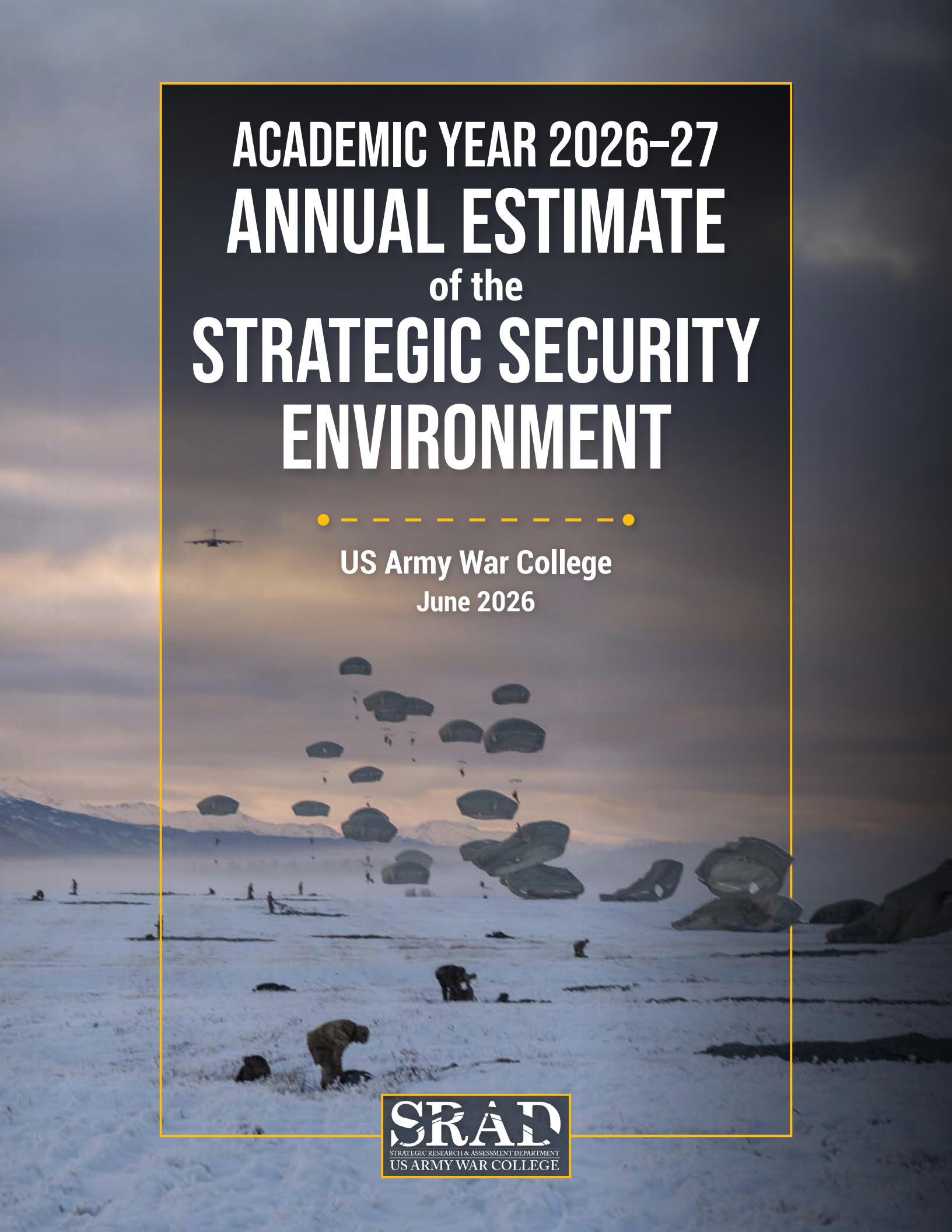

ACADEMIC YEAR 2026–27
ANNUAL ESTIMATE
of the
STRATEGIC SECURITY ENVIRONMENT

US Army War College
June 2026

SRAD
STRATEGIC RESEARCH & ASSESSMENT DEPARTMENT
US ARMY WAR COLLEGE

Academic Year 2026–27
Annual Estimate of the Strategic Security Environment

US Army War College

June 2026

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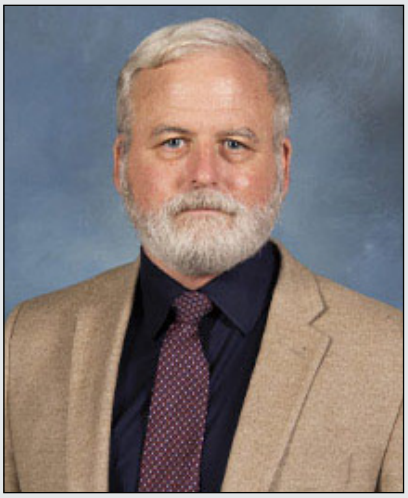


Welcome to the annual estimate of the strategic security environment developed by the US Army War College Strategic Research and Assessment Department. This estimate will enable the national security research community to identify critical areas for investigation that support strategic decision making, especially as applied to Landpower. Doing so will enhance decisonmakers' understanding of complex, potentially consequential issues and enable them to assess the risks and opportunities associated with action. The product continues to adapt, with this year's narrative simplified into two broad themes: (1) regional challenges and opportunities and (2) national and institutional challenges.

This narrative, supported by 14 authors from across the US Army War College who examine the emerging challenges in their respective fields and build on previously published estimates, identifies potential areas for future research. These estimates reflect collective judgments about the likely course of events over the near-to-medium term (one to two years). Because we conduct estimates under conditions of unresolvable uncertainty, their value lies less in specific predictions than in providing a clearer picture of the possibilities within a specific decision space, the drivers that determine how events are likely to play out, and the risks and opportunities associated with acting on those drivers. To enable focused research, the Strategic Questions Research List (SQRL), a tailored list of 105 command-sponsored questions from 47 different Army and Joint organizations from across the Department of War, supplements these assessments.

Dr. C. Anthony Pfaff
Director
Strategic Research and Assessment Department
US Army War College

Introduction

International relations remain characterized by great-power competition; however, China's influence has become an increasingly significant feature of conflict outside Asia. Beijing's support for Russia and Iran has made conflicts in Ukraine and the Middle East more intractable, and its activity in Latin America may provide additional leverage against the United States that it can use to shape US options elsewhere. Meanwhile, as the United States prioritizes the Western Hemisphere, organized crime—some emanating out of China—poses challenges to maintaining stability closer to home. In turn, while conflict in Europe and the Middle East will continue to demand US attention, finding ways to contain Chinese influence globally may be the most significant security challenge in the near-to-medium term.

