

2025 WORLDWIDE THREAT ASSESSMENT

DEFENSE INTELLIGENCE AGENCY



ARMED SERVICES SUBCOMMITTEE ON INTELLIGENCE AND SPECIAL OPERATIONS
UNITED STATES HOUSE OF REPRESENTATIVES

Jeffrey Kruse, Lieutenant General, U.S. Air Force
DIRECTOR, DEFENSE INTELLIGENCE AGENCY

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INTRODUCTION

Chairman Jackson, Ranking Member Crow, and Members of the Committee,

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

DIA commits to each of our relevant Committees that we are constantly evolving to best posture, collect, analyze, predict, warn, and meet the challenges presented by the global security environment. Our mandate is to provide exceptional decision advantage to our Nation through world-class support to the warfighter, the acquisition community, and our national leaders. I am privileged to lead this organization, and I want to assure you that DIA officers, who serve in more than 140 nations around the world, are dedicated to providing the most sound and most predictive insights into the strategic, operational, and tactical security threats confronting the United States.

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

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NATIONAL SECURITY THREATS EXPANDING FUELED BY ADVANCED TECHNOLOGY

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

THE U.S. HOMELAND AND SOUTHERN BORDER

The U.S. Homeland faces an array of threats emanating from strategic competitors and non-state entities seeking to erode U.S. competitive advantage or target U.S. citizens. Our adversaries are developing long-range and novel missile capabilities to target the Homeland, and continue to seek new avenues to threaten our cyber networks and critical infrastructure. Along our southern border, transnational criminal organizations, drug trafficking organizations, and terrorist groups are attempting to evade regional and U.S. law enforcement—including by exploiting persistent migration flows—to conduct activities aimed at harming U.S. citizens.

Missile Threat

U.S. adversaries continue efforts to advance their missile capabilities threatening the Homeland—including traditional ballistic missiles, aeroballistic and cruise missiles, and novel nuclear and conventional warhead delivery systems. Both China and Russia are expanding their missile inventories and aggressively pursuing new systems, such as hypersonic glide vehicles, engineered to complicate U.S. defenses in the event of a conflict. North Korea now has developed an intercontinental ballistic missile (ICBM) capable of ranging the continental United States.

Terrorism

The terrorist threat to the U.S. Homeland remains dynamic and diffuse as terrorist groups decentralize attack plotting efforts. Over the next year, ISIS probably will try to conduct high-profile attacks in the West, similar to the group's attacks in France and Belgium approximately a decade ago. ISIS's affiliates in Afghanistan and Al-Qa'ida's affiliate in Yemen probably pose the greatest threat to the United States. On 1 January, an ISIS-inspired lone actor killed 14 people in New Orleans, which will reinforce ISIS's use of propaganda to inspire attacks. In spring 2024, eight individuals with potential ties to ISIS were arrested in the United States, having entered through the U.S. southern border, which shows the threat of individuals with potential ties to terrorist groups transiting the southern border.

Unmanned Systems

The threat posed by Unmanned Systems (UxS) to DoD interests and the U.S. Homeland probably will increase in coming years, driven by commercial demand, advances in UxS-enabling technologies, and the difficulty in attributing intent to actors using these systems. Hostile actors may leverage these factors to improve UxS weaponization and surveillance capabilities against the United States.

- » Many UxS systems are inexpensive, widely available, and easy to operate—enabling a broad range of actors to exploit their capabilities. As technology advances, the means by which unmanned systems can potentially surveil and threaten the U.S. Homeland will expand, to include against critical infrastructure or military installations.
- » More advanced UxS swarms complicate the threat posed to traditional U.S. defense systems, given continued improvements in range, payload, and power. UxS technology's continued maturation and convergence with other technologies, including AI, big data, Internet of Things, and 5G telecommunications will exacerbate this threat.

Illegal Migration

(U) Migration flows toward the U.S. southern border have declined approximately 80 percent since the beginning of this year, averaging about 400 encounters per day, according to law enforcement data. This follows a decrease in 2024 in which U.S. Customs and Border Protection reported 2.1 million migrant encounters, marking a 14-percent decline from the record level of nearly 2.5 million encounters recorded in 2023. Poor socioeconomic conditions in Central and South America are probable drivers of this migration. Budget constraints, ambiguities about authorities, and competing security priorities are likely to constrain Latin American security forces' ability to reduce the migrant flows toward the United States.

Cartels and Drug Trafficking

The Gulf Cartel, Cartel Jalisco New Generation, Northeast Cartel, and Sinaloa Cartel, along with their smaller factions, are the organizations most responsible for supplying the U.S. drug market. The Juarez Cartel also controls the strategic corridors near U.S. ports of entry in Chihuahua State. These Mexico-based groups, along with other violent organizations such as MS-13 and Tren de Aragua, are drivers of violence across the region and have established drug trafficking infrastructure and influence in the United States that threatens U.S. security.

The fentanyl flow across the U.S. southwest border is likely to fluctuate this year as Mexican suppliers adjust their production to boost profitability following a decline in fentanyl's price in

the saturated U.S. market. During the first half of fiscal year 2025, fentanyl seizures decreased 30 percent at the U.S. southwest border. This decline builds on a 19 percent decline the previous year, probably owing in part to increased arrests in Mexico, traffickers' attempts to balance supply in the United States, and cartel efforts to avoid increased U.S. and Mexican border security. Still, more than 86,000 Americans were killed by fentanyl in 2024. Cocaine and methamphetamine trafficking to the United States probably will remain elevated this year as continued profitability prompts increased production.

GROWING COOPERATION AMONG U.S. COMPETITORS AND ADVERSARIES

Building on activities over the past two years, leaders in Beijing, Moscow, Tehran, and Pyongyang will strengthen their nations' ties in their drive to undermine the influence of the United States and its allies. Russia's war in Ukraine has accelerated cooperation among our competitors, most of which is transpiring in bilateral channels. This cooperation is likely to take the form of supporting one another in regional conflicts and in international fora, collaborating to evade sanctions, and taking steps to pressure the West during the next year as these nations look to expand the breadth and depth of their collaboration. Friction will persist in some aspects of the relationships among China, Russia, Iran, and North Korea; however, our competitors will seek to compartmentalize these differences as they advance military, security, and intelligence cooperation. We anticipate any multilateral cooperation among these competitors will lag behind ongoing bilateral cooperation as these governments give priority to the transactional nature, discretion, and speed of bilateral partnerships.

- » **China** will continue to advance selected areas of partnership with Russia while avoiding actions such as overtly providing materiel or lethal military assistance to Russia that might elicit reputational or economic costs for Beijing. China legitimizes Russia's global actions by meeting with Russian leaders and working with Russia in various fora such as the United Nations; Brazil, Russia, India, China, and South Africa (BRICS); and the Association of Southeast Asian Nations. China is steadily expanding bilateral military exercises and operations with Russia and conducted the first combined air and maritime patrols near the Arctic during the past year. China will continue to block new efforts to sanction North Korea and blame the United States for failing to alleviate North Korea's security concerns, even while China harbors strong security concerns of its own regarding North Korea.
- » **Russia** is aggressively seeking foreign support for its combat operations in Ukraine. North Korea and Iran separately supplement Russia's stressed military stockpiles. North Korea has shipped millions of artillery rounds and dozens of ballistic missiles to Russia during the past year and has deployed more than 12,000 troops to fight for Russia against Ukraine. Iran continues to provide Russia armed unmanned aerial vehicles (UAVs), all of which are being used against Ukrainian forces and civilians. In return, Russia is expanding its sharing of space, nuclear, and missile applicable technology, expertise, and materials to China, Iran, and North Korea, which will enable advancements in all three countries' weapons of mass destruction (WMD) programs during the next three to five years.

