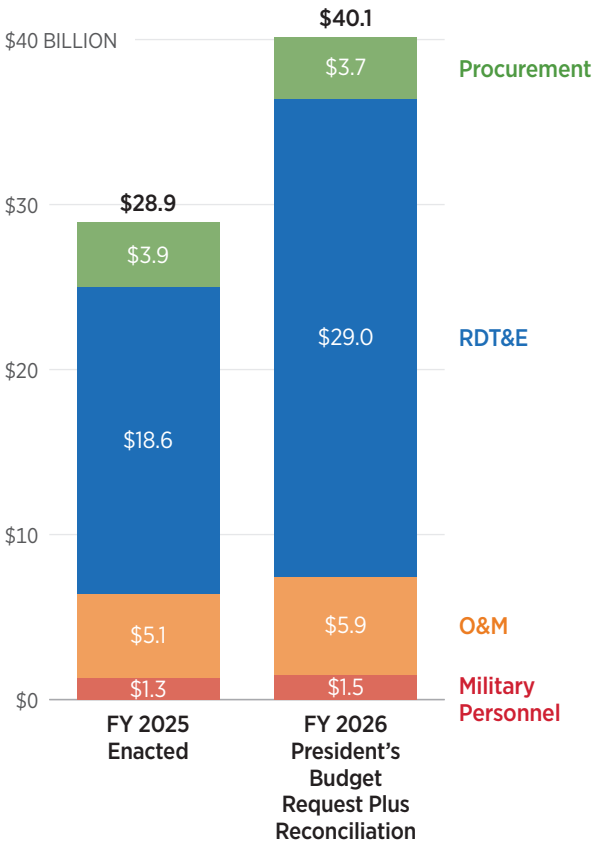
The U.S. Space Force owns and operates two launch bases and related ranges: Cape Canaveral Space Force Station on the east coast of Florida and Vandenberg Space Force Base on the central coast of California. Space Force procures launches from commercial providers to put national security satellites into space. Technological innovation in launch vehicles (rockets) and launch range operations has dramatically reduced the cost of launch and increased launch range capacity. These developments reduce financial barriers for both satellite and launch companies and allow government to develop and field large constellations of relatively small and relatively inexpensive satellites for national security.[54]

Satellite Command and Control. The Space Force operates the Satellite Control Network, a system of 19 antennas around the globe that supports launch and day-to-day control of U.S. government satellites, including both defense and Intelligence Community satellites. According to the GAO, increasing demand could compromise satellite missions, and the system is in need of significant modernization.[55]

Test and Experimentation Satellites. The Space Force routinely launches satellites to test new technologies, tactics, techniques, and procedures. Among the more notable is the X-37B Orbital Test Vehicle, an unmanned reusable space plane. Two of these spacecraft have flown at least seven times in both low-Earth and highly elliptical orbits and have remained in space for as long as 908 days.[56]

CHART 21

Space Force Budget Breakdown



NOTES: O&M refers to Operations and Maintenance. RDT&E refers to Research, Development, Test, and Evaluation.
SOURCES: U.S. Department of War, Office of the Under Secretary of War (Comptroller), "Defense Budget Materials—FY2026," https://comptroller.defense.gov/Budget-Materials/Budget2026/ (accessed January 21, 2026), and Heritage Foundation research.

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Space Force Budget

The FY 2025 enacted budget for the Space Force was $28.7 billion, a decrease of $0.6 billion from the FY 2024 budget and $800 million less than requested.[57] The total requested for FY 2026—which notably includes $13.8 billion provided by the One Big Beautiful Bill reconciliation legislation signed into law on July 4, 2025[58]—is $40.2 billion, an increase of more than $11 billion over the FY 2025 enacted amount.[59] The nation needs to sustain a Space Force budget of at least this magnitude.

The FY 2025 Operation and Maintenance (O&M) budget of $5.2 billion is about 18 percent of total Space Force funding. The budget funds 81 percent of Weapon System Sustainment requirements and a 2 percent civilian pay raise. It also "sustains mission operations and supports headquarters and field commands for doctrine development, warfare, intelligence, and professional military education."[60]

The FY 2025 Military Personnel (MILPERS) budget reflects 4 percent of the budget at $1.2 billion. It includes "end strength growth from 9,400 military authorizations to 9,800 military authorizations" and "a 4.5% pay raise, 4.2% Basic Allowance for Housing, and 3.4% Basic Allowance for Subsistence."[61] The FY 2026 budget request for Space Force MILPERS is $1.5 billion.[62] It increases military authorizations end strength to 10,400 and includes "an across-the-board 3.8 percent pay raise, an increase of 4.2 percent for Basic Allowance for Housing, and 3.4 percent for Subsistence."[63]

The FY 2025 Research, Development, Test & Evaluation (RDT&E) budget of $18.7 billion is the largest portion of the Space Force's annual funding—almost 64 percent of the total. It includes "funding for Resilient Missile Warning/Missile Tracking capabilities, Space Technology Development and Prototyping, Ground/Space Domain Awareness, Next-Generation Overhead Persistent Infrared (OPIR), Evolved Strategic Satellite Communication (SATCOM) (ESS), Protected Tactical SATCOM (PTS), and Tech Transition (Space)."[64] The FY 2026 budget request includes $15.5 billion (a decrease of ~$3 billion), but the One Big Beautiful Bill Act adds $13.5 billion for a total of $29 billion.[65] Much of this increase will likely fund elements of the Golden Dome with money specified for "Long Range Kill Chains;" "Resilient Missile Warning Missile Tracking—Low Earth Orbit (LEO);" and "Resilient Missile Warning Missile Tracking—Medium Earth Orbit (MEO)."[66]

The FY 2025 $4.3 billion Procurement budget reflects approximately 15 percent of total Space Force funding. It "funds acquisition of space vehicles and terminals, ground control systems, launch services for seven National Security Space Launches and four SDA launches, and related communications security and training products."[67] The FY 2026 budget request for Space Force procurement is $0.9 billion less than FY 2025's at $3.4 billion.[68] The decrease reflects three fewer National Security Space Launches than in the prior year.

Although the FY 2025 Space Force budget is almost twice as large as the initial FY 2020 budget, most of this increase reflects consolidation of other funding previously managed by the Air Force, Navy, Army, and Space Development Agency. The Chairman of the House Appropriations Subcommittee on Defense expressed skepticism as to whether the FY 2025 Space Force budget request would keep pace with the capabilities needed.[69]

Space Threats

Any discussion of space threats must include the threats against U.S. and allied space capabilities (threats *to* space) and the threats against U.S. and allied terrestrial capabilities posed by adversary space systems (threats *from* space).

Threats *to* Space. For many decades, the Department of Defense recognized that adversaries could threaten U.S. space capabilities through a variety of ground-based and space-based capabilities. These threats include kinetic attacks and cyberattacks against ground infrastructure such as launch infrastructure, command-and-control antennas, and missile warning radars; the use of lasers to blind, damage, or destroy satellites; electronic warfare to jam ground-to-space, space-to-ground, and space-to-space communication and command-and-control links; ground-based kinetic attacks (missiles) against satellites; space-based kinetic attacks from one satellite to another; and the use of nuclear weapons in space (an exo-atmospheric explosion that instantly destroys systems and creates a nuclear environment that disrupts and destroys satellites over time).

China. According to the U.S. Space Force, "China is the PACING CHALLENGE and is rapidly improving its space capabilities to TRACK & TARGET U.S. military forces. China & Russia are pursuing a wide range of counterspace capabilities to DISRUPT & DEGRADE U.S. space capabilities." The Space Force assesses that "[t]he People's Liberation Army (PLA) expects space to play an important role in future conflicts by enabling long-range precision strikes and denying other militaries the use of space-based information." In addition, "the PLA likely sees counterspace operations as means to deter and counter U.S. military intervention in a regional conflict."[70]

In 2007, China used a direct-ascent antisatellite missile (DA-ASAT) to destroy one of its defunct weather satellites in low-Earth orbit, "creating more than 2,700 pieces of trackable debris that remain in orbit." Since 2007, China has advanced that missile "into an operational system intended to target LEO satellites." In addition:

- China likely intends to field ASAT weapons capable of destroying satellites up to geosynchronous altitudes, effectively holding at risk all U.S. and allied satellites.
- China is developing satellite "inspection and repair" systems which could have a dual-use function as weapons. In January 2022, the Chinese Shijian-21 satellite moved a non-functioning Chinese navigation satellite to a "graveyard orbit" above the geosynchronous belt. This technology could be used in future systems to grapple and move U.S. and allied satellites.
- The Space Force has observed many Chinese experimental satellites conducting "unusual, large, and rapid maneuvers" in the geosynchronous belt. These are tactics that "could have several military applications."
- China "has multiple ground-based laser weapons able to disrupt, degrade, or damage satellite sensors." The Space Force believes that China "could have higher-power systems able to damage satellite structures" later this decade.
- Chinese military exercises routinely include jamming "against space-based communications, radars, and navigation systems like GPS." The Space Force also believes that China "may be developing jammers to target SATCOM over a range of frequencies, including U.S. military protected extremely-high-frequency (EHF) systems."[71]

Russia. Russia continues to develop, test, and deploy counterspace systems "to take advantage of a perceived vulnerability of U.S. military dependence on space." For example:

- In November 2021, Russia tested a DA-ASAT missile against a non-operational Soviet satellite in low-Earth orbit, "creating 1,500 pieces of trackable debris."

- A large missile observed on a MiG-31 aircraft in 2018 "may be related to an air-launched ASAT missile…that will be 'capable of destroying targets in near-space.'"

- Russia has deployed several orbital ASAT prototypes in low-Earth orbit in 2017, 2019, 2022, 2024, and 2025. "The four most recent were all placed in orbits matching those of U.S. national security satellites, and one ejected an object near a Russian satellite while testing a space-based ASAT weapon."

- Starting in 2018, "Russia deployed laser weapons to five strategic missile divisions." The system is intended to "mask missile deployments by blinding satellite sensors." The Space Force believes "Russia may deploy more powerful lasers by 2030."

- Russia is "developing an ASAT capability using a satellite designed to carry a nuclear weapon."

- Russia told international regulators in 2025 that "it considered European satellites aiding Ukraine's military as 'legitimate targets,'" and its "continuing electronic attacks on GPS and SATCOM across Europe have been called 'extremely worrisome and unacceptable['] by the International Telecommunications Union."[72]

Threats *from* Space. U.S. adversaries, particularly China and Russia, understand the value that space provides to terrestrial warfighting and have developed significant capabilities to communicate, sense the battlefield, provide navigation, and target U.S. and allied forces in conflict.

China. According to the Space Force, "CHINA's ambitious space program is…key to Chinese Communist Party (CCP) plans for a powerful and prosperous nation" and, as noted above, is expected "to play an important role in future conflicts by enabling long-range precision strikes and by denying other militaries the use of space-based information."[73]

In 2015, the CCP "organized its military space capabilities under the newly-established Aerospace Force which was subsequently aligned under the Central Military Commission in Beijing." By July 2025, China had conducted 42 space launches, 41 of which were successful, and had placed 112 payloads into orbit, 17 percent of which "were intelligence, surveillance, and reconnaissance capable satellites." In addition:

- "Since the end of 2015, China's on-orbit presence has grown by approximately 927% (+1,049 satellites). As of July 2025, China had more than 1,189 satellites in orbit."

- The Chinese military "benefits from 510+ ISR-capable satellites with optical, multi-spectral, radar, and radio frequency sensors, increasing its ability to detect U.S. aircraft carriers, expeditionary forces, and air wings."

- China's "improving space-based capabilities combine with its growing arsenal of stand-off weaponry to enable long-range precision strikes against U.S. and allied forces."

- "China has launched three reusable space-planes that released unidentified objects." They were in orbit for two days, more than nine months, and almost nine months, respectively.[74]

Russia. According to the Space Force, "Russia has one of the world's largest space programs and is among the world's most capable space actors. Its experience and pedigree are unmatched outside the U.S." Moreover, "Russia views space as a warfighting domain and believes space supremacy will be a decisive factor in future conflicts."[75]

Russia's military space capabilities and personnel were integrated into the Aerospace Forces in 2015, "in part to better integrate space-based capabilities into larger operations." More recently, its space technology has declined as a result of such problems as funding shortfalls and growing international isolation. Moscow still hopes to maintain its constellations and develop next-generation capabilities. However:

- Russia conducted only 17 launches in 2024 and "remained largely absent from the international launch market, launching only five foreign payloads."

- Despite its expertise in rocket engines and space launch, Russia increasingly lags behind the U.S. and China in launch activity.

- Russia operates some of the world's most capable ISR satellites for optical imagery, SIGINT, and missile warning but relies increasingly on civil and commercial satellites. Russian private military companies, for example, have purchased imagery from Chinese company Spacety to support combat operations in Ukraine.[76]

Readiness

Any discussion of military readiness should begin with a fundamental question: "Ready for what?" Historically, the U.S. Space Force and the earlier space forces of the Air Force, Army, and Navy have maintained high levels of readiness to operate in a benign, uncontested environment. However, the Space Force is *not* ready to operate successfully in a contested space environment. Current Space Force capabilities are vulnerable to myriad adversary counterspace systems, and the Space Force does not have sufficient capacity or capability to hold adversary space systems at risk.

The Space Force has taken and continues to take steps to address this situation. There is a Field Command (Space Training and Readiness Command) dedicated to the task of implementing robust training and developing the tactics, techniques, and procedures necessary to operate during wartime. The proposed Space Futures Command would define the set of resilient capabilities as well as offensive and defensive space control capabilities necessary to operate in and through a contested space environment. The Space Development Agency is fielding a constellation of data transport and threat tracking satellites that are inherently resilient to many adversary threats.

All of this action is warranted, but significant additional resources and people will be required. Flat budgets of approximately $30 billion are not enough to address the readiness challenges that the Space Force must confront.

Future Capabilities, Challenges, and Issues

Future Space-based Capabilities. The Space Force is being asked to take on new missions to support the Joint Force. In addition to traditional Communication, Position/Navigation/Timing, Weather, and Missile Warning missions, the Space Force is collaborating with the Intelligence Community to develop and operate a constellation of radar satellites to track ground-based and sea-based moving targets. Heretofore, this mission was accomplished by the now-retired Joint Surveillance Target Attack System (JSTARS) E-8 aircraft. The Air Force and Space Force are also considering how the Space Force can support the Air Battle Management mission currently conducted by the Airborne Warning and Control System (AWACS) E-3 Sentry aircraft.[77]

The Space Force might consider global logistics as an additional mission in the coming years. As the price of launch continues to drop and launches become increasingly routine, using rockets to move material and even manpower becomes practical. Suborbital launches could move critical material to any place on the planet within a couple of dozen minutes.[78]

The Space Force might also consider applying kinetic or electromagnetic force from space to the air, land, and maritime domains. China has already demonstrated the capability to do so with its launch and reentry of a hypersonic test vehicle.[79] Such "force application" capabilities are not prohibited by existing treaties, although they might be perceived as destabilizing.

An Expanding Area of Responsibility (AOR). Historically, the Space Force and its predecessors have operated in relatively near-Earth space—out to approximately 22,500 miles above the Earth's surface. Both the PRC and the U.S. are now devoting increasing attention to the environment that extends to the moon—approximately 275,000 miles away—commonly called the "cislunar space." Both nations recognize the geopolitical, military, and potential economic value of operating beyond the traditional near-Earth altitudes.[80] This emerging recognition presents significant technical and budgetary challenges that the Space Force will need to address in the coming years. For now, the men and women of the Space Force will have their hands full satisfying the Joint Force's needs and ensuring dominance of the traditional near-Earth Space AOR.

Acquisition Reform. The current House version of the FY 2026 NDAA focuses significant attention on acquisition reform. Key themes include delivering capabilities at speed and scale, revitalizing the defense industrial base, leveraging commercial

innovation, and developing a mission-oriented defense acquisition workforce.[81]

All of these themes are applicable to space acquisition, and many are underway. The Space Development Agency has made significant progress in delivering space capabilities at speed and scale. On September 10, 2025, the SDA launched 21 "Tranche 1" data transport spacecraft into low-Earth orbit. The agency plans to launch the remaining 120-plus Tranche 1 data transport and missile warning and tracking satellites over the next couple of years.[82]

In April 2024, the Space Force published the "U.S. Space Force Commercial Space Strategy." In the foreword to the document, the CSO and Assistant Secretary of the Air Force for Space Acquisition and Integration wrote that:

> In this increasingly congested and contested space domain, we must seize the opportunity to capitalize on significant innovative commercial space solutions. As outlined in the National Defense Strategy (NDS), we must tap into the spirit of American entrepreneurship, innovation, and vibrant competitive markets to be successful and sustain our competitive advantage across the spectrum of conflict in this era of Great Power Competition.[83]

Additionally, the Space Force is organizing its forces into "Mission Deltas." According to the Space Force:

> Mission Deltas oversee all aspects of mission area functions—people, training, equipment and combat sustainment. The MD framework consolidates the units in SpOC [Space Operations Command, now Combat Forces Command] that perform crew force operations, cyber defense and intelligence support with the program offices in Space Systems Command that perform Level 1 and Level 2 maintenance, operational enhancements and application-layer software development.[84]

This organizational construct will help to reinforce the NDAA goal of developing a mission-oriented defense acquisition workforce.

However, while all of these internal Space Force reforms are laudable, there is much more to be done. The department's most senior leadership must foster an environment that prudently accepts and manages risk. Congressional oversight must account for the need to "fail forward." Otherwise, acquisition professionals will default to risk aversion and process compliance.

Potential Organizational Changes. There are several important organizational changes that Congress, the President, and the War Department might do well to consider in the coming years. The first would be to make the service a department separate from the Department of the Air Force. Proponents of such a change argue that there is a need for dedicated senior leadership (Secretary and Under Secretary of the Space Force); dedicated support functions (manpower, environment and engineering, financial management, legislative liaison, general counsel, surgeon general, etc.); and champions for budget. Supporters of the status quo argue that recent and current Secretaries of the Air Force have been staunch supporters of the new service and that adding support functions would be an unnecessary growth in staff and bureaucracy with a negative return on investment.[85]

The second potential organizational change would be to combine the National Reconnaissance Office and the Space Force into a single organization. Perceived benefits of such an arrangement would include closer collaboration on space acquisition and operations; improved intelligence, surveillance, and reconnaissance support for the Joint Force; and reduced bureaucracy. Arguments for maintaining separate organizations focus on the need to satisfy national requirements of the Intelligence Community, the complexity of the current NRO budget sources and processes, and existing congressional oversight committee jurisdiction.[86]

Scoring the U.S. Space Force

Capacity Score: Marginal

The current capacity of the U.S. Space Force is sufficient in certain areas and inadequate in others. There are sufficient numbers of satellites providing PNT and missile warning. Additional communication, weather, and space domain awareness satellites are necessary to support terrestrial and space operations. Ground infrastructure supporting satellite command and control and space domain awareness is insufficient. Based on publicly available unclassified information, the Space Force has little to no capacity to protect existing and planned space systems. It also is woefully short of the resources required to hold adversary space systems at risk.

Capability Score: Marginal

The Space Force maintains and operates many highly capable systems. Its current communication, weather, PNT, and missile warning systems provide extraordinary capability. However, the Air Force has divested the Ground Moving Target Indicator mission, and there are no Space Force space systems to satisfy this mission. The Air Force will likely continue to divest certain missions historically conducted from the air that are no longer tenable in a contested air domain. The Space Force must be funded properly to develop and procure these capabilities. Additionally, the Space Force is years away from fielding the data transportation capability that is needed to support a way of war that remains dependent on a vast network of sensors, shooters, and decision-makers. Finally, the Space Force does not have the capability that is needed to protect U.S. space systems and hold adversary systems at risk.

Readiness Score: Weak

Previous versions of this assessment scored Space Force readiness as "Marginal." Space Force readiness has deteriorated both because of the increasing capability and capacity of the adversary and because of the increased likelihood that the adversary will seek to disrupt and destroy U.S. space capabilities. Put simply, the Space Force is not ready to operate in a contested environment. It is likely that any conflict with a major adversary will begin in space. Most of today's Space Force capabilities are highly effective in an uncontested environment, but unlike the other services, whose readiness challenges can be addressed by additional training, exercises, and improved maintenance, the Space Force lacks the capacity and capability to be ready for conflict in space.

Overall Assessment: Marginal

The Space Force is woefully short of the resources required to hold adversary space systems at risk and is not ready to operate in a contested environment even though conflict with a major adversary will likely begin in space. While most of its current capabilities are highly effective in an uncontested environment, the Space Force lacks the capacity and capability to be ready for conflict in space. The Space Force is years away from fielding the data transportation capability that is needed to support a way of war that remains dependent on a vast network of sensors, shooters, and decision-makers. Space Force readiness has deteriorated both because of the increasing capability and capacity of the adversary and because of the increased likelihood that the adversary will seek to disrupt and destroy U.S. space capabilities. While still capable, for these and many other reasons, the Space Force is assessed as "Marginal."

Policy Recommendations

Consistent with the criticality of the Space Force's function in our nation's way of war, coupled with the need to resource and organize most effectively, the President should:

- **Re-energize the National Space Council.** The first Trump Administration used the National Space Council to drive key organizational and cultural change, including the creation of U.S. Space Command and the U.S. Space Force. Given the multitude of challenges the nation faces, the President should direct the Vice President to lead the National Space Council.

- **Develop a national vision and strategy for space.** The President's leadership is vital if the nation is to realize the necessary space capabilities, innovation, collaboration with allies,

U.S. Military Power: Space Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability			✓		
Readiness		✓			
OVERALL			✓		

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

acquisition reform, and cultural change. In his first Administration, the President signed a number of critical space policy documents. Each one should be reviewed and, as necessary, updated or rewritten.

- **Emphasize the importance of space to deterrence.** The President should consider a declaratory statement regarding the importance of space-based capabilities and how the U.S. will consider both kinetic attacks and non-kinetic interference with such systems. Additionally, Congress should direct the Department of War to provide an unclassified report (with an appropriately classified annex) on how robust offensive space control capabilities can deny adversaries the benefits of space and how a declaratory policy and acknowledged set of capabilities can deter adversary hostile actions in space, at sea, in the air, on the ground, and in cyberspace.

For its part, Congress should:

- **Order an assessment of Space Force readiness.** Congress should direct the Chief of Space Operations to provide a detailed classified report on the state of Space Force readiness to operate in and through an increasingly contested domain. The report should identify shortfalls and a plan to establish high levels of readiness consistent with a multitude of emerging and evolving threats to U.S. national security, civil, and commercial space capabilities.

- **Pursue organizational opportunities.** Congress should hold hearings and direct reports on the Department of War's plans to consider such Space Force organizational opportunities as establishing a Space National Guard; raising the U.S. Space Force to a Secretary-led department on organizational par with the Departments of the Army, Navy, and Air Force; and combining the U.S. Space Force with the National Reconnaissance Office. The hearings and reports should include detailed costs and benefits.
- **Require the executive branch to report on progress in promoting competition and commercial capabilities.** Congress should direct the Chief of Space Operations and the Secretary of the Air Force to report on the progress implementing their plan to integrate commercial capability into Space Force architectures and operations. Congress should also direct the Secretary of War to report on the need for and plan to ensure a robust competitive space industry environment to drive down costs and drive up innovation.

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America's Strategic Deterrent

Robert Peters

Introduction

After decades of neglect, the United States is finally building new missiles, new bombers, new submarines, and—most important—new nuclear warheads. This massive nuclear modernization is driven by China's "breathtaking" nuclear breakout,[1] Russia's 10-to-1 advantage over the United States in non-strategic nuclear weapons, the breakdown in arms control following China's refusal to engage in any forms of arms control or strategic stability discussions and Russia's abrogation of the New START and Intermediate-Range Nuclear Forces treaties, and lesser nuclear threats that include the ever-advancing North Korean nuclear program and even Pakistan's nuclear buildup, which includes the pursuit of nuclear-capable missiles with the potential to hit targets in North America.

Although this deterioration in the security environment is bad enough, the U.S. nuclear modernization program is not going well. The United States is years behind schedule on fielding the Sentinel missile, the *Columbia*-class submarine, and new nuclear warheads; as of 2025, the National Nuclear Security Administration (NNSA) was nine years behind schedule in producing new plutonium pits, the fissile core of a nuclear weapon; and the United States still does not have a credible non-strategic nuclear option forward deployed in the Indo-Pacific theater despite the Chinese and North Korean nuclear buildups.

For these reasons, the U.S. deterrent is a mixed bag. America's strategic deterrent remains strong, but the ability of the U.S. to deter multiple nuclear-armed peers at the strategic level, as well as at the theater non-strategic level, will come under increasing strain. Accordingly, the U.S. strategic deterrent earns a very mixed rating.

History of America's Nuclear Deterrent

Born of the Second World War, America's nuclear deterrent remains the cornerstone and ultimate guarantor of American security.

Beginning in 1942, the Manhattan Project unfolded at laboratories and facilities across America, from the University of Chicago to Oak Ridge, Tennessee, and the mesas of Los Alamos, New Mexico. Academics, physicists, engineers, and military officers worked together to build the bombs that finally ended the Second World War.

The advent of the Cold War brought about larger arsenals of atomic weapons and new generations of ever more powerful weapons on a variety of platforms and delivery systems. In time, the United States fielded tens of thousands of nuclear weapons designed to deter Communist aggression. By the end of the Cold War, the United States maintained a strategic triad of nuclear-capable bombers, nuclear-armed ballistic missile submarines (SSBNs), and intercontinental ballistic missiles (ICBMs) that could carry high-yield nuclear warheads to any target in the world. At the same time, it fielded shorter-range, lower-yield non-strategic weapons.

America's strategic deterrent consists largely of the missiles, bombers, and weapons developed in the Cold War. This deterrent is undergoing a significant modernization process, and that process has not gone well with significant cost and schedule overruns.