The prioritization of the Western Hemisphere is a continuation of the 2025 executive orders examined in last year's *Academic Year 2025–26 Annual Estimate of the Strategic Security Environment*, which was codified in the subsequent *National Security Strategy* and *National Defense Strategy*. In response, the Joint Force has postured to support new missions more focused on organized crime, illicit drugs, and illegal immigration. For the Army, the consolidation of US Army North, US Army South, and US Army Forces Command into the US Army Western Hemisphere Command reflects this prioritization. Greenland's shift from the United States European Command's area of responsibility to United States Northern Command serves as one of the more prominent examples of this reprioritization. As the threat in the Western Hemisphere continues to evolve, the role of the Army in homeland defense and its support to the interagency warrant further exploration, especially in the event of a large-scale conflict with a peer adversary.

This change in responsibility brings the Arctic, Central America, and South America under one command, whose challenges include not only competition with Russia in the north and China in the south, but also cross-border illicit activity, including a growing, multidimensional transnational organized crime threat. For the Arctic, near-term priorities will remain ensuring early-warning and air-defense capabilities; however, increased maritime traffic and other human activities will soon require a larger Coast Guard and law-enforcement presence, much like along the southern US border. It will also require containing growing Chinese interests, likely facilitated by Russia, which is increasing its military presence in the far north. As the northern borders begin to resemble those in the south, the southern borders will continue to evolve as China expands its political and economic leverage over the region. While near-term limits exist on how much leverage Beijing can exert, the complex interplay of organized crime, weak governance, and economic shock will likely present the Chinese with opportunities to challenge the United States as polarization and frustration with democracy increase. In turn, further research on the Department of War's role within a whole-of-government approach to mitigating the influence of China, Russia, and Iran rivals in the region, who can directly impact US security and prosperity, becomes imperative.

The competition between the great powers has become more apparent in the Pacific, where interests are clearer and the potential for conflict greater. China's territorial claims in the

South and East China Seas, and those against Taiwan and along China's border with India, bring China into direct conflict with several US partners, including the Philippines, with which the United States has a defense pact. While these differences remain on a slow burn, exercises and operations in contested areas, especially near Taiwan, continue to heighten tensions. Moving forward, the tenuous relationship between the United States and China will hinge on all parties' desires to manage, rather than settle, these territorial claims. Research in the coming period could focus on several issues, including the US and allied military posture in the region, deterrence against potential Chinese aggression, the defense of Taiwan, and avenues to improve Sino-American crisis communications.

At the same time, the war in Ukraine continues to be a focal point for European security, which remains focused on the persistent threat from Russia. The changing US positions toward Europe, and especially NATO, encourage European states to seek greater independence of their defense capabilities from the United States. While it remains unclear how effectively Europe can achieve that independence, a near-term rebalancing of defense roles and responsibilities among NATO members is likely.

At stake is Europe's ability to counter not just Russia's invasion of Ukraine, but other provocations that may follow. For its part, Russia will remain focused on its operations in Ukraine. Given current capabilities, it is unlikely that the operational and tactical situations will change significantly over the next year, though economic and social pressures to end the war, plus uncertain support from allies—for both Russia and Ukraine—create conditions for unexpected shocks that could lead to one side's collapse.

A rigorous assessment of the European theater necessitates an inquiry into the transition from fragmented industrial nationalism to a scalable, integrated defense industrial base. Central to this evolution would be the societal capacity for mobilization and the political viability of varied conscription models to enhance resilience. Furthermore, research is needed to evaluate the potential pivot toward a positional-defense framework. Departing from traditional maneuver-centric doctrines would fundamentally redefine NATO's force structure, procurement priorities, and long-term posture, signaling a significant shift in how the Alliance secures its eastern flank.

The conflict with Iran places the United States in a position where it must choose between maximalist goals associated with regime change and its nuclear program and more limited objectives it can achieve independently of Tehran's choices. Because Tehran can choose how much pain it can endure, maximalist objectives will be difficult to achieve. However, degrading Iran's air defense, ballistic missile, and nuclear capabilities would likely increase their threshold for future provocation and establish an effective—though hard to assess—deterrent. Under those conditions, Tehran will lean more heavily on its proxies, especially in Iraq and the Levant, where their ability to act as spoilers of governance and security-sector reforms will enable them to control their near abroad, limiting US presence while avoiding direct conflict.

Although the clash with Iran and its aftermath currently dominate the strategic environment in the Middle East, these factors are not the only ones that will impact the United States in the region. From underlying structural challenges to ongoing conflicts in and among states in the region, any attempt to understand the future environment will have to include an analysis of the effects of the conflict with Iran and look beyond it to the wider facets of the Middle East that will contextualize the outcome of the present crisis.

Africa, the often-overlooked continent, presents a latent, but potentially significant security challenge. China and Russia have varying degrees of influence over fragile and authoritarian African states and are likely to expand that influence into states like Nigeria and Kenya, which have traditionally been close US partners. Moreover, China and Russia are not the only powers seeking to influence African states. Middle powers like Türkiye and the United Arab Emirates are expanding their efforts to address the rise of jihadist groups in the Sahel and civil war in places like Libya and Sudan. While these efforts do not directly compete with US interests, coordination will become increasingly important to ensure they do not undermine US efforts, especially given the potential for conflict between US allies, such as Türkiye and the United Arab Emirates, and adversaries such as Russia and China.

Exacerbating these concerns is the growing proxy war by African states in the Democratic Republic of the Congo and surrounding regions. Coupled with the proliferation of jihadists not just in the Sahel, but also in East Africa, the potential for instability remains high. Further research on how internal conflicts and external power involvement interact to shape long-term stability and governance outcomes across Africa, particularly in fragile states such as Somalia, Sudan, and Libya, will be needed. There are additional research gaps in understanding how emerging actors, such as middle powers and non-Western partners, will influence security architecture, governance models, and economic development.

Adjusting to these changing security dynamics requires balancing the potential for smaller, limited wars against the need to manage strategic rivalries to avoid open conflict on terms unfavorable to the United States. Improving that balance requires changes in how the US military acquires and fields new technologies and capabilities, as well as improvements in the production of combat systems and munitions. More specifically, the US military must continue to transform the equipment acquisition process through targeted efforts in requirement identification and prioritized resourcing. These adjustments, while initially a top-down shift, will require the Joint Force to offer bottom-up refinement through this modernization process. Further research should focus on how much strategic or critical materials must be reshored to reduce the nation's strategic risk and which manufacturing capabilities or capacity the United States must reshore to do so.

The following assessment of these regional and institutional challenges is not an all-encompassing document but a primer designed to inform research and to help the defense community navigate the challenging security landscape.

North America

The defense landscape in North America is evolving rapidly to face the current strategic environment. Even before the publication of the 2025 *National Security Strategy of the United States of America* (*NSS*) and the *2026 National Defense Strategy* (*NDS*), the US Department of War and the US Army began undergoing a transformation that shifted their focus, structure, and operations across North America. The *Academic Year 2025–26 Annual Estimate of the Strategic Security Environment* explored the beginnings of this shift and the implementation of corresponding executive orders. This year's update builds on last year's analysis and examines current national priorities and ongoing structural changes to achieve a better understanding of the evolving strategic direction of homeland and hemispheric defense.