- » **Iran** will seek cooperation with Russia, China, and North Korea to mitigate its diplomatic isolation and sanctions, though it probably will chafe at the limitations of those countries' support for some of Tehran's key regional interests. Iran will attempt to use its sale of UAVs and missiles to Russia as leverage to acquire advanced military technology, such as the SU-35 multirole fighter. Iran also has expanded its military space program in the past three years, in part with Russia's assistance, and continues to develop space launch vehicle (SLV) booster technologies that may shorten its pathway to fielding an ICBM if converted for that purpose. During the next two years, Iran's defense spending probably will stagnate and compel it to focus on seeking other suppliers, such as China, or acquiring lower-cost military equipment to meet its needs. China has thus far been reticent to transfer advanced military equipment to Iran, probably because of the threat of sanctions and not wanting to disrupt ties with its other partners in the Middle East.
- » **North Korea** almost certainly is receiving reciprocal military cooperation from Moscow—including SA-22 surface-to-air missile systems and electronic warfare (EW) equipment—for providing soldiers and materiel to support Russia's war against Ukraine. North Korea has strengthened its relationship with Russia by signing a Comprehensive Strategic Partnership agreement last year, which includes mutual defense assurances. With China, North Korea's critical economic and political dependence on China underpins the bilateral relationship. The countries have maintained a mutual defense treaty since 1961, but have virtually no military cooperation. North Korea's engagement with Russia probably reflects an attempt to counterbalance China's leverage over Pyongyang.

CHINA

China maintains its strategic objectives to be the preeminent power in East Asia, challenge the United States for global leadership, unify Taiwan with mainland China, advance the development and resiliency of China's economy, and become technologically self-sufficient by mid-century. China continues to advance its global capabilities to confront the United States and its allies across the diplomatic, information, military, and economic domains. China's President Xi Jinping will continue to oversee a whole-of-government effort to better prepare China for competition with the United States and its allies in the Indo-Pacific region and beyond, and focused efforts to undermine popular and political support for U.S. military alliances and security partnerships.

This year, Beijing will watch Washington carefully for changes in policy and probably is preparing measures to deter, defeat, and retaliate against any U.S. moves it perceives as intending to disrupt China's diplomatic, economic, and security objectives. China's officials also will seek opportunities to drive wedges between the United States and its allies and partners. Along its periphery, China is likely to continue multidomain pressure campaigns against the Philippines, Taiwan, and other nations resisting China's territorial claims. China will seek opportunities to exploit narratives that criticize Washington's ability to manage crisis and conflict. These efforts are aimed at presenting China as a more responsible global leader.

Military Modernization and Spending

China is rapidly advancing its military modernization and developing capabilities across all warfare domains that could enable it to seize Taiwan by force, to better project power in the western Pacific, and to disrupt U.S. attempts to maintain presence or intervene in conflict in the Indo-Pacific region. China's leaders are stressing the imperative of meeting key military transformation targets set for 2027 and 2035. These milestones seek to align the transformation of China's People's Liberation Army (PLA) with its other national modernization efforts, which include advancing "a new type of international relations", being actively involved in "global governance", and unification with Taiwan.

- » In 2025, China announced a nominal 5.2 percent annual military budget increase to \$247 billion. However, China's actual defense spending is significantly higher, following 2024 defense spending of an estimated \$304-\$377 billion. These figures include publicly omitted defense spending such as research and development and defense industrial base subsidies.
- » The PLA increased military pressure on Taiwan last year following the election of a new president. In April, the PLA conducted large-scale drills in the waters and airspace around Taiwan that included an aircraft carrier battle group to warn Taiwan. The PLA has

demonstrated an improving ability to conduct near-simultaneous, geographically dispersed exercises. In particular, China's Joint Sword series of exercises showed that the PLA is advancing its capabilities to blockade Taiwan. The PLA Navy (PLAN) executed its first dual aircraft carrier exercise in the South China Sea (SCS) last year, demonstrating a growing ability and capacity to project power across the region.

- » China announced it had realigned the PLA's Aerospace Force, Cyberspace Force, Information Support Force, and Joint Logistic Support Force directly under the Central Military Commission, which includes President Xi Jinping and other top military leaders. This realignment reinforces the importance PLA leaders place on space, cyberoperations, and EW as asymmetric weapons to paralyze adversaries' information systems during a conflict.
- » PLA Air Force and PLA naval aviation forces continue to evolve into more technologically advanced, effective, and capable forces proficient at conducting joint operations. This past year, China unveiled the J-35A, a fifth-generation fighter that can operate from PLAN aircraft carriers.
- » The PLA Rocket Force has fielded approximately 900 short-range ballistic missiles (compared to 1,000 in 2023), 1,300 medium-range ballistic missiles (compared to 1,000 in 2023), 500 intermediate-range ballistic missiles (similar to 2023), 400 intercontinental ballistic missiles (compared to 350 in 2023), and 400 ground-launched cruise missiles (compared to 300 in 2023).

Despite these military advances, China continues to be either unwilling or unable to ensure safe operations in international air and maritime domains, which poses a threat to U.S. and international air and sea traffic operating in the area. Last year, a PLA J-10 fighter deployed flares in the path of an Australian Seahawk helicopter operating in support of UN-imposed sanctions against North Korea in the Yellow Sea.

President Xi continues to publicly express concern about disloyalty and corruption in the PLA's ranks, and in 2024 a long-serving admiral in charge of enforcing loyalty and ideological compliance across the PLA was removed and investigated for corruption. The dismissal resembles the abrupt removal in 2023 of China's defense minister and senior PLA Rocket Force officers, reportedly because of corruption surrounding weapons procurement and nuclear modernization. In mid-March, press outlets identified a vice-chairman of China's Military Commission—Gen He Weidong—as another senior target of anti-corruption investigations.

Nuclear Capabilities

China's nuclear warhead stockpile probably has surpassed 600 operational nuclear warheads. We estimate that China will have more than 1,000 operational nuclear warheads by 2030—much of which will be deployed at higher readiness levels for faster response times—and will continue

growing its force until at least 2035. This supports the PLA's objective to achieve a more diverse nuclear force, comprising systems including low-yield precision strike missiles and ICBMs with multi-megaton yields, to provide a broader range of nuclear response options.

- » China's approach to using nuclear force is based on PLA "deterrence" of an enemy first strike and "counterstrike" against an adversary's military capability, population, and economy when deterrence fails. China's current force modernization suggests that it seeks to have the ability to inflict far greater levels of overwhelming damage to an adversary in a nuclear exchange.

Space and Counterspace Capabilities

China's space-related activities aim to erode U.S. space superiority and exploit a perceived U.S. reliance on space-based systems to deter and counter intervention in a regional military conflict. China is investing in space systems that enhance its own Command, Control, Communications, Computers, Cyber, Intelligence, Surveillance, Reconnaissance, and Targeting (C5ISRT) capabilities. China will continue to launch a variety of satellites that substantially enhance its intelligence, surveillance, and reconnaissance (ISR) capabilities; field advanced communications satellites able to transmit large amounts of data; improve its space-based positioning, navigation, and timing capabilities; and deploy new weather and oceanographic satellites.

- » China possesses more than 1,000 satellites, including about 500 remote-sensing/ISR satellites, second only to the United States. By 2030, Chinese companies plan to launch thousands of satellites as megaconstellations, which are intended to compete with Starlink as alternative providers of global internet and secure communications.

China continues to dedicate significant resources to ensure its ability to disrupt, damage, and destroy adversary space capabilities. The PLA has operational anti-satellite missiles intended to target satellites in low Earth orbit and probably is developing more advanced capabilities to destroy satellites in geosynchronous orbit. China also has developed a variety of electronic warfare systems, including mobile jammers, almost certainly dedicated to denying an adversary's satellite communications and Global Positioning System (GPS) capabilities during conflict. China has fielded multiple satellites, such as the Shijian-21 in geosynchronous Earth orbit, capable of disrupting or destroying other on-orbit satellites.

Cyberspace Capabilities

China-led cyberintrusions, including by the PLA Cyberspace Force and the Ministry of State Security, are targeting information networks around the world, including U.S. Government systems, to steal intellectual property and data and develop access into sensitive networks. China very likely will continue to use its cyberspace capabilities to support intelligence collection against U.S. academic, economic, military, and political targets and to exfiltrate sensitive information from defense infrastructure and research institutes to gain economic and military advantage.

- » Since early 2024, the U.S. Government has publicly identified efforts by China's cyberactors to pre-position for cyberattacks on U.S. critical infrastructure. China probably would use its access to attack these systems if it viewed a major conflict with the United States as imminent.

Taiwan and South China Sea

China is likely to continue its campaign of diplomatic, information, military, and economic pressure on Taiwan to advance its long-term objective of unification with Taiwan, deter any move by Taiwan toward independence, and test the United States' commitment to Taiwan's defense.