The question then becomes: How credible is America's strategic deterrent, and where does it need to be strengthened?

Capacity, Capabilities, and Readiness

As noted, America's strategic deterrent consists of a triad of ICBMs, bombers, and ballistic missile

U.S. NUCLEAR AT A GLANCE

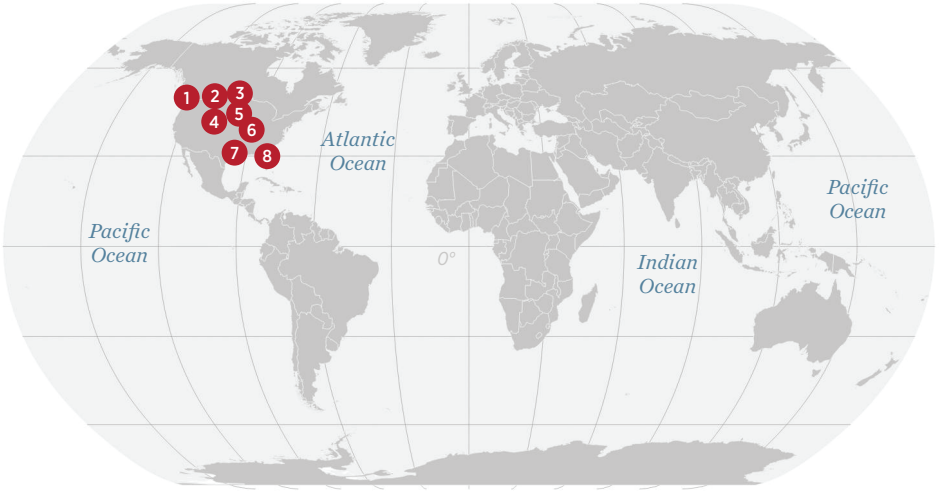
EST. 1945

MOTTO
"Peace Is Our Profession"



U.S. Navy Adm. Richard A. Correll
USAF, Commander

MAJOR BASES



1. Naval Base Kitsap
2. Malmstrom Air Force Base
3. Minot Air Force Base
4. Warren Air Force Base
5. STRATCOM HQ
6. Whiteman Air Force Base
7. Barksdale Air Force Base
8. Naval Submarine Base King's Bay

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$60

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

50,000

RESERVE MILITARY

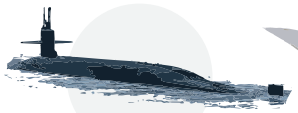
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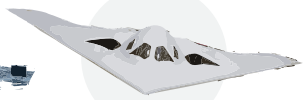
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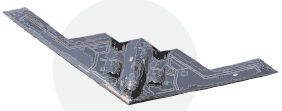
KEY EQUIPMENT (estimated current inventory)


ICBMs (400)


SSBN (14)


B-21 Raider


Air-Launched Cruise Missiles (300)


B-2A Spirit (19)


Gravity Bombs (200)


F-35A Lighting II (500)


B-52H Stratofortress (76)


Trident D5 (1,920)


F-16


F-15

SOURCE: Heritage Foundation research.

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submarines. In addition, the United States maintains a small arsenal of non-strategic nuclear weapons that are designed to deter limited nuclear attack.

ICBMs. The American intercontinental ballistic missile force consists of Minuteman III ICBMs dispersed across a number of states in 450 silos. These missiles are the most promptly responsive leg of the nuclear triad because of their constant readiness and direct communication with America's leadership. Their payload and speed also make their interception by adversary missile defenses difficult.

Each ICBM is currently loaded with a single high-yield, highly accurate warhead that can hold targets at risk throughout Europe and Asia in less than an hour. Each missile also has the capacity to carry additional uploaded nuclear warheads if there should be a policy decision to upload.

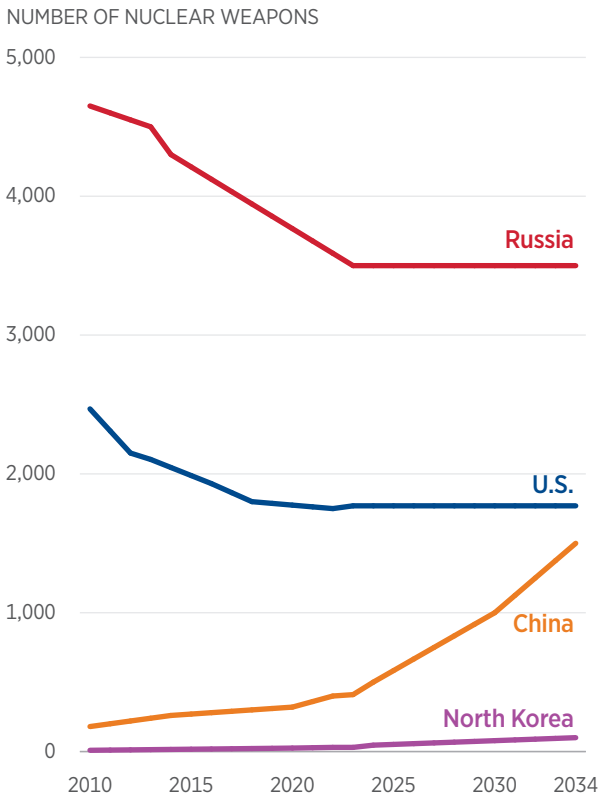
The ability to launch the ICBM force promptly means that our adversaries cannot be sure that they will be able to destroy our ICBMs prior to a launch—which means that even a large-scale nuclear strike on America's ICBM force could fail to destroy the ICBMs and also trigger the large-scale American nuclear response that our adversaries were trying to avoid by targeting our ICBMs in the first place. In this sense, the ICBM force's very existence contributes to deterrence and strategic stability because neither the United States nor an adversary has an incentive to launch a nuclear first strike on the other's homeland.

Because the ICBMs are stationed in hardened silos, they are highly survivable against all but multiple strikes from high-yield nuclear warheads. This survivability means that our adversaries cannot destroy a large number of our strategic bombers and ballistic missile submarines as part of an exquisite first strike without also committing significant (and nearly prohibitive) numbers of their high-end forces to the neutralization of America's missile fields. If the United States were to abandon its ICBM force, adversaries might be tempted to destroy our bombers and SSBNs while they are in garrison, thereby destroying a large percentage of America's strategic deterrent with relatively few weapons as part of an exquisite first strike.

America's Minuteman III force was first deployed in 1970 with an expected service life of roughly 10 years.[2] The last Minuteman was meant to retire during the Reagan Administration; however, for more than 30 years, the United States has

CHART 22

Comparing Nuclear Arsenals



NOTES: North Korea's nuclear arsenal in 2010 was estimated to consist of fewer than 10 operationally deployed nuclear weapons, and its 2022 nuclear arsenal was estimated to consist of between 20 and 30.
SOURCES: Hans M. Kristensen et al., "Chinese Nuclear Weapons, 2024," *Bulletin of the Atomic Scientists*, Vol. 80, No. 1 (2024), https://www.tandfonline.com/doi/epdf/10.1080/00963402.2023.2295206?needAccess=true (accessed January 21, 2026); U.S. Department of Defense, *Military and Security Developments Involving the People's Republic of China, 2023: Annual Report to Congress*, https://media.defense.gov/2023/Oct/19/2003323409/-1/-1/1/2023-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA.PDF (accessed January 21, 2026); Hans M. Kristensen, Matt Korda, and Eliana Reynolds, "Russian Nuclear Weapons, 2023," *Bulletin of the Atomic Scientists*, Vol. 79, No. 3 (2023), https://www.tandfonline.com/doi/epdf/10.1080/00963402.2023.2202542?needAccess=true (accessed January 21, 2026); Bruce W. Bennett et al., *Countering the Risks of North Korean Nuclear Weapons*, RAND Corporation and Asan Institute for Policy Studies, April 2021, https://apps.dtic.mil/sti/trecms/pdf/AD1130493.pdf (accessed January 21, 2026); and Hans M. Kristensen and Matt Korda, "Nuclear Notebook: United States Nuclear Weapons, 2023," *Bulletin of the Atomic Scientists*, Vol. 79, No. 1 (2023), https://www.tandfonline.com/doi/epdf/10.1080/00963402.2022.2156686?needAccess=true (accessed January 21, 2026).

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been using life extension programs (LEPs) to extend the Minuteman III's service life. The Sentinel missile, the Minuteman III's replacement, is scheduled to come online in the 2030s.[3]

Bombers. The air leg of America's deterrent force consists of B-52 and B-2 nuclear-capable bombers. During the first Cold War, America's strategic bombers were kept on day-to-day strip alert; today's nuclear-capable bombers are de-alerted but remain ready to respond to crises and deterrence requirements.[4]

Bombers are not as prompt as the missile force and take hours to reach their target. This longer flight time between the decision to employ nuclear weapons and the time of weapon on target gives policymakers the ability to recall bombers while in flight—a flexibility that is unique among America's strategic deterrent capabilities.

Also, because bombers are globally deployable, they provide an important signaling capability that can be directed both at America's allies, thus providing a visible assurance of America's extended deterrence commitment to them, and at America's adversaries as a visible demonstration of America's willingness to employ nuclear capabilities in defense of its interests and allies. The ability to deploy nuclear-capable bombers forward visibly and openly can demonstrate will and ultimately de-escalate tensions in a region by signaling that America is willing to use force and that an adversary may be crossing a red line.

Bombers are also able to carry a variety of munitions, including standoff air-launched cruise missiles, and a variety of gravity bombs with a number of different explosive yields. This flexibility in payload makes bombers of particular utility in the mission as a hedge against uncertainty.

The totality of the bomber leg of the nuclear triad is currently modernizing with the B-61 Mod 11 gravity bombs being replaced by the more advanced-yield B-61 Mod 12 bombs and the high-yield B-83 gravity bombs being replaced by the B-61 Mod 13 bombs. The standoff air-launched cruise missile is being replaced by the Long-Range Standoff (LRSO) cruise missile, and the B-2 stealth bomber will be replaced by the B-21 Raider bomber later this decade. This modernization of the weapons, missiles, and the bomber itself means that the bomber leg of the triad will be more survivable in a conflict and therefore more likely to carry out deterrence missions and deliver munitions successfully if deterrence fails.[5]

Ballistic Missile Submarines. SSBNs equipped with Trident II (D5) submarine-launched ballistic missiles (SLBMs) are the backbone of America's strategic deterrent. Taken as a whole, this sea-based leg of the triad is the most survivable component of America's strategic deterrent. Patrolling the Pacific and Atlantic oceans, SSBNs are virtually undetectable, which means that even if an adversary could carry out a cataclysmic attack on the American homeland, the submarine force could respond with an assured second-strike capability.

The *Ohio*-class submarine force, which first entered service in 1981, is in the twilight of its service life. The service life of these vessels, originally intended for 30 years, has been extended to more than 40 years.[6] Further significant life extensions are not feasible beyond the emergency LEPs the Navy is currently considering as a stopgap measure. Beginning in the early 2030s, the *Ohio*-class submarines will be replaced by the next-generation *Columbia*-class submarines.[7]

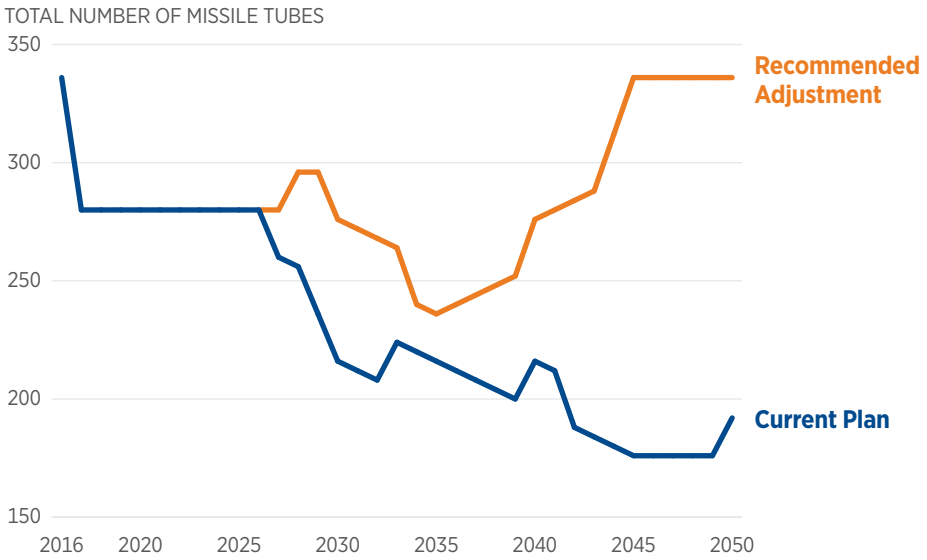
Non-Strategic Nuclear Weapons. Since the early days of the Cold War, the United States has forward deployed low-yield theater-range nuclear weapons to nations on the front lines. Nuclear munitions were stored in Korea, and North Atlantic Treaty Organization (NATO) pilots in Europe were trained to fly their nations' dual-capable aircraft, which could carry and employ American nuclear weapons. This was called nuclear burden-sharing.

NATO allies continue to host American B-61 nuclear gravity bombs to deter regional aggression. NATO allies are transitioning their Dual Capable Aircraft (DCA) squadrons from fourth-generation aircraft to fifth-generation F-35 DCA aircraft. Because of their stealthy nature, F-35s will have a greater chance of penetrating enemy air defenses and servicing relevant targets. This upgrade will enhance NATO's deterrent posture in the face of Russian attempts at nuclear coercion. Therefore, the United States will maintain the ability to forward deploy nuclear-capable bombers and U.S. and allied DCA globally.

In addition, the U.S. Departments of War and Energy will continue two programs established by the 2018 Nuclear Posture Review: the sea-launched cruise missile-nuclear (SLCM-N) and the low-yield SLBM. The SLCM-N is a major defense acquisition

CHART 23

Mitigating Lost Deterrence: *Ohio*-Class Life Extension and Additional Missile Tubes



SOURCES: U.S. Navy, Naval History and Heritage Command, "US Ship Force Levels 1886–Present," published November 17, 2017, https://www.history.navy.mil/research/histories/ship-histories/us-ship-force-levels.html (accessed January 21, 2026); U.S. Navy, Office of the Chief of Naval Operations, Deputy Chief of Naval Operations for Warfighting Requirements and Capabilities—OPNAV N9, *Report to Congress on the Annual Long-Range Plan for Construction of Naval Vessels for Fiscal Year 2025*, March 2024, https://s3.amazonaws.com/static.militarytimes.com/assets/pdfs/1710968056.pdf (accessed January 21, 2026); and authors' analysis.

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program that is slated for fielding in 2035.[8] It fills a hole in the U.S. arsenal that was created with the retiring of the TLAM-N nuclear Tomahawk cruise missile as directed by the 2010 Nuclear Posture Review.[9] The SLCM-N will be launched from a submarine or surface vessel without having to rely on host nation support. It may have a range of between 1,000 and 2,000 nautical miles, making it an important intermediate-range, penetrating theater capability with a low-yield warhead.[10]

The SLCM-N will serve as a visible or overt assurance to allies in the Indo-Pacific and Europe. Its non-ballistic trajectory, combined with its non-visible generation characteristics, will give our adversaries pause and therefore contribute to America's ability to deter strategic attacks on allies. The SLCM-N's deployability to the Western Pacific or Europe during times of crisis would signal to our adversaries that, despite their theater nuclear advantage, they cannot use nuclear threats or nuclear employment to coerce or gain advantage without risking a U.S. theater nuclear response in kind.[11]

The United States should continue to field the W76-2, the low-yield SLBM introduced following the 2018 Nuclear Posture Review and meant to give the United States a prompt, low-yield nuclear option delivered through a ballistic trajectory, even after SLCM-N is fielded to ensure that America fields a deterrent that is diverse in characteristics and composition. Because the so-called 2025 One Big Beautiful Bill Act includes increased funding for both the missile and the warhead,[12] SLCM-N's future should be secure.

Importance of the Modernization Program of Record. The United States began its current nuclear modernization program in 2010—when relations with China were mostly positive and before Russia set fire to the global arms control regime, invaded Ukraine, and began its now-tiresome series of nuclear threats against the West—to replace the Cold War legacy triad one-for-one with new warheads, missiles, bombers, and submarines. Every existing legacy platform or warhead would be replaced by a successor system.[13]

Modestly amended in 2018 to include the low-yield SLBM and the SLCM-N, the 2010 modernization program is a multi-decade endeavor to produce a modernized arsenal. However, the current nuclear modernization program of record is characterized by cost overruns and schedule delays in virtually every major aspect of the nuclear enterprise.

Most nuclear warheads in the arsenal are older than the median age of the average American. While it is safe to assume that the current force of bombers, submarines, missiles, and associated warheads will continue to perform their military function until they are replaced with the new arsenal in the coming decade, our nation cannot accept further delays in the modernization of its strategic deterrent.[14]

In many cases, this investment in America's strategic deterrent will pay dividends for the next half-century, including in the 2070s and 2080s when it is expected that the new warheads, ballistic missile submarines, and many of the missiles will be retired. This twice-in-a-century moment of recapitalizing our nuclear enterprise and ensuring that the cornerstone of American security remains strong is of paramount importance in protecting our nation.

Role and Function of America's Strategic Deterrent

America's nuclear deterrent has a number of important functions and is spread across a triad of capabilities, including land-based intercontinental ballistic missiles (ICBMs), ballistic missile submarines, and bombers as well as a set of non-strategic nuclear weapons.[15] The totality of America's strategic triad is being modernized to ensure that America's deterrent remains credible for the next half-century. However, while this modernization is necessary, it is also not enough to meet the challenges at hand effectively.[16]

As noted above, nuclear weapons are the ultimate guarantor of American security. For decades, both Republican and Democratic Administrations have sought to maintain a robust strategic deterrent capable of (1) deterring strategic attack, (2) assuring our allies, (3) achieving U.S. objectives if deterrence fails, and (4) hedging against future uncertainty.[17]

Deterring Strategic Attack. The primary goal of nuclear weapons is to deter a strategic attack on the American homeland, U.S. forces abroad, and allies around the world. Such an attack is most often thought of as a nuclear attack. The American nuclear arsenal therefore is meant to convey to our adversaries that the United States has the will and capability to deter nuclear attacks under any conditions and respond to such attacks with the full range of force in the nation's arsenal.

However, strategic attack does not necessarily have to be nuclear. Other strategic, non-nuclear attacks could include a biological weapons attack on the American homeland, a significant chemical weapons employment against U.S. forces or citizens, a devastating cyberattack against critical U.S. capabilities, or other forms of strategic attack that take place in space or against space-based targets. While this list is not exhaustive, our adversaries should understand that the types of capabilities used in such an attack are less important than their impact and that the United States will respond to any type of attack that has a strategic effect on the American homeland, U.S. citizens, or U.S. interests with overwhelming force.

Assuring Allies. For decades, the United States has extended nuclear deterrence commitments to allies in the Indo-Pacific and Europe.[18] Assuring our allies of America's commitments advances our mutual interests by deterring and, if necessary, defeating adversary aggression before it reaches America's shores. Assurance is built upon decades of trust, joint force deployments, strategic dialogues, and personnel exchanges. No one—not our own people, our allies, or our adversaries—should doubt the credibility and capability of America's nuclear umbrella. America's nuclear arsenal has been its most successful tool in assuring allies that they do not need to pursue their own nuclear weapons programs.

Achieving U.S. Objectives if Deterrence Fails. No one seeks to employ nuclear weapons, nor would anyone do so lightly.[19] Every U.S. President in the atomic age has considered employing nuclear weapons only in the most extreme circumstances and only for defensive use. Credibility, however, demands that the United States must maintain a reliable nuclear arsenal that is capable of achieving a variety of effects so that if deterrence fails and America's adversaries choose to secure their objectives by using violence and force, the United States is able to achieve its objectives.

Hedging Against Future Uncertainty. The United States has pursued and always should pursue a stable security environment that allows for

freedom and prosperity for all of the world's peoples, but it also must be prepared for a significant degradation of the security environment. Just as the world security environment degraded from 2010 to 2024, it is entirely possible that further degradations could manifest in heretofore unseen ways. Nuclear weapons must therefore remain a credible deterrent against unknown and unknowable developments in the years to come.[20]

As Russia increasingly relies on nuclear coercion as a means of "diplomacy" and China continues on its path as the world's fastest-growing nuclear power, nuclear weapons will become more important than ever as a hedge against uncertainty.[21] This is particularly true during a period when Russia and China have invested so heavily in their defense industrial bases and are seemingly prepared for large-scale, protracted conflict.[22] However, this also means that the United States must maintain the ability to produce nuclear warheads and associated delivery mechanisms—to include missiles, bombers, and submarines—at scale and rapidly in order to shore up deterrence in times of global uncertainty. This will require sustained investment both in the defense industrial base and across the nuclear enterprise itself.

The Force Today

Since the 1950s, the United States has relied on a triad of nuclear systems—ICBMs, bombers, and ballistic missile submarines—as the backbone of its strategic deterrent. Each leg of this triad performs specific functions that, while different, are mutually supportive and contribute to a nuclear posture that is meaningful to allies and adversaries alike. These functions and attributes mean that the nuclear triad is:

- **Survivable**—Ensures that the force and associated nuclear command and control are resilient and robust enough to survive adversary attack and function throughout the course of a conflict.

- **Deployable**—Is able to relocate to allied or partner territory for the purposes of political signaling or to enable military effect.

- **Diverse**—Has a number of range options, yield options, warhead and delivery types, and flight profiles; is able to engage multiple geographic locations despite adversary defenses; and is able to change targets quickly to enable adaptive planning and employment, thus giving the United States the ability to craft effective, credible, and tailored deterrent strategies.

- **Accurate**—Is able to strike targets with precision, thus minimizing the effects on non-targeted areas.

- **Penetrating**—Is able to overcome adversary active defenses while still holding at risk hardened and deeply buried targets.

- **Responsive**—Has the ability to deploy and deliver military effects as quickly as possible.

- **Visible**—Has the ability during crisis and conflict to signal to allies and adversaries the political message of America's willingness to employ nuclear weapons.

Assessing America's Nuclear Deterrent

The U.S. strategic deterrent includes nuclear warheads, associated delivery systems, and the ability to assure America's allies. Taken together, they make it possible to assess the effectiveness of America's nuclear deterrent.

Nuclear Warhead Stockpile. The United States currently has roughly 1,550 operationally deployed strategic nuclear weapons and around 200 operationally deployed non-strategic nuclear weapons.[23] Although the nuclear warheads are old—the newest was assembled in 1989, and some are decades older—all of the NNSA's computer modeling suggests that they will perform the military functions for which they were designed.[24] The B-61 gravity bombs, W76 and W88 warheads deployed on submarine-launched ballistic missiles, and W78 and W87 warheads on ICBMs should therefore be able to fulfill their military requirements if employed.[25] The W80, the sole warhead for the nuclear-armed air-launch cruise missile, is similarly effective.

Assessment: *Strong*.

Strategic Delivery System. America's ability to put nuclear weapons on target remains strong. As it embarks upon a significant recapitalization, or nuclear modernization, of the missiles, submarines, bombers, and weapons that comprise its strategic

deterrent, the United States also maintains a robust set of capabilities that can hit any fixed target anywhere in the world with a strategic nuclear weapon. There is no question that, if called upon, the U.S. deterrent will be able to execute its mission.

Assessment: *Strong*.

America's Extended Deterrent. If nuclear weapons deter America's adversaries, they also assure its closest allies, who benefit from America's extended deterrent, under which the United States would come to their defense, potentially with nuclear weapons, in the event of strategic attack. Increasingly, however, America's allies are questioning the credibility of its willingness to defend them.

This problem is particularly acute in Asia where allies in Seoul and, to a lesser degree, Tokyo desire ever more concrete examples of America's willingness to defend them. In Europe, the situation is different. Some in Europe's capitals are suggesting that American demands that Europeans assume a more active role in their own conventional defense indicates a hesitancy to come to Europe's defense—particularly with nuclear weapons—if Russia overtly threatened Europe with armed aggression. Although no American ally has yet embarked upon an indigenous post–Cold War nuclear weapons program, it is increasingly common to hear them question the role and functionality of America's nuclear umbrella.

Assessment: *Strong*.

Nuclear Enterprise Modernization Program of Record. The current nuclear modernization program of record falls into two major buckets. The first is the warhead production program of record, which focuses on producing new warheads designed to meet 21st century military requirements. This is overseen by the National Nuclear Security Administration. The second is the modernization of the platforms needed to deliver warheads to the target. This includes the bombers, ICBMs, and ballistic missile submarines that constitute the triad.

Nuclear Stockpile. More than 20 years ago, the Administration of President George W. Bush established the National Nuclear Security Administration within the Department of Energy to ensure the ability of the United States to maintain and produce nuclear warheads in a timely fashion. The NNSA is responsible for America's nuclear weapons infrastructure; is responsive to military-generated warhead requirements; and oversees the assessment, design development, production, test, and research programs that respond to War Department warhead requirements.