Prioritizing the Homeland

The first line of effort in the 2026 *NDS* is "Defend the U.S. Homeland."[1] Whereas homeland security has long been a priority in the *NSS*, the new strategy takes a different approach to meeting that priority. Rather than focusing primarily on defeating adversaries overseas, the *NSS* and the *NDS* prioritize action within the Western Hemisphere and the homeland. Ongoing activities include enhancing border security, reorganizing forces, and addressing the secondary and tertiary effects of this hemispheric focus.

The Department of War has already emphasized border security. The 2025 *NSS* states border security is the primary element of national security and the nation must curb illegal immigration and defend itself against terrorism, drugs, espionage, and human trafficking.[2] These security efforts include enlisting hemispheric partners and allies to increase security on land and at sea, as well as implementing targeted US military deployments to bolster border defense and defeat cartels.[3] Since January 2025, the administration has acted on these objectives by increasing the number of military personnel on the United States' southwest border by approximately 6,500, bringing the total number of troops to over 7,000.[4] In September 2025, elements of the 101st Airborne Division (Air Assault) and the 10th Mountain Division (Light Infantry) replaced soldiers serving along the border, demonstrating the ongoing commitment to border security through augmentation with active-duty military units.[5] The additional efforts at the southwest border had positive effects in 2025. Drug seizures increased by 33 percent

Sidebar: Contractor representatives participate in the US Army Corps of Engineers Baltimore District Industry Day for the US Coast Guard Yard Waterfront Optimization project at Curtis Bay, Maryland, October 22–23, 2025 (photo by David Adams).

from October to November 2025, reaching 54,947 pounds.[6] Land-border encounters for the month of November went down from more than 224,000 encounters in 2023 and more than 94,000 in 2024 to fewer than 11,000 in 2025.[7] Given this drop in illegal border crossings, a long-term military presence on the border is likely.

The United States has shifted to a broader view of homeland defense—one that includes securing the Western Hemisphere. To integrate hemispheric defense more effectively, the US Army activated a new organization—the US Army Western Hemisphere Command—merging US Army North, US Army South, and US Army Forces Command. This new command, headquartered at Fort Bragg, North Carolina, retains many of the responsibilities of the organizations it absorbed, including large-scale readiness oversight, security cooperation, homeland defense, and defense support of civil authorities (DSCA).[8] Prioritization will be essential to balancing these diverse and unique mission sets.

By emphasizing border defense and power projection within US Army Western Hemisphere Command's area of responsibility, the United States has signaled a significant strategic shift toward more active and deliberate homeland defense. In 2018, the Global Operating Model, introduced in that year's *NDS*, focused on defeating adversary capabilities forward, before they could have a significant impact on the homeland. The idea of the United States defeating enemies far from the continental United States provided the logic for taking the fight to Islamic terrorists in the Middle East during the war on terrorism, and has arguably been the US military's modus operandi since World War I. The current administration's reinvigoration of the Monroe Doctrine seems to indicate a more direct focus on homeland

A US Army UH-60 Black Hawk helicopter crew with Charlie Company, 7th Battalion, 158th Aviation Regiment, performs a check-ride flight during Mojave Falcon 25 at Fort Hunter Liggett, California, June 8, 2025 (US Army photo by Master Sergeant Justin P. Morelli).

Leaders and staff from the US Army Corps of Engineers oversee BMGR-1 project construction and bollard installation, February 9, 2026, near Yuma, Arizona (US Army Corps of Engineers photo by Robert DeDeaux).

defense as a means of enhancing national security. This approach will likely involve even more activity within the Western Hemisphere—including theater security cooperation and direct military action—with direct action potentially decreasing elsewhere. But the 2026 Iran war indicates this shift has not yet taken place.

A Whole-of-Nation Approach to Homeland Defense

Along with the border mission, Department of War personnel have recently been deployed in support of special events such as the US presidential inauguration, as well as the responses to natural disasters such as the Los Angeles wildfires of 2025 and the Central Texas floods of 2025. National Guard troops were also sent to deter crime and protect federal personnel and property in Chicago, Los Angeles, and Washington, DC.[9]

Although the DSCA mission remains an ever-present requirement, elements of the Department of War are beginning to assess how a reverse-DSCA concept could support federal requirements in the contested environment of a large-scale conflict. This concept, referred to as either civil support to military operations or civil support to defense activities, suggests the Department of War will require a mechanism for requesting support from state, local, tribal, and territorial governments—as well as federal agencies—to enable military operations during large-scale mobilization, deployment, and homeland defense activities.

Increased cooperation is vital given the risks to critical, domestic infrastructure within the United States, most of which the Department of War does not directly control. As stated in the 2025 *NSS*, adversaries will continue to threaten critical infrastructure with cyber and physical attacks.[10]

Both Russia and the People's Republic of China (PRC) pose active and significant risks to US critical infrastructure and have pre-positioned themselves to exploit vulnerabilities in the event of a major conflict with the United States.[11] China's purchase of US farmland near US military bases is an example of a competitor gaining a positional advantage, which it could exploit for intelligence collection or more nefarious activities in the event of a conflict.[12] The cyber threat has been demonstrated by events such as the Colonial Pipeline incident whereas attacks on electrical infrastructure—such as those in Tacoma, Washington (2022), and San Jose, California (2023)—highlight US vulnerability to physical sabotage.[13] The disruption or destruction of critical infrastructure could result from an adversary's missile attack, but such an attributable action presents a greater risk to the adversary than an action that partially or fully masks the adversary's responsibility.[14] Russian sabotage in Europe—such as the November 2025 attack on the Polish-Ukrainian railway corridor—provides an example of a US adversary employing a low-cost method to mask kinetic effects in a way that provides the perpetrator with plausible deniability.[15] Complicating matters further, these types of disruptive activities can be carried out by proxy forces or unwitting domestic groups.[16]

Infrastructure such as the electrical grid, transportation networks, and banking and financial systems has become increasingly complex, intertwined, and vulnerable.[17] The interdependence of critical infrastructure presents the risk of cascading effects, with the impacts of attacks on one sector rolling into other sectors.[18] The 2025 *NSS* highlights this point, noting the government's relationship with the private sector is crucial to protecting critical infrastructure.[19] Developing and improving connections with the private sector will be critical to homeland defense. Ultimately, the Department of War cannot defend against these threats alone, which makes increased mechanisms for cooperation essential.

Despite the need for a reverse-DSCA mechanism, the concept may cause significant tension between civil and military requirements during a conflict with a peer adversary. During a large-scale war, DSCA requirements will not disappear; in fact, they will likely increase due to adversary activity. Simultaneously, the US military will need support in protecting critical infrastructure and power-projection facilities—assistance that was not required during the uncontested deployments of the war on terrorism. In the next conflict's resource-constrained environment, balancing trade-offs between military and civil support will be a tremendously difficult obligation for US political and military leaders to fulfill.