China possesses a variety of military options to coerce Taiwan, including increasing the frequency and scope of China's military presence operations, air and maritime blockades, seizure of Taiwan's smaller outlying islands, joint firepower strikes, and a full-scale amphibious invasion of Taiwan. China appears willing to defer seizing Taiwan by force as long as it calculates unification ultimately can be negotiated, the costs of forcing unification continue to outweigh the benefits, and its stated redlines have not been crossed by Taiwan or its partners and allies.

China has contested the Philippines' presence in the South China Sea, particularly at Second Thomas Shoal, despite a 2016 international tribunal ruling in favor of the Philippines. The PLAN, China Coast Guard, and maritime militia sought to assert China's perceived sovereignty by using water cannons and non-destructive lasers against Philippine ships and aircraft and conducting dangerous and aggressive maneuvering, resulting in collisions with Philippine counterparts. These aggressive responses by the PLA are likely to continue during the next year, creating conditions that risk escalating conflict in the region.

Global Military Operations

China is improving PLA systems to operate further from China for longer periods and establishing a more robust overseas logistics and basing infrastructure to sustain deployments at greater distances, efforts that can potentially threaten U.S. global operations or international commerce during a conflict. China is pursuing a mixture of military logistics models—including

bases with garrisoned forces, host-nation shared facilities, exclusive PLA logistics facilities collocated with commercial infrastructure, or ad-hoc access to commercial infrastructure abroad—to support China’s overseas military logistics needs.

- » In 2024, the PLA conducted a highly scripted exercise in Tanzania, representing China’s largest-ever military exercise in Africa. This exercise demonstrated the PLA’s ability to project power globally with the deployment of more than 1,000 troops by sea and air.
- » This year, on 5 April 25, the Cambodian Prime Minister and a PLA delegation inaugurated the Joint Logistics and Training Center at Ream Naval Base in Cambodia. China’s Ministry of National Defense insists that the center is to support joint operations in areas like counterterrorism, disaster prevention, humanitarian assistance, and training. Preceding the official opening at Ream, the PLA continuously stationed two naval combatants—rotated a total of three times—at the facility’s pier. China probably also has considered establishing PLA military facilities in Burma, Thailand, Indonesia, Pakistan, Sri Lanka, United Arab Emirates, Cuba, Kenya, Equatorial Guinea, Seychelles, Tanzania, Angola, Nigeria, Namibia, Mozambique, Gabon, Bangladesh, Papua New Guinea, Solomon Islands, and Tajikistan.

RUSSIA

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.

Despite Western provision of lethal aid to Ukraine, Russia almost certainly seeks to avoid direct conflict with NATO because it assesses it cannot win a conventional military confrontation with the alliance. However, Moscow remains fully capable of employing asymmetric capabilities against the United States and allies, including cyber and information campaigns, and ultimately possesses an existential threat capability with its strategic nuclear forces that can range the U.S. Homeland.

The war in Ukraine is part of Putin's broader objectives to recoup the prestige and global influence that he perceives Russia lost when the Soviet Union collapsed in 1991 and to exercise control over former Soviet states. Russia aims to wield strong influence over these states' foreign, domestic, and economic policies, while limiting inroads by rival foreign powers.

Trajectory of Russia's War in Ukraine

Putin almost certainly is committed to victory in Ukraine, and his objectives remain mostly unchanged since the beginning of the war: Ukrainian neutrality and a further partition of the Ukrainian state. In the absence of a negotiated settlement or, alternatively, robust Western aid, the battlefield outlook probably will continue to slowly trend in Russia's favor through 2025, though Russian battlefield gains are slowing and continue to come at the expense of high personnel and equipment losses. Since the war's start, Russia has lost at least 10,000 ground combat vehicles, including more than 3,000 tanks, as well as nearly 250 aircraft and helicopters, and more than 10 naval vessels. Russia has experienced more than 700,000 personnel casualties during the war. Russian forces maintain small, incremental progress toward capturing portions of Donetsk and Luhansk Oblasts and expelling Ukrainian forces from 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 Ukraine infrastructure with a combination of one-way attack UAVs and long-range missiles to degrade its national will to fight.

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. The war against Ukraine has proven costly to the Russian military, especially to Russia's ground forces, which probably have suffered more than 170,000 fatalities since the war began.

Military Capabilities and Modernization

Russia's conventional capabilities to deter, fight, or militarily compete with NATO are likely to be degraded for at least the next three years as the majority of all combat-capable Russian units are committed to the war in Ukraine. Russia faces tradeoffs between modernizing weapons and resupplying its forces in Ukraine, and Russia's defense industry is giving priority to refurbishing its equipment and existing platforms ahead of producing new or modernized weapons systems. The exception is submarines, where planned modernization and fielding has continued mostly without interruption. In 2025, Russia plans to spend at least \$150 billion on defense- and security-related expenditures, which is an inflation-adjusted increase of 19 percent from 2024 and will constitute approximately 40 percent of Russia's federal budget. Russia is experiencing labor shortages in the economy, which along with sanctions, are driving up costs for its defense industry. These rising defense production costs probably will hamper Russia's long-term modernization efforts, particularly for producing advanced equipment.

The Russian Navy almost certainly will serve as Russia's primary tool of global power projection during the next year. The Russian Navy conducted deployments to Latin America and deployed a nuclear-powered submarine in the region last year for the first time since the fall of the Soviet Union. The Navy also conducted a multi-fleet, global exercise in September—OKEAN-2024—to showcase its ability to defend its national security interests despite attrition in Ukraine. The Russian navy also fielded new, advanced ballistic missile submarines, cruise missile submarines, and attack submarines in its Pacific Fleet.

- » Overusage of aircraft and pilots in combat operations, as well as poor force implementation, probably will strain Russia's Aerospace Forces' operations in 2025 but not disrupt the pace of Aerospace Forces employment in the conflict. These forces have demonstrated varying degrees of proficiency and capability in Ukraine, leading to both substantial losses of equipment and veteran personnel, as well as the development of new tactics for weapons employments, such as glide bombs.

- » 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. Additionally, Russia's use of UAVs in the conflict has expanded dramatically as these systems have proven to be cost-effective tools to detect enemy movements, provide artillery targeting assistance, and conduct short- and long-range strikes.

Cyberspace Capabilities

Russian state and nonstate cyberactors have maintained a high volume of offensive cyberoperations against U.S.-associated target networks. State-sanctioned cyberoperations have seemingly prioritized cyberespionage over cyberattacks, targeting sensitive data and intellectual property. For example, between 2023 and 2024 a hacking group attributed to the Russian Foreign Intelligence Service (SVR) exfiltrated terabytes of data from Microsoft's corporate email system, including correspondence, credentials, and passwords for U.S. government accounts. Since 2023, this activity increasingly has included pro-Russian nonstate cyberactors conducting cyberattacks against U.S. critical infrastructure – for example, the Cyber Army of Russia Reborn group has conducted a variety of successful low-level cyberattacks against U.S. water and energy infrastructure. These cyberattacks against critical infrastructure threaten U.S. national security, economic progress, and public health and safety by potentially disrupting access to water, electricity, gas, and other key utilities.

Space and Counterspace Capabilities

Many of Russia's space programs remain constrained by international sanctions and competing priorities within Russia's broader military modernization efforts. Russia will prioritize the development and fielding of counterspace systems over the next year, which it believes will deter Western adversaries reliant on space and enable it to disrupt or destroy Western satellites should deterrence fail. One such system is a satellite capable of carrying a nuclear device. The United States has been aware of Russia's pursuit of a satellite capable of carrying a nuclear device dating back years, but only recently have we been able to make a more precise assessment of their progress toward it. A space-based capability such as this would pose a threat to the thousands of satellites operated by countries and companies around the world. In 2024, Russia vetoed a U.N. resolution that reaffirmed the 1967 Outer Space Treaty's ban on the placement of nuclear weapons and other weapons of mass destruction in space. Russia is also developing—and in some cases has already fielded—an arsenal of non-nuclear counterspace weapons, including lasers, a ground-launched antisatellite missile, and electronic warfare systems. In 2024, Russia also conducted its most recent test of a space-based antisatellite weapon near a U.S. government satellite.