The NNSA must focus on the mission of designing and building nuclear warheads above all else, even at the cost of other presumably worthy efforts within the NNSA or the Department of Energy. The fact is that the NNSA is taking too long to produce warheads at scale and putting our nation at risk in the process.[26]

Recalibrating Where and How the NNSA Accepts Risk. The United States has not produced new plutonium pits (the fissile material central to a nuclear detonation) at scale since Rocky Flats ceased production in 1989, and current efforts to restart the capability are years behind schedule.[27] The Los Alamos National Laboratory began to produce plutonium pits at a small scale in late 2024—14 years after the modernization program began—and the Savannah River site's ability to produce plutonium pits in any meaningful quantity is approximately a decade away.[28] Other key projects, such as the Uranium Processing Facility and Lithium Processing Facility, are similarly over budget and behind schedule.[29]

After not having built nuclear weapons or produced nuclear fissile material in almost three and a half decades, the United States is having to relearn how to enrich uranium for defense purposes. Despite some attempts by the government to shelve critical projects, such as the Tritium Finishing Facility in South Carolina and the High Explosive Synthesis, Formulation, and Production (HESFP) Facility in Texas, the modernization program of record must be not only sustained, but also accelerated and expanded.[30]

Construction of the Rocky Flats, Colorado, plutonium facility began in 1952, and Rocky Flats was producing plutonium pits by 1954. By 1962, our nation was producing more than 2,000 nuclear warheads a year. As of 2025, however, the United States had built roughly a dozen new plutonium pits and no new nuclear warheads despite being in the 15th year of the 2010 nuclear modernization program.[31] Considering that China is building more than 100 new nuclear warheads a year—every year—the NNSA has to do better.

Nuclear Enterprise Workforce. The nuclear enterprise workforce consists of the skilled people who design, develop, and produce nuclear warheads according to military requirements and sustain the

nuclear stockpile to ensure its continued safety, security, and effectiveness. They also extend the life of nuclear warheads and design, develop, and produce new nuclear weapons.[32]

The workforce also assesses and certifies that the reliability of the nuclear stockpile can be assured in the absence of nuclear testing and maintains a nuclear test capability that can be employed if testing becomes necessary. It provides an effective response to technical problems with a warhead or to adverse global security developments that call for force augmentation by uploading reserve nuclear warheads onto existing systems.

America's nuclear enterprise workforce is without peer. They must understand the importance of and the stakes involved in their work. They must be empowered to build the arsenal of the 21st century without being hamstrung by bureaucratic and regulatory paralysis—which is the situation in which far too many of today's workers operate: a "no risk" environment characterized by more concern for workplace safety and environmental regulations than is shown for executing the mission at hand: producing warheads.[33]

NNSA's Role in Building a 21st Century Arsenal. Today, North Korea can illicitly produce nuclear warheads, China is building 100 new nuclear weapons a year, and the United States does not have the sustained plutonium pit manufacturing capability that it needs to avoid stockpile age-out, support life-extension programs, and prepare for future uncertainty.[34] Plutonium pits are critical components of every nuclear warhead, and nearly all current stockpile pits were produced between 1978 and 1989.[35] The NNSA's limited ability to produce plutonium pits is creating a strategic risk for the United States.[36]

Assessment: *Marginal*.

Nuclear Delivery Systems Modernization. Much has been written about delays in the Sentinel missile and *Columbia* programs. Both projects are behind schedule and over budget.

The Sentinel program's challenges resulted in a Nunn–McCurdy review, in which the Pentagon in 2024 had to certify that Sentinel was a defense critical program. Such reviews are triggered when U.S. Department of War programs reach a certain threshold of cost overrun and are required by law.[37] The Air Force now says that certain Minuteman III missiles may be in operation well into the 2040s or even until 2050 given programmatic delays.[38] Many have said that, because of these overruns and delays, the United States should terminate the Sentinel and move to a strategic "dyad" of bombers and submarines, but the primary driver of the cost and budget overruns is not that the rocket itself is troubled, but rather that the missile infrastructure—silos, tunnels, and command-and-control centers built in the 1960s for the Minuteman program—is old and needs to be replaced. This replacement of the missile infrastructure is the primary driver of programmatic cost overruns.

The *Columbia* program is increasingly challenged with schedule overruns that impose even greater requirements on *Ohio*-class submarines to continue to patrol beyond their programmed lifespans. The first *Columbia* subs should be conducting operations by the early 2030s, but it is possible that the program could instead fall further behind schedule.

The B-21 bomber—designed to supersede the B-2 stealth bomber—is more on track and will be flying within the next few years, but it was originally scheduled to be flying by 2018.[39]

In short, all of the nuclear delivery systems modernization programs are underway—but all are at least behind schedule, and some are significantly over budget.

Assessment: *Marginal*.

Overall Assessment: *Strong*.

Policy Recommendations

China's nuclear breakout, Russia's advantage in non-strategic nuclear weapons, North Korea's slow but steady nuclear expansion, and the death of arms control make it imperative that the United States builds the arsenal it needs to deter America's adversaries. This will require action to achieve at least six broad goals by 2035. These goals include:

- **Enhancing America's Global Posture.** The United States, in coordination with its allies, must strengthen deterrence and shrink the deterrence gap, but building more capabilities by itself is not a sufficient response to the problems that face us. Global posture must change as part of a broad strategic reset. To this end, the United States, working with allies in Asia and Europe, should reexamine the forward stationing of non-strategic nuclear weapons in

both theaters to help stabilize their deteriorating security environments. The United States should also consider returning to intermittent strip alerts for our strategic bomber forces so that a number of nuclear-armed bombers are loaded with munitions and ready to take off for nuclear operations missions within minutes, establish a new U.S.-based and globally deployable DCA squadron, and develop procedures for the regular movement of road-mobile ICBMs.

- **Updating NATO's Nuclear Posture.** During the Cold War, the United States had nuclear weapons stationed on the front lines. In addition to ground-launched systems stationed in Germany, they included forward deployed fighter-bombers certified to carry nuclear gravity bombs. The United States also trained allied pilots and certified allied aircraft to carry and employ U.S. nuclear weapons in the event that NATO found itself in a nuclear conflict with the Warsaw Pact. The mission of such aircraft and munitions was to deter and, failing that, rapidly defeat Warsaw Pact aggression against NATO members.

  Today, NATO maintains a residual nuclear capability of U.S. and allied fighter-bombers that are prepared to employ nuclear weapons, but what was forward deployed and near the NATO borders in 1989 is now in the center of NATO, and the nuclear gravity bombs and nuclear-capable aircraft remain in the same bases where they were stationed when the Berlin Wall fell. Germany and Italy, which were on the front lines of the Cold War, are 1,000 nautical miles or more from the Russian threat to NATO. Fighter-bombers that would carry nuclear weapons would almost certainly have to conduct an aerial refueling as part of the employment of a nuclear weapon against non-NATO targets. Additionally, there is a growing risk of nuclear "haves" and "have-nots" within NATO with only those allies that were part of NATO during the Cold War participating in the nuclear DCA mission and newer member countries, which are now the front lines of the Alliance and arguably most at risk of Russian aggression, relegated to non-DCA status.

  In view of Russia's attempts at nuclear coercion and even nuclear blackmail against Ukraine and NATO member states, it is time to reexamine the utility of a Cold War nuclear force posture and particularly Cold War–era basing.[40] The United States, in concert with its allies, should examine the forward deployment of nuclear-capable fighters and the storage of nuclear gravity bombs. This examination should include the training of new DCA pilots in new NATO DCA-participating nations, to include nations like Poland and Finland that are currently defending NATO's borders from potential Russian aggression.[41] The United States and its NATO allies should also examine the utility and implications of diversifying the Alliance's nuclear arsenal within Europe to include, in addition to nuclear gravity bombs, long-range air-launched nuclear cruise missiles stationed in Europe. Updating NATO's deterrence posture may be expensive, but it is also necessary as part of a 21st century deterrence posture that is both credible and effective at deterring Russian aggression.

- **Forward Stationing Non-Strategic Nuclear Weapons in Asia.** At the end of the Cold War, the United States unilaterally removed its non-strategic nuclear weapons from Asia as part of the Presidential Nuclear Initiatives.[42] In the 2010s, the United States officially retired the TLAM-N, the final nuclear system that was seen by many allies as the "Asian" deterrence capability.[43] While the development of the SLCM-N is a good step toward providing a theater-range nuclear deterrent in the Western Pacific, allies in Korea and, increasingly, Japan are questioning the viability of America's extended deterrent commitments. Such questions could cause those nations to seek indigenous nuclear weapons capabilities. Further, the continued expansion of both China's and North Korea's nuclear weapons could further destabilize an already tense region.

  The United States should therefore discuss with Korea the reopening of nuclear weapons storage sites on the Korean Peninsula and the possible forward deployment of non-strategic nuclear weapons to Korea.[44] Such a move is not

to be taken lightly, but given that the United States and its allies have attempted for two decades to engage in denuclearization discussions with North Korea only to be rewarded with continued threats of nuclear holocaust against the United States, South Korea, and Japan, it is time for a different approach.

- **Updating America's Nuclear Posture at Home.** In addition to updating its nuclear posture in Europe and Asia to reflect the changed global security environment, the United States should update its nuclear posture at home. The Air Force should regularly conduct strip alert exercises so that nuclear-capable bombers are ready to execute deterrence operations at a moment's notice. The Air Force should also certify an additional squadron of U.S.-based F-35s as nuclear-capable. This additional squadron should be globally deployable and ready to conduct deterrence operations from allied nations or overseas American territory on order. Finally, the Air Force should develop the tactics, techniques, and procedures needed to enable exercises for road-mobile Sentinel operations. Although these actions represent an increase in nuclear deterrence activities from levels over the past 30 years, they still constitute a deterrence posture that is more relaxed than the posture the United States maintained throughout most of the Cold War.

- **Building a Larger, More Diverse Strategic Arsenal.** To prepare for the emerging security environment, the United States must field a credible strategic deterrent that is moderately larger and somewhat more diverse than the current arsenal. To that end, the United States should seek to field the following force by 2035.

  Strategic Bombers. The United States should continue to field a mix of B-52 and B-21 nuclear-capable bombers into the 2030s. At least 100 of the B-21s should be nuclear-capable. Within the strategic arsenal, the United States should field 200 B-61 gravity bombs of various configurations. It should also field a stockpile of 1,000 LRSO nuclear cruise missiles.

  ICBMs. The United States should field an arsenal of 450 Sentinel ICBMs, 400 of which should be silo-based. Each missile should carry a mix of one to three warheads of various yields. The United States should also field a road-mobile variant of the Sentinel missile to ensure that it has an additional second-strike capability throughout the program life of the *Columbia*-class SSBN fleet. The *Columbia*-class boats have an expected lifespan of roughly 40 years, which means that they should be operating into the early 2080s.

  It is assumed that the *Columbia*-class submarines, built using 2020s technology, should remain undetectable throughout most of the 21st century; that U.S. adversaries should not develop new technologies with which they can detect the submarines; and that the U.S. should therefore retain an assured second-strike capability that can disincentivize U.S. adversaries from attempting a first strike. However, these assumptions raise critical issues. It is not certain that the *Columbia*-class submarines will be undetectable a half-century from now. Nor is it certain that the technologies and capabilities developed in the 2020s will not be overcome by heretofore undeveloped detection technologies.

  Because it is not certain that 2020s technology will be undetectable through the 2080s, it is in America's interest to consider an additional survivable, second-strike capability as a hedge against the day when SSBNs may no longer be undetectable. The United States should therefore field a small road-mobile Sentinel force as a hedge against an advancement in anti-submarine warfare by our adversaries. The Air Force should design and field vertical erector launchers that can be attached to heavy trucks that are capable of holding and launching either the Sentinel ICBM or modified Sentinel ICBMs as may be required. Combined with security details on accompanying vehicles, the Sentinel becomes a road-mobile ICBM—something that it is, while not impossible, exceedingly difficult to target.

  Road-mobile Sentinels should be permanently stationed in garrisons on existing missile bases

but able to exit those garrisons and move on randomized circuits during exercises or times of crisis as a signaling tool. Air Force missileers may operate and drive them on designated public and U.S. Department of War roads and highways. Road-mobile Sentinels may be armed with up to three nuclear warheads of variable yield, giving them the equivalent of a submarine-launched ballistic missile's striking power. Road-mobile Sentinels may operate inside American territory along preapproved (but not preplanned) routes in relatively unpopulated areas, thereby—given the flight times that even extremely fast missiles need to traverse from Russia or China to the United States—creating significant targeting challenges for our adversaries. Should a launch against the American homeland be detected, the ICBMs would be able to move to any number of launch sites to await further orders (to include launch or alert orders). In this way, road-mobile Sentinels may provide the United States with a backup second-strike capability for most of the rest of the 21st century.[45]

Columbia-*Class SSBNs.* First fielded in the 1960s, nuclear ballistic missile submarines patrol the waters of the North Atlantic and Pacific Oceans undetected with only the ships' captains knowing exactly where they lie. The value of these submarines lies in their secrecy and ability to deliver scores of nuclear warheads in a relatively brief period of time. Amazingly silent to the point of being undetectable, they represent the assured second-strike leg of the American nuclear triad.

The *Columbia*-class SSBNs will perform a function similar to that of the *Ohio*-class submarines, albeit in smaller quantity. The current program of record calls for the United States to replace the 14 *Ohio*-class SSBNs with 12 *Columbia*-class boats at the rate of one boat per year beginning in 2031. Although the Navy will field a smaller fleet, the current program of record calls for the *Columbia*-class SSBNs to carry fewer missiles than the current *Ohio*-class SSBNs carry. When originally deployed, the *Ohio* class operated 24 ballistic missile tubes. After the 2010 New START nuclear arms control treaty entered into force, the U.S. Navy shuttered four ballistic missile tubes to comply with the treaty.[46] The *Columbia* class is currently programmed to have a smaller missile capacity, fielding only 16 missile tubes per boat. With the current Trident II (D5) missile, this fleet of 12 *Columbia* SSBNs could deploy a maximum of 1,920 warheads versus the nearly 5,000 possible warheads loaded onto the original *Ohio*-class ballistic missile fleet.

The new *Columbia* SSBNs are designed to be the quietest ever built and therefore undetectable by current technologies. Averaging between $8.4 billion and $9.2 billion per boat for the 12 to be built, they are admittedly expensive, but they will be patrolling the world's oceans and providing a continuous deterrence presence into the 2080s.[47]

Given the increasing number and diversity of adversary nuclear weapons, which create additional targets that the United States must consider holding at risk both to deter strategic attack on the United States or its allies and to hedge against future uncertainty and further degradation of the security environment, it is incumbent upon the United States to field a larger SSBN force for the next half-century to ensure that it can field a credible deterrent. The fundamental question facing the U.S. Navy is therefore how the current ballistic missile submarine program of record, conceptualized in 2010, can be amended to ensure that we have a fleet of SSBNs that is sufficient to maintain this deterrent into the 2080s.

The U.S. Navy has a duty to ensure the viability and credibility of the nation's assured second-strike capability in a way that is flexible and responsive to the evolving threat environment. For this reason, it is time to revisit America's at-sea deterrent writ large. Specifically, the United States will need to take immediate action on the existing *Ohio*-class SSBN fleet and longer-term actions on the *Columbia*-class fleet. Beginning in February 2026, the Navy should reopen the missile tubes that were shuttered on *Ohio*-class SSBNs as a result of the New START treaty limitations, thus

bringing the total number of tubes to 24 on each *Ohio*-class submarine. Each *Ohio* should carry the full complement of D5 Trident SLBMs akin to their pre–New START loadout.

The Navy should expand the *Columbia* program of record to include four additional SSBNs and should make the necessary budgetary and industrial plans for such an expansion. This programmatic expansion is necessary not only to hedge against an uncertain 21st century future and maintain a credible deterrence posture against a single nuclear peer—the driving construct that led the U.S. Navy to program for 12 *Columbia* SSBNs in 2010—but also to deter two nuclear peers in the 2030s. Assuming that the build rate of one *Columbia* a year by 2031 is sustained, the United States should build a total of 16 SSBNs by 2045.[48]

- **Building a Significantly Larger, Far More Diverse Non-Strategic Arsenal.** The current nuclear force posture was designed for a benign security environment in which adversaries did not engage in nuclear coercion against their neighbors and were not rapidly expanding their strategic and non-strategic nuclear arsenals. Today, additional U.S. theater, non-strategic nuclear capabilities are necessary in both Europe and the Indo-Pacific to deter adversary theater nuclear advantage and offset potential adversary conventional advantage.[49] Such additional theater, non-strategic nuclear capabilities must be deployable, survivable, and variable in their available yield options.

  While it is not necessary to match the number or diversity of non-strategic systems fielded by adversaries of the United States in order to present a credible deterrent, it *is* necessary to field a credible arsenal of variable yields that is capable of holding a variety of theater-range targets at risk from multiple launch points within the theater. The importance of this capability should not be overlooked or discounted. If the United States needed to respond to adversary theater-range nuclear strikes with relatively high-yield U.S. nuclear strikes generated from the American homeland, the chances of retaliatory nuclear strikes against those bases might well increase. By fielding a capable theater nuclear arsenal that can generate effects from within theater, the United States can reduce the chances that the homeland will be struck with nuclear weapons and limit the chances of horizontal escalation. This is not to say that the United States seeks a theater nuclear war—but it does seek to field a credible force that will deter our adversaries. Theater-range nuclear weapons—particularly those that are of variable yield—strengthen deterrence and therefore promote stability by limiting the chances for escalation and increasing the options for tailored deterrence strategies.[50]

  Gravity Bombs. Given Russia's staggering advantage in theater-range nuclear weapons, the United States should increase the number of B-61 gravity bombs in Europe by 75. In addition, given China's dual-capable theater-range systems, particularly the nuclear-capable DF-21 anti-ship missile and nuclear-capable intermediate-range DF-26 land attack missile, the United States should dedicate 75 nuclear weapons to the Indo-Pacific theater.

  Anti-Ship Nuclear Weapons. As noted above, the United States must be able to hold adversary targets at risk in order to deter adversaries from pursuing escalation pathways during a conflict. Increasing the types of targets that the military can hold at risk with either conventional or nuclear weapons gives the United States more flexible—and therefore more tailorable—deterrence options.

  There is reason to believe that America's adversaries are developing theater-range, nuclear-capable anti-ship missiles. Therefore, the United States obviously has good reasons for doing so as well. The ability to target enemy capital ships with nuclear weapons offers a leader the ability to employ low-yield theater-range weapons against legitimate military targets with virtually no chance of civilian casualties and with minimal nuclear fallout because of the maritime nature of the target set. Adding naval vessels to potential target lists

further expands the attack surface from which that actor can select. The U.S. Department of War should therefore field an integrated sensor and targeting package that will enable a long-range anti-ship missile to find, fix, and finish moving adversary naval assets with a nuclear warhead.

An anti-ship nuclear capability should give the President more graduated nuclear response options in the face of an adversary's use of nuclear weapons, thereby better deterring the adversary's limited nuclear strikes.[51] Accordingly, the United States should build 100 theater-range, nuclear-capable anti-ship missiles with 50 allocated to the Indo-Pacific and 50 held in reserve for contingencies in other areas of operation.

Nuclear-Capable Hypersonic Weapons. America's adversaries are developing nuclear-capable hypersonic systems. These platforms allow them to hold key U.S. and allied targets at risk with fast-traveling and maneuverable delivery systems that are difficult to intercept with missile defenses. They are prompt, penetrating, and potentially responsive and can be delivered from a variety of platforms. Taken together, the combination of hypersonic-speed, long-range maneuverable missiles and nuclear warheads presents an asymmetric capability that could erode strategic stability and incentivize our adversaries to be the first to employ nuclear weapons in a conflict.

By fielding a similar capability, the United States should provide the President with more options by which he can hold enemy targets—particularly those protected by missile defenses deep inside their homelands—at risk. While the development and fielding of such capabilities might not necessarily strengthen or compensate for the erosion of strategic stability triggered by adversary development of hypersonic nuclear weapons, it would address some of the asymmetry that results from such adversary capabilities. Accordingly, the United States should field nuclear-capable variants of the Army's Long-Range Hypersonic Weapon and the Navy's Mako Multi-Mission Hypersonic Missile for a total of 150 nuclear-capable hypersonic missiles.

Ground-Based, Intermediate-Range Nuclear Weapons. The dissolution of the Intermediate-Range Nuclear Forces (INF) Treaty because of Russian treaty violations is unfortunate, but it is also a reality.[52] Moreover, China's breathtaking expansion of its theater-range conventional and nuclear-capable missile force creates an opportunity for it to hold at risk maritime and ground targets from Japan to Northern Australia.[53]

The ability to strike adversary targets with ground-based, road-mobile, intermediate-range nuclear-capable missiles complicates the adversary targeting calculus. Such a deployment would also help to deter conventional and nuclear aggression against allies by presenting adversaries with the demonstrable threat of America's non-strategic arsenal, which is forward deployed for use in the defense of America's interests and allies. Such a step would also assure U.S. allies of the credibility of the American security commitment and therefore reduce proliferation risks among key allies who enjoy but may be questioning America's extended deterrence commitments. The United States should therefore develop and field an arsenal of intermediate-range, nuclear-capable missiles that can be deployed to American and allied bases in the Indo-Pacific, European, and Middle Eastern areas of operation.[54]

Conclusion

Given the increasingly dangerous threat environment, the United States must work with purpose, urgency, and determination to ensure that it fields a strategic deterrent that can deter strategic attack on the American homeland and limited theater nuclear attack overseas. It must think about strategies that can deter and, if necessary, defeat multiple nuclear-armed adversaries simultaneously or sequentially. It must also field a force that is qualitatively second to none even if adversaries field a combined force that is quantitatively superior to that of the U.S.

The stakes involved in America's nuclear deterrent are nothing less than America's global interests

U.S. Military Power: Nuclear

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Nuclear Stockpile				✓	
Strategic Delivery Systems				✓	
Extended Deterrent Credibility				✓	
NNSA Warhead Modernization			✓		
Nuclear Delivery Systems Modernization			✓		
OVERALL				✓	

and—more important—the welfare of the American people and continuation of the American constitutional republic. A credible nuclear deterrent is not cheap, but it is far cheaper than fighting a nuclear war, even if the United States were to "win" such a war. The goal is not to fight such a war, but to deter the war from unfolding in the first place.[55]

If the autocrats in Beijing and Moscow are not deterred, they will become increasingly emboldened. They will become increasingly threatening and, in the absence of a credible American deterrent, more likely to use nuclear coercion to achieve their goals, not only against their neighbors, but also against America's allies—and, potentially, the United States itself.

The United States should not let such a world come about. Instead, it should build and field the arsenal that is needed to keep the American people safe for the next half-century. It cannot afford to do anything else.

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Missile Defense for the 21st Century

Robert Peters

Introduction

Today, as demonstrated in real-world combat environments in the Middle East and Ukraine as well as in realistic, live-fire exercises, the United States fields a missile defense capability that is second to none. However, because adversaries continue to enhance their missile capabilities and expand their nuclear arsenals, the United States is now embarked upon the largest missile defense buildup in world history.

Missile defense is a critical part of the national security architecture that enables U.S. military efforts, deters attacks, and protects such critical infrastructure as population, industrial centers, and politically and historically important sites. It can strengthen U.S. diplomatic and deterrence efforts and give senior decision-makers the time and options they need to respond effectively during crises involving missiles that fly on both ballistic and non-ballistic trajectories.

The United States is now embarked on building the Golden Dome missile defense system, which is designed to intercept adversary missile threats before they reach the U.S. homeland. The boldest endeavor in missile defense since 1983's Strategic Defense Initiative, Golden Dome offers a way to protect the American people from enemy missile attacks.

History of America's Missile Defense

The current U.S. missile defense system is a result of investments made by successive U.S. Administrations with the support of Congress. In 1983, President Ronald Reagan envisioned a defensive shield—the Strategic Defense Initiative (SDI)—as a layered ballistic missile defense (BMD) system that ultimately would render nuclear missiles "impotent and obsolete."[1] The system's layers would have boost, ascent, midcourse, and terminal interceptors, including directed-energy interceptors, providing the United States with more than one opportunity to shoot down an incoming missile.

In the end, however, the United States stopped far short of this goal even though the SDI program generated tremendous technological advances and benefits.[2] Instead of a comprehensive layered system, the United States now has no boost-phase BMD systems and extremely limited midcourse defense against the advanced ballistic missile threats from China and Russia.

The volatility and inconsistency of priority and funding for missile defense by successive Administrations and Congresses—controlled by *both* major political parties—have yielded a system that is limited both numerically and technologically, extremely limited in defending against more sophisticated or more numerous long-range missile attacks, and part of the current impetus behind building more and more capable missile defenses.