China's Influence South of the Border

Prioritizing homeland defense requires an appreciation of PRC efforts in Mexico and, as addressed in another section, throughout the Western Hemisphere. Mexico is an important US security partner that cooperates with the United States on key issues such as immigration,

organized crime, and, in some cases, PRC activities. Mexico's armed forces have a close working relationship with the United States. Today, the Mexican and US militaries, as well as other agencies, collaborate closely, conducting joint exercises and embedding personnel in each other's institutions. Additionally, Mexico extradites criminals to the United States, and its national guard helps control the transit of migrants through Mexican territory to the US border.

With respect to the People's Republic of China, because Mexico has been offered generally tariff-free access to the US market, Chinese companies have invested substantially in Mexico in recent years, particularly in warehousing and distribution operations near the US border, as well as in auto parts and other sectors oriented toward the US market. Additionally, PRC-based companies have made substantial inroads into Mexico's telecommunications sector, including in areas such as smartphones and other devices, cloud computing and storage, surveillance systems, port operations, banking, and green-energy generation and transmission.

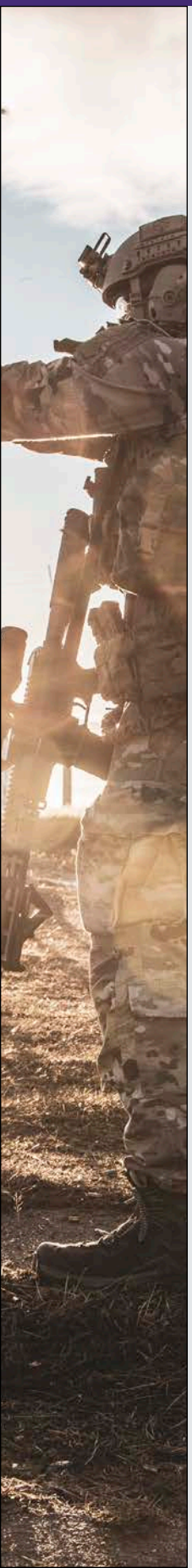
Mexico's defense ministry and navy have regularly sent personnel to training courses in China, hosted People's Liberation Army officials (including during the annual Mexican Independence Day parade), and been courted by the Chinese Communist Party for academic and other cooperation in the space sector. The enhanced relationship between the Chinese and Mexican governments is a reason for US concern, as it increases the Chinese Communist Party's access within the Western Hemisphere. Whether this relationship can be leveraged for significant strategic effect in a conflict remains to be seen.

Conclusion

The defense landscape in North America is changing. The efforts to prioritize homeland defense are officially codified in US strategic documents, capturing a general shift that has been ongoing since early 2025. But the strategic implications of this shift remain to be seen. For the US Army, changing priorities have the potential to reframe training standards, adjust the types of missions organizations train for, or even influence the type of citizen who chooses to serve. These secondary and tertiary consequences warrant further exploration to enable the force to maximize the opportunities and mitigate the risks associated with the rising prioritization of the homeland.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by the Assistant Secretary of the Army (ASA) – Manpower & Reserve Affairs; Headquarters, Department of the Army (HQDA) G-3/5/7; HQDA G-8; Director of the Army National Guard; United States Northern Command; US Army Western Hemisphere Command; and the United States Special Operations Command cover topics such as:

- Civil Support to Defense Activities (CSDA): A New Paradigm for Homeland Defense
- Setting the Theater for Homeland Defense and Power Projection
- Adapting Special Operations Forces for the Homeland



Central and South America and the Caribbean

The strategic environment in the United States Southern Command (USSOUTHCOM) area of responsibility (AOR) is currently in flux due to interactions among multiple forces. These forces include a growing and multidimensional threat of transnational organized crime—a threat that has made public insecurity a central issue in many countries, undermining the functioning of and public confidence in democratic institutions. At the same time, a significant shift in US engagement in the region—including the United States' expanded use of its military to address migration, drug trafficking, and anti-US regimes, as well as sharp changes in US policies regarding assistance, tariffs, and responses to extrahemispheric actors—has altered regional political dynamics and discourse. Meanwhile, the People's Republic of China (PRC) is continuing to expand its commercial presence and engagement in the political, military, and technological sectors, increasing Beijing's regional influence. China is also reacting to new US engagement patterns in the region with a combination of caution and efforts to exploit opportunities from any political or commercial dynamics these patterns generate.

In a global context, the dynamics of the region may also be impacted negatively by new technologies, such as artificial intelligence. Combined with social-media connectivity, these technologies are facilitating the polarization of and decreasing trust in already-vulnerable institutions. The risk of economic shocks and military activities in conflicts outside the region—along with the ever-present hazards of new pandemics and major climate events (such as hurricanes, droughts, floods, earthquakes, and wildfires)—also threatens to impose physical and economic damage, with strategic impacts on countries already under considerable stress. Finally, an extended conflict with Iran would affect global petroleum prices and may adversely impact net petroleum-importing states in Central America and the Caribbean. Elevated petroleum prices may also impact economically marginal sectors by driving up prices for cooking gas, heating oil, and gasoline used by taxi drivers and private truck drivers, creating social and political pressures (similar to the regional events that occurred after Russia invaded Ukraine in February 2022).

Sidebar: US Army Green Berets and Chilean special forces conduct advanced marksmanship drills at Punta Arenas, Chile, May 28, 2025, as part of exercise Southern Star 25 (US Army photo by Sergeant Wesley Akers).

Illicit Activities

Transnational organized crime in the USSOUTHCOM AOR is increasingly multidimensional, fragmented, and networked, with patterns shifting partly in response to the United States securing the southern border, taking actions against narco-boats in the Caribbean and eastern Pacific, and carrying out military action in Venezuela. Criminal dynamics in the region include the expansion of illicit activities involving multiple types of drugs flowing to various destinations, illegal mining, human trafficking, gang violence, money laundering, and the trafficking of timber and exotic flora and fauna. All these activities tend to reinforce each other through the networks of people involved in them and the opportunities to launder money and move illicit goods.

The illicit drug economy in the region is dominated by the expanding production of cocaine and synthetic drugs (including but not limited to fentanyl), which are mostly produced in regional laboratories using Chinese precursor chemicals. Cocaine production has particularly expanded in Colombia, owing in part to the permissive and often-ineffective security policies of the leftist, populist regime of Gustavo Petro. Coca production has also increased in Peru, Bolivia, Venezuela, and Central America—the latter two of which were historically part of transit routes to the United States. Cocaine transit from Colombia through Ecuador has dramatically increased rates of violence in Ecuador. Some heroin is also produced in Mexico and in the mountainous regions of Guatemala, which borders Mexico to the south and east.