WMD Capabilities

Russia is expanding its nuclear forces by adding new capabilities, including nuclear air-to-air missiles and novel nuclear systems. Russia probably maintains a nuclear stockpile of about 1,550 deployed strategic warheads and up to 2,000 non-strategic warheads. Russia is expanding its nuclear posture to Belarus by establishing missile and nuclear-capable aircraft capabilities, renovating a nuclear weapons storage site, and training Belarusian crews to handle tactical nuclear weapons. Throughout the Russia-Ukraine conflict, Russia has used nuclear-related rhetoric and military exercises to signal its resolve and deter Russia-perceived Western involvement in the conflict. However, Russia is very unlikely to use nuclear weapons in the conflict unless Russian leadership judged it faced an existential threat to the regime.

Russia probably is expanding its chemical and biological warfare programs' capabilities. Russia used fourth-generation nerve agents in targeted killings in 2018 and 2020 and employed pharmaceutical-based agents in special operations in 2002 and 2005. Russia continues to use riot-control agents and chloropicrin in battlefield operations in Ukraine but Russia almost certainly has not used its fourth-generation nerve agents in the conflict.

Destabilization Campaign

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.

Russia's Global Presence

Russia seeks to enhance its force projection by pursuing basing or pre-approved port call agreements worldwide. Russia continues hosting bilateral and multilateral military exercises, particularly with Indo-Pacific countries, and probably will expand bilateral defense ties with additional Global South countries over the next year. Russia envisions the development of additional basing in the Mediterranean Sea, Red Sea, and Indian Ocean regions to enable inter-fleet transfers.

- » **Belarus.** Russia sees Belarus as an integral part of a single and indivisible Russian civilization, and Belarus remains one of Russia's closest partners. Russia seeks to use its Union State Treaty with Belarus to expand its political control of Belarus and maintain strategic depth against NATO. Russia benefits from Belarus's strategic location along the northern border of Ukraine,

exploiting Belarus as a logistical hub, buffer with NATO, venue for training troops, rehabilitating injured and wounded troops, launching offensives, and supplying weapons to the front.

- » **Caucasus Region.** Russo-Armenian relations deteriorated last year, as Armenia threatened withdrawal from the Collective Security Treaty Organization and Russia used information operations to denigrate Armenian democracy and its more pro-Western leadership. In Georgia, Russia almost certainly aims to return Georgia to its sphere of influence. Since the parliamentary elections in October, the Georgia Dream-led government has created an environment that enables Russia to increase its influence in the country.
- » **Central Asia.** Russian has deep historical, economic, political, military, and cultural ties in Central Asia which enable it to maintain persistent, if somewhat uneven, influence in the region. Russia views security in Central Asia as integral to its own and employs bilateral and multilateral cooperation agreements to control the security architecture across the region, including through the Collective Security Treaty Organization, Commonwealth of Independent States, and Shanghai Cooperation Organization. Moscow also leverages Central Asia's reliance on Moscow's gas and oil infrastructure to exert pressure on regional countries to meet Moscow's goals.
- » **Africa.** Russia probably perceives Africa—particularly the Sahel—as a unique arena where relatively low-cost investments allow it to compete with the West and bolster its reputation as a reliable global power. Russia seeks to expand its footprint in Africa, gain access to natural resources, and build political influence with various states on the continent through opportunistic arms sales, paramilitary deployments, and military basing and access agreements. During the next one to two years, Russia's ability to sustain its presence or further its military expansion in Africa almost certainly hinges on continued access to the Mediterranean Sea, which will require an enduring presence in post-Asad Syria or the establishment of an alternative port for Russia's use.

IRAN AND ITS PROXY FORCES

Israeli military strikes against Iran's Axis of Resistance and Islamic Revolutionary Guard Corps-Qods Force (IRGC-QF) senior leadership since October 2023 have prompted Iran to directly retaliate against Israel, a departure from its preferred strategy of avoiding direct military confrontation while permitting independent partner- and proxy-led action. Iran has attempted to exploit the Israel-HAMAS conflict to internationally isolate Israel, expand its regional influence, and enhance the capabilities of its Axis of Resistance; these actions continue to threaten sparking protracted regional conflict.

- » Iran almost certainly will attempt to rearm Hizballah and continue providing lethal aid to Iraqi Shia militias, Syrian militants, and the Huthis to impose costs on Israel and threaten U.S. interests. The Huthis resumed strikes in March 2025 following Israel's resumption of combat operations in Gaza.
- » In December 2024, Iran withdrew all Iranian personnel from Syria due to the Asad government's collapse, almost certainly disrupting Iran's ability to reconstitute Hizballah's strategic munitions stockpiles. The loss of influence with the Syrian government also diminishes Iran's regional prestige and will hinder its ability to project influence within Lebanon and Syria-based Shia communities.

Iranian Military Activity

In the next year, the persistent threat of direct attacks against Iran may compel Iran to further pivot from its predominantly reactive military strategy to a more proactive, direct approach in an effort to deter a full-scale conflict and threats to Iranian leadership. Iran's retaliation in April 2024 for Israeli attacks on Iran's consulate in Syria marked the first instance of direct Iranian conventional involvement in the crisis. Iran used approximately 300 missiles and UAVs in the attack. In October 2024, Iran conducted a second strike against Israel using approximately 200 missiles, claiming retaliation for a series of attacks against Iranian, Hizballah, and HAMAS senior officials. With each exchange, Iran grappled with how to balance its perceived need to reestablish deterrence against attacks with the risk of escalating the conflict into a broader regional war.

- » Iran probably will focus future investments on improving the range, accuracy, lethality, and reliability of its missile and UAVs to deter and respond to others' actions. During the past year, Iran has also increased cyberattacks, cyberespionage, and information operations against Israel while supporting regional proxies and partners to conduct UAV and missile attacks against Israeli territory.

- » Israel's calibrated airstrikes against Iranian interests have demonstrated Israel's ability to reach targets anywhere in Iran, and Israeli leaders probably are reserving the option to target more sensitive Iranian targets. Israel will continue to depend on its layered missile defenses to defend against larger barrages of Iranian airstrikes such as those in 2024, but management of interceptor missile stockpiles probably will be required during future attacks.

Over the course of the coming year, Iran probably would respond to a U.S.-led "pressure campaign" by authorizing expanded proxy attack campaigns against U.S. forces in Iraq and Syria, pressing Gulf partners to prevent U.S. or Israeli military action from their territory, and targeting U.S.-affiliated shipping in the Persian Gulf. Iran almost certainly will seek to avoid direct conflict with the United States but also will continue assassination plotting against current and former U.S. officials in retaliation for the 2020 death of IRGC-QF Commander Qasem Soleimani, and against Israeli and Jewish targets globally.

WMD Capabilities

Iran almost certainly is not producing nuclear weapons, but Iran has undertaken activities in recent years that better position it to produce them, if it chooses to do so. Since 2019, Iran conducted activities that exceed previous Joint Comprehensive Plan of Action (JCPOA) limits, including increasing the size and enrichment levels of its uranium stockpile, producing small quantities of uranium metal, restricting International Atomic Energy Agency monitoring to pre-JCPOA levels, and expanding uranium enrichment at its Fordow Fuel Enrichment Plant. These actions reduce the time required to produce sufficient weapons-grade uranium for a first nuclear device to probably less than one week. Iran also continues to pursue advancements related to its chemical and biological weapons programs.

- » Iran senior leaders probably have not decided to restart its pre-2003 nuclear weapons program, but since April 2025, Iranian officials have threatened to revisit their nuclear doctrine if its nuclear facilities were attacked.
- » Iran probably is pursuing central nervous system-acting chemicals for offensive purposes and probably has not abandoned its intention to conduct research and development of biological agents and toxins.

Hizballah

Hizballah's military capabilities, arsenal, and leadership were badly degraded as a result of Israeli military strikes. Israel has destroyed at least 50 percent of Hizballah's military infrastructure and offensive capabilities since September 2024 and killed Secretary General Hassan Nasrallah and his

successor. Hizballah is unlikely to consider fully disarming, but has withdrawn its overt forces and infrastructure from the immediate border region with Israel. Despite the plausibility of ceasefire violations from both sides, major conflict is unlikely to resume in Lebanon in the next six months.

HAMAS

Israeli military operations in Gaza resumed in mid-March, with wider ground combat operations expected this spring. The IDF seeks to re-clear Gaza's urban neighborhoods of HAMAS militants and infrastructure in pursuit of Israel's broader war aims of eliminating HAMAS and returning the hostages held by HAMAS, including American dual-citizens. HAMAS retains the basic capabilities to conduct complex and simple ambushes, emplace improvised explosive devices (IEDs), and launch small rocket volleys.