In 2002, citing the growing rogue state missile threats, the United States withdrew from the 1972 Anti-Ballistic Missile Treaty, which limited the ability of the United States to field ballistic missile defenses.[3] In the years that followed this withdrawal, the United States built and fielded 44 missile defense interceptors in Alaska and California. These interceptors were limited in numbers as they were designed not to intercept advanced ballistic missiles such as those from Russia or China, but rather to intercept missiles from emerging rogue states that were investing in both nuclear and long-range missile technologies, such as North Korea and Iran.[4]

For a decade and a half, the United States' missile defense posture remained largely unchanged,

U.S. MISSILE DEFENSE AT A GLANCE

EST. 2002



Space Force Gen. Michael Guetlein
Director of Golden Dome

MAJOR BASES



1. Pearl Harbor Naval Base
2. Fort Greely
3. Vandenberg Space Force Base
4. Naval Base San Diego
5. Aegis Ashore battery, Redzikowo, Poland
6. Aegis Ashore battery, Deveselu, Romania
7. Aegis Ashore battery, Guam

CURRENT BUDGET

IN BILLIONS FOR FY 2025

$30

CURRENT PERSONNEL

ACTIVE-DUTY MILITARY

10,000

RESERVE MILITARY

500

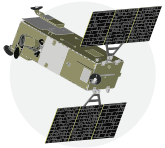
CIVILIAN

2,000

KEY EQUIPMENT (estimated current inventory)



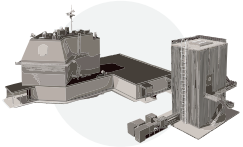
Ground-Based Interceptors (44)



Space Based Interceptors



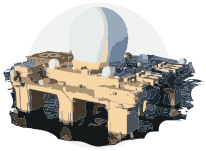
Patriot battalions (15)



Aegis Ashore (3)



THAAD Batteries (8)



Sea-Based X-Band (1)



BMDS Radars (23)

SOURCE: Heritage Foundation research.

heritage.org

focusing on a limited capability and capacity. By the latter half of the 2010s, however, the vision for missile defense started to change with the deterioration of the global security environment. The National Missile Defense Act of 1999 had made it official U.S. policy to protect the homeland only from a "limited ballistic missile attack."[5] The National Defense Authorization Act (NDAA) for Fiscal Year 2017, however, dropped the word "limited" even as it continued to focus on ballistic missiles.[6]

In January 2019, the Trump Administration published its congressionally mandated Missile Defense Review (MDR), a statement of policy intended to guide the Administration's missile defense programs. The 2019 MDR addressed the dangerous threat environment that had evolved since the previous MDR in 2010 and recognized that future missile defense systems might have to defend against cruise and hypersonic missiles in addition to ballistic missiles.[7]

The 2020 NDAA made it a matter of policy to rely on nuclear deterrence to defend against "near-peer intercontinental missile threats" and focus on improving missile defense against "rogue states."[8] During roughly the same period, the Missile Defense Agency (MDA) began to solicit proposals for the Next Generation Interceptor (NGI), meant to be a more effective missile defense interceptor capable of intercepting not just rudimentary intercontinental ballistic missiles (ICBMs) such as those fielded by North Korea or Iran, but also from more advanced missile threats, to include Russia and China.[9]

The Biden Administration's 2022 Missile Defense Review recognized that the "evolution of offensive air and missile threats has accelerated greatly since the United States began developing its first ballistic missile defense systems over fifty years ago" and that "[t]his trend represents a growing national security challenge expected to multiply in scope and complexity over the coming decade."[10]

In January 2025, President Trump released Executive Order 14186, "The Iron Dome for America," mandating the establishment of a multilayered missile defense system (now known as Golden Dome) that includes a space-based platform.[11] The 119th Congress has identified close to $24 billion in fiscal year (FY) 2026 to begin work on President Trump's missile defense system, to include a robust space-based layer.[12]

In the future, as technological trends progress and modern technologies become cheaper and more widely available, North Korean or Iranian ballistic missiles and countermeasures may rival in sophistication, if not in numbers, those of Russia or China. It is for this reason, coupled with the adversary threats of coercive or limited-escalation nuclear attacks, that the United States is committed to building Golden Dome.

The Evolving Air and Missile Threat Environment

America's adversaries—particularly China, Iran, North Korea, and Russia—are building more and more diverse capabilities that can target not only their regional neighbors, some of whom are American allies, but the United States itself. Such new weapons systems, including ICBMs, long-range cruise missiles, hypersonic missiles, and even orbital bombardment systems, are coupled with increasing attempts at coercion, particularly against America's regional allies. This coercion sometimes takes the form of attempted nuclear coercion, as is the case with North Korea both against the American homeland and against U.S. allies in the Pacific and Russia's regular threats of nuclear use against the U.S. homeland and our allies in Europe. Other times, it takes the form of outright attacks on civilian and military targets as evidenced by the Iranian attacks on Israel and Russian attacks on Ukraine.

It is clear that America's adversaries increasingly see potential missile and autonomous systems strikes on not only military targets, but also on homelands and civilian population centers, as legitimate. This is true not only for targets in the homelands of America's allies, but for the United States as well.

This development in adversary perception is because America's adversaries see the U.S. homeland to be not only a valid target, but a vulnerable one as well. It also explains both why they are building a growing array of long-range strike capabilities—and why the United States must develop and field a credible multilayered missile defense architecture.

The Evolving Long-Range Strike Threat

Adversaries seek to threaten and potentially exploit America's vulnerability to long-range attacks as a means to achieve their own wide-ranging revisionist goals, be they breaking up the North Atlantic

Treaty Organization (NATO), diminishing American global influence, or projecting power to the Western Pacific. As noted, America's adversaries are increasingly building long-range threats, many of which may be nuclear-capable, in order to achieve the above goals. These long-range threats include ballistic missiles, long-range cruise missiles, hypersonic missiles, and threats that potentially could be deployed from orbital platforms.

Ballistic Missiles. States have built ballistic missiles for purposes of warfare since the 1940s. By the 1950s, with the Atlas missile program, both the United States and the Soviet Union were pursuing ICBMs as delivery vehicles for nuclear warheads, capable of striking each other's homelands.

Russia and China have had ICBMs capable of carrying nuclear warheads for decades, and both countries are modernizing their ICBM arsenals. Russia is pursuing the "super-heavy" SS-28 Sarmat ICBM, capable of carrying multiple nuclear warheads to targets in North America.[13] China is the fastest-growing nuclear power on the planet and is building nuclear ICBM silos in its western desert at a breathtaking pace.[14] North Korea, meanwhile, is advancing its Hwasong-18, a road-mobile three-stage ICBM capable of carrying nuclear weapons and reaching targets in North America.[15]

Long-Range Cruise Missiles. In recent years, Russia has shown a proclivity to proclaim the development of new systems and capabilities, many of which never materialize. One of interest was outlined in a Defense Intelligence Ballistic Missile Committee report, which identified the SSC-X-09 Skyfall as a program of concern.[16] The Skyfall is reportedly a cruise missile with a range of up to 20,000 kilometers that is maneuverable and can fly at low altitude.[17] The range of the missile means that Russia can base the missile anywhere in its territory and still be able to reach targets in the continental United States; because of its maneuverability and low flight altitude, such a system can evade most missile defense radars and interceptors. While this and other long-range cruise missile systems remain in the development and testing stage, it is possible that Russia is seeking to deploy such capabilities with an eye to having an additional capability of striking the United States with a limited number of nuclear weapons from a platform that could evade existing missile defenses. The 2024 annual assessment of *Military and Security Developments Involving the People's Republic of China* published by the U.S. Department of Defense (now U.S. Department of War) suggests that China is pursuing its own arsenal of such long-range cruise missiles.[18]

Hypersonic Missiles. Hypersonic flight, generally described as beginning at around five times the speed of sound, is gaining more interest from advanced militaries around the world. Hypersonic weapons are divided into two general categories: hypersonic cruise missiles and hypersonic glide vehicles. Hypersonic cruise missiles use a scramjet thrust that enables them to sustain speed and maneuver as necessary at lower altitudes of flight. Hypersonic glide vehicles use rockets to accelerate to high speeds during a boost phase and then glide in the atmosphere at enormous speeds with significant maneuverability during the terminal phase of flight. Their speed, range, and maneuverability mean they can be effective against regional targets or against targets in North America while complicating enemy efforts to detect, track, and prevent attack.

The speed and maneuverability of hypersonic weapons present real challenges from defense perspectives—which is one reason adversaries are building them. Hypersonic weapons' maneuverability at low altitudes makes targeting and engagement with traditional missile defenses such as Terminal High Altitude Air Defense (THAAD) and Patriot Air Defense difficult if not impossible. Faster interceptors and battle management systems, along with more precise radars, can likely ensure greater effectiveness of missile defenses, but much needs to be done to counter the novel threats posed by hypersonic weapons.

Russia has been interested in hypersonic capabilities since the 1980s. It claims that the Kinzhal, which has seen service in the Ukraine war, is a jet-launched hypersonic missile and that its Avangard hypersonic glide vehicle is nuclear-capable.[19] Moscow is also pursuing a ship-based hypersonic cruise missile, the Tsirkon.[20] Russia seems to be pursuing hypersonic capabilities as part of a broader strategy of fielding long-range precision fires that could be nuclear or conventionally armed.

For the past several years, U.S. Department of Defense officials have warned of China's interest in hypersonic capabilities. According to the Defense Department's 2020 assessment of China's military power, the People's Liberation Army Rocket Force

(PLARF) "paraded the DF-17 missile [its first hypersonic glide vehicle] for the first time as part of the PRC's 70th anniversary parade in 2019."[21] An unclassified Congressional Research Service report noted that China had the potential both to evade U.S. missile defenses and to be nuclear-capable.[22] More recent reports suggest that China is pursuing a variety of hypersonic capabilities, to include ground-launched, air-launched, and even submarine-launched capabilities, many of which could support a nuclear warhead.[23]

Beyond Russia and China, in March and April of 2024, North Korea claimed to have tested a hypersonic glide vehicle capable of striking targets in Japan and South Korea.[24] Although there has yet to be a confirmed test of a North Korean hypersonic capability, it is very possible that North Korea seeks hypersonic capabilities.

One positive characteristic of hypersonic weapons is that their high speed may make them more vulnerable to disruption by smaller impacts of interceptors or changes in their structures. Put another way, the tight performance margins needed to ensure that they perform high-speed maneuvers over extended spaces may make them far more vulnerable to interception than traditional and generally more robust ballistic missiles are.

Fractional Orbital Bombardment System (FOBS). FOBS is an orbital platform that could launch strikes from space against terrestrial targets, using kinetic, high-explosive, or even nuclear weapons. FOBS has never been fielded, but it has been discussed for more than half a century.

However, it is now known that the Russians sought nuclear-armed FOBS for a number of reasons: unlimited flight range; lesser flight time from launch to target than is the case with missiles; the impossibility of predicting the target of a FOBS platform during flight time; the likely high degree of accuracy of such a system; the lack of strategic warning of such an attack; and—most important—the ability to overcome American missile defenses due to the speed of a FOBS-launched weapon.[25] The Soviets understood that FOBS can put warheads on a target with no warning and are impossible to intercept.

FOBS was largely ignored for decades, but in the past few years, two major reports have indicated that China and Russia were potentially interested in putting nuclear weapons on FOBS. In 2021, Under Secretary of Defense Frank Kendall noted that China was potentially pursuing a FOBS capability,[26] and in October 2023, the U.S. Department of Defense noted that "[t]he PRC probably is developing advanced nuclear delivery systems such as a strategic hypersonic glide vehicle and a fractional orbital bombardment (FOB) system."[27] In February 2024, reports suggested that Moscow once again was interested in putting nuclear weapons in orbit—potentially as antisatellite weapons but also potentially as a FOBS capability.[28]

The Lower-Escalation Pathway Temptation

China, Iran, North Korea, and Russia are challenging American interests and seeking to constrain American influence and freedom of action around the world. Russia is attempting to use nuclear weapons to coerce the West due to its support for Ukraine and has hinted at pursuing a possible low-escalation pathway attack on NATO states in pursuit of such a goal. Other actors may also pursue a lower-escalation pathway attack as their missile forces expand and diversify.

In a lower-escalation pathway, an enemy would attack an American homeland site, potentially including military assets, with a limited number of conventional or low-yield nuclear weapons limiting civilian casualties, in an attempt to change the behavior of the United States.

In a low-escalation pathway attack, China or Russia may try to escalate its way out of a conventional conflict it is losing against the United States by conducting a series of limited conventional or nuclear strikes at key targets in the U.S. homeland. These coercive strikes would be intended to demonstrate enough resolve and result in significant damage to convince U.S. political leaders to give in to adversary demands but limited enough in scope and scale (meaning not catastrophic) to not prompt an overwhelming U.S. response.

This lower-escalatory pathway of forcing a nation to negotiate has not been tested, but the logic is sound, and there is some indication that America's adversaries are considering such a strike. China is building a nuclear arsenal that in the coming years could enable it to carry out such a strike, and Russia openly discusses the prospects of limited nuclear strikes against targets in the West.

The United States' existing approach to missile defense, as enacted through the Missile Defense

Agency, is not comprehensive and can neither address lower-escalation coercive attacks from China or Russia nor compete with China's pacing challenge. Specifically:

> In 2020, DoD estimated the PRC's operational nuclear warhead stockpile was in the low-200s and was expected to at least double by 2030. However, Beijing has accelerated its nuclear expansion, and DoD estimates this stockpile has surpassed 600 operational nuclear warheads as of 2024, on track to exceed previous projections....[29]

> By 2030, DoD estimates that the PRC will have over 1,000 operational nuclear warheads, most of which will be fielded on systems capable of ranging CONUS [the Continental United States].[30]

As a consequence of these developments, the United States requires a comprehensive set of missile defense layers to counter an adversary's lower-escalation temptation. A set of comprehensive missile defense layers that can destroy at least a hundred adversary nuclear-armed missiles—be they from China, North Korea, or Russia—would incentivize adversaries' leaders to abandon plans for "easy coercion" or "cheap shot" attempts with a few missiles to coerce or intimidate American political leaders. Forcing adversary leaders to consider the lower likelihood of success for attacks below 100 missiles, in addition to the potential for provoking an unacceptably damaging U.S. response, may help to improve deterrence and raise the threshold for missile-based strikes against the U.S. homeland. Making escalation more difficult and riskier to achieve lowers the risk of adversaries' seeing value in escalation.

While adversaries might be tempted to execute a lower-escalation pathway strike (say, by firing only a dozen nuclear-armed missiles at the American homeland) as a high-risk but potentially high-reward strategy to end a conflict on terms acceptable to them, they would be far more cautious about firing more than a hundred nuclear-armed missiles at the United States. Such a strike would almost certainly trigger the kind of massive U.S. nuclear retaliation that they would otherwise try to avoid, in addition to the uncertainty of success for the initial attack.

In this way, a credible and effective multilayered missile defense architecture could deter America's adversaries from pursuing an otherwise attractive lower-escalation pathway in the near future. The existing Ground-Based Interceptor (GBI) architecture, first fielded in 2004 and designed to defend against limited attacks from North Korea, may no longer be sufficient to defend against even a rogue state attack, given the expansion and maturation of North Korea's missile program.[31] To put it another way, effective and credible missile defenses are not a "future nice to have;" they are a "near-term must have."

Missile Defense in America's Strategic Posture

The United States maintains credible nuclear capabilities and highly lethal, battle-proven conventional capabilities that give its adversaries pause, deter aggression, assure allies, and defeat threats should deterrence fail. A credible, integrated, and multilayered missile defense architecture as envisioned by Golden Dome is a strategic imperative on par with maintaining a credible and diverse nuclear arsenal, particularly in an era when America's adversaries are developing, deploying, and employing ever more capable and lethal missile threats.

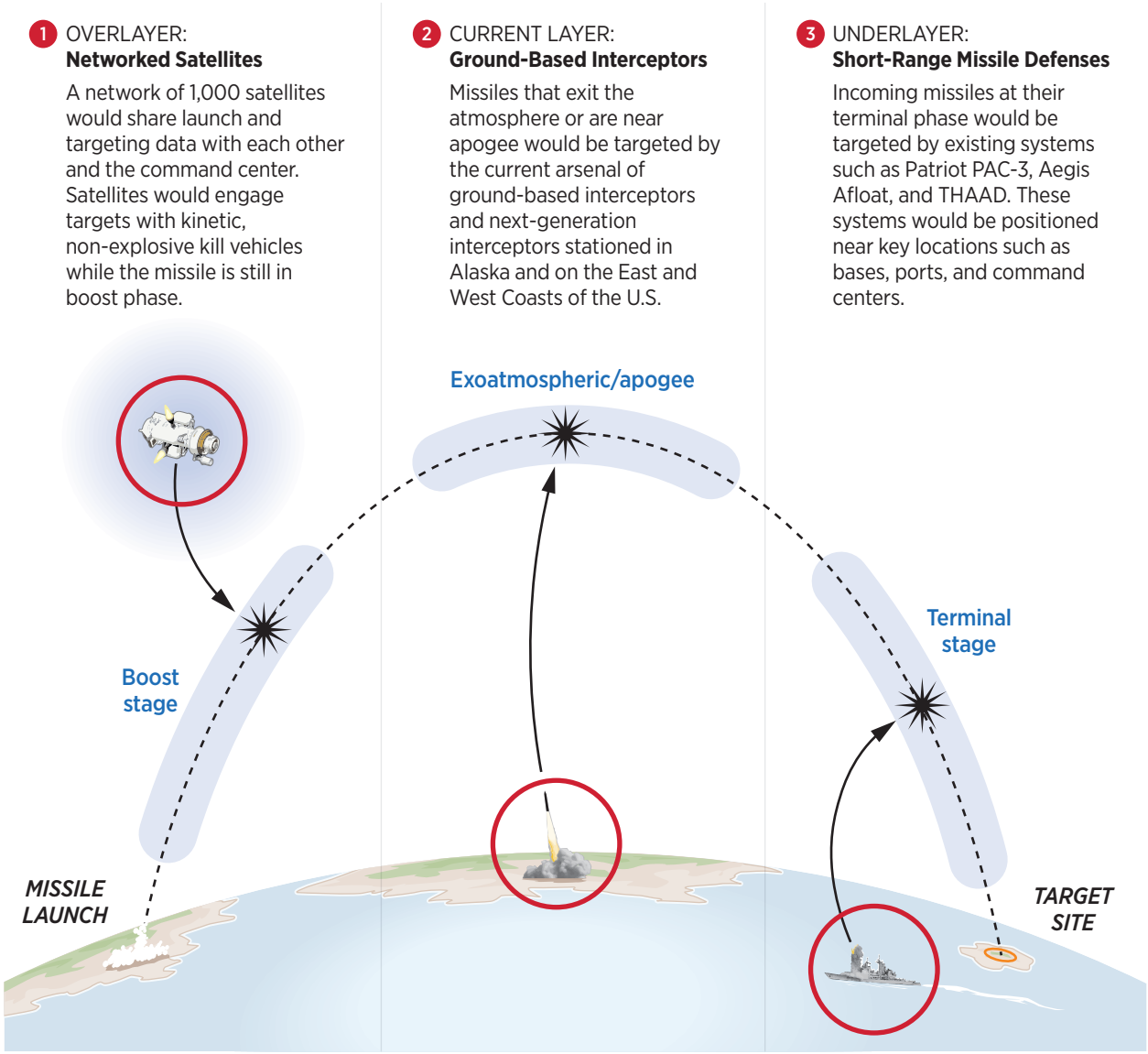
Adversaries may grow more desperate during a prolonged conventional conflict with a superpower like the United States, and this could lead them to take riskier strategies like conventional or even nuclear strikes on America's homeland and critical infrastructure. To counter this threat, the United States should deploy integrated air and missile defense (IAMD) systems that can deter and defeat such coercive attacks. It should also be prepared to defeat multiple salvos conducted over extended periods of time. It is likely to strain credibility to have defenses that can defeat just a single salvo. A credible missile defense architecture such as Golden Dome must be able to defeat (or seem to be able to defeat) multiple waves of attacks during a protracted conflict.

There are three possible ways the United States may respond to adversaries' long-range missile threats—be they lower-escalation pathway strikes, repeated salvos on the American homeland during a protracted conflict, or even larger-scale strategic attacks—to its allies and the American homeland. Washington can:

FIGURE 4

A Layered Missile Defense System

To defend the U.S. against missile attacks more effectively, key sites should be protected with an integrated defense system that consists of multiple layers of protection. If one layer is unable to neutralize a threat, another layer can be deployed.



SOURCE: Heritage Foundation research.

heritage.org

- **Acquiesce** to the wishes of adversaries by, for example, accepting a fragmented NATO, reduced American global influence, and limits to its ability to project power;
- **Rely** solely on the threat of punishment to deter a growing list of ever more capable adversaries from striking civilian population centers; or

- **Build** effective missile defenses to deny adversaries the ability to coerce the United States or its allies.

Given the emerging threats and the apparent desire of America's adversaries to field an arsenal of ICBMs, long-range cruise missiles, hypersonic capabilities, and FOBS—many of which are optimized to overwhelm or evade U.S. missile defenses—the United States can and should build an integrated, multilayered missile defense architecture that can deter and defeat coercive strikes on the homeland while also providing a regional defense of key capabilities overseas.

A credible Golden Dome that incorporates existing homeland missile defenses, to include existing GBIs and regional missile defenses in the Indo–Pacific, Europe, and the Middle East, and builds additional capacity and capabilities in several key areas is required given the expanding threats. Such a missile defense architecture must perform a number of functions, including:

- **Defending the homeland.** The United States must ensure that its population centers and critical locations are protected and preserved.

- **Defending key overseas nodes.** Such nodes could be key bases, logistical sites, or allied population centers.

- **Defending the U.S. and its allies against a variety of inbound threats.** Typically, the United States has focused its missile defense on intercepting ballistic missiles and cruise missiles overseas and ballistic missiles at home. Given the evolving nature of the threat, the United States should field the capabilities necessary to defeat all types of inbound threats, to include long-range cruise missiles, hypersonic threats, and those delivered from orbit.

- **Defending the U.S. and its allies against a variety of actors.** No longer should the United States optimize its missile defenses only against rogue actors, such as Iran or North Korea. It can also field capabilities that can destroy threats from other, more advanced adversaries, such as China and Russia.

An effective Golden Dome would support a number of U.S. defense objectives, including:

- **Deterring attack.** Deterrence by denial, which is the ability to prevent an attacker from achieving its operational objectives, can be a powerful tool. An effective missile defense architecture that could credibly intercept a variety of long-range threats from a variety of actors could deter U.S. adversaries from launching an attack in the first place because they believe that such an attack would not achieve their objectives and instead would leave them vulnerable to significant reprisals from the United States.

- **Limiting damage should deterrence fail.** Even if a missile defense architecture is not perfect, it could significantly limit the extent of damage through a partial success rate. That is, if an adversary seeks to destroy six critical targets, even a partially effective missile defense could ensure that some quantity of those targets survived an attack.

- **Assuring allies.** Regional allies, particularly those located close to U.S. adversaries and would therefore be on the front line should a conflict erupt, often seek assurance that the United States will support them during times of crisis or conflict. In many cases, their need for assurance drives their calculations about whether they need an independent nuclear arsenal. In many ways, the more insecure they feel, the more likely they are to pursue an independent nuclear weapons program, which it has been U.S. policy to oppose since 1963. Forward deploying nuclear weapons is one way to assure allies and convince them not to pursue their own nuclear weapons programs. Integrated missile defenses are another important tool.

Finally, it is America's policy that no nation should be allowed to put nuclear weapons in orbit for the purposes of targeting sites on Earth. Therefore, the United States reserves the right to destroy, preemptively, any adversary orbital platform that carries nuclear weapons, and may do so using any tool best suited to the purposes—whether that tool is based terrestrially or in orbit.

Framing Missile Defense Capabilities and Missions

The U.S. missile defense system has three critical physical components:

- Sensors,
- Interceptors, and
- Command-and-control infrastructure that provides data from sensors to interceptors.

Of these, interceptors receive much of the public's attention because of their visible and kinetic nature. Components of missile defense systems may be classified based on the phase of flight during which intercept occurs, although some—for example, the command-and-control infrastructure or radars—can support intercepts in various phases of flight. Interceptors can shoot down an adversary ballistic missile in the boost, ascent, midcourse, or terminal phase of its flight. As cruise missiles and hypersonic glide vehicles continue to proliferate, the MDA and the military services must therefore consider intercepts in all four phases of flight.

Another way to classify missile defense systems is by the range of an incoming missile (short-range, medium-range, intermediate-range, or intercontinental-range). An interceptor's flight time determines both the time available to conduct an intercept and the optimal interceptor placement to improve intercept probability. The United States has "30 minutes or less" to detect an ICBM, track it, provide the information to the missile defense system, find the optimal firing solution, launch an interceptor, and shoot down the incoming missile, ideally with enough time to fire another interceptor if the first attempt fails—a tactic known as "shoot-look-shoot." The time needed to intercept short-range, medium-range, and intermediate-range ballistic missiles is shorter.

Finally, missile defense can be framed by the origin of interceptor launch. At present, U.S. interceptors are launched from the ground or from the sea. In the past, the United States explored possible ways to intercept ballistic missiles from the air or in space, but such efforts have been limited since the U.S. withdrawal from the ABM Treaty in 2002.[32]

Assessing America's Missile Defense

An effective and credible missile defense architecture must include a number of components, such as an integrated sensor architecture that takes multiple data streams from multiple U.S. and allied or partner sources and creates an integrated command-and-control and management structure and three different engagement levels:

- **A short-range defense** to protect key high-value nodes in the U.S. homeland and overseas,
- **A ground-based system** to give general coverage over North America, and
- **A space-based overlayer** that can engage a number of threats across the world in various stages of flight.

This is the essence of Golden Dome, President Trump's groundbreaking missile defense architecture unveiled in 2025.[33] Taken together, such an architecture can increase America's ability to address adversary threats and strengthen deterrence by denying adversaries the benefit of missile strikes on key targets.

While some of the critical components for a Golden Dome exist today, including regional command-and-control nodes, theater air defense systems, and GBIs, there is important work to be done in (1) integrating disparate systems into a cohesive architecture and (2) expanding existing systems to include more capacities and building capabilities in orbit if the United States is to field a credible missile defense architecture.

Integrated Command and Control. An integrated command-and-control system can more effectively coordinate the tracking and interception of enemy missile launches by developing and fielding a Hypersonic and Ballistic Tracking Space Sensor Layer, and integrating shots from the various layers, missile defenses can get more shots at incoming missiles, thereby increasing the likelihood of a successful interception. Put another way, if the overlayer misses the interception, GBIs have the opportunity to engage the incoming target. If the GBIs miss, the underlayer can have some utility in potentially intercepting inbound missiles or warheads at a limited number of critical sites.

Assessment: *Strong*.

An Effective Underlayer for Protecting Critical Sites. Current off-the-shelf missile defenses such as Patriot PAC-3s, Aegis Afloat, air-to-air missiles and surface-to-air missiles, directed-energy weapons (DEW), and THAAD systems may provide robust missile and autonomous systems defenses around a limited number of key locations within the U.S. homeland, at forward bases, and at key allied locations.[34] Locating such systems near key bases, ports of embarkation, and command-and-control nodes provides multiple interception opportunities of enemy missiles that target critical, high-value nodes. Accordingly, the United States should develop and deploy an underlayer that leverages terminal phase intercept capabilities that are postured to defeat a countervalue attack.