Whether significant new US influence over the government of Venezuela—following the January 3, 2026, operation that captured the country's de facto leader, Nicolás Maduro—will decrease drug production and transits through Venezuela remains to be seen. Uncertainty also remains regarding whether greater antidrug efforts and US cooperation with the new, pro-US government of Rodrigo Paz Pereira in Bolivia will impact that country's role as a drug producer and a transit hub.

Beyond cocaine, fentanyl is produced primarily in Sinaloa, Mexico, whereas other synthetic drugs are produced in various countries within the USSOUTHCOM AOR, often intended for the European market. The production and shipment of synthetic drugs constitute another source of illicit revenue that is corrupting governments, empowering criminal groups, and facilitating regional conflicts.

European demand for both cocaine and synthetic drugs has brought representatives from a range of Europe-based criminal groups into the region, including Italy's 'Ndrangheta and the Albanian mafia. These criminal organizations interact with other groups such as the Sinaloa cartel and the Jalisco New Generation Cartel from Mexico, the First Capital Command and the Red Command from Brazil, and a range of Colombia-based groups.

In the Caribbean—from Trinidad and Tobago to the smaller islands of the Lesser Antilles—revenues from the flow

of illicit drugs, the availability of guns (mostly from the United States), and politically connected street gangs have led to particularly high levels of homicide and other violence.[20] But over the coming year, this dynamic may be helped by an expanded US military presence and high-profile military activities against narco-traffickers in the region.

Preliminary evidence suggests US actions against narco-boats transiting the Caribbean and the eastern Pacific may be causing drug smugglers to increase their use of container shipping and other commercial transportation methods. These US actions may also be contributing to the use of alternative routes to Europe, including across Guyana, Suriname, and French Guiana; through the Brazilian jungle; and along a southern route through Bolivia, Paraguay, Argentina, and Uruguay.

High international gold prices have increased illegal mining activities, with this lucrative activity creating notable public problems across Peru and Bolivia, as well as Colombia, Venezuela, and the interiors of Suriname and Guyana.

Illegal logging and trafficking in exotic flora and fauna are significant problems across much of the Amazon Basin, including in the interior regions of Bolivia, Peru, Ecuador, Colombia, Venezuela, Guyana, and Suriname.

Following the substantial closure of the US southern border, flows of migrants through Mexico, Central America, and Panama's Darién Gap—and the lucrative human-smuggling business accompanying such flows—have decreased substantially. Still, the displacement of millions of Venezuelans in recent years, coupled with migrants fleeing violence and economic difficulties in Ecuador, the Caribbean, and elsewhere, has contributed to increased criminal activity and violence in locations where migrants have come to reside. Such crimes—including an array of extortion rackets, prostitution, and other activities—are perpetrated by notorious, violent groups such as Tren de Aragua, which prey on desperate refugees.

Several potential developments could unleash a new wave of migration and related criminal violence in the region: economic collapse in Cuba stemming from expanded US pressure on the regime of Miguel Díaz-Canel; the continuing deterioration of the desperate security situation in Haiti, which is effectively ruled by violent gangs; and an explosion of violence in Venezuela if criminal groups and factions of the criminal government (which is currently cooperating with the United States) turn on each other.

As the commercial, financial, and human ties between the People's Republic of China and the countries in the USSOUTHCOM AOR grow, Chinese organized crime has also become a growing problem. Multiple PRC-based criminal groups are active in the supply of precursor chemicals for synthetic drugs, as well as in value chains related to illegal mining, human trafficking, extortion, the illicit trade in timber and exotic flora and fauna, and illegal fishing—particularly off the coasts of South America.

The difficulty in combating criminal groups and the violence they wreak is also compounded by technology, including cryptocurrencies for money laundering, encrypted devices and networks for communication and surveillance, submersible and autonomous watercraft for transporting drugs and other contraband, and a range of unmanned aerial vehicles. The latter, fueled by the growing market and technological adaptations from the Russia-Ukraine War, include unmanned vehicles for observation, for transporting contraband across borders or into facilities such as prisons, and for delivering lethal effects against adversaries. Underfunded and often inefficient, overly bureaucratized police and military forces in the region are struggling to acquire counter-drone systems and adopt tactics, techniques, and procedures in response to an environment in which these forces, and the populations they support, can be observed and attacked.

China's Influence in the Region

In the context of pressures from organized crime, the People's Republic of China continues to expand its commercial presence and associated influence in the USSOUTHCOM AOR. Additionally, China is deepening its engagement in other strategic domains, such as technological cooperation, political work at all levels, security activities, and a range of human, digital, and other networks that expand Beijing's access to and leverage over countries in the region.

The telecommunications devices and infrastructure of PRC-based companies—along with biometrically connected surveillance systems, scanners, and other digital equipment—have an increasingly significant presence in the USSOUTHCOM AOR. Through this commercial and technical position, which PRC-based companies are seeking to lock in by cornering

US Army Major General Phil Ryan (left), US Army South commander, greets General Luis Cardozo Santamaría, commander of the Colombian National Army, at Fort Sam Houston, Texas, September 2, 2025 (US Army photo by Staff Sergeant Joshua Taeckens).

The US Army Corps of Engineers and Panamanian partners conduct an engineering assessment of the Bridge of the Americas in Panama, April 10, 2026 (US Army photo by Rydell Tomas Jr.).

markets and setting technological standards, the Chinese government may be obtaining worrisome access to the intellectual property of companies in the region. Moreover, this position provides insight into the decision making of regional leaders and details about their personal lives, which could give PRC agents leverage over these individuals.

Beyond digital technologies, the People's Republic of China has established a major position in the region's transportation, electrical, digital, and financial infrastructures, giving it leverage in advancing the goals of Chinese companies and the regional position of the Chinese government. These advancements include the exclusive operation of strategically located ports and space facilities, the establishment of multiple signals intelligence facilities (and possibly other assets) in Cuba, and other assets and relationships that could be exploited militarily in the event of a war with the United States and its Indo-Pacific allies.

In its third white paper on Latin America and the Caribbean—released just three days after the 2025 *National Security Strategy of the United States of America*—the People's Republic of China highlights its continuing efforts to host members of the region's legislatures and political parties, provincial and local officials, journalists, police and military members, scholars, and scientists.[21] These efforts, aimed at building relationships of influence and potential compromise, complement the work the Chinese Communist Party's United Front Work Department already does in the region. This work, also acknowledged in the white paper, involves wooing business councils, friendship societies, ethnic Chinese communities, and other entities.

The white paper also highlights China's continuing expansion of bilateral and multilateral engagements in the region through its preferred Community of Latin American and Caribbean States forum and subforums, in which the United States is not present. In the name of development, the People's Republic of China is expanding its engagement with the region in sensitive areas such as space and artificial intelligence, while also openly expanding its military engagement through military training and exchanges, counternarcotics cooperation, and efforts to counter money laundering.