The Huthis

Since November 2023, the Yemen-based Huthis has conducted nearly 200 maritime attacks, striking more than 30 merchant ships, including at least 10 oil tankers in the Red Sea, Gulf of Aden, and Indian Ocean, and attempted attacks in the eastern Mediterranean. These attacks target civilian entities, including U.S. commercial ships, and undermine freedom of navigation and global trade, having decreased Red Sea transit by 70 percent since October 2023. Huthi missile and UAV attacks also have unsuccessfully targeted U.S. naval ships and caused light damage in Israel.

The Huthis have been emboldened by the success of their campaign, garnered significant domestic support by creating a distraction from domestic issues, and strengthened their position in Iran's Axis of Resistance, including claiming coordinated attacks with an Iraqi militia group. The group continues to receive and develop longer-range and more accurate missiles and UAVs from Iran. In the event that U.S. strikes kill senior Huthi leadership, the group is likely to incrementally expand the geographic scope and range of targets they intend to strike.

The Huthis have asserted that deescalation is contingent upon ceasefires in Gaza and Lebanon, the resumption of humanitarian aid to prewar levels, and the cessation of U.S.-led strikes in Yemen. However, the group probably will consider similar attacks in the future—including attacks on U.S. ships and persons—to press for greater international legitimacy, or extort shipping companies for protection from strikes.

NORTH KOREA

North Korean leader Kim Jong Un is increasingly confident in his international political legitimacy and regime security. North Korea is in its strongest strategic position in decades, possessing the military means to hold at risk U.S. forces and U.S. allies in Northeast Asia, while continuing to improve its capability to threaten the U.S. Homeland.

Military Capabilities and Modernization

The Korean People's Army (KPA) almost certainly is capable of mounting a prolonged defense of North Korea's territory while imposing severe damage on an adversary using conventional, biological, chemical, and nuclear weapons. North Korea remains one of the most militarized nations in the world with more than one million active duty personnel and more than seven million reserve and paramilitary personnel. However, resource constraints have slowed efforts to upgrade rapidly aging conventional forces, with the country's poorly constructed industrial system and infrastructure deteriorating.

- » The KPA Special Operations Force (SOF) is highly trained and well equipped, and is capable of infiltrating into South Korea. North Korea's SOF deployment to Russia will enable North Korea to use lessons learned from that experience for future combat training.

Missile Development and WMD

The KPA Strategic Force is North Korea's nuclear-armed missile force operating ballistic and cruise missiles that can threaten the U.S. Homeland, U.S. forces in the Indo-Pacific, and our allies and partners. North Korea continues to illicitly procure items for its missile program that it cannot produce domestically, often in cooperation with Chinese and Russian nationals. Similarly, North Korea almost certainly will continue marketing and proliferating ballistic missile systems and related technology to other countries of concern, as demonstrated by its provision of missiles to Russia for use in Ukraine.

- » In 2024, North Korea successfully launched one ICBM—its largest solid-propellant system—and also conducted its largest-ever salvo launch, simultaneously firing 18 short-range ballistic missiles. These efforts signal continued progress toward North Korea's stated defense modernization goal of improving its deterrence threat against the United States. To this goal, North Korea has developed new ballistic missile systems intended to enable strikes against U.S. targets in the region and the continental United States.

North Korea continues to support its nuclear weapons program and increase its nuclear weapons stockpile by producing plutonium and highly enriched uranium. In early 2021, Kim laid out a five-year defense plan that emphasized developing tactical nuclear weapons, and further highlighted the importance of developing “smaller and lighter nuclear weapons,” and “ultra-large nuclear warheads.” North Korea’s 2023 public display of nuclear weapon systems, which Kim claimed were for use with North Korea’s ballistic missiles, probably was an effort to demonstrate progress toward this plan. North Korea has restored its nuclear test site and is now postured to conduct a seventh nuclear test at a time of its choosing. North Korea probably has a biological warfare program and almost certainly has a chemical warfare program with the capability to produce nerve, blister, blood, and choking agents.

Space and Cyberspace Capabilities

In late 2023, North Korea completed its only successful launch of a domestic SLV, placing its only operational satellite into Low Earth Orbit. After the launch, North Korea threatened to destroy U.S. spy satellites if the United States “tries to violate the legitimate territory” of North Korea, referring to its satellite program. North Korea’s ballistic missiles and SLVs could be used as a very basic antisatellite platform to target U.S. and partner satellites in a conflict. Additionally, North Korea has received an offer from Russia to assist its space program, including SLVs, satellites, and training.

North Korea maintains offensive cyber capabilities to illicitly generate revenue through criminal enterprises, such as cryptocurrency theft, ransomware, and hacking-for-hire efforts. North Korea has broadened its cyber efforts beyond income generation to also conduct cyberespionage globally against foreign officials, academics, and defense and aerospace industries, probably in an effort to gain insight into its adversary capabilities, policies, and acquire information to aide North Korea’s own weapons development. These cyberactors routinely collaborate with foreign criminals as third-parties to advance its cyber-related objectives.

LATIN AMERICA

Socioeconomic conditions in Latin America continue to provide opportunities for U.S. competitors to secure political, economic, or security influence in a region where insecurity creates conditions for migration and transnational crime to thrive. During the next year, persistent gang activity in Haiti probably will significantly challenge the government's ability to end the violence and stabilize the country.

- » The humanitarian crisis in Haiti remains volatile following the one-year renewal of the UN Multinational Security Support mission. During the past year, gang attacks on infrastructure forced the closure of air- and seaports and the displacement of hundreds of thousands of Haitians. Security improvements almost certainly will be difficult to achieve until MSS funding, personnel, and equipment meet target levels.
- » Colombian and Ecuadorian armed groups almost certainly are the main perpetrators of Colombia's rural insecurity and Ecuador's instability. These groups are responsible for violence against communities, security forces, and one another as they vie for control of drug production and trafficking hubs.
- » Cuba almost certainly will remain receptive to increased political, economic, defense, and security cooperation with China, Russia, and Iran to quell instability and perceived threats to the Cuban government. As Cuba's socioeconomic conditions continue to deteriorate, the country is experiencing food and medical shortages, power outages, and concerns about subsequent civil unrest.

China's and Russia's Outreach

China's engagement in Latin America probably is intended to solidify its trade ties in the region, including sourcing critical minerals, and to shrink the number of Taiwan's diplomatic partners. In November, Xi and Peruvian President Dina Boluarte inaugurated a new Peruvian deepwater port intended to improve China's economic links with South America. Latin America includes seven of the 11 countries that maintain diplomatic relations with Taiwan.

- » China recognizes the Panama Canal's strategic importance to global trade and China's economy, and seeks to ensure its ships are not barred from using the Canal. Chinese companies have won a handful of contracts to build or operate infrastructure near the Canal, but the Panamanian government remains committed to maintaining the Canal's neutrality.

During the next year, Russia almost certainly will continue its efforts to court Latin American countries' support. In 2024, Russia made several efforts to engage multiple Latin American countries, including a June deployment of a Russian nuclear-powered submarine to Cuba, high-level bilateral engagements with several countries in the region, and targeted economic pressure intended to reduce support to Ukraine.

TERRORISM

The Islamic State of Iraq and ash-Sham's (ISIS's) and al-Qa'ida's ability to threaten U.S. and allies' interests probably is growing more dynamic and diffuse as both groups have implemented a decentralized plotting approach toward Western countries. With the fall of the Asad regime in Syria, ISIS and al-Qa'ida are trying to expand their freedom of movement and access to operational resources. Both groups continue to reference Israeli operations in Gaza to galvanize their global networks, recruit new members, generate revenue, and enable or inspire attacks against U.S., Israeli, Jewish, and European interests worldwide. The groups are also seeking to improve their weapons capabilities, including with commercial technologies such as UAVs and artificial intelligence.

- » Al-Qa'ida's and ISIS's most active, largest, and well-resourced affiliates are primarily in Africa. These affiliates focus on plotting attacks locally, but some affiliates probably will also use their infrastructure on the continent as a springboard to advance plotting elsewhere this year.

ISIS

Throughout most of 2024, ISIS had to rely more on its global network, including affiliates in Africa and South Asia, amid leadership losses in the Middle East, but this trend may change as the group exploits the changing operating environment in a post-Asad Syria. ISIS will continue to use social media to enable its plotting and attempts to directly orchestrate attacks.