Assessment: *Strong*.

Ground-Based Layer. The current missile defense layer comprises 44 ground GBIs at sites in Alaska and California. They are optimized for targets coming from North Korea and were built when North Korea had a very modest ability to target North America with missiles. Later this decade, the next-generation interceptors (NGIs) should augment the existing GBIs on the West Coast with 20 additional interceptors.[35]

The fielding of NGIs is a necessary step, but one that is inadequate for the current threat. A modest expansion of missile interceptors is necessary to contain not only the expanding North Korean and Iranian missile threats but also threats posed by Russia and China. To that end, the United States should expand the number of NGIs it purchases from 44 to approximately 64 and plan to station a significant portion of the new interceptors on a new missile defense site on the East Coast to better target incoming adversary missiles from Eurasia.[36] These 64 NGIs should replace the older GBIs currently deployed in Alaska and California.

These capabilities, needed today given the growing threat from adversary long-range fires, are an important interim step to a more robust, space-based missile defense layer and will form a critical component of Golden Dome.

Assessment: *Strong*.

A Space-Based Overlayer. The "overlayer" is a capability that can field a network of microsatellites in orbit that would serve as both sensors and communication relays, as well as platforms for launching interceptors capable of destroying long-range threats regardless of point of origin, destination, or delivery mechanism. Of particular utility against rogue states such as Iran and North Korea, an overlayer can make an important contribution on threats posed by China and Russia.

The constellation's networked sensors automatically would share launch and targeting data with each other and with ground-based command-and-control networks. They can carry small kinetic, non-explosive kill vehicles or directed-energy weapons that can engage targets across multiple stages of flight, including the boost phase, midcourse flight, or coasting phase.

The technology to share launch and targeting data among the orbital sensors exists today. Similar to how ride-share applications use networked artificial intelligence (AI) to identify which vehicles are closest to a customer's location, networked satellites can identify a threat and identify which interceptors are best positioned to engage and destroy an enemy's launched missile.

A constellation of satellites in orbit through the development and deployment of a Proliferated Warfighter Space Architecture can engage enemy missiles far sooner than a ground-based system, particularly those that are located thousands of miles away in North America. Because they are closer to the target in space and en masse, they can get not only multiple shots at enemy missiles during their trajectory but the satellites can engage some targets while the targets are still in their ascent phase, thereby increasing the chances that interceptors may destroy inbound targets.

In addition, an orbital sensor and engagement capability addresses many of the challenges posed by terrestrial-based engagement, particularly its ability to surveil huge portions of the Earth's surface from orbit. This expanded sensor coverage, coupled with redundant interceptors, increases the likelihood of a successful interception before the missile strikes its intended target.

A proliferated constellation of orbital satellites may address a variety of terrestrial or space-based threats. Further, a robust space-launched resupply capability that leverages commercial launch capabilities would be able to replace expended satellites quickly during a conflict, thus strengthening the resilience (and therefore, efficacy) of such a capability. Building such satellites at scale

enables cost-efficiency, resilience, and rapid reconstitution.

Assessment: *Marginal.*

Allied and Theater Missile Defenses. The United States can strengthen its homeland defenses while at the same time strengthening missile defenses for forward deployed U.S. forces and with allies and partners against missile threats from any adversary. By strengthening, integrating with, and operating with allied and partner missile defense systems, the United States may better deter and, if necessary, defeat missile and autonomous systems threats globally, thereby reducing the risk to deployed American forces, the lives and citizenry of America's allies and partners, and, ultimately, the American homeland.

Threats from adversary missile and autonomous systems increasingly blur the line between theater or regional missile threats and missile threats to the American homeland. To combat such threats, regional Combatant Commanders can now and may increasingly work with key allies and partners in the Indo–Pacific, Europe, and the Middle East on information-sharing (both pre-launch and post-launch), targeting data, and interceptions. Iran's 2024 attacks on Israel—which mixed ballistic missiles, cruise missiles, and autonomous systems—failed due to the integration of American and partnered missile defense capabilities and command-and-control nodes.[37] This type of collaboration may be a model for successful capability integration among American, allied, and partner missile defense architectures. Cooperation with like-minded allies and partners can be crucial both for real-world interceptions but also, increasingly, on development of ever more advanced and capable missile defense systems.

Such advances can be crucial to counter adversary anti-access/area-denial (A2AD) strategies that increasingly rely on advanced missile threats to deny American access to forward theaters. Collaborating with allies and partners to build and deploy advanced missile interceptors, both at home and abroad, may enable American freedom of action and key access to the most critical parts of the globe. Regional missile defense architectures in the Western Pacific, including national missile defenses in Japan and South Korea, NATO missile defense architectures and the effective missile defense systems employed by U.S. partners in the Middle East, only strengthen America's position, standing, and freedom of action.

Where appropriate and feasible, the United States should work with allies and partners on IAMD detection and defeat capabilities that may be concealed or disguised to enhance deterrence and complicate adversary targeting.

Assessment: *Strong*.

An Ever-Evolving Architecture. In addition to the above layers, which are designed to prevent adversaries from launching a long-range strike on the United States or its regional allies, the United States must continue to develop new capabilities both to strengthen defenses and to introduce uncertainty into the minds of adversaries. With these two goals in mind, the U.S. Department of War should continue to explore new capabilities while employing existing capabilities in innovative ways.

For instance, placing missiles on autonomous aerial systems and on drones to shoot down enemy missiles in the boost phase or placing missile interceptors, such as the SM-6, in shipping containers in overseas ports that could target enemy missiles close to their homelands would not only help to protect key areas, but also keep America's adversaries guessing. To this end, the War Department should embark on an aggressive campaign to identify key capabilities that can mitigate today's adversary missile threat.

Assessment: *Strong*.

Policy Recommendations

The single most urgent recommendation is for Congress to fund and for the Department of War to build and field Golden Dome, to include the orbital constellation of sensors and shooters, a third ground-based missile defense site on the East Coast, and the associated Golden Dome battle management systems. To this end, the United States should build on the GOLDEN DOME for America Act, sponsored by Senator Dan Sullivan and Senator Kevin Cramer and Representative Mark Messmer, to field a robust and integrated multilayered defense architecture with a heavy emphasis on space-based interceptors.

Between the GOLDEN DOME for America Act and the One Big Beautiful Bill,[38] the United States is on track to fund Golden Dome with an initial budget of ~$25 billion to begin building the architecture. Such an architecture should include an initial

U.S. Military Power: Missile Defense

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Integrated Command and Control				✓	
Existing Under Layer				✓	
Existing Ground-Based Layer				✓	
Existing Space-Based Overlayer			✓		
Theater Defenses				✓	
Architecture Evolution				✓	
OVERALL				✓	

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

space-based capability of a few dozen interceptors, on the way to an overall space-based interceptor architecture of between 1,500 and 2,200 interceptors.

Eventually, Golden Dome should examine the threats posed by non-arctic trajectories. While not a direct threat now, it is not beyond the realm of possibility that an adversary could forward deploy nuclear-capable missiles in the Western Hemisphere, from which they can range the United States without having to overfly missile interceptors in Alaska or the West Coast. Further, it may be possible at some point in the future for adversaries to build a super long-range ICBM that is able to attack the United States not from a polar-arctic trajectory, but from a polar-Antarctic trajectory using rockets with a range of more than 20,000 kilometers. While still a future possibility, it is one that an evolving 21st century missile defense architecture should take into account and be prepared to address.

Conclusion

America is well on its way to building a robust missile defense architecture that can deny our adversaries from carrying out a strategic attack on the American homeland. This will require patience, innovation, and resources, but from an engineering perspective, building a credible orbital missile defense shield such as Golden Dome is simple in

comparison with putting a man on the moon within seven years or coming up with the idea for an atomic bomb and then building and employing it in less than four years.

The time is now.

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U.S. Coast Guard

Phillip Smyth

Introduction

The United States Coast Guard (USCG), after years of underfunding, particularly during the Biden years, is on the verge of major changes following the infusion of $25 billion from President Trump's One Big Beautiful Bill Act (OBBBA) and the announcement of Force Design 2028. However, needed programs, ships, and other equipment still face delays and cancellations, and recruitment has been abysmal. In the face of competition from near-peer and peer competitors, especially the People's Republic of China (PRC), the Coast Guard remains at a severe disadvantage.

The USCG maintains a unique place as both an armed service and a civilian law-enforcement entity. Along with providing port security and mass-mobilization capabilities to support the U.S. Navy, it must deal with such serious problems as marine safety and the flow of illegal immigration, illegal criminal narcotics, and illegal fishing in addition to assisting partner and allied states around the world in building their own naval and coast guard capabilities.

The USCG is still woefully underprepared and ill-equipped to deal with a peer competitor such as the PRC. China's distant-water fishing fleet, People's Liberation Army Navy (PLAN), Maritime Militia, and China Coast Guard (CCG) have grown exponentially during the past decade. Additionally, China continues to increase deployments of its state-controlled fishing fleets, research ships, and military vessels not just in the seas around Southeast and Northeast Asia, but into the U.S.'s Exclusive Economic Zone (EEZ) and extended continental shelf. All of these multiplying threats pose serious challenges to the USCG's policy of "meeting presence with presence."

Heavy use, old age, maintenance problems, and lack of funds continue to undermine USCG capabilities. The USCG's shorter-range HH-65 helicopter is being decommissioned after 36 years of service, and its workhorse HH-60 helicopters, the platform on which the USCG was hoping to base future helicopter purchases and strategy, have been grounded because of safety issues resulting from their decrepit state and overuse.

The United States also needs to replace and expand its aging polar icebreaker fleet. With more than 1,000 miles of coastline in the Arctic, a presence in other Arctic states and Antarctica, and deficient capabilities, the U.S. is strategically vulnerable. One of its two active polar icebreakers is nearly 50 years old; to continue deployments, the USCG was forced to cannibalize from a sister ship. China, a state with no Arctic coastline, was able to deploy five new polar icebreakers to the Arctic (near Alaska) in August 2025.

Nor are new platforms and equipment all the USCG needs to remain viable. Maintaining and staffing the Coast Guard requires a more concerted effort to recruit and retain servicemembers. The USCG has a strong auxiliary volunteer element that can be utilized in time of war; it should also be used to increase participation in rebuilding the organization. The USCG will need both to reinvigorate its reserve elements and to attract new active-duty members.

A service that is charged with protecting the homeland should not be allowed to continue its rudderless drift, especially as competitors and other threats are actively increasing their capabilities.

Service Overview

Since the beginning of the Republic, the U.S. Coast Guard has taken on countless roles in defense

of the United States. Founded in 1790 as the United States Revenue Cutter Service, the Coast Guard served as America's first and only official naval force until the creation of the U.S. Navy in 1798.[1]

In 1861, Coastguardsmen fired the first maritime shot of the American Civil War.[2] During World War II, off the coast of Greenland, the Coast Guard seized the *Busko*, a Norwegian Nazi-aligned Quisling government ship. It was the first capture of an enemy surface vessel by the United States during the war.[3]

Today's Coast Guard is also the result of an amalgamation of numerous governmental organizations dealing with safety, port security, and smuggling. It includes what was once the U.S. Revenue Cutter Service, the U.S. Life-Saving Service, and several other former sections of the U.S. government related to managing lighthouses. The combination of these elements culminated in the U.S. Coast Guard Act of 1915.[4]

As the only armed service that performs law-enforcement duties, the USCG has operated under shifting authorities since its beginning. From 1790–1967, it belonged to the U.S. Department of the Treasury. The U.S. Navy took over leadership of the Coast Guard during the War of 1812 as well as from 1941–1945 during the Second World War. From 1967–2003, the USCG was under the U.S. Department of Transportation, and in 2003, following the terrorist attacks of September 11, 2001, it was transferred to the U.S. Department of Homeland Security (DHS).

As a mission-oriented organization, the U.S. Coast Guard has a number of set programs that fall under both homeland and non-homeland security tasks. Specifically:

> The Coast Guard manages six major operational mission programs: The operational mission programs oversee 11 Missions codified in the Homeland Security Act of 2002. That act delineates the 11 missions as "homeland security" or "non-homeland security" missions.
>
> 1. Ports, Waterways & Coastal Security
> 2. Drug Interdiction
> 3. Aids to Navigation (ATON: including maintaining the nation's lighthouses, buoys & VTS; also legacy ATON missions including lightships & LORAN)
> 4. Search & Rescue (SAR)
> 5. Living Marine Resources
> 6. Marine Safety
> 7. Defense Readiness (National Security & Military Preparedness)
> 8. Migrant Interdiction
> 9. Maritime Environmental Protection
> 10. Polar, Ice & Alaska Operations (including the International Ice Patrol)
> 11. Law Enforcement (including Prohibition Enforcement History)
>
> **Homeland Security Missions:** Ports, Waterways, and Coastal Security; Drug Interdiction; Migrant Interdiction; Defense Readiness; and Other Law Enforcement
>
> **Non-Homeland Security Missions:** Marine Safety; Search and Rescue; Aids to Navigation; Living Marine Resources; Marine Environmental Protection; and Ice Operations.[5]

The contemporary USCG safeguards over 100,000 miles of U.S. coastline, the U.S.'s Exclusive Economic Zone (EEZ) and extended continental shelf, and such inland waters as major rivers and lakes. It also operates with partner states and allies in law enforcement to prevent illegal fishing, smuggling, and narcotics. As a force, it has 39,000 active-duty members,[6] approximately 6,300 reservists,[7] and 26,000 to 32,000 volunteer auxiliary members.[8]

Search and rescue efforts continue to be a principal focus for the Coast Guard, which was heavily utilized to rescue those on disabled or sinking ships, survivors of natural disasters, and victims of other incidents throughout 2025. The Coast Guard also has continued to aim for a two-hour search and rescue response time within USCG sectors.[9]

The contemporary Coast Guard has been plagued by chronic underfunding, major recruitment shortfalls, old or declining equipment, extensive maintenance problems, and the lack of enough key ships to carry out the missions it has been tasked with performing. If a conflict with China over Taiwan were to develop, the USCG's strong search and rescue, seamanship, vessels, and aircraft would play a major role in assisting the U.S. Navy and protecting the U.S. homeland. However, in its current state, it is doubtful that the service could execute many of its other assigned missions.

Nevertheless, 2025 saw a number of major changes that will have a positive impact on the service as it continues into the 21st century. The most significant were the creation of Force Design 2028 and the funding provided by the OBBBA.[10] The additional funding has allowed the USCG to put more attention into acquisition and shipbuilding. These efforts have also helped the USCG to demonstrate what systems have not worked or what newer tools might be needed in the future.

Force Design 2028. In an effort to reconfigure and modernize the U.S. Coast Guard, DHS and Coast Guard leaders issued a new strategy in 2025: Force Design 2028, a program to rebuild the organization around four major themes:

- Organization,
- People,
- Technology, and
- Contracts and Acquisitions.[11]

Focusing on these four major issues sets a clear standard for where and how the Coast Guard is to be rebuilt with new funds and focuses attention on the need to ready the service for the future.

Decline of Coast Guard Assets and Forces

Chronic underfunding has undermined the U.S. Coast Guard's capabilities. In May 2025, DHS Secretary Kristi Noem told Congress that the USCG was underfunded by at least $21 billion.[12] The purchase and acquisition of new cutters, ice breakers, and aircraft and the updating of facilities to remove backlogged maintenance issues are all needed to restore the Coast Guard as an effective multi-mission force that can tackle its multi-mission focus.

Cutters. The USCG's cutters are the backbone of its fleet of vessels, which also includes smaller boats. Cutters are ships that have crew accommodations and are over 65 feet in length. The USCG had 241 cutters as of January 2025[13] and 1,508 smaller boats as of 2024.[14] These ships take on roles related to port security, drug interdiction, surveillance, and illegal fishing, among many others. Unfortunately, however, many of these vessels have suffered from maintenance backlogs, and cutters are often unavailable for major anti-drug missions, in addition to which many cutters currently in the fleet are quite old: Many inland and river cutters average around 55 years of age, and medium endurance cutters average between 30 and 50 years of age.[15]

Newer cutters were beset by delays in design and production, but the OBBBA enabled Coast Guard shipbuilding programs to receive $162 million for inland buoy tenders (Waterways Commerce Cutters); $1 billion to buy more of the service's small but successful Fast Response Cutters; and $4.3 billion to acquire more Offshore Patrol Cutters, the long-delayed replacements for the aging medium endurance cutter fleet.[16] However, until shipbuilding is ready to take on and deliver these orders, the delivery process for these cutters will likely be a slow one.

Icebreakers and the Arctic. Given the geopolitical and climatological changes in the Arctic, the USCG's need for new icebreakers has never been more pressing. Icebreakers protect the sea-lanes needed for commerce, scientific research, and the maintenance of presence and projection in both the Arctic and the Antarctic. However, there is a serious shortage of the vessels that the United States requires for these tasks. A 2023 U.S. Coast Guard analysis said the service would need "eight to nine" new icebreakers,[17] but efforts to produce these ships have been undermined by cost overruns, issues with design, and numerous delays.

As of August 2025, the USCG was operating only three polar-capable icebreakers.

- The USCGC *Polar Star* is 49 years old, the USCG's only heavy icebreaker, and currently the only Coast Guard ship capable of Antarctic missions to the McMurdo Station.[18] The *Polar Star* has also suffered from fires, maintenance issues, and other problems.[19]
- Commissioned in 1999, the medium icebreaker USCGC *Healy* has experienced numerous fires and lacks spare parts.[20]
- The newest, a non-military icebreaker, is the USCGC *Storis*. Purchased from a private owner, the *Storis* was commissioned on August 10, 2025.[21] It is still waiting for its future homeport in Juneau, Alaska, to be fitted with an upgraded pier.[22]

Compared to America's deficient icebreaker capabilities, Russia currently operates the world's largest and best-equipped fleet of polar icebreakers: 57 ships including the world's only nuclear icebreaker.[23] It also has extensive facilities and other security architecture to support icebreaking in the Arctic. Canada has the world's second largest fleet of icebreakers: 18 with delivery of two more expected by 2032.[24] Nordic states such as Sweden, Norway, and Finland heavily utilize icebreakers in their ice-filled coastal waters, and Finland is a world leader in icebreaker construction.[25]

For its part, China, a state with no coastline in the Arctic and an initially limited albeit expanding presence in the Antarctic, claims to be a "near-Arctic state" and seeks to create a "Polar Silk Road."[26] From 2024–2025, China has increasingly sent its ships into the Arctic, particularly near the U.S. EEZ and extended continental shelf. In 2024, three Chinese icebreakers sailed near the Aleutian Islands.[27] In August 2025, China sent five icebreakers north of Alaska "in or near the U.S. Arctic."[28]

In late 2024, the Icebreaker Collaboration Effort (ICE) Pact was created to facilitate the delivery of additional icebreakers, in part by partnering with Finnish and Canadian shipbuilders. The tripartite ICE Pact would also facilitate the exchange of knowledge to American shipbuilders by allowing Finnish and Canadian expertise in icebreaking design and construction of icebreakers to be utilized within America's ailing shipbuilding apparatus.[29]

President Trump has affirmed the importance of closing the U.S.'s growing icebreaker gap. In June 2025, the President announced that he intended to buy 40 icebreakers, potentially from Finland.[30] The OBBBA allotted $4.3 billion for three new PSCs; $3.5 billion for up to three new medium Arctic Security Cutters (ASCs); and $816 million for small and medium cutters.[31] This funding certainly allowed for more to be done on the acquisition of new icebreakers. However, for almost a decade, shipyards tasked with building and designing the PSCs have experienced delays and cost overruns. The ASC, a vessel that the Coast Guard needs to accomplish its Arctic goals, is still in need of a design; a Request for Information was not submitted until April 2025.[32]

Since 2017, the USCG has intended to replace its aging heavy icebreakers with what would become the PSC.[33] Yet, according to the Congressional Budget Office, despite having been authorized in 2019, "[a]s of July 2024, the design of the PSC was only 59 percent complete."[34] In May 2025, Bollinger Mississippi Shipbuilding was approved to begin production on the first *Polar Sentinel* PSCs.[35]

Increased funding is a positive development, but delays and the need for new vessels quickly require a faster and more proactive approach. As former Coast Guard Captain Luke Slivinski has suggested, allowing the Coast Guard "to bypass the traditional acquisitions process and go straight to...an existing medium polar icebreaker warship design in current operation...would enable an immediate start to construction" and eliminate "years' worth of time devoted to establishing requirements; advertising, bidding, and awarding the contract; and vessel design."[36] The United States should also buy available non-military icebreakers as it did with the USCGC *Storis* to fill critical gaps. The U.S. may be forced to buy from overseas shipyards to fulfill its icebreaker needs, and while continued multilateral cooperation with partners and allies is a net benefit for U.S. policy and projection, the Coast Guard should seek out foreign options that are affordable and include U.S. shipbuilders in the building of the vessels. The United States needs icebreakers and the capabilities to construct them *now*.

Aviation. Funding increases in the OBBBA have given the Coast Guard the ability to purchase newer aircraft that comport with its Force Design 2028. Specifically, $1.1 billion was included for six new long-range HC-130J aircraft, along with simulators; $2.3 billion was included for more than 40 MH-60 helicopters; and $266 million was allocated for long-range unmanned aircraft systems (UAS), providing the Coast Guard with another increasingly required asset both for surveillance and for search and rescue. Such funding of specific and more purpose-built aircraft will enable the Coast Guard to move forward with a more streamlined fleet.

"As of 2024," according to the Congressional Budget Office, "the Coast Guard had about 200 aircraft. About three-quarters were helicopters, and the rest were fixed-wing aircraft."[37] These aircraft perform missions ranging from search and rescue to drug interdiction, surveillance, security, and environmental protection. Due to the harsh extremes of their operating environments and issues with supply, many of these aircraft require more intensive maintenance services.

Reduced budgets under the Biden Administration, repairs, and the number of different airframes operated by the USCG have affected the ability of the service to field needed aircraft. From fiscal year (FY) 2018–FY 2022, according to the U.S. Government Accountability Office (GAO), USCG fixed-wing and rotary-winged aircraft failed to meet availability targets.[38] Systemic maintenance and issues related to heavy use with its air fleet stretched the USCG to its limit in 2023–2024 following a series of groundings.

Fixed-Wing Aircraft. The Coast Guard's fixed-wing aircraft often perform transportation, patrol, rescue, surveillance, command and control, and interdiction duties. Additionally, some of these platforms' longer ranges allow the USCG to patrol larger zones—a necessity in the Pacific, Arctic, and stretches of the Atlantic. It was the Coast Guard's longest-range platform, the HC-130Js, that were key elements in monitoring Chinese ship movements near Alaska, for example, in 2025.[39]

The fixed-wing fleet has been undergoing a process of modernization, and many older airframes have been retired. The last long-range HC-130H was retired in 2024. The platform had been in service for 56 years.[40] The Gulfstream C-37A, a long-range command-and-control aircraft acquired in 2007, was complemented by a C-37B, which was acquired in 2022.[41] However, the fixed-wing fleet also has had maintenance-related problems. In 2023, all of the USCG's 14 C-27J Spartan Patrol Aircraft had to be grounded when it was discovered that all had structural cracks.[42]

Rotary-Winged Aircraft. The Coast Guard was an early adopter of rotary-winged aircraft, and because of the multitude of missions that helicopters can perform, they form a large and core portion of the USCG aviation force. In 1944, for example, it was the USCG that flew the first lifesaving mission using a helicopter.[43]

Around 100 MH-65 helicopters are currently in service with the USCG. A workhorse for the service, particularly with search and rescue, since its first delivery in 1984, the aircraft have cumulatively logged over 1.8 million flight hours.[44] Although the MH-65 is currently being phased out in favor of the MH-60 Jayhawk, the USCG has signed a memorandum of understanding with Airbus that could keep the helicopter operating until 2037.[45]

The USCG intends to have the MH-60 as its sole helicopter platform, a move to a single platform that would allow a level of standardization for the USCG to invest more in new attachments, perform more functional maintenance, and streamline training, but the helicopter has been beset by operation stresses as a result of its high usage. "By late 2023," according to *Forbes*, "over 90 percent of the Coast Guard's MH-60T helicopters were operating with more than 16,000 flight hours," and "[a]s of early December, almost 18 percent of the Coast Guard's 45-strong MH-60T 'Jayhawk' medium range recovery fleet [was] out of service."[46] After the November 2023 crash of an MH-60 in Alaska, the USCG cut the service life of the helicopter from 20,000 hours to 19,000.[47] As a result, six MH-60s were immediately grounded.

Despite these issues, Coast Guard aviation's talent and mission focus have allowed the service to perform its essential duties. In July 2025, while flying in an MH-65, one Coast Guard swimmer rescued 165 people following major floods in Texas.[48] However, Coast Guard aviation's readiness and resources have not recently been tested in a major national crisis such as a Hurricane Katrina–type event. Even with funding increases, the Coast Guard's performance vulnerabilities are still present.

The Coast Guard requires a cohesive plan and evaluation of its aircraft assets. When there are numerous aircraft types with different maintenance requirements, training regimens, and complex supply chains, costs rise and efficiency diminishes. This is partly why the USCG has not been meeting availability targets. The recently grounded C-27Js came into the Coast Guard by way of an ultimately unneeded U.S. Air Force procurement program when the USCG was already integrating a more purpose-built aircraft, the HC-144 Ocean Sentry, into its fleet.

As more funding arrives, the USCG must address its pressing maintenance issues. Increasing the availability of and access to parts supplies to meet immediate needs should also be factored into its plans. The USCG should explore options for long-range aircraft and unmanned systems that can be utilized for longer-range intelligence, surveillance, and reconnaissance (ISR) equipment. Longer-range ISR assets that can allow other resources to be prepositioned would also help the USCG to maintain presence and support DHS and other national security missions.