Other Extrahemispheric Actors

Beyond the People's Republic of China, US adversaries Russia, Iran, and Hezbollah maintain a limited commercial and military presence in the USSOUTHCOM AOR. Nonetheless, all three adversaries are limited in their ability to exploit and extend these capabilities. Russia, which has used arms sales and training to build up relationships with the region's militaries since the early 1970s, is currently limited due to its absorption in the Russia-Ukraine War and associated US sanctions. This preoccupation prevents Russia from supplying significant quantities of new weapons or from supporting weapons it has previously sold to the region. In the Middle East, Iran and Hezbollah have been gravely weakened by Israeli and US military actions—including the decimation of Hezbollah's leadership in Lebanon—regardless of the outcome of the ongoing actions between the United States, Israel, and Iran. All these US adversaries have also been impaired in their regional advances by the loss of Venezuela as their principal partner and point of access to the USSOUTHCOM AOR.

US soldiers take up defensive positions during Exercise Southern Vanguard 25 in Antuco, Chile, August 28, 2025 (US Army National Guard photo by Sergeant Jean Sanon).

The United States is paying more attention to threats in the Western Hemisphere, as captured in the 2025 *National Security Strategy of the United States of America* and in the *2026 National Defense Strategy*. This attention includes pushing back against the influence of extrahemispheric actors, as well as carrying out US military actions that have increased the credibility of a threatened US response. These actions have made states in the USSOUTHCOM AOR more cautious about engaging with US extrahemispheric adversaries in sensitive areas such as security and space, leading to the cancellation of some PRC space projects in 2025.

Nonetheless, little evidence suggests PRC-based companies' domination of critical sectors in the region—or the expanding PRC human and security networks that are key to China's regional influence—has decreased. The United States has modestly increased its presence in Panama by reopening its Combined Jungle Operations Training Center at Fort Sherman. But evidence indicates China still has many ways to target US forces transiting the Caribbean and the Panama Canal during a war in the Indo-Pacific, to threaten the US homeland from nearby countries such as Mexico, and to support military operations from dual-use port facilities under Chinese control, such as the facility in Chancay, Peru.

Regional Support for the United States

Politically, the USSOUTHCOM AOR is dominated by a historically unprecedented proportion of countries disposed to work with the United States. In recent years, this trend has been driven by pro-US regimes that have come to power in countries traditionally dominated by the left, such as Argentina and Bolivia. The trend is also helped by the continuation of pro-US governments in Paraguay, Ecuador, and Guyana, among other countries. Victories that have further advanced a US-receptive region include those of pro-US conservative José Antonio Kast in Chile, Nasry Asfura in Honduras, and center-right technocrat Laura Fernández Delgado in Costa Rica. The anti-US governments of Venezuela, Cuba, and, to a degree, Nicaragua are under considerable US pressure, which minimizes their willingness and ability to work actively against US interests.

The political right also has a reasonable chance of winning in the politically fragmented landscapes of Peru (April 2026) and Colombia (May 2026), as populations in both countries are frustrated by corruption and insecurity under currently or previously left-oriented regimes. In Brazil, the left-oriented government of Luiz Inácio Lula da Silva is the most significant regime to be openly critical of US activities in the region. Brazil is also the biggest host of PRC investment, trade, and military activity within the USSOUTHCOM AOR. Nonetheless, even Lula has been careful to moderate Brazil's rhetoric and posture and avoid reprisals from the United States, particularly with a national election coming up in October 2026.

Although these political configurations benefit the United States' pursuit of its strategic objectives in the region, they arguably reflect domestic factors more than US policy. These factors include citizens' frustrations with insecurity and fears of a leftist return. For some governments, compliance or silence reflects a desire to avoid provoking the current US administration.

In the future, the strategic configuration that currently benefits the United States could rapidly evolve if cooperative governments do not increase citizen security and prosperity, or if changes in internal US politics—or the international situation—cause currently silent governments to decrease their fear of US retribution.

Conclusion

To navigate the strategic challenges and opportunities in Central and South America and the Caribbean, the US Department of War must monitor and more granularly understand the corrosive effects of illicit activities and the impacts of new technologies on the region's economies, institutions, and political dynamics. China's continuing advances in the region—in the context of an unprecedentedly large group of countries open to working with the United States—renders vital an understanding of the opportunities, as well as the limits and risks, of using coercion and military action to compel partners to limit China's advance.

Greater attention to the role of US military forces in the Western Hemisphere also makes the identification of intended strategic effects more important than ever. These effects may include directly acting against individual threats, preserving US access by helping like-minded partners succeed through security cooperation, and leveraging the value of US military support to make partner militaries advocates within their own systems—both for strengthening relations with the United States and for limiting the activities of US adversaries such as China. The secondary and tertiary impacts of the shifting security environment in the Western Hemisphere warrant further research. This research is necessary to understand the region's potential implications for broader US strategic objectives and to begin developing corresponding options for implementing new strategic guidance and advancing US interests.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by United States Southern Command, US Army Western Hemisphere Command, and the National Counterintelligence and Security Center cover topics such as:

- China's Military Projection in Latin America
- Transnational Threats
- Countering Non-State Actors

Asia

As US President Donald Trump and Chinese leader Xi Jinping negotiated the terms of the US-China relationship in 2025 and early 2026, their discussions played a major role in shaping the strategic landscape of Asia. The state of this relationship held major implications for Asia's economies and security environment, as well as the strategic calculations of US allies and partners in the region. The United States and China entered 2026 having achieved at least a tentative easing of tensions, but major disagreements remained on a series of high-stakes economic and security issues. These issues are sure to receive close attention during a busy year for US-China diplomacy. At the time of this writing, President Trump planned to make an official visit to China in mid-May, with Xi expected to visit the United States later in 2026.

Relations Between the United States and China in Flux

Throughout 2025, the US government focused heavily on the economic dimensions of the US-China relationship, especially trade. As part of its April 2025 tariff announcement, the US government took an especially tough line in regard to China, imposing escalating tariffs that eventually reached as high as 145 percent.[22] In contrast to the many countries that responded by offering concessions to the United States, China chose a policy of firm resistance. Chinese leaders calculated the prospect of scarce goods and rising prices for US consumers would pressure the US government to moderate its position. China also curtailed US access to rare earth minerals—crucial inputs for carmakers and other manufacturers—through export controls. But in October 2025, when President Trump and Xi met in Busan, South Korea, on the sidelines of the Asia-Pacific Economic Cooperation summit, they reached an agreement on a one-year trade truce.