- » ISIS-Khorasan in Afghanistan and Pakistan has adapted to Taliban pressure to bolster its high-profile external attack capabilities, as demonstrated by the January 2024 bombings in Kerman, Iran, and the March 2024 attack in Moscow.
- » In Africa, ISIS-Somalia continues to serve as a key hub for ISIS operations globally, including external plotting in the West. In the Sahel and West Africa, ISIS branches are expanding their operational reach and strengthening their attack capabilities.
- » In the Middle East, ISIS's freedom of movement is routinely contested and the group has suffered leadership losses in Iraq and Syria. In late 2024 and early 2025, U.S. military and Iraqi security forces killed 14 ISIS members in western Iraq, including ISIS's second-in-command, as well as a senior member who led ISIS's efforts to develop chemical weapons. However, ISIS may be able to offset these losses as the group reintegrates ISIS prisoners who have been freed as a result of the Hayat Tahrir al-Sham (HTS) offensive in Syria.

Al-Qa'ida

Al-Qa'ida probably will focus on localized plotting against U.S. and partner interests over the next year, with the threat posed by the group especially growing in Africa. Al-Qa'ida never officially named a successor to Ayman al-Zawahiri after his death in 2022, and the group's probable acting emir, Iran-based Sayf al-Adl, has not successfully reinvigorated the group's external plotting efforts. At the same time, al-Qa'ida still seeks to enable and inspire attacks in the West and, similar to ISIS, is capitalizing on Middle East conflict—including in Gaza and after the fall of the Asad regime—to amplify its propaganda.

- » In Africa, al-Shabaab in Somalia almost certainly poses the most direct threat to U.S. forces of any terrorist group on the continent. Al-Shabaab also is seeking to acquire Huthi weapons for use in Somalia. Similar to ISIS, al-Qa'ida's affiliates in West Africa are also exploiting instability to expand their reach and attack capabilities.
- » In the Middle East, Hurras al-Din—al-Qa'ida's affiliate in Syria—continues to face leadership and resource constraints and the extent to which the group will exploit the situation in Syria to reverse these trends this year remains unclear. In Yemen, al-Qa'ida in the Arabian Peninsula probably is giving priority to local targets but maintains the intent and some capability to attack the U.S. Homeland, most recently enabling an attack that killed three U.S. servicemembers at Naval Air Station Pensacola in 2019.

SOUTHEAST ASIA

Most Southeast Asian countries are increasingly concerned about the region becoming a battleground for great-power competition and the potential disruption to the authority and centrality of regional institutions such as the Association of Southeast Asian Nations (ASEAN). In response to intensifying tensions, most regional capitals are reinforcing non-aligned foreign policies with a range of partners. Southeast Asian countries' preference to avoid entanglement in geopolitical rivalries, coupled with divergent security priorities and threat perceptions, has translated into fairly muted responses to global security crises. Most Southeast Asian countries have called for a cessation of hostilities in both the Russia-Ukraine conflict and war in Gaza, and avoided statements directly supporting the Philippines following instances of China's aggression and encroachment of Philippine-claimed SCS territories.

China's military harassment has escalated at several disputed areas in the SCS, most notably Second Thomas Shoal, Sabina Shoal, and Scarborough Reef. Tensions over the Second Thomas Shoal culminated in mid-June 2024 with one of the most violent confrontations with China's Coast Guard (CCG) to date, resulting in damage to Philippine resupply ships and injury to at least one Philippine Navy personnel. CCG ships subsequently used similar tactics to disrupt Philippine efforts to resupply a Philippine Coast Guard ship stationed at Sabina Shoal, ultimately forcing the ship to depart the shoal. PLA and Philippine ships also continue to have dangerous interactions at Scarborough Reef as the Philippines asserts its territorial rights and sovereignty. These activities have stimulated numerous bilateral efforts focused on confronting China's aggression and territorial encroachment in the SCS and contributed to the Philippines passage of domestic legislation to codify and align its domestic territorial policies with international law. The Philippines is also relying on its growing regional partnerships, including with Australia, Japan, and South Korea, to counter China's aggression, hold China accountable for its malign SCS actions, and deter Beijing's efforts to revise international norms for its own benefit.

SOUTH ASIA

South Asia's security situation is shaped by various factors, including terrorism and long-standing mistrust among neighboring states, several of which are modernizing their militaries and nuclear capabilities. Terrorist activity in Afghanistan and Pakistan will challenge military and security forces, and ongoing tensions along India and China's Line of Actual Control border demarcation are capable of escalating quickly. Russia and China continue efforts to bring regional powers closer into their respective spheres of influence.

Afghanistan

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

The Taliban has made some progress toward gaining de facto recognition with regional partners, despite persistent concerns about the state of human rights, inclusive representation in government, and militancy in Afghanistan. Iran has met with the Taliban to discuss water rights and threats posed by terrorist groups, particularly ISIS-Khorasan and Jaysh al-Adl. India is pursuing low-level engagement with the Taliban, focused on humanitarian assistance, countering terrorism, and enabling private sector growth.

- » Russia is continuing to deepen its relationship with the Taliban, expressing its intent to formally recognize the government and cooperate against terrorism. In September 2024, the Russia Ministry of Foreign Affairs spokesperson emphasized Russian efforts to remove the Taliban from Russia's list of terrorist groups and develop multilateral cooperation while blaming the West for instability in the country.
- » In January 2024, China's President Xi accepted the diplomatic credentials of a Taliban-appointed ambassador. The Taliban's focus on improving internal security and reducing violence has enabled some foreign investments from China, including oil extraction and copper mining activities in Afghanistan.

India

Indian Prime Minister Narendra Modi's defense priorities will probably focus on demonstrating global leadership, countering China, and enhancing New Delhi's military power. India views China as its primary adversary and Pakistan more an ancillary security problem to be managed, despite cross-border attacks in mid-May by both India's and Pakistan's militaries.

- » Following a late April terrorist attack in Jammu and Kashmir, New Delhi conducted missile strikes on terrorism-related infrastructure facilities in Pakistan. The missile strike provoked multiple rounds of missile, drone, and loitering munition attacks, and heavy artillery fire, by both militaries from 7 to 10 May. As of 10 May, both militaries had agreed to a full ceasefire.

To counter Chinese influence and boost its global leadership role, India is giving priority to advancing its bilateral defense partnerships in the Indian Ocean region through exercises, training, arms sales, and information sharing. India also has increased trilateral engagement in the Indo-Pacific region and actively participates in multilateral fora such as the Quadrilateral, BRICS, Shanghai Cooperation Organization and ASEAN.

- » In late October 2024, India and China reached an agreement to move forces away from the two remaining contested positions along the disputed Line of Actual Control in eastern Ladakh. The disengagement did not resolve the longstanding dispute about border demarcation but reduced some tension still lingering from a 2020 incident when troops on both sides were killed in a clash along the Line of Actual Control.

India almost certainly will continue promoting its "Made in India" initiative this year to build its domestic defense industry, mitigate supply chain concerns, and modernize its military. India continued to modernize its military in 2024, conducting a test of the nuclear-capable developmental Agni-I Prime MRBM and the Agni-V multiple independently targetable reentry vehicle while also commissioning its second nuclear-powered submarine to strengthen its nuclear triad and bolster its ability to deter adversaries.

India will maintain its relationship with Russia through 2025 because it views its ties to Russia as important for achieving its economic and defense objectives and sees value in the relationship as a means to offset deepening Russia-China relations. Under Modi, India has reduced its procurement of Russian-origin military equipment but still relies on Russian spare parts to maintain and sustain its large inventory of Russian-origin tanks and fighter aircraft that form the backbone of its military's ability to counter perceived threats from China and Pakistan.

Pakistan

During the next year, the Pakistani military's top priorities are likely to remain cross-border skirmishes with regional neighbors, rising attacks by Tehrik-e Taliban Pakistan and Baloch nationalist militants, counterterrorism efforts, and nuclear modernization. Despite Pakistan's daily operations during the past year, militants killed more than 2,500 people in Pakistan in 2024.