Facilities and Maintenance. The maintenance issues that have plagued the Coast Guard, in addition to reflecting ongoing funding neglect, have

directly affected mission readiness and capacity to operate. Because the Coast Guard's facilities, vessels, and aircraft operate in harsh environments and are heavily used, major maintenance shortfalls have caused cutters and air assets to be unable to deploy, thereby hurting their capability to perform missions. The OBBBA gave the USCG $2.2 billion to maintain readiness through depot maintenance.[49] Without these funds, the service would likely continue to experience major maintenance shortfalls. However, according to a 2025 GAO report, the USCG would need upwards of $7 billion for infrastructure facilities.[50] This money would not be needed just for rebuilding, overhaul, and regular maintenance, but also to compensate for the extensive backlog created by years of neglect.

Access to spare parts has been another long-term readiness problem for the Coast Guard. During an August 2024 event, then-USCG Vice Commandant Admiral Kevin Lunday told the audience that:

> On the asset side we're struggling to sustain the readiness of our current fleet of ships, of boats, of aircraft, and offshore infrastructure, and our IT systems, and networks. Let me give you an example: If you want to get underway on a major Coast Guard cutter today, you have to do what we call a 'controlled parts exchange' with other ships at the pier. That's a fancy term for cannibalization. We'll steal parts or borrow…from the other ships just to get another ship underway. Now, you can do that for a short amount of time, but when you do it over a number of years, you're eating your own readiness. And that's what we're seeing.[51]

The USCG Auxiliary. The Auxiliary is a 26,000-strong to 32,000-strong volunteer element of the U.S. Coast Guard.[52] Any adult who meets eligibility requirements and is over the age of 17 can join the Auxiliary, and this allows it to recruit from a broad spectrum of talents and capabilities.[53] Nevertheless, the force includes many individuals of retirement age, and many lack skills beyond assisting in search and rescue. The Auxiliary does not carry out the Coast Guard's military or law-enforcement duties, but it does act as a cost-effective and increasingly important force multiplier.

Costing less than $20 million annually and saving taxpayers approximately $240 million a year,[54] Auxiliary flotillas raise their own funds. As noted, the Auxiliary acts as a force multiplier for the USCG by assisting in safety, maintenance of facilities and vessels, inspection duties, public education, public affairs, and search and rescue.[55]

The U.S. military is currently hard-pressed to find enough translators and interpreters who specialize in Indo-Pacific languages; the Auxiliary has an Interpreter Corps that serves with Coast Guard operations around the world.[56] Another major goal of Force Design 2028 is to strengthen the Coast Guard's cyber capabilities; members of the Auxiliary could be used to further enhance the USCG's cyber assets and in a cost-effective manner.[57] And during 2010's Deep Water Horizon oil rig explosion and spill, Auxiliarists were there to provide extensive environmental, rescue, and other forms of support.[58]

In a potential war—for example, a war with China—U.S. Naval militias, potentially under National Guard auspices, would be required for the war effort. However, only Alaska, California, New York, Ohio, and South Carolina can currently call upon such units. In World War II, Auxiliarists could join or be enrolled in the Coast Guard's now-disbanded Temporary Reserve.[59] In a contemporary conflict, the Auxiliary could be called upon once more to fill the ranks of state-run maritime militias and activities within the USCG.

Recruitment and Retention. The U.S. military's multi-year recruitment crisis has not left the USCG unscathed. The USCG must do more to address its recruitment and retention of officers, enlisted members, and reserves. This is a particularly challenging issue given that recruitment issues have long plagued the USCG, especially from 2019–2023 when the service did not meet its recruitment goals. In 2022, the Coast Guard "recruited 2,793 service members out of a goal of 4,200," which was just "a little over 66.5 percent of its annual objective."[60] In 2024, then-Vice Commandant Admiral Kevin Lunday told an audience at the Brookings Institution that "we've had to lay up three…of our major cutters because we don't have enough enlisted personnel to crew them."[61] In May 2025, the GAO noted that "[h]eavy workloads, command leadership, and physical and technical infrastructure issues hurt morale and affected retention."[62]

In 2022, in an attempt to alleviate recruitment issues, the USCG removed some barriers to

enlistment. The enlistment age was raised from 34 to 42, single parents were allowed to join, and restrictions on those with higher debt-to-income ratios were relaxed.[63] In 2024, the Coast Guard finally exceeded its recruitment goal with about 200 more recruits than their target number of 4,200. New recruiting stations and about 100 new recruiters were largely credited with meeting the 2024 goals.[64] The USCG's continued use of more recruiters and recruitment offices, along with more targeted marketing of the service, would certainly assist in recruitment efforts.

Nevertheless, the USCG continued to lose servicemembers faster than it could replace them.[65] Citing the GAO, *Stars and Stripes* reported in May 2025 that because of retention issues, the USCG was "short about 3,000 members" and "operating below the workforce level that it deems necessary to meet operational demands."[66] The GAO has recommended that the Coast Guard focus on collecting and analyzing more data to make up for recruitment shortfalls and for future targeted recruitment,[67] but the growing need for specialized skills within the USCG indicates that a more immediate focus on certain areas is required. Increasingly, individuals with key skills that assist with retention and/or missions, such as those with a cyber or technology background and those with medical experience, should be a targeted recruitment focus.[68]

The USCG's demand for medical, technology, and other professionals, both for its missions and to meet the needs of USCG servicemembers, faces stiff private-sector competition. Salaries for those in the technology and medical fields, for example, are higher in the private sector.[69] Since August 2025, the USCG has offered upwards of $75,000 as an enlistment bonus,[70] and additional financial incentives may be required for more specialized skillsets. Retention among those stationed in isolated or rural areas, often key zones for USCG presence, has suffered because of issues related to the provision of health care. Therefore, notes USCG Lieutenant (junior grade) Victoria Folz, "increasing recruitment efforts targeting medical students and professionals could yield positive results."[71] Attracting individuals working for technology companies and those attaining degrees for technology positions should also be goals for USCG recruiters.

Attracting those in technology fields often requires a more dynamic approach beyond direct recruitment at schools and universities focused on those skillsets. Many in the cyber field maintain irregular schedules and do not match Coast Guard physical fitness requirements.[72] Using the USCG's Auxiliary to appeal to volunteers would save money and create a new opportunity for recruiting outside of the normal paradigms of direct recruitment into the Coast Guard.

Countering Narcotics, Illegal Immigration, Human Smuggling, and Human Trafficking

Illegal Narcotics. The U.S. Coast Guard's narcotics interdiction efforts have increased significantly since 2024. Approximately 1,024 metric tons (2,257,534 pounds) of cocaine were seized from 2020–2024.[73] The Eastern Pacific, the Caribbean, and the border with Mexico have been key areas of focus. In July 2025, the USCG stated that it had "seized over 242,000 pounds [around 109 metric tons] of cocaine" since January 20, 2025.[74] In March 2025, one seizure in the Pacific yielded narcotics worth more than $500,000,000.[75] Also in 2025, during Operation Pacific Viper, the USCG made the largest seizure of cocaine in its history: 61,740 pounds.[76]

In February 2025, the U.S. Department of State listed eight Mexican, Central American, and South American drug cartels as foreign terrorist organizations;[77] the USCG's efforts to counter the threat of illegal narcotics have never been greater than they have been since then. In view of the 2026 actions in Venezuela and continued efforts to counter drug flows, elements of the USCG's special operations Maritime Security Response Team might be better utilized if they were more integrated with the ranks of the United States Special Operations Command. Along with the use of dedicated aircraft devoted to deploying fast-ropers, the USCG could better assist in many of these efforts.

Drug cartels, particularly many of these recently listed groups, have been expanding their trafficking through maritime routes. According to DHS, non-commercial go-fast boats, fishing boats, and sailing vessels have transported a majority of illegal drugs into the United States.[78] In August 2025, DHS Secretary Noem noted that "80% of illicit drug seizures occur at sea."[79]

Increasingly, the drug cartels are using narco-submarines to traffic illegal narcotics. According to InSight Crime, "A near-record number of

narco-submarines were intercepted crossing the Atlantic and Pacific in 2024."[80] USCG Lt. Commander Stephen Brickey told CNN in 2019 that "[t]hey blend in.... Most of the vessel is underwater, so it's hard to pick out. They're painted blue. They match the water."[81] According to one report, these low-cost and difficult-to-detect vessels "have also become more advanced." [82] One intercepted narco-submarine came equipped with a Starlink system and antenna.[83]

Narco-submarines are also traversing greater distances, traveling to Europe and Australia. *The Wall Street Journal* has characterized their utilization as the equivalent of a "secret cocaine superhighway under the Atlantic," noting that narco-submarines were transporting narcotics as far away as Spain.[84] By mid-2025, the cartels were often complementing their smuggling efforts by also using underwater drones.[85]

As the quality and technological capabilities of narco-submarines have increased, the USCG has relied primarily on human intelligence generated by partner states in intercepting narcotics shipments.[86] The addition of higher-technology approaches with a focus on ISR and combining new passive sensors and unmanned systems would certainly aid in the anti-narcotics mission. Additionally, given that the USCG must continue its patrols over expansive areas, the further integration of these systems would help it to cover more ground. In keeping with Force Design 2028, the USCG has been looking at capabilities and systems that can better integrate a wider spectrum of information to "Sense, Make Sense, and Act."[87]

The USCG must also look at its core capabilities. Increased access to newer and better-maintained cutters would also be beneficial. The Coast Guard's extensive maintenance issues have had a negative effect on its missions. According to the DHS Inspector General, "Coast Guard cutters were unavailable for 2,058 cumulative days over a 3-year period" from 2021–2023.[88] In 2024, citing a Coast Guard statement, the GAO noted that the USCG's medium endurance cutters, "a key asset for interdicting drugs," were not available because "the declining condition of the cutters risked decreased capability for meeting mission requirements."[89]

Illegal Immigration, Human Smuggling, and Human Trafficking. Illegal immigration utilizing sea routes expanded during the Biden Administration, and illegal immigrants, professional human smugglers, and human traffickers have continued to use them.[90] Moreover, smuggling and illegal immigration attempts have not abated. By March 2025, the USCG had "tripled" its personnel commitment to dealing with these issues.[91] At around the same time, the USCG announced that it had diverted cutters, aircraft, and other patrol craft to heighten its "operational presence near southwest border between [the] U.S. and Mexico."[92] While distinct issues, illegal immigration, human smuggling, and human trafficking often overlap and require specialized expertise and resources.

Countering China

The PRC has aggressively promoted a strategy of grey-zone conflict with the U.S. and its Pacific partners. From 2024–2025, the Chinese have increasingly been sending icebreakers, ostensible research vessels, and their CCG into the U.S. EEZ off the coast of Alaska. In October 2024, a China Coast Guard vessel entered the Arctic for the first time and was later joined by another CCG vessel for exercises with Russia.[93] Thus, the USCG is increasingly coming into contact with Chinese vessels that are both creeping closer to U.S. claims and challenging America's ability to protect the homeland.

As China has continued its efforts to copy and then utilize lessons gleaned from the United States, it has invested heavily in its CCG. In 2017, analyst and researcher Ryan Martinson noted that "China's expansion in maritime East Asia has relied heavily on non-naval elements of sea power, above all white-hulled constabulary forces."[94] Nearly a decade later, the buildup of and reliance on these "white-hulled constabulary forces" (the CCG) has only increased.[95] The CCG has exhibited close cooperation with the PLAN and China's maritime militia forces.[96] In fact, it has been so close that a PLAN warship collided with a CCG vessel in the South China Sea as they were harassing Filipino fishermen in August 2025.[97]

Known by Western observers as the PRC's "Second Navy" or "Shadow Navy," the China Coast Guard was created in 2013 and modeled after its U.S. counterpart.[98] The CCG has also undergone a meteoric rise in its adoption of new types of shipping, equipment, tasking, and restructuring as well as its contribution to China's militant posturing in the Pacific.

A 2019 Naval War College study reported that the CCG had 1,275 hulls. By 2024, the CCG had 150 oceangoing patrol vessels.[99] Compared to the USCG, which has around 200 cutters and 1,400 smaller boats, the CCG's vessels are newer and have not suffered from the same maintenance issues. CCG ships have been widely utilized in the disputed waters of the South China Sea. Many of the CCG's ships have had a more naval than white-hulled focus. Many of China's ships can be fitted with anti-ship missiles.

Like the USCG, the CCG is an amalgamation of different capabilities with a multi-mission focus. The China Marine Surveillance, China Fishery Law Enforcement Command, China Maritime Police, and some seaborn units belonging to the PRC's General Administration of Customs were all combined into the CCG.[100] Superficially, the CCG's strongest elements relate to its maritime patrol and law-enforcement capabilities,[101] although the CCG was removed from its position under the Ministry of State Security's People's Armed Police in 2018.[102]

The combining of these disparate entities and their centralization through the creation of a new force bears many hallmarks similar to the U.S.'s 1915 Coast Guard Act and the later incorporation of different agencies into the USCG. Unlike the USCG's, the CCG's goals appear to be more military-focused and law enforcement–focused with search and rescue as a distant secondary goal.

The CCG has been involved in "rescue" operations that were made necessary by its ramming of other ships. In January 2025 and in rough seas, the CCG shadowed and did little to assist in the Filipino effort to recover the body of a Filipino fisherman.[103] The CCG even impeded the rescue of a drowning Filipino fisherman in July 2024 near the disputed Scarborough Shoal.[104]

These incidents also show how the USCG can better assist regional partners in their efforts to counter the Chinese menace. In fact, the USCG has conducted a number of deployments to the Western Pacific, including assisting with the monitoring of fisheries in the Marshall Islands in July 2025 and joint exercises with Japan, South Korea, and the Philippines in June.[105] The USCG has also increased assistance to its Filipino counterparts in the Philippine Coast Guard.[106] Through continued joint training, the promotion of interoperability, and collaboration with the Philippines and other regional partners and allies, the United States can better counter China's grey-zone tactics. The USCG's exchange of tactics and new knowledge about how to counter China with overseas partners is a great asset in U.S. military planning.

In 2022, the USCG launched its first anti–illegal, unreported, and unregulated fishing (IUU) effort for the intergovernmental South Pacific Regional Fisheries Management Organization. The South Pacific Ocean covers nearly a quarter of the world's oceans and is plied regularly by ships belonging to China's distant-water fishing fleet, which has deep links to the PRC's maritime militias and has contributed to depleting the seas of numerous resources.[107] Near the Galapagos Islands, the USCG has shadowed Chinese fishing vessels that have plundered local fisheries. The Chinese maritime militia fleet also fields several skilled units, some of which have been used repeatedly to advance Chinese geopolitical goals in the South China Sea.[108]

The increase in the use of Chinese "research" vessels, CCG, and maritime militias will require the USCG to move at a faster pace to acquire icebreakers, cutters, and longer-range ISR equipment to assist in countering Chinese grey-zone warfare. The USCG has a valuable role in countering Chinese illegal fishing maneuvers and penetrations into U.S. territory and claims, along with backing partners and allies in the Pacific and Arctic.

Assisting regional partners and allies must also include the construction and modernization of bases that can give the Coast Guard a more forward operating position. Geographically, the Pacific is incredibly vast, and the area between USCG in Honolulu, Hawaii, and other USCG facilities in Guam is around 4,000 miles. A Coast Guard facility that could host cutters in American Samoa, an American territory in the South Pacific, would improve America's ability to assist allies and safeguard large swaths of ocean against Chinese projections.[109]

As a military support element for the U.S. Navy, however, the USCG is at an extreme disadvantage vis-à-vis a militarized China and a CCG set up to act as a support element for China's PLAN. The USCG's main tasks in wartime would include the execution of anti-submarine warfare (ASW) and convoy escort, but its personnel lack the training, weapons, and equipment that would enable them to assume those functions quickly. In order to counter narco-subs in the Pacific, for example, the USCG has had to ask the U.S. Navy to provide ASW capabilities and

support.[110] Given the USCG's maintenance backlogs and demonstrated inability to deploy cutters to deal with drug flows in the Caribbean and Pacific, the extent to which the U.S. Navy could depend on the Coast Guard's capabilities in an all-out fight against China becomes a matter of some doubt.

Beijing has shown a keen interest in pushing the United States out of the South Pacific. In 2022, China signed a security pact agreement with the Solomon Islands. That year, the island country turned away a USCG cutter engaged in patrols in the area.[111] In 2023, China and the Solomon Islands also agreed to a pact on "law enforcement and security matters."[112] In 2024, the island nation of Nauru switched its diplomatic recognition from Taiwan to China. A direct and more formidable USCG presence in the region would do much to let the Chinese know that the South Pacific is not their property.

Conclusion

The USCG's 2025 adoption of Force Design 2028 and the needed funds provided by the OBBBA will go far to ready the USCG for the future. The challenge of systemic institutional dysfunction within the Coast Guard is beginning to be addressed. The USCG has executed record-breaking drug busts, countered Chinese projections near the United States, assisted partners and allies abroad, continued missions for port security, and performed many search and rescue operations. However, the service continues to suffer from the residual effects of years of neglect and underfunding.

As the U.S. Coast Guard finds a firmer footing with new fiscal support, there are still many questions to be resolved with regard to how many and how effectively missions can be executed. Despite significant investments in the Coast Guard, the road to being a fully functional service with negligible backlogs—particularly with regard to new ships, maintenance, and aircraft—is still years away. The USCG will require sustained support to become the service it needs to be in case of any potential conflict with China over Taiwan.

Scoring the U.S. Coast Guard

Capacity Score: Weak

Funds allotted to the USCG by the OBBBA combined with Force Design 2028 will push the Coast Guard in a more positive direction, but its current capacity score is "weak." Maintenance issues continue to undermine the effectiveness of the service's nearly 240 cutters, and facilities needed to maintain newer ships have not yet been constructed. More recruitment and retainment mechanisms are necessary along with the acquisition of new ships and aircraft and an extensive rebuilding of the Coast Guard's maintenance capabilities. In 2025, the Government Accountability Office reported that "the Coast Guard is short about 2,600 active-duty staff and operating below the workforce level it thinks necessary to meet mission needs."[113] Lacking sufficient staff and maintenance capacity, the Coast Guard struggles to remain mission ready.

Capability Score: Weak

The USCG's capability score is "weak" trending toward "marginal." The lack of icebreakers in the Arctic puts the United States at a severe disadvantage with peer competitors and near-peer competitors, particularly China and Russia. Because of maintenance issues, the USCG had problems deploying cutters to the Caribbean. In the Arctic and Pacific, China's newer and more modern vessels make it harder to meet "presence with presence" against its increasingly frequent aggressive advances. The inability to field functional cutters, helicopters, and fixed-wing aircraft in a variety of zones has had a detrimental effect on the USCG's ability to execute its missions. As a warfighting entity, the USCG lacks anti-submarine and convoy escort capabilities, and "as competition with China accelerates," in the words of Navy Lieutenant Commander James Halsell, "the homeland once again is not secure from undersea threats. Chinese and perhaps Russian submarines could interdict logistics, disrupt critical infrastructure, or threaten the American public's sense of security."[114]

Readiness Score: Very Weak

The USCG's readiness score is "very weak." Modernization has hit numerous snags that have forced the service to rely on older and/or deficient equipment. Inadequate maintenance infrastructure and

a workforce that is not large enough to meet current needs continue to be major problems. In 2025, the DHS Inspector General observed that "Coast Guard cutters were unavailable for 2,068 cumulative days over a 3-year period" and "calculated that the Coast Guard could have interdicted an additional 57 to 89.1 metric tons of cocaine had these cutters been performing the counterdrug mission."[115] The fact that the need for parts and need for cannibalization are ever-present issues means that entire air fleets have been grounded because of maintenance issues that, along with a lack of personnel, make the USCG's readiness to face a peer competitor such as China a matter of serious concern.

Overall USCG Score: Weak

Maintenance issues have been a major problem for the U.S. Coast Guard, and significant backlogs were a significant issue from 2024–2025. With the passing of the One Big Beautiful Bill Act, the USCG finally has much of the funding (approximately $25 billion) it needs to be less dysfunctional than it has been for many years. Even as the Coast Guard's air and sea fleets are modernized, there will likely be continued shortfalls in its ability to deploy assets. The USCG still lacks the icebreaking capabilities required to compete with China and Russia in the Arctic, and in the Eastern Pacific and Caribbean, as noted above, the lack of enough key vessels and aircraft has hurt the Coast Guard's ability to complete drug interdiction missions and carry out other critical operations.

Policy Recommendations

- **End the maintenance backlog.** As it receives needed funding, the USCG can assess its maintenance needs, refit some facilities, buy needed parts, and improve training. Security infrastructure in the Caribbean, Pacific, and Arctic should take precedence because of their harsher operating environments and security needs.

  Too many bases, particularly smaller facilities that are placed closely together, are in disrepair and unnecessary. As the USCG continues its efforts to become a more modern and well-organized force, some base closures and consolidations may be necessary. Due to faster boats, helicopters, and other equipment, and as assessed by the GAO and by the Coast Guard, some of these bases are functionally obsolete. Although closing USCG facilities would be a relatively unprecedented move, the closing and consolidation of some bases might be very effective in assisting the USCG in its modernization and deployment efforts.[116]

- **Improve recruitment and retention.** Despite the dedication of its servicemembers and having recruited at a desired level in 2024, the Coast Guard is still woefully undermanned. As of August 2024, the Coast Guard had "more than 4,000 empty billets in its military workforce" out of an authorized "active duty end strength of 44,500." Specifically, "according to the latest figures from the Defense Manpower Data Center, from the end of June [2024], the active force only [had] 40,358 members."[117] In 2023, recruitment and retention issues "forc[ed] the Coast Guard to take ten cutters out of service, transfer five tugs to seasonal activation, and shutter 29 boat stations."[118] The USCG should continue to offer financial incentives for new recruits, increase its marketing for recruitment, target recruits that can bring added value to the service, and create facilities (particularly in more isolated areas) that better cater to the needs of its servicemembers. Additionally, a more focused utilization of volunteer elements, such as the Coast Guard Auxiliary, might do more to provide some services needed by the USCG.

- **Increase investment in unmanned aerial systems.** The USCG has put $350 million into AI and robotics research but only $11 million of its budget into upgrading and purchasing current autonomous systems, many of them short-range.[119] Upgrading current systems and bringing more onboard should be a primary focus. As drug flows through the eastern Pacific and Caribbean increase and the threat of China looms, the USCG requires larger numbers of and more advanced equipment to maintain a layered approach to interdiction and military support. The adoption of further unmanned aerial systems, particularly medium-range and longer-range vehicles, would significantly enhance these efforts. The first MQ-9 Reaper

U.S. Military Power: Coast Guard

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability		✓			
Readiness	✓				
OVERALL		✓			

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

drones came into service with the USCG in September and quickly demonstrated their worth in countering illegal immigration, smuggling, and illegal drugs.[120] These systems help the USCG to maintain a more constant presence, are cheaper to operate and maintain, and do not require the same levels of training that are needed for the USCG's aviation wing.

- **Significantly increase the number of USCG icebreakers.** The United States has only three operational icebreakers, and only one is capable of reaching U.S. facilities in Antarctica. At a time when a focus on security infrastructure in the Arctic should be a priority, the USCG lacks the icebreakers it needs, particularly as the Arctic becomes a zone for great-power competition. In October 2025, the Trump Administration announced that it would purchase 11 Arctic Security Cutter icebreakers from Finland; four would be produced in Finland, and seven would be produced in the United States.[121] This can serve as a needed stopgap before the Arctic Security Cutters can be brought into service, but the U.S. will still need to accelerate domestic efforts and produce at least 20 heavy and medium-sized vessels. In the shorter term, a mix of at least nine medium and heavy icebreakers would help to fill gaps in the Arctic for the U.S.[122] As northern sea-lanes continue to open to billions of dollars in trade and resource acquisition, newer, more capable icebreakers can support a longer-range U.S. strategic approach to the Arctic. However, these icebreakers will need specialized docking and maintenance facilities,

and purchased icebreakers should have modular capabilities that comport with changing Coast Guard requirements.

- **Replace old and outmoded cutters.** The USCG's cutters are old and need to be replaced. The age and poor maintenance of these cutters have undermined the USCG's ability to counter the activities of cartels operating in Central and South America. Replacing its 29 medium endurance cutters should be a priority. Additionally, the USCG has requested funding for two more fast response cutters for deployment to the Pacific, but more should be commissioned and brought online.[123] Despite many successful missions countering drug cartels and Chinese IUU in the Caribbean and Eastern Pacific, the lack of key vessels and aircraft has hurt the Coast Guard's ability to complete other drug interdiction missions and carry out other critical operations.
- **Increase forward positioning in the South Pacific.** American Samoa provides a needed base for the USCG to project American strength and counter Chinese advances in the region. The United States cannot afford to ignore this region and its importance to the security of key American allies such as Australia.

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U.S. Merchant Marine

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Introduction

On June 12, 1775, the British armed sloop HMS *Margaretta* found herself pursued by the citizens of Machias, Maine. Following the Battles of Lexington and Concord in Massachusetts, American Captain Jeremiah O'Brien, on board the sloop *Unity*, followed by another sloop, *Falmouth Packet*, aimed to seize and arrest British sloop-of-war commander Midshipman James Moore. The capture of Moore's *Margaretta*, while only a small footnote in the Revolutionary War, is seen as the beginning of the American Merchant Marine.[1]

Two hundred and fifty years later, the U.S. Merchant Marine is ranked as the world's 22nd largest merchant marine.[2] In January 2025, the U.S. Maritime Administration identified only 188 ships of over 1,000 gross tons in the active fleet.[3] That placed the United States commercial fleet at only 0.55 percent of the world's fleet by deadweight tonnage. In terms of shipbuilding, the United States pales in comparison with nations like China (54.57 percent of world shipbuilding); South Korea (28.02 percent); and Japan (12.56 percent); in fact, as of December 2, 2025, the United Nations Conference on Trade and Development's "Maritime Profile" entry for the United States says only "No value reported or collected."[4]

With a small commercial fleet and a diminutive commercial shipbuilding infrastructure, the United States finds itself in the strange position of being the most significant naval power in the world while also lacking the key commercial component to make it a true maritime power. This is a strategic vulnerability that leaves the U.S. exposed to economic coercion by China.