The trade truce signaled the emerging US desire to stabilize relations with China in the pursuit of a comprehensive trade deal. While seeking this objective, the US government also expressed its determination to proceed from a position of strength. The *National Security Strategy of the United States of America*, published in November 2025, promised to "harden and strengthen our military presence in the Western Pacific," while also encouraging allies to increase their roles in burden sharing.[23] According to this document, the United States would aim to protect

Sidebar: US Army soldiers assigned to the 25th Combat Aviation Brigade, 25th Infantry Division, conduct a preflight check on a HH-60 Black Hawk before a long-range maritime air assault for the Joint Pacific Multinational Readiness Center rotation 26-01 at Ford Island, Oahu, Hawaii, on November 7, 2025 (US Army photo by Sergeant Olivia Cowart).

A US Army soldier fires an M3 Carl Gustaf recoilless rifle during a combined arms live-fire exercise at Rodriguez Live Fire Complex, South Korea, December 13, 2025 (photo by First Lieutenant Jonathan Sauls).

open sea-lanes in the South China Sea and to deter conflict over Taiwan, "ideally by preserving military overmatch."[24] The *2026 National Defense Strategy*, released in January, stated the United States would "erect a strong denial defense along the First Island Chain" and seek to "ensure that neither China nor anyone else can dominate us or our allies."[25] But this document also stated the United States sought to establish "strategic stability" in the Indo-Pacific, featuring "a decent peace, on terms favorable to Americans but that China can also accept and live under."[26]

The United States took a similar approach toward Taiwan, the self-governing island democracy the People's Republic of China regards as its own territory. While aiming to strengthen Taiwan's capacity to defend itself, the US government adhered to the policy of strategic ambiguity, declining to say whether the United States would come to Taiwan's defense if the People's Republic of China were to invade. In early 2025, the US Department of State removed language from its website stating, "we do not support Taiwan independence," provoking criticism from China.[27] The website's language maintained a long-standing US government position: The United States opposes "unilateral changes to the status quo" and supports a peaceful resolution of "cross-Strait differences."[28] The national security strategy used similar language: "We will also maintain our longstanding declaratory policy on Taiwan, meaning that the United States does not support any unilateral change to the status quo in the Taiwan Strait."[29] According to news reports, high-ranking Pentagon officials also sought clarification from US allies Japan and Australia about what role they would play in a war over Taiwan.[30] The annual threat assessment of the US Intelligence Community, released in March 2026, stated Chinese leaders do not currently

plan to invade Taiwan in 2027 and for now are focused on setting "the conditions for eventual unification with Taiwan short of conflict."[31]

Consistent with his demands for allies and partners to expand their roles in burden sharing, President Trump called on Taiwan to increase its defense spending to 10 percent of its gross domestic product. In November 2025, Taiwan's President Lai Ching-te of the Democratic Progressive Party proposed a special defense budget of $40 billion over the next eight years and reiterated his pledge to increase Taiwan's defense spending to 5 percent of the country's gross domestic product by 2030. At the time of this writing, the majority alliance between the Nationalist Party and the Taiwan People's Party had stalled the special defense budget in Taiwan's Legislative Yuan. The United States also approved an $11 billion arms sale to Taiwan, drawing sharp criticism from China. This package of arms sales would significantly change China's calculations regarding a potential invasion of Taiwan by allowing the island, within its concept of asymmetric warfare, to improve its strike capabilities and the survivability of its forces.[32] In a February 2026 phone call between Trump and Xi, the Chinese leader expressed his strong opposition to the arms sale, reportedly hinting it could jeopardize Trump's plan to visit China. At the time of this writing, the US government had delayed a final decision on the deal.[33]

Assertiveness and Turmoil in China

As Chinese leaders evaluated Trump's second-term foreign policy, they sought ways to turn the developing situation to their advantage, expressing confidence they would achieve favorable outcomes in trade negotiations with the United States by holding firm to their positions. Chinese leaders believed the US government's determination to reach

US Army scouts set up a security perimeter as part of an aerial insertion training exercise during North Wind 26 on Hokudai-en, in Hokkaido, Japan, January 28, 2026 (US Army photo by Staff Sergeant Dylan Grace).

a comprehensive trade agreement gave China valuable bargaining leverage.[34] The Chinese leaders maintained a tough line on Taiwan, hoping they might be able to win concessions from the United States on this issue.[35] Reportedly, China was interested in exploring whether a US focus on the Western Hemisphere might give China a freer hand in Asia.[36] Meanwhile, signs of China's assertive military posture remained apparent, along with turmoil in the high command of the People's Liberation Army (PLA). The US military continued to call attention to threatening and potentially risky PLA behavior in Asia, even as Xi's ongoing purge of top military leaders raised a series of questions about China's military capabilities and intentions.

On the issue of Taiwan, China took notable actions that expressed Beijing's continued determination to gain control of the island. In November 2025, China reacted strongly to a statement by newly elected Japanese Prime Minister Sanae Takaichi. Takaichi stated Japan intended to regard a Chinese invasion or naval blockade of Taiwan as a "survival-threatening situation" that would justify Japanese military intervention.[37] China responded with vitriolic rhetoric and economic reprisals against Japan. In late December 2025, just 11 days after the United States announced its $11 billion arms sale to Taiwan, China conducted major military exercises in the waters and airspace surrounding the island. China called the exercises a "stern warning" against external interference in Chinese affairs.[38] During these exercises, in a maneuver military analysts regarded as particularly dangerous, a PLA J-16 fighter jet fired flares at a Taiwanese F-16 that had scrambled as the PLA aircraft approached the median line of the Taiwan Strait.[39]

Besides conducting military exercises around Taiwan, which have grown in scope, frequency, and intensity over the past few years, China has maintained an assertive military posture in Asia more broadly. In January 2026, Admiral Samuel Paparo, the head of United States Indo-Pacific Command, said China continued to apply military pressure on countries in Southeast Asia despite the apparent stabilization of US-China relations in recent months.[40] The Philippines, a US ally, has been an especially frequent target of such pressure, especially in the area around Scarborough Shoal. In December 2025, PLA aircraft locked their weapons radars onto Japanese aircraft, an action military analysts consider to be threatening because it could signal an attack.[41]

Even as China maintained this assertive regional posture, Xi continued to shake up his top military leadership. In January 2026, Xi placed General Zhang Youxia, his top general, under investigation for allegedly committing severe violations of party discipline and state laws. Zhang was the senior of two vice-chairmen on the Central Military Commission, the Chinese Communist Party's top military decision-making body. Xi's move against Zhang was the most dramatic step yet in his campaign to root out corruption in the People's Liberation Army. At the same time, China announced General

Liu Zhenli, chief of the PLA Joint Staff Department, was also under investigation. Previously, in October 2025, China announced it had expelled nine senior military commanders on corruption charges, including General He Weidong, who was also a vice-chairman of the Central Military Commission and China's second-ranking general.[42]

Following Zhang's downfall, Xi has now removed nearly all his top military leaders over the past three years. In 2023, Xi stacked the Central Military Commission with presumed loyalists, naming six generals to serve under him in his capacity as the commission's chairman. Xi has now removed five of those six generals, along with theater commanders, service-branch commanders, and dozens of other senior military officials. In the view of many PLA analysts, Xi's ongoing purges would likely limit the short-term combat effectiveness of the People's Liberation Army, potentially reducing the likelihood of an imminent invasion of Taiwan. But Xi appears willing to pay this price as he attempts to strengthen his personal control of the People's Liberation Army and ensure its political loyalty while building it into a world-class military.