- » Pakistan regards India as an existential threat and will continue to pursue its military modernization effort, including the development of battlefield nuclear weapons, to offset India's conventional military advantage.
- » Pakistan is modernizing its nuclear arsenal and maintaining the security of its nuclear materials and nuclear command and control. Pakistan almost certainly procures WMD-applicable goods from foreign suppliers and intermediaries.
- » Pakistan primarily is a recipient of China's economic and military largesse, and Pakistani forces conduct multiple combined military exercises every year with China's PLA, including a new air exercise completed in November 2024. Foreign materials and technology supporting Pakistan's WMD programs are very likely acquired primarily from suppliers in China, and sometimes are transshipped through Hong Kong, Singapore, Turkey, and the United Arab Emirates. However, terrorist attacks targeting Chinese workers who support China-Pakistan Economic Corridor projects has emerged as a point of friction between the countries; seven Chinese nationals were killed in Pakistan in 2024.
- » Pakistan and Iran have taken steps, including high-level meetings, to deescalate tensions after the two countries conducted unilateral airstrikes on each other's territory in January 2024 in response to cross-border terror attacks.
- » In September 2024, Taliban and Pakistani border forces clashed near border posts, resulting in the death of eight Taliban fighters. In March 2025, Pakistan and the Afghanistan exchanged air and artillery strikes on each other's territory, each citing alleged militant infrastructure as the targets.

MIDDLE EAST

Regional U.S. partners are increasing their outreach to alternate security partners, including U.S. competitors such as China and Russia, to gain access to advanced military and dual-use technologies and hedge against what some have perceived as U.S. disengagement in the Middle East in favor of the Indo-Pacific region. U.S. Arab partners are expanding their diplomatic, military, and economic engagements with Iran, despite continued distrust of Iranian intentions in the region, in the hopes of deterring attacks from Iranian-backed groups.

Syria

Following an 11-day campaign in late 2024, the HTS-led coalition of Syrian opposition groups captured Aleppo, Hama, Homs and Damascus, culminating in the collapse of the Syrian Arab Army and President Bashar al-Asad fleeing the country. In March 2025, the Syrian transitional government, led by President Ahmad Husayn al-Shara, introduced a five-year interim constitution. The severe economic challenges confronting the interim government as well as the difficulty in uniting Syria's historically fractious opposition into a single authority probably portends continued instability in the country.

- » Interim government leaders have stated a desire to reengage the West, allow the return of Syrian refugees, and protect religious and ethnic minorities. HTS has in the past targeted ISIS and al-Qa'ida figures in Syria and probably would be receptive to counter-ISIS or counter-al-Qa'ida cooperation with the United States.
- » The Syrian transitional government is facing challenges uniting former opposition groups and the Syrian Democratic Forces (SDF) around a new, centralized Syrian government over concerns about HTS's ability to manage extremism, protect minorities, and integrate potentially competing groups. Despite this, the new government will likely be open to counterterrorism cooperation, particularly if the SDF is integrated into the Syrian military. In January, the new government successfully prevented an ISIS attack on a Shia shrine, potentially demonstrating its interest in combating extremism. Thus far, the HTS-led transitional government has been resistant to external interference, particularly from Iran, which some Syrians suspect of attempting to disrupt unification efforts.

Turkish support for HTS and other rebel groups before and during the offensive probably has positioned Ankara as the most influential foreign partner for the new government. Iran withdrew its personnel from Syria as a result of the Asad government's collapse, and Russia is continuing to withdraw personnel and equipment while negotiating with Damascus to retain some level of access to its military bases.

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- » During HTS's offensive, Turkey and its coalition of armed Syrian groups attacked and occupied areas in northern Syria held by the SDF, the Kurdish-dominated U.S. partner force in Syria, and are poised for additional operations against SDF territory. The domestic unpopularity of the SDF, coupled with Turkey's relative military superiority, suggests that the SDF probably faces an existential threat from Ankara that will distract the SDF from partnering with U.S. forces in the counter-ISIS campaign.
 - » Turkey intends to press the interim Syrian government to cooperate with Ankara on longstanding Turkish priorities, including clearing the SDF—which Turkey views as synonymous with the Kurdistan Workers' Party—from its border, repatriating Turkey-based Syrian refugees, and improving its economic ties to Syria. The Turkish defense minister offered assistance to carry out counter-ISIS operations with the United States in lieu of the SDF and has pledged military support to the interim government if requested.

In the aftermath of the HTS-led campaign, Israel conducted air strikes against military equipment and weapons depots of the former Syrian regime to prevent their acquisition by jihadist extremists and sent troops to occupy territory in the UN Disengagement Observer Force buffer zone on the Syrian side of the border.

Iraq

Since October 2023, Iran-backed militias in Iraq have launched more than 200 UAV and indirect fire attacks against U.S. and Coalition forces in Iraq, Syria, and Jordan, and more than 250 UAV and land-attack cruise missile attacks against Israel. The attacks have been mostly ineffective, probably due to poor quality equipment and successful air defense engagements, but did kill three U.S. soldiers in Jordan and two Israeli soldiers in Israel. The attacks almost certainly were intended to respond to the Israel-HAMAS conflict and to accelerate the drawdown of the U.S.-led Coalition in Iraq, which is scheduled to close some Iraq-based facilities by September 2025. Iran-backed militias have not conducted any attacks against US forces since the Gaza ceasefire began on 19 January 2025.

Iraqi security force (ISF) leaders seek to preserve U.S.-led Coalition support to their aerial reconnaissance, air-to-ground strike, counterterrorism operations, and sustainment abilities, despite pressure from Iran and the militias to cut off all U.S. or Coalition support. Even absent U.S. assistance, the ISF probably will be able to unilaterally secure Iraq against ISIS for at least two years in part because ISIS-Iraq is weak and only maintains the capability to conduct sporadic, low-level attacks, mainly in rural areas.

AFRICA

Many African countries are facing political and economic instability and humanitarian crises, which are likely to pose security threats to U.S. interests in Africa and create space for expanded engagement by U.S. competitors. Many African governments' security concerns, coupled with frustrations about the quantity and quality of Western support, probably will prompt African leaders to increasingly engage with U.S. competitors to meet economic, infrastructure, and security needs.

- » In 2024, many African countries deepened economic and security ties to China, illustrated by the 53 African countries that attended the ninth Forum on China-Africa Cooperation in Beijing. Broad international fora like this and quieter bilateral engagements with countries such as Gabon and Mozambique suggest that some African countries may permit China to establish military facilities on the continent. Defense cooperation with China also is deepening, as seen with China and Tanzania conducting a combined ground, air, and naval exercise in August 2024.
- » Some African governments, such as those in Burkina Faso, Central African Republic, Equatorial Guinea, Mali, and Niger, see Russia as an alternative security partner to the West that will provide direct security assistance without stipulations related to democratic or human rights. Many African countries are targeted by complementary Russian disinformation campaigns that seek to undermine public faith in the democratic process, push anti-Western narratives, and foment resistance to U.S. presence.
- » In 2024, ISIS and al-Qa'ida branches conducted more than 6,100 attacks across the continent, which is consistent with the previous year's pace of attacks and highlights shortfalls in regional militaries' abilities to effectively combat Salafi jihadist terrorist groups.

North Africa

Algeria and Morocco remain in an uneasy standoff centered on Western Sahara and both countries have increased their defense budgets. Algeria faces new insecurity on its southern border as Mali's internal conflict between the Russian-backed Malian Armed Forces and separatist rebels intensified this past year. Russia is entrenched in eastern Libya, and has used the country as a launchpad and logistics hub for its activities in Sub-Saharan Africa. North Africa also remains a primary avenue of immigration to Europe, with migrants transiting Libya and Tunisia to access dangerous routes across the Mediterranean Sea.

West Africa

The ruling juntas in Burkina Faso, Mali, and Niger are focused on consolidating their power amid threats from terrorist groups, but poor governance and economic performance and reduced international defense partnerships have degraded their ability to combat these groups. An al-Qa'ida-linked attack in September 2024 in Bamako underscores the threat near U.S. diplomatic facilities and the potential for this threat to spread to coastal West Africa. In March, Niger blamed degraded bilateral relations and U.S. condescension for its decision to end its military agreement with the United States, demanding the withdrawal of U.S. forces and subsequently inviting Russian military advisors into the country.

East Africa

Tensions between Ethiopia and Somalia—which were precipitated by Ethiopia signing a deal in 2024 for maritime access with the autonomous region of Somaliland in exchange for recognizing its sovereignty—have since eased, facilitating Ethiopia's participation in African Union (AU) missions in Somalia. Counterterrorism operations in Somalia have slowed amid international concerns that Somali forces are not ready to assume duties from the current AU mission. Violence in Sudan's civil war has spread to new areas, exacerbating the existing humanitarian crisis. Ethiopia intensified its military response to concurrent domestic insurgencies, contributing to forced displacement and civilian casualties.