On April 9, 2025, President Donald Trump signed Executive Order 14269, "Restoring America's Maritime Dominance," which announced his new shipping strategy:

> **Section 1**. *Purpose*. The commercial shipbuilding capacity and maritime workforce of the United States has been weakened by decades of Government neglect, leading to the decline of a once strong industrial base while simultaneously empowering our adversaries and eroding United States national security. Both our allies and our strategic competitors produce ships for a fraction of the cost needed in the United States. Recent data shows that the United States constructs less than one percent of commercial ships globally, while the People's Republic of China (PRC) is responsible for producing approximately half.
>
> Rectifying these issues requires a comprehensive approach that includes securing consistent, predictable, and durable Federal funding, making United States-flagged and built vessels commercially competitive in international commerce, rebuilding America's maritime manufacturing capabilities (the Maritime Industrial Base), and expanding and strengthening the recruitment, training, and retention of the relevant workforce.
>
> **Sec. 2**. *Policy*. It is the policy of the United States to revitalize and rebuild domestic maritime industries and workforce to promote national security and economic prosperity.[5]

The President's action was preceded by issuance of the United States Trade Representative's *Report on China's Targeting of the Maritime, Logistics, and*

Shipbuilding Sectors for Dominance and reintroduction of the Shipbuilding and Harbor Infrastructure for Prosperity and Security (SHIPS) for America Act, sponsored by Senators Mark Kelly (D–AZ) and Todd Young (R–IN) and Representatives John Garamendi (D–CA) and Trent Kelly (R–MS), on April 30, 2025.[6]

These three actions represent the most significant reform in American maritime legislation since the Merchant Marine Act of 1970. Moreover, the reconciliation budget enacted in the summer of 2025, the so-called One Big Beautiful Bill, allocated limited resources to the commercial maritime sector—$450 million "for maritime industrial workforce development programs" and $600 million "for the lease or purchase of new ships through the National Defense Sealift Fund"—but within defense spending and not for the lead agency, the U.S. Maritime Administration.[7] As the assessment in this chapter will make clear, more resources will be required.

The Fall of the American Maritime Sector

The United States Merchant Marine and maritime infrastructure finds itself in this situation as a result of a series of actions dating back to the end of the Second World War. During World War II, the United States transformed itself into the Arsenal of Democracy, but it was the U.S. Merchant Marine and the American maritime sector that allowed for delivery from the home front to the battle front. That victory did not come without a cost: The United States lost 733 ships and approximately 9,500 American merchant mariners. With the defeat of Germany and Japan, the United States found itself with a Navy and Merchant Marine that were second to none. United States ships delivered 63 percent of the cargo for the Allies in the Second World War, and the U.S. Maritime Commission, the precursor to the modern Maritime Administration (MARAD), oversaw the construction of 5,777 ships and the training of nearly 250,000 merchant mariners.[8]

At the end of the Second World War, the United States was in a position akin to that of the British Empire before the First World War with a massive Navy, a worldwide network of bases, and a commercial fleet that could transport the products from its factories to a world devastated by war in 1945. However, from the beginning, the United States adopted a series of policies to minimize its commercial dominance, and these policies in turn undermined the ability of the U.S. to sustain its maritime infrastructure.

- The Ships Sale Act of 1946 provided Allied merchant marines with 1,113 replacement vessels to repopulate their fleets.
- The General Agreement on Tariffs and Trade (GATT) lowered American tariffs but allowed for higher reciprocal tariffs against the United States to foster industries overseas.
- Before its entry into World War II, the United States used the Panama registry to avoid neutrality laws, particularly the transportation of 100-octane fuel to the United Kingdom. The use of these open registries proliferated with creation of the Liberian Registry by the U.S. in 1948. The aim was to provide one of the few independent states in Africa with an income source (registration fees) with lower regulatory thresholds to provide a registry for low-cost ocean transportation for emerging nations around the world.
- The Marshall Plan of 1949 provided loans to nations to restore their industry—in this case, to rebuild their shipyards using the pre-fabrication methods adopted in American shipyards by American industrialist Henry J. Kaiser, who brought assembly-line manufacturing techniques to shipbuilding.
- In 1949, the new U.S. Department of Defense (DOD) created its own military merchant marine, the Military Sea Transportation Service (renamed Military Sealift Command in 1970), which would manage the transportation of DOD cargo but still relied on the U.S. Merchant Marine for its crews and sustainment during times of war.
- The Federal-Aid Highway Act of 1956 led to the creation of the Interstate Highway System and shifted coastal cargo off of ships and onto shore. This had the effect of reducing demand for domestic U.S. shipping.

- The introduction of the Boeing 707 and McDonnell Douglas DC-8 jetliner freed space on intercontinental rail lines for more cargo.

- The Colonial Pipeline in 1962 diminished the need for tanker transportation between the U.S. Gulf Coast and East Coast.[9]

- The Vietnam War demonstrated the need for a commercial merchant marine to meet initial demands in 1965, but the prolonged nature of the war required the breakout of ships from the National Defense Reserve Fleet, using ships left over from the Second World War (largely the *Victory* class) to free commercial ships to return to commercial service.

- In 1981, it was decided that the construction differential subsidy, which had been initiated under the Merchant Marine Act of 1936 to offset the higher costs of building American merchant ships involved in international trade, should be ended. This led to the shifting of commercial ship construction to nations in Europe, Japan, and Korea. (For a time in the 1980s, the U.S. Navy's goal of building and maintaining a 600-ship fleet to counter the Soviet Union did keep domestic shipyards busy.)[10]

All of these issues led to the overall decline of the U.S. merchant fleet from its commanding position in 1945. The U.S. Merchant Marine continued its significant fall, accelerating downward in the 1990s and early 2000s as the nation chased a supposed Cold War "peace dividend." This occurred despite the emergence of China's military to challenge America's former maritime dominance.

Composition and Functions of U.S. Merchant Marine Fleets

The Merchant Marine Act of 1920, commonly referred to as the Jones Act—one of its authors was Senator Wesley Jones (R-WA)—laid out the purpose and policy of the United States toward its merchant marine:

> It is necessary for the national defense and for the proper growth of its foreign and domestic commerce that the United States shall have a merchant marine of the best equipped and most suitable types of vessels sufficient to carry the greater portion of its commerce and serve as a naval or military auxiliary in time of war or national emergency, ultimately to be owned and operated privately by citizens of the United States; and it is declared to be the policy of the United States to do whatever may be necessary to develop and encourage the maintenance of such a merchant marine, and, insofar as may not be inconsistent with the express provisions of this act, the Secretary of Transportation shall, in the disposition of vessels and shipping property as hereinafter provided, in the making of rules and regulations, and in the administration of the shipping laws keep always in view this purpose and object as the primary end to be attained.[11]

This statement lays out both the American Merchant Marine's national security role and its commercial role. In 2025, both are in question because of the size, age, and infrastructure needed to sustain the service.

There are four different categories of fleets that make up the U.S. Merchant Marine:

1. The Maritime, Tanker, and Cable Security Fleets,
2. The Jones Act/Cabotage Fleet,
3. The Military Sealift Command Fleet, and
4. The Ready Reserve Force.

The three security fleets—Maritime, Tanker, and Cable—maintain a fleet of commercially viable, military useful merchant ships that are active in international trade. These fleets would be available to the U.S. Department of War (DOW) in times of conflict or national emergency. Established on October 8, 1996, the Maritime Security Program (MSP) resurrected the operational differential subsidy from the Merchant Marine Act of 1936, which had been phased out in the 1980s and early 1990s. The initial contracts were for 47 ships, which was later expanded to 60[12] as depicted in Table 1.

Maritime Security Program (MSP). The Maritime Security Fleet provides a worldwide presence for U.S.-flagged ships and taps into the commercial

networks of some of the largest shipping companies in the world, including Maersk, CMA CGM, HAPAG-Lloyd, Hoegh Autoliners, and Wallenius Wilhelmsen. The 60 ships are all built overseas, under 25 years of age, and engaged in commercial service. They are also available and in many cases under contract to transport DOW cargo, either as part of their scheduled voyages or when chartered for exclusive use by the DOW. The ships provide nearly 2,000 at-sea billets for American licensed merchant mariners. Their presence on all the world's oceans gives the armed services the ability to move critical equipment and supplies. The MSP has three types of vessels: roll-on/roll-off ships (ro/ro); containerships (both non-sustaining and self-sustaining); and heavy-lift ships.[13]

The MSP's 20 roll-on/roll-off ships are operated by American Roll-on Roll-off Carrier (ARC); US Ocean; Farrell Lines; and Liberty Global Logistics.[14] They cover the globe with services from the United States to Europe, the Middle East, and Asia including some round-the-world voyages. These ships are commonly used for military resupply and deployments to Europe in support of the North Atlantic Treaty Organization (NATO) and provide 3.5 million square feet of military useful capacity to the nation on a ready basis.

The 35 containerships include ships operated by Maersk Lines from the U.S. East Coast to Europe and the Middle East. Since Yemen's Houthi attacks against ships in January 2024, U.S.-flagged ships have avoided the Red Sea and the Bab el-Mandeb Strait and instead have routed around the Cape of Good Hope. Other operators include APL, a subsidiary of the French-owned CMA CGM. APL recently swapped its six ships for newer ones and operates in the Pacific. Plans are for CMA CGM to transfer more ships to the U.S. registry, but those ships will operate under the CMA CGM banner, and it is unclear whether the MSP will be expanded to include them. HAPAG recently shifted their ships from Europe to the Pacific. Seven of the 35 containerships have cranes that allow them to operate in ports without shore cranes and operate around Africa and Asia. These ships are important if the ship-to-shore (STS) cranes in ports are damaged by combat, weather, or cyberattacks. Overall, the containerships provide the capability to transport 131,147 20-foot-equivalent units (TEUs) and are utilized to move DOW sustainment equipment and material around the world.

The final segment of the MSP consists of the five heavy-lift ships of US Ocean, LLC. These ships feature heavy-lift cranes with a maximum lifting capacity of 900 tons, a ro/ro ramp capacity of 150 metric tons, and the ability to carry watercraft. The ships demonstrated their versatility when they transported Army LCU-2000s back to the United States from Gaza relief operations in 2024.[15] The ships also have the highest ice ratings, which makes them ideal for the yearly supplies to McMurdo Station in Antarctica and Pituffik Space Base in Greenland. All five of these ships were built in yards across China.

Tanker Security Program (TSP). In 2022, Congress approved funding for a 10-ship Tanker Security Program.[16] Prior to creation of the TSP, there were two tankers in the MSP that the State Department used to transport fuel to Israel. The TSP was created to ensure that a core fleet of U.S.-based product tankers can operate competitively in international trade and enhance U.S. supply chain resiliency for liquid fuel products. Each ship receives an annual stipend of up to $6 million. Unlike the MSP containerships, which operate on set routes, TSP tankers, much like the ro/ros and heavy-lift ships of the MSP, depend on individual charters and voyages. The TSP targeted Medium Range (MR) product tankers of between 30,000 and 60,000 deadweight tons with a fuel capacity of 230,000 barrels. For comparison, a new *John Lewis*–class Military Sealift Command oiler can carry 156,000 barrels.[17]

The initial contract was for nine tankers, evenly split among three companies. Crowley, in conjunction with Stena Bulk, reflagged *Stena Immaculate*, *Stena Imperative*, and *Stena Impeccable*. Overseas Shipping Group (OSG) added one tanker to the two that were in the MSP to make three: *Overseas Santorini*, *Overseas Mykonos*, and *Overseas Sun Coast*. The final company, TORM, teamed up with Seabulk and reflagged the ships *Torm Thunder*, *Torm Thor*, and *Torm Timothy*. The tenth ship, *Shenandoah Trader*, came from US Marine Management.[18]

The 10-ship program did not remain in place long. The provisions of the TSP prevented the ships from being chartered by the U.S. Department of Defense for longer than 180 days. This meant that when Military Sealift Command advertised contracts for U.S.-flagged tankers, these ships were excluded if the terms went beyond half a year.[19] *Overseas Mykonos* was withdrawn from the TSP so

that OSG could charter the ship to MSC. On March 10, 2025, *Stena Immaculate*, on a short-term contract to Military Sealift Command to haul U.S. Air Force fuel to the United Kingdom, was rammed by the MV *Solong*, a Portuguese-flagged containership under the command of a Russian master. *Stena Immaculate* survived a massive fire, and all of the crew were saved, but one on board *Solong* perished. It is unclear whether *Stena Immaculate* will be able to return to service, leaving just eight ships operational in the TSP.[20]

Plans to increase the TSP to 20 ships will depend on the global tanker market, the availability of MR tankers on the open market, and whether future contracts will allow for longer charters to the U.S. Department of War. With the closing of the Red Hill fuel facility in Hawaii and the need for distributed logistics across the Indo-Pacific theater, the growing demand for floating tanker storage means growing demand for TSP tankers.[21]

Cable Security Program (CSP). The final security fleet is comprised of the cable security ships. Recent anchor drags in the Baltic Sea have highlighted the danger to undersea telecommunication, power, gas, and fuel pipelines and cables. The Military Sealift Command has operated just one cable repair ship since the 1980s, USNS *Zeus* (T-ARC 7). The CSP added two ships to the U.S. registry: MV *Decisive* and MV *Dependable*, both of which were built in Singapore in 2003 and 2002, respectively. In August 2024, then-Secretary of Transportation Peter Buttigieg announced plans to cut the $10 million in funding for the CSP, but the ships remain under U.S. registry.[22]

The protection of U.S. coastal trade has always been of vital importance. The second law adopted by the First Congress in 1789 imposed "a duty on goods, wares, and merchandizes, imported into the United States" and was followed by an act imposing "duties on tonnage." In 1817, following the War of 1812 with Great Britain, the U.S. passed legislation to prohibit foreign shipping from operating in the coastwise trade. Since then, most famously with Section 27 of the Merchant Marine Act of 1920, protection of domestic transportation or cabotage has been the law.[23] Under its current version, "a vessel may not provide any part of the transportation of merchandise by water, or by land and water, between points in the United States to which the coastwise laws apply, either directly or via a foreign port" unless it "is wholly owned by citizens of the United States for purposes of engaging in the coastwise trade."[24]

In January 2025, the Maritime Administration identified 92 of the 188 ships over 1,000 gross tons and engaged in carrying cargo between U.S. ports as "Jones Act Eligible" (although certain sectors and ships are omitted). Freighters (a combination of containerships, general cargo, and ro/ro) and tankers make up the 92-ship fleet.

Freighters are used to move cargo between the continental United States and its non-contiguous states and territories. Matson Navigation Company operates in the Pacific, principally between the U.S. West Coast, Hawaii, and Alaska, but also Guam, China, and Okinawa. PASHA operates between Hawaii and the Mainland; TOTE operates between the U.S. and Alaska and between the continental U.S. and Puerto Rico and the Caribbean; and Crowley services Puerto Rico. Coastal Transportation and Trident Seafoods operate exclusively in and around Alaska in the fishing trade.[25]

The second major group of ships in the Jones Act are the 55 tankers owned and operated by a variety of firms: Fairwater—a joint venture between SEACOR Holdings and Crowley—and Maritime Partners, OSG, BP Exploration, and Polar Tankers. They operate between Alaska and the U.S. West, Gulf, and East Coasts. Some haul crude oil directly to refineries in the mid-Atlantic from the Gulf, and others sail to Florida because the state is not serviced by pipelines. All of these tankers are double hulled, having been replaced following the Oil Pollution Act of 1990.[26]

The other component of the Jones Act fleet are those directly involved in the inland waters of the United States. These include the tugs and barges along the coasts and inland water, and the Great Lakes cargo fleet that operates between March and January. According to the Lake Carriers' Association, U.S.-flagged Great Lake freighters moved 78.2 million tons, including sand, salt, iron, grain, coal, cement, and limestone, in 2024.[27] The replacement of U.S. Coast Guard icebreakers on the Great Lakes has been delayed, and the current 140-foot icebreaking tugs are now beyond their 40-year life cycle. The one positive aspect has been the continued progress on the new Sault Ste Marie (Soo) lock in Michigan. Currently, only the Poe Lock can handle the largest Lakers, which means that a crucial

component of our national economic security is reliant on a single piece of infrastructure.[28]

Military Sealift Command (MSC). The third major fleet in the U.S. Merchant Marine is operated by the Navy's Military Sealift Command. Created in 1949, as the Military Sea Transportation Service (MSTS), MSC is the largest single employer of merchant mariners with more than 5,500 directly employed by the U.S. Department of War as civil service mariners and another 1,500 on contract operated ships. When MSTS was created at the beginning of the Cold War, its mission was to transport troops, fuel, and cargo for the U.S. military. Over its 75-year history, MSC has adopted new missions such as oceanographic surveys and support to missile defense, and its current fleet reflects that evolution.[29]

In 1972, the Navy oiler USS *Taluga* was redesignated as the United States Naval Ship (USNS) *Taluga* (T-AO 62), and its crew of naval sailors was replaced by civilian merchant mariners. The ship was the first oiler transferred to MSC and proved that civilians could support the underway replenishment mission of refueling vessels off the coast of Vietnam.[30] By the 2010s, MSC operated all of the U.S. Navy's auxiliary vessels, including several with hybrid crews (a combination of civil service mariners and U.S. Navy sailors). By 2025, one out of every five ships in the U.S. Navy had civil service mariners on board, and many of the ships were integrated into the force structure and operation of the fleet.[31]

Combat Logistics Force. The first of MSC's five major missions is that of the Combat Logistics Force. They are the descendants of *Taluga* and are broken into three groups. Two of the *Supply*-class fast combat support ships—USNS *Supply* (T-AOE 6) and USNS *Arctic* (T-AOE 8)—are based on the East Coast. Both ships recently proved their value in supporting the deployments of the *Eisenhower* and *Truman* strike groups to the Red Sea against the Houthis.[32] All of the civilian-manned U.S. Navy replenishment ships are unarmed and defenseless and could well be at serious risk in a future peer-to-peer conflict on the world's oceans.

The largest group in the Combat Logistics Force is comprised of the fleet replenishment oilers. The mainstay of the fleet is the aging *Henry J. Kaiser* class. The first of these ships, which are capable of hauling 180,000 barrels of fuel at 20 knots, entered service in the mid-1980s, so they are approaching the end of their operational life. The plan is to retire them as new *John Lewis*–class oilers come online from the National Steel and Shipbuilding Company (NASSCO).[33] However, delays in production of the first three ships necessitated prolonged post-delivery availability: USNS *John Lewis* (T-AO 205) conducted its first deployment in mid-2025.

In September 2024, the oiler USNS *Big Horn* (T-AO 198) ran aground while supporting the *Lincoln* strike group off Oman. The ship suffered flooding of its engine room and damage to the propellers and rudders. Towed back to the United States, *Big Horn* was withdrawn from service. The loss of *Big Horn* demonstrated the vulnerability of naval logistics when a single oiler was tasked to support an aircraft carrier and its escorts. The *Lincoln* group had to dispatch several of its escorts into the Red Sea to refuel, and a commercial tanker, fitted to conduct underway replenishment, had to refuel the carrier.[34]

The last of the Combat Logistics Force are the 14 ships of the *Lewis and Clark*–class dry cargo/ammunition ships. As the name implies, the *Lewis and Clark* ships marry the capabilities of store ships (AFS) and ammunition ships (AE), into a composite T-AKE ship. Two of the ships are allocated to the afloat prepositioning force, and the other 12 are based around the world to support the Navy. Typically, two are forward deployed in the Persian Gulf: USNS *Alan Shepard* (T-AKE 3) and USNS *Amelia Earhart* (T-AKE 6). Some are based in the western Pacific and rotate between Singapore, the Philippines, Korea, and Japan. The remaining are on the West and East coasts with the latter being deployed to Europe and the Mediterranean as needed.[35]

Special Missions. Special Missions dates to 1958 and involves survey ships exploring the ocean depths and range instrumentation vessels such as USNS *Howard O. Lorenzen* (T-AGM 25) and SBX-1 monitoring ballistic missile tests by China, Russia, and North Korea. Seven ships provide a unique form of ocean surveillance by towing passive and active sonar arrays. The five MSC T-AGOS operate in the western Pacific amid the First Island Chain to monitor Chinese submarines, and the two commercial ships are on the U.S. East Coast. The venerable cable ship USNS *Zeus* completed its last mission in early 2024, and the chartered CS *Global Sentinel* has taken its place.[36]

Prepositioning and Seabasing. The third area, Prepositioning and Seabasing, goes back to the early 1960s when U.S. Secretary of Defense Robert S.

McNamara decided to load and preposition *Victory* ships near potential trouble spots around the world. Only three were activated, and all of them were offloaded in Vietnam in 1966. In 1979, the Rapid Deployment Joint Task Force, the forerunner of U.S. Central Command, needed shipping preloaded and prepositioned to marry with troops flying in from the United States. The Near Term Prepositioning Force, later the Afloat Prepositioning Force, took form in the anchorage of Diego Garcia in the Indian Ocean. By the time of the Persian Gulf War, the U.S. Marine Corps had three squadrons with a total of 13 ships stationed in the Atlantic, Indian, and Pacific Oceans. Another dozen ships carried equipment for the Navy, Air Force, and Army along with fuel and even water. By 2001, the Army had added its own brigade afloat along with the combat support and combat service support for an entire corps.[37]

The concept of afloat prepositioning has largely fallen out of favor with the Department of War. From a high of four squadrons of ships—three Marine Corps and one Army—just a handful of ships remain. The Marine Corps operates a few ro/ros around Korea, Japan, and the Marianas. The Army decided to shift its afloat war reserves (AWR-3) to shore bases in western Asia and the Middle East. The Air Force, which once operated four containerships, has halved its program.

The newest element in prepositioning/seabasing consists of the new *Lewis B. Puller*–class expeditionary support bases (ESBs). The ESBs are designated as USS with a Navy O-6 in command but a civilian mariner crew to handle the engine room, navigation, and feeding for the ship. A modification of the commercial *Alaska*-class supertankers built by NASSCO, ESBs feature an immense landing platform and facilities for embarked personnel to launch and recover aerial and surface drones.[38]

Fleet Support. This fourth area of the MSC fleet includes a host of specialized ships, both purpose-built and converted. They include many offshore support ships that are used to support the submarine force and special forces as well as some that are used for fleet experimentation. This second group includes the fleet's two venerable hospital ships—USNS *Mercy* (T-AH 19) and USNS *Comfort* (T-AH 20)—along with rescue and salvage ships, which are about to be replaced by the new *Navajo Nation*–class salvage ships, and a fleet of fast transports. The fast transports were designated by the commander of Military Sealift Command, Rear Admiral Philip Sobek, and U.S. Fleet Forces for layup in order to free crews to support the ships in the Combat Logistics Force.[39]

Chartered Ships. The final area is made up of ships chartered from the U.S. Merchant Marine and used to transport dry cargo and tankers. According to MSC, the latter category has grown with 10 tankers under charter as of December 2025. Many are used to distribute fuel to Defense Logistics Agency depots worldwide, but with the closing of Red Hill in Hawaii, the Indo-Pacific Command required afloat storage for some of its fuel as part of distributed logistics.

Additionally, since 2015, MSC had returned to outfitting its leased tankers with the capability and requisite training to conduct Consolidating Operations (CONSOLs) with ships of the Combat Logistics Force, and those warships were fitted with underway replenishment rigs. It was one of these ships, MV *Overseas Mykonos* (the ship that withdrew from the Tanker Security Program), that was dispatched to provide needed fuel to USS *Abraham Lincoln* (CVN 73). The tankers in the MSC charter fleet are a mix of vessels and demonstrate one of the reasons why the United States needs once again to begin constructing commercial tankers.[40]

Ready Reserve Force (RRF). The fourth U.S. Merchant Marine fleet is designated not as a fleet, but as the Ready Reserve Force. Following the Vietnam War, the U.S. Department of Defense realized it needed a pool of vessels that would be available when the Merchant Marine was unable to respond. In 1965, the U.S. commercial fleet answered the call, but as the war progressed, the shipping lines needed their ships to return to their normal service. In their place, 172 ships were activated from the National Defense Reserve Fleet, but those ships were poorly maintained, took weeks if not months to activate, and were excessively costly while reliability was low. In 1977, the RRF was created, and in January 2025, it consisted of 51 ships: 45 ro/ros, four crane ships, and two aviation logistics support ships.[41]

The RRF was maintained in a five-day reduced operating status with the ships operated by commercial shipping firms on a 10-year contract. Ships were berthed evenly among the U.S. West, Gulf, and East Coasts. The heart of the fleet was the 45 ro/ros, which provided over 10 million square feet of cargo space. The ships were a mix of designs, and the majority were foreign built with propulsion varying

from steam boilers to gas turbines and diesels. Their average age was 45 years. In 2019, during a massive readiness exercise—Turbo Activation 19—28 ships received no-notice orders to activate. Of these, 23 activated, just below the required 85 percent threshold, but the test demonstrated some other major issues.[42]

In the fleet, 22 ships were in a non-mission capable status, meaning they could not meet the five-day activation if alerted. This reduced the RRF's overall capability by 3.7 million square feet. The ships that were activated and did not sail experienced a myriad of issues. The final finding was the most damning: When all factors were considered, including the performances and tests conducted on the ships that did activate, the RRF's overall rating was 40.7 percent.