Central and Southern Africa

During the past year, Central Africa has faced heightened violence and instability, jeopardizing already fragile humanitarian and economic situations in the region. The conflict between the Democratic Republic of the Congo (DRC) and Rwanda has escalated after the breakdown in October 2024 of a U.S.-Angolan-brokered ceasefire and after stalled diplomatic efforts to negotiate a peace; this led to the Rwandan-backed March 23 Movement (M23) armed group seizing the cities of Goma in late January and Bukavu in February. The conflict has drawn in neighboring countries, regional and international security missions, and the United Nations. Throughout 2024, the Central African Republic continued to rely on the Russian private military company Wagner to maintain security, which resulted in regular reports of human rights violations. In southern Africa, the waning popularity of longtime ruling parties is having a destabilizing effect, as demonstrated by the two months of unrest in Mozambique following its October 2024 elections that resulted in deaths and temporarily impeded an important mineral supply route.

THE POLAR REGIONS

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

- » Russia aspires to improve its military posture in the Arctic to enhance its ability to defend against a strategic attack, and 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.

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

- » China currently has three Arctic-capable icebreakers and will seek to expand its domestic icebreaker development to support future military deployments in the Arctic and to normalize China's presence in the Southern Ocean around Antarctica.
- » In September 2023, China's icebreakers completed the PLAN's 13th Arctic expedition, which marked the first time China reached the geographic North Pole. The expedition included ice site surveys, collecting ice samples, and deploying buoys to transmit acoustic data back to China. The acoustic data collected from its buoy systems in the Arctic may support improving maritime surveillance and detection.
- » China also is expanding its space observation infrastructure in the Arctic, which may provide China with military and civilian capabilities to monitor U.S. satellites over the Arctic region.

Russia remains China's strongest Arctic partner—the two countries cooperate through combined military patrols, economic development, and scientific and technological research. Russian and Chinese military and security cooperation probably will increase in frequency and scope in the Arctic, as both countries probably perceive it as successful strategic messaging. It also probably will marginally improve their ability to conduct combined operations. Russia remains wary of Chinese ambitions for the region and probably harbors reluctance to allowing China's military presence in the Arctic. However, due to the acute acceleration in Russia's financial and technological dependence on China as result of Western sanctions, Russia is likely to grudgingly make security-related concessions in the Arctic to China over the next year.

- » In late September 2024, China and Russia conducted a combined coast guard patrol that entered the Bering Strait—the farthest north the Chinese Coast Guard has patrolled. Separately, in July 2024, China and Russia conducted a combined naval patrol, in the Bering Sea and Bering Strait. These developments reflect China's efforts to normalize its military presence in the Arctic region.
- » China and Russia closely cooperate on Arctic economic development across several lines of effort, including maritime trade, transport and logistics, natural resource extraction, and scientific research and development. As of 2024, China and Russia were jointly developing the Northern Sea Route, which will enable China to more easily access the region's natural resources, to include Russian natural gas, and in some instances, can cut shipping times between Europe and China by a third.

In the Southern Hemisphere, China is investing in Antarctic infrastructure, having completed construction in early 2024 on the latest of its five active Antarctic stations used for environmental research and to support China's space program. The new station will provide telemetry, tracking and communications capabilities for scientific polar observation satellites, and its equipment is well positioned to also collect signals intelligence over Australia and New Zealand.

FOREIGN INTELLIGENCE THREATS

The Department of Defense (DoD) faces an extremely sophisticated global foreign intelligence threat environment as the rapid development of available and affordable advanced technologies is accelerating the capabilities and numbers of state and non-state actors posing intelligence threats to DoD interests. U.S. competitors' use of ubiquitous technical surveillance capabilities—the widespread collection, processing, and analysis of aggregated data that can identify patterns of activity that link persons to things, events, or locations—presents one of the most acute, generalized threats to DoD and U.S. Government personnel traveling or operating worldwide. Within the United States, in addition to declared intelligence officers and attachés from U.S. adversaries, the extremely large presence of foreign academics using student visas and tourists in the country provides robust opportunities for non-traditional collection activities to satisfy intelligence requirements.

Our competitors use a wide variety of technical means to surveil DoD personnel and operations around the world. Proliferating Safe City surveillance systems and facial recognition capabilities will enable adversaries to track and observe DoD interests with greater ease.

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

ADVANCED TECHNOLOGY

Global advancements in AI, biotechnology, quantum sciences, and microelectronics will continue to pose a significant threat to U.S. technological advantage. Our adversaries and competitors recognize the potential for emerging technologies to enhance military processes, equipment, and forces, and dual-use breakthroughs in the commercial sector can enable even less capable states and nonstate actors to benefit militarily. These advances are increasing the pace of research and development and creating novel and enhanced threats.

- » China continues its state-led drive to dominate critical advanced technology fields, and the PLA is striving to integrate advanced technologies to enhance its forces and field disruptive military capabilities. China also sponsors researchers and scientists who licitly and illicitly acquire intellectual property innovated by DoD-funded research programs.
- » Russia maintains its strategic ambition to develop advanced technologies for military capabilities, but ongoing international sanctions and export controls are constraining its progress.

Dual-use advanced and emerging technologies such as biological sequencers and synthesizers, computational biology, AI/machine learning, nanotechnology, and biomanufacturing have the potential to be applied to a variety of adversary military applications, including for human performance enhancement, human-machine integration, and biological and chemical weapons. Developing or acquiring software, hardware, and data that are optimized for military systems and processes will be key to any country's effectiveness in fielding these capabilities.

- » States are developing AI to improve decision-making support, enable quicker and more accurate ISR and targeting, tailor influence operations, advance cyber capabilities, and develop unmanned vehicles with higher levels of autonomy.
- » Since 2023, AI-enabled unmanned aerial vehicles have been used widely in Ukraine, and influence operations have utilized generative AI to create text, video, audio, and photographs to support their narratives.
- » Since last year, several new open-source AI-enabled computational biology tools have become available globally, which improve adversaries dual-use capabilities for both chemical and biological applications.

Quantum technologies—including quantum computing, communications, and sensing—probably will provide militaries with more advanced capabilities in decryption; positioning, navigation, and timing; and ISR. Although select research areas, such as sensing, are advancing more rapidly, non-governmental experts indicate that development of a quantum computer

capable of decryption is unlikely in this decade. Since last year, China and Russia both unveiled new higher performance quantum computers and continued expanding their quantum communications networks.

Microelectronics remain the linchpin of technology competition and represent a critical chokepoint in technology development and acquisition efforts. Access to high-end microelectronics underpins a state's ability to develop computing-intensive advanced technologies, such as AI and quantum. Although the United States and its allies maintain a technological advantage in manufacturing and design processes, our competitors are working diligently to reduce their foreign dependencies related to these critical technologies.

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

GLOBAL HEALTH AND BIODEFENSE

Naturally occurring biological threats remain a global health problem with national security implications. Novel infectious diseases, the resurgence and spread of once geographically limited infectious diseases, zoonotic diseases, and antimicrobial resistance all can overwhelm response capacities and make outbreaks harder to control. Compounding the threat, the rise in the number of laboratories around the world conducting high-risk life sciences research using potential pandemic pathogens without appropriate oversight has increased the risk of an accidental release. In many countries around the world, pathogens are stored in laboratories that lack appropriate biosecurity measures and could be diverted by actors who wish to do harm.

The most likely infectious disease threats to deployed U.S. forces come from endemic diseases that cause regional epidemics. The current outbreaks of dengue, mpox, and highly pathogenic avian influenza have the potential to disrupt military operations. While force health protection measures are usually effective in countering these threats, some emerging infectious disease threats, such as drug resistant pathogens, risk rendering medical countermeasures ineffective.

Developing countries almost certainly require support to prevent and contain disease outbreaks. China and Russia have invested in providing medical supplies, personnel, and research cooperation in order to outcompete the United States and gain political influence. Since 2018, China has provided medical teams, financial donations and medicine, and medical equipment to 53 African countries. China also constructed the African Union's Headquarters of the Africa Center for Disease Control and Prevention.