This poor performance in 2019 and again in 2021 pushed the need to accelerate the RRF Recapitalization Program. Since its inception, seven ro/ros—have joined the RRF, but the reflagging of the first two (*Cape Arundel* and *Cape Cortes*) ran into difficulties with the U.S. Coast Guard, which is ironic as the ships had previously been U.S.-flagged. As new ships entered the fleet, older ships were retired, including the venerable Fast Sealift ships and several ships in some of the major classes, to provide parts.[43] It is expected that some of the LMSRs (Large, Medium-Speed Roll-On/Roll-Offs) used in the Marine Corps and Army prepositioning programs will join the RRF, but efforts to revitalize the surge sealift force have just barely maintained the status quo.

Scoring the U.S. Merchant Marine

Capacity Score: Marginal

The current size of the U.S. Merchant Marine—188 commercial ships (those in the security fleets and cabotage trade), over a hundred ships in the Military Sealift Command, and 51 ships in Ready Reserve Force—along with the personnel and maritime infrastructure, is not sufficient to support the U.S. military and economy adequately including, when required, in a protracted conflict. Despite current efforts to reverse this trend, such as the SHIPS for America Act and the President's executive order on shipbuilding, the aging of the surge sealift fleet and reduction in the number of active ships in the MSC fleet because of critical crewing issues cause the U.S. Merchant Marine's capacity to be rated as "marginal."

Capability Score: Weak

The current Merchant Marine, Military Sealift Command, and surge sealift fleets meet the requirements as set out by the U.S. Department of War and commercial needs. Issues with delayed entry of replacement vessels, such as the *Lewis*-class replacing the *Kaiser*-class oilers, have further strained the fleet. However, the reduced overall size of afloat prepositioning and the age of the surge sealift fleet cause the ability of the Merchant Marine to meet its required capabilities to be rated as "weak."

Readiness Score: Very Weak

It is in readiness that the U.S. Merchant Marine scores lowest. The loss of USNS *Big Horn* while supporting the *Abraham Lincoln* battlegroup and the collision involving MT *Stena Immaculate* demonstrate the vulnerability of afloat support for naval and military forces around the world. Tests involving the Ready Reserve Force have highlighted concerns about readiness, and issues remain with respect to whether there are adequate personnel to fully crew the RRF in an emergency lasting more than six months. The Merchant Marine's overall readiness is therefore rated as "very weak."

Overall U.S. Merchant Marine Score: Weak

With a Merchant Marine ranked as 22nd in the world, the reduced readiness of 17 ships in the MSC fleet, and the aging of the Ready Reserve Force and inability to keep up vessel replacement versus retirement, the overall capacity and capability of the U.S. Merchant Marine are clearly in decline. Given the lack of current shipbuilding—the shipyard in Philadelphia is the only one building any commercial vessels for the merchant marine—the fleet will likely continue to age without adequate replacements. These issues have an impact on direct support to the Navy; on maritime infrastructure as shipyards and repair facilities have no commercial alternatives to sustain them; and on the

U.S. Department of War as any deployments will be forced to rely on a shrinking and aging fleet and workforce that are potentially unable to support them at required levels. The U.S. Merchant Marine's overall score is therefore "weak."

Policy Recommendations

The U.S. Merchant Marine serves as a crucial auxiliary for the military in time of war and national emergency while providing an essential service in the transportation of goods in the coastwise cabotage trade. A potential peer-to-peer conflict would severely strain the Merchant Marine's capabilities, and the shifting of ships from domestic and international trade into military support missions would have a disruptive effect on the American economy.

Several studies that have been conducted point to a significant deficit in American sealift; one report commissioned by the Maritime Administration remains embargoed a year after its conclusion in late 2024. Nevertheless, several reviews that are publicly available and a workshop hosted at The Heritage Foundation with industry and military experts confirm the need for approximately 1,300 commercial ships to mitigate Chinese maritime dominance. Specifically, the nation will need the following U.S.-flagged and U.S.-crewed vessels, augmented perhaps with allied assured sealift, for a total of 1,315 ships of six different classes:

- 960 containerships;
- 122 tankers;
- 33 liquefied natural gas (LNG) carriers;
- 77 roll-on/roll-off ships;
- 106 bulk carriers;
- Seven heavy-lift ships (four for military damage repairs and three for cargo that can be delivered only on this class of ships); and
- 10 cable-laying and repair ships.

This total represents a conservative estimate that still assumes significant risk of Chinese interference.[44] Regarding wartime sealift needs, ongoing TIDALWAVE wartime campaign simulations being conducted by The Heritage Foundation validate a need for no fewer than 45 oilers (TAO): As of December 26, 2025, the Navy had only 20.

The sealift capacity of the Military Sealift Command and the Maritime Administration's Ready Reserve Force is adequate based on current estimates, but the readiness, age of the fleet, and personnel for any conflict lasting more than six months are in serious question. Not factored into the current fleet are any attrition or losses and how to replace such displacements. In the First World War, this was accomplished through the seizure of the interned German fleet; the chartering of neutral shipping; and, in a final instance, the seizing of the neutral Dutch merchant marine in American harbors in March 1918. In the Second World War, the United States initiated a building program before the outbreak of the war through the Merchant Marine Act of 1936 and then used a series of emergency construction programs to produce the *Liberty*-class and *Victory*-class freighters.

In terms of international trade, the diminutive size of the U.S. Merchant Marine means that about 2 percent of imports and exports is handled on board U.S.-flagged ships, the majority of which are in the Maritime or Tanker Security Program fleets. This small amount—less than 1 percent of world trade—would clearly not be enough if the United States were to suffer disruptions from conflict or boycotts from major shipping lines. U.S. operation of ships with higher costs to build, crew, and maintain against ships employing foreign mariners and in open registries would be cost prohibitive. However, national registries do not merely provide reserves of ships to carry trade; they employ mariners and maintain the maritime industrial base with shipyards, repair facilities, and the supply chain.

The diminutive and aging workforce also presents a challenge because the U.S. Department of War relies on the surge ships to transport forces overseas. With only one-third of the required crew personnel on board, the shortfall must be drawn from the commercial merchant marine. This does not factor in crew reliefs or casualties in a protracted conflict. With graduates from the U.S. Merchant Marine Academy, along with the state maritime academies and union schools, the nation can produce mariners, but issues with credentials and certifications have led many mariners to leave the

U.S. Military Power: Merchant Marine

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability		✓			
Readiness	✓				
OVERALL		✓			

ABOUT THE ASSESSMENT CATEGORIES

OVERALL ASSESSMENT. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

CAPACITY. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service,
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

CAPABILITY. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

READINESS. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.

profession, and there is a lack of senior licensed and unlicensed personnel.

Beyond the current programs that support the Merchant Marine, new programs such as revised cargo preferences that would require a certain percentage of American goods to be shipped on U.S.-flagged ships could increase the demand for domestic shipping: Cargo is king. Current proposals such as the U.S. Trade Representative's port fees for Chinese-built and Chinese-owned ships, the SHIPS Act, and President Trump's executive order can produce a new framework of maritime laws akin to the Merchant Marine Acts of 1920, 1936, and 1970.

There remain many challenges for and criticisms of the U.S. Merchant Marine. Open registries overseas with fewer regulatory costs and oversight, offshore corporations, foreign mariners, and heavily subsidized shipbuilding programs make an American alternative appear non-competitive. New legislation and reforms must address this, but it should be clear that a truly level playing field is likely not achievable without forceful federal action. However, U.S.-flagged vessels do come with the advantage of U.S. government support and the protection of the U.S. military. What is currently needed is proactive action to address these issues, not more reactive policies like those that have been present since 1970.

Overall, the aging ships and personnel, limited global market share, higher operating costs, and lack of readiness make the U.S. Merchant Marine a liability in any potential situation, both today and in the future. Proposals by the Trump Administration have aimed to address these challenges, but actions to address them adequately have yet to be taken. Plans to resume building LNG carriers

domestically constitute a positive development, but it will be years before they yield the desired results. Proposals to reflag ships in the U.S. Merchant Marine by CMA CGM and other shipping firms are a good initial step.

Nevertheless, 2025 marked the most significant year in U.S. Merchant Marine development and action in more than 50 years. The United States appears to be awakening from its period of sea blindness toward commercial shipping. This is attracting nearly $200 billion in new investments in America's waterfront communities from allies like South Korea and Japan; notable is the purchase and $5 billion of renovations begun by Hanwha shipbuilder in Philadelphia.[45] Events like the grounding of *Ever Given* in the Suez Canal, the backlog of ships off the ports of Los Angeles and Long Beach, and the closing of the port of Baltimore after *Dali* struck the Francis Scott Key Bridge have highlighted the vital role of commercial shipping. Naval shipbuilding issues have also demonstrated the need for work in domestic yards to maintain personnel and infrastructure as government contracts wane.

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Conclusion: U.S. Military Power

The Active Component of the U.S. military is two-thirds the size it should be, operates equipment that is older than it should be, and is burdened by readiness levels that are more problematic than they should be. To the extent that progress has been made, it has been at the expense of both capacity and modernization. Accordingly, this *Index* assesses:

- **The U.S. Army as "Marginal."** Based on the historical use of its ground forces in combat, the Army has less than two-thirds of the forces in its Active Component that it would need to handle more than one major regional contingency (MRC). This shortfall in capacity might be offset if the modernity or technological capability of its forces were very high, but this is not yet the case, and the Army has a long way to go in modernizing its key systems. The Army has fully committed to modernizing its forces for great-power competition, but its programs are still in their development phase, and it will be a few years before they are ready for acquisition and fielding. Insufficient capacity for more than one MRC might also be offset if capabilities and readiness in the National Guard and Reserves were to be enhanced.

  In other words, the Army is aging faster than it is modernizing, in addition to which it has faced relatively stagnant budgets in comparison to the Navy and Air Force. At the broadest strategic level, this makes sense, as the Navy and Air Force are more central to Indo-Pacific planning and need major investments to keep up with the People's Liberation Army. The Army, however, also has an important role to play in the Indo-Pacific and needs targeted investment in new capabilities like the Multi-Domain Task Force (MDTF). More generally, the Army also needs to maintain an edge over all potential adversaries in the traditional aspects of ground power. The Army remains "weak" in capacity with 62 percent of the force it should have but has significantly increased the force's readiness, exceeding its own internal requirement that 66 percent of its Brigade Combat Teams (BCTs) must be at the highest readiness levels, thereby earning the highest score of "very strong" for readiness.

- **The U.S. Navy as "Weak."** The technology gap between the Navy and its peer competitors is narrowing in favor of competitors, and the Navy's ships are aging faster than they are being replaced. The fleet is too small relative to mission workload, and supporting shipyards are overwhelmed by the repair work that is needed to ensure that ships are available. This inadequate maintenance infrastructure contributes to ships not returning to the fleet in a timely manner, which in turn causes readiness problems as steaming days needed to train crews to levels of proficiency are lost. The Navy is projected to have a fleet of 280 ships by 2027, which is smaller than the current force of 290 and well below the 400 needed to meet operational demands. Current and projected funding shortfalls will make it harder to deal effectively with any of these serious deficiencies. This leaves the Navy unable to arrest and reverse the decline of its fleet as adversary forces grow in number and capability.

- **The U.S. Air Force as "Weak."** The Air Force is smaller, older, and less ready than at any point in its history. This matters because America's asymmetric military advantage is

the ability to own the skies and hold adversary targets at risk across the globe. The Air Force's responsibility to America is to field an appropriately sized, capable, and ready force that can execute these critical, Joint Force–enabling military functions. Yet during the decades following the Cold War, this sacred responsibility has been gradually marginalized, and America's ability to own the skies and hold adversary targets at risk has been steadily eroded. As a result, the United States is accepting more strategic risk than it should—risk not just of conflict or deterring a conflict, but risk of losing a conflict. For example, the Air Force has only two-thirds the number of active-duty combat-coded fighter aircraft required to fight two MRCs. Additionally, its warfighting readiness is very low because of aircraft age, aircraft availability, and low sortie rates and flight hours for its aircrew. Finally, the Air Force's fleet seemingly gets smaller every year, and the FY 2026 budget continues this downsizing trend despite President Trump's One Big Beautiful Bill Act (OBBBA).

Overall, the service is not ready for peer conflict at a time when the world is increasingly dangerous. Fortunately, a properly sized, capable, and ready Air Force can reduce strategic risk, deter conflict, and ensure that the nation could prevail if deterrence fails, and there are encouraging signs, including passage of the OBBBA in July 2025, that Congress may be ready to resource the Air Force in line with today's strategic environment. To this end, Congress should increase the Air Force's budget to account for the immense cost of nuclear modernization, grow the size of the service's fleet to meet the requirements the Air Force identified in 2018's "The Air Force We Need" for a 2030 fight with China, and assist the service in improving the readiness of combat units with the right mix of jets, maintenance capability and capacity, and trained aircrew, all while prioritizing the core missions the service is uniquely tasked to execute: air superiority and global strike. These actions would ensure that America's Air Force is ready to "fly, fight, and win" anytime and anywhere.

- **The U.S. Marine Corps as "Strong."** The Marine Corps' capacity is evaluated against a one-MRC standard, whereas the other services are evaluated against a two-MRC construct. The Corps consistently meets its unique requirement to produce three simultaneous Marine Expeditionary Units every day of the year. The Corps' strong capacity and capability ratings stem in large part from the inherent flexibility of fighting as O6-led Marine Air Ground Task Forces (MAGTFs). MAGTFs combine ground and air combat power with their associated logistics support under a single commander and can be modified as mission sets dictate. The Marine Corps' strong readiness rating comes from a consistent equipment modernization campaign and being five years into reorganizing itself to fight the PRC more effectively if needed.

  The Marine Corps is not without its challenges. The shortages of amphibious shipping, sealift, long-distance transportation, and sustainment affect the entire Joint Force, but the Marines may feel those impacts most acutely in their role as the rapidly responsive expeditionary force. However, while these challenges are significant, they do not yet prevent the Marine Corps from completing its assigned missions.

- **The U.S. Space Force as "Marginal."** The Space Force is assessed the same in this year's *Index* as it was in the *2024 Index*. The Space Force has made significant progress in the six years it has existed. The FY 2026 budget is projected to be more than 250 percent larger than the service's first-year budget. The Space Force established a field command dedicated to testing, training, education, and readiness. It has fielded many new domain awareness sensors and C2 systems. It has launched many next-generation GPS satellites and operationally accepted the long-beleaguered GPS command-and-control program. The Space Force is taking advantage of commercial space capabilities and international allies and partners. It has architected and begun to field resilient data transportation and missile warning constellations of satellites. The Space Force has embraced and initiated many of the

acquisition reforms directed by the FY 2026 National Defense Authorization Act and Secretary of War Pete Hegseth.

At the same time, however, the Space Force has not kept pace with the rapidly advancing threats to and from space. China and Russia are fielding ground-based and space-based threats to our space assets that outpace the Space Force's efforts to develop resilient architectures and defensive capabilities. China is also rapidly fielding space systems that will target our fixed and mobile air, land, and maritime forces in the Pacific Area of Responsibility (AOR). The Space Force must field capabilities to defeat these space-based threats. Additionally, our nation continues to ask more of the Space Force, which will need, for example, to provide critical sensors and interceptors as part of the Golden Dome missile defense program. The Air Force has retired or will retire airborne intelligence, surveillance, and reconnaissance (ISR) and air battle management sensors; the Space Force is racing to field capabilities to mitigate these retirements. The nation's growing economic dependence on space capabilities suggests that the Space Force will need to have the capability to defend all of our interests in the domain. In short, while the Space Force has made remarkable progress in a few short years, it will need to accelerate its capabilities and capacities if it is to be fully capable of answering our nation's demands.

- **U.S. Strategic Deterrent as "Strong."** America's strategic deterrent remains strong and credible and is able to impose significant—even catastrophic—costs on any who would carry out a strategic attack on the United States or its allies. However, challenges in modernization of delivery systems, particularly the Sentinel missile, and the production of plutonium pits prevent a rating of "very strong." Moreover, as time progresses, America's nuclear-armed adversaries—particularly China—will field larger arsenals that will create ever larger deterrence challenges for the United States. Consequently, the United States in the coming years must field a larger and more diverse nuclear arsenal, particularly among theater nuclear weapons, to deter adversary aggression successfully. This means not only that the nuclear modernization program of record (to include the relevant components within the Department of War and Department of Energy) must be put back on schedule, but also that the United States will likely have to augment the program of record to increase the number of operationally deployed nuclear weapons.

- **U.S. Missile Defense as "Strong."** Missile defenses have shown—from Ukraine to the Middle East to live-fire tests—that they work remarkably well. Integrated air and theater missile defenses continue to demonstrate their value in deterring and, if necessary, mitigating the impact of adversary missile strikes. As the United States builds Golden Dome, which will integrate existing homeland missile defenses with regional missile defense architectures, and expands global sensor coverage while at the same time fielding additional ground-based and space-based missile interceptors, it will be better postured to deter and, if necessary, defeat enemy missile threats.

- **The U.S. Coast Guard as "Weak."** Despite some successes in 2025, such as record-breaking drug seizures, a continued fast response to disasters and search and rescue missions, an improvement in recruitment, and a much-needed increase in funding from the One Big Beautiful Bill Act, the U.S. Coast Guard remains burdened by a variety of negative issues. Historically, the Coast Guard has been an underfunded service, and many of its ships and aircraft are old and experience heavy usage, which causes further deterioration. In addition, newer vessel designs have been beset by delays. The USCG's cutters, the backbone of its fleet, have suffered from poor maintenance, maintenance backlogs, and delays in programs that are intended to bring new, more advanced, and more functional modular cutters online. This necessarily has a negative effect on the interdiction of narcotics and illegal immigration insofar as they involve the Coast Guard.

  Faced with over 2,500 miles of U.S. Arctic coastline along with missions to U.S. bases in

U.S. Military Power: Summary

VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG

the South Pole, the USCG operates only two medium icebreakers and one heavy icebreaker—and its only heavy icebreaker is now 50 years old. Coast Guard helicopters, particularly the workhorse HH-60s, have experienced maintenance issues and groundings as a result of accidents and heavy use. Although recruitment improved in 2025, retention issues persist. The Coast Guard has also gone without antisubmarine training, a deficiency that, in view of the drug cartels' increased use of narco-submarines and the service's duty to escort U.S. vessels during wartime, puts it at a distinct disadvantage. As a result, the USCG would also be at a disadvantage in the event of a conventional great-power conflict, particularly in the Pacific. Acquiring newer modular vessels, aircraft, unmanned systems, and newer training regimens can help to reverse these trends, but the process will necessarily be a slow one.

- **The U.S. Merchant Marine as "Weak."** Most emblematic of this sad state of America's sealift is the sidelining of 17 Military Sealift Command ships because of crew shortages. That too few seaworthy commercial ships is a persistent problem that drives low readiness assessments is borne out in activation exercises like Turbo Activation 19 Plus. Moreover, there is little good news on the horizon as both future classes of logistic ships and the revival of America's commercial maritime industry seem to be stalled and delayed. Action is urgently needed to reverse this trend and begin a serious effort to fill gaps in the military and assured commercial shipping that the nation would need to sustain a prolonged major war.

In the aggregate, America's overall military posture must be rated "marginal." The Space Force and Army are rated "marginal," and the Navy, Air Force, Coast Guard, and Merchant Marine are rated "weak." Only the Marine Corps, nuclear forces, and missile defense are rated "strong," but the Corps is a one-war force, and its overall strength is therefore not sufficient to compensate for the shortfalls of the larger services. Moreover, if the United States should need to employ nuclear weapons, the escalation into nuclear conflict would seem to imply that handling such a crisis would challenge even a fully ready Joint Force at its current size and equipped with modern weapons. Additionally, the war in Ukraine, which threatens the economic and political stability not just of Europe, but of other regions as well, shows that some actors (in this case Russia) will not necessarily be deterred from conventional action even though the U.S. maintains a strong nuclear capability. Strong conventional forces of necessary size are therefore essential to America's ability to respond to emergent crises in areas of special interest.

The *2026 Index* concludes that the current U.S. military force is at significant risk of being unable to meet the demands of a single major protracted regional conflict while also attending to various other presence and engagement activities. The force would probably not be able to do more and is certainly ill-equipped to handle two nearly simultaneous MRCs—a situation that is made more difficult by the generally weak condition of key military allies.

In general, the military services continue to prioritize readiness and have made some progress over the past few years, but modernization programs, especially in shipbuilding and the production of fifth-generation combat aircraft, continue to suffer as resources are committed to preparing for the future, recovering from 20 years of operations, and offsetting the effects of inflation. With respect to the Air Force, some of its limited acquisition funds are being spent on aircraft of questionable utility in high-threat scenarios while research and development receives a larger share of funding than efforts meant to replace quite aged aircraft are receiving. As observed in the 2021, 2022, 2023, and 2024 editions of the *Index*, the services have normalized reductions in the size and number of military units, the forces remain well below the level needed to meet the two-MRC benchmark, and past difficulties involved in trying to recruit young Americans

U.S. Military Power: Army

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability			✓		
Readiness					✓
OVERALL			✓		

U.S. Military Power: Navy

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity	✓				
Capability			✓		
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Air Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability				✓	
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Marine Corps

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity				✓	
Capability				✓	
Readiness				✓	
OVERALL				✓	

U.S. Military Power: Space Force

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability			✓		
Readiness		✓			
OVERALL			✓		

U.S. Military Power: Nuclear

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Nuclear Stockpile				✓	
Strategic Delivery Systems				✓	
Extended Deterrent Credibility				✓	
NNSA Warhead Modernization			✓		
Nuclear Delivery Systems Modernization			✓		
OVERALL				✓	

U.S. Military Power: Missile Defense

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Integrated Command and Control				✓	
Existing Under Layer				✓	
Existing Ground-Based Layer				✓	
Existing Space-Based Overlayer			✓		
Theater Defenses				✓	
Architecture Evolution				✓	
OVERALL				✓	

U.S. Military Power: Coast Guard

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity		✓			
Capability		✓			
Readiness	✓				
OVERALL		✓			

U.S. Military Power: Merchant Marine

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Capacity			✓		
Capability		✓			
Readiness	✓				
OVERALL		✓			

U.S. Military Power

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
Army			✓		
Navy		✓			
Air Force		✓			
Marine Corps				✓	
Space Force			✓		
Nuclear				✓	
Missile Defense				✓	
Coast Guard		✓			
Merchant Marine		✓			
OVERALL			✓		

to join the military services have had their effect on service end strength even as recruiting has recently improved.

As currently postured, the U.S. military is at significant risk of not being able to defend America's vital national interests with assurance. It is rated "marginal" relative to the force needed to defend national interests on a global stage against actual challenges in the world *as it is* rather than as we wish it were. As demonstrated by The Heritage Foundation's recent TIDALWAVE war simulation, these challenges are particularly grave in a protracted conflict. This is the inevitable result of years of sustained use, underfunding, unclear priorities, shifting security policies, poor discipline in program execution, and a lack of seriousness across the national security establishment even as threats to U.S. interests have surged.

Although the One Big Beautiful Bill Act, signed by President Trump on July 4, 2025, added more than $150 billion in defense spending on top of annual defense appropriations, more investment is needed. The President's call on January 7, 2026, for a $1.5 trillion defense budget—more than $500 billion more than the current budget—is a positive sign that greater investment is on the way, but this must be done in a disciplined and fiscally responsible manner that also seeks savings, reforms, and efficiencies from the U.S. Department of War.[1] The focus of the United States should be on restoring peace through strength, and while some work has been done in this regard, much remains to be finished to reverse the effects of years of defense budgetary decline and lack of prioritization.

Endnote

1. See U.S. Senate Committee on Armed Services and U.S. House Committee on Armed Services, "SASC/HASC Defense Reconciliation Overview," undated, https://armedservices.house.gov/uploadedfiles/obbb_hasc_and_sasc_defense_legislation_summary.pdf (accessed January 13, 2026).

Methodology

Service Assessment Explanatory Language

Overall Assessment. The overall assessment of a military service is measured against its ability to perform its respective role in a two-major regional contingency (MRC) scenario. The assessment of the U.S. Marine Corps is sized against a single major regional contingency (MRC) scenario. This benchmark is the *minimum* standard for U.S. hard-power capacity with the understanding that maintenance, operational tempo, training cycles, crisis response, treaty commitments, and/or strategic reserve considerations can cause some forces to be unavailable. Other factors that influence this assessment are the availability of logistical support to enable combat power (fueling ships, supply ships, cargo aircraft, etc.) and the ability to reconstitute combat power for protracted conflict (defense industrial base capacity, etc.).

Capacity. The U.S. military must have a sufficient quantity of the right capability or capabilities to meet its mission sets. Capacity (numbers) can be viewed in at least three ways:

- Compared to a stated objective for each category by each service;
- Compared to amounts required to complete various types of operations across a wide range of potential missions as measured against a potential adversary, and
- As measured against a set benchmark for total national capability.

Capability. Examining the capability of a military force requires consideration of:

- The proper tools (material and conceptual) with the design, performance characteristics, technological advancement, and suitability that the force needs to perform its function against an enemy successfully;
- The sufficiency of armored vehicles, ships, airplanes, and other equipment and weapons needed to win against the enemy;
- The appropriate variety of options to preclude strategic vulnerabilities in the force and give flexibilities to battlefield commanders; and
- The degree to which elements of the force reinforce each other in covering potential vulnerabilities, maximizing strengths, and gaining greater effectiveness through synergies that are not possible in narrowly stovepiped, linear approaches to war.

Readiness. While capacity and capability considerations are central to the warfighting ability of the U.S. military, readiness performs a crucial role in determining whether combat power is prepared when it is needed. Factors that are considered include (among others):

- Sufficient staffing levels,
- Fulfillment of training requirements, and
- Age and maintenance of equipment.



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