Asian Reverberations

Throughout Asia, countries have evaluated recent developments in the US-China relationship and made corresponding adjustments. The US imposition of tariffs on a broad range of countries created some tension with US allies, but many of these same countries remain unsettled by China's growing power and assertiveness. In Japan and South Korea, newly elected leaders have shaped their countries' national strategies, taking account of recent moves by both the United States and China. The United States and its Asian allies have continued to expand their multilateral cooperation, especially within the group consisting of the United States, Japan, Australia, and the Philippines.

With respect to Japan, China's tactic of applying pressure appeared to backfire. Facing intense Chinese pressure following her comments on Taiwan, Takaichi held firm, declining to retract her statement. In February 2026, less than four months after taking office, Takaichi called a snap election and won in a landslide victory, with her Liberal Democratic Party of Japan securing a supermajority in the lower house of Japan's parliament. With this resounding victory, voters gave Takaichi a strong mandate to strengthen economic and security ties with the United States and increase defense spending. This effort would build on recent advances in the US-Japanese alliance. In early 2025, US Forces Japan established a Joint Operations Command Cooperation Team with Japan's Self-Defense Force to strengthen interoperability and joint planning.[43] Later in 2025, the two countries also announced a strategic trade and investment agreement under which Japan pledged to invest $550 billion in the United States.[44]

South Korean President Lee Jae-Myung, who took office in June 2025, addressed US calls to increase South Korea's defense spending and improve the country's military capabilities. In November 2025,

South Korea committed to increase defense spending to 3.5 percent of its gross domestic product and assume a leading role in defending the Korean Peninsula. At the same time, South Korean officials agreed to transfer wartime operational control from the US-led Combined Forces Command to a South Korean–led command. This change, scheduled for 2028, would be the culmination of a process that has been ongoing for nearly two decades. Under this arrangement, the US–South Korean military structure and the US commitment to defend South Korea will remain in place.[45] These moves are consistent with the US *2026 National Defense Strategy*, which declares: "South Korea is capable of taking primary responsibility for deterring North Korea with critical but more limited U.S. support."[46] South Korea also pledged to invest $350 billion in the United States, including in shipbuilding.[47]

The future of trilateral cooperation among the United States, Japan, and South Korea was the subject of some uncertainty. Since 2023, when the United States hosted the leaders of Japan and South Korea for a trilateral summit, the leadership in all three countries has changed. To date, the three countries have deepened their economic engagement and maintained security cooperation under new leadership. In September 2025, the United States, Japan, and South Korea held the trilateral Freedom Edge 25—a multidomain, joint military exercise—and demonstrated improved interoperability. In January 2026, Takaichi hosted Lee for a two-day visit to Japan. Lee took no public position on the dispute between China and Japan,

US Army Brigadier General Jin H. Pak speaks with Republic of Korea Army Lieutenant General Son Dae-kwon during a railhead exercise conducted by the 6th Ordnance Battalion at Jeonui-myeon, South Korea, August 27, 2025 (US Army photo by Staff Sergeant Reginald Harvey).

but his visit offered Takaichi a measure of support. Nevertheless, various obstacles to the strengthening of Japanese–South Korean relations remain, including both historical animosity and contemporary differences in how the two countries conceive of their national interests. In early January 2026, before visiting Japan, Lee made the first state visit to China by a South Korean president since 2017. Lee met with Xi and declared he sought a "full-scale restoration" of ties between the two countries.[48]

The United States continued to strengthen cooperation with its Asian allies, both bilaterally and multilaterally. Following recent deployments of the US Army's Typhon midrange missile system and an anti-ship missile launcher, the United States planned to deploy additional high-tech missile systems to the Philippines.[49] The Japan-Philippines

Reciprocal Access Agreement, which allows for preplanned deployments of forces between the two countries, entered into force in September 2025. Together, the United States, Japan, Australia, and the Philippines continued to conduct a range of joint military exercises and sought to increase their interoperability. As part of the Australia–United Kingdom–United States (AUKUS) agreement, the United States plans to deploy as many as four submarines to the HMAS Stirling naval base in Western Australia, with the first submarine set to arrive in 2027. This naval base, which (due to range limitations) would be significantly more difficult for China to hit with missiles than the US submarine base in Guam, could serve as both a site for submarine repairs and a hub from which to blockade shipping lanes to China in the event of war.[50]

Conclusion

President Trump's forthcoming visit to China will likely set the tone for US-China relations and, to a large extent, for Asia's strategic landscape in the period to come. The US government hopes to achieve a comprehensive trade deal that would prevent China from wielding rare earth minerals as leverage against the United States, while securing the uninterrupted sale of US soybeans to China. For its part, China hopes to use the trade negotiations as leverage on other issues, including Taiwan. Countries throughout Asia, many of which maintain close economic relations with China while still relying on close security ties with the United States, will monitor the Trump-Xi negotiations closely while calculating their own responses. The developing situation in Asia raises many questions that are ripe for research, including questions related to the US and allied military posture in the region, deterrence of possible Chinese aggression, the defense of Taiwan, and possible avenues for improving US-China crisis communications. Such improvements could help avoid military escalation resulting from accidents, misunderstandings, or dangerous maneuvers.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by Office of the Chief of Staff, US Army, HQDA G-2, United States Indo-Pacific Command, US Army Pacific, US Forces Korea, US Eighth Army, US Forces Japan, and US Army Japan cover topics such as:

- Indo-Pacific Strategy
- People's Liberation Army Operational Endurance
- Deterrence by Denial

Europe

Several key findings from the *Academic Year 2025–26 Annual Estimate of the Strategic Security Environment* still remain valid for Europe in 2026. The transatlantic economy, valued at approximately $9.5 trillion, accounts for one-third of global gross domestic product (GDP) when measured in terms of purchasing power. Europe remains the primary source of foreign direct investment in the United States, providing nearly two-thirds of total global inflows. Conversely, 56 percent of US outward investment since 2009 has targeted Europe. Despite the United States' strategic and policy focus on the Indo-Pacific, the trade in goods between the United States and the EU (without the United Kingdom since 2020) reached nearly $1 trillion in 2024—surpassing US-China trade by 60 percent.[51]

Although Europe remains economically important, Europe's stability faces persistent threats, primarily from Russia's ongoing war of aggression against Ukraine. Despite sustained diplomatic efforts by the United States and its allies, Moscow shows no inclination toward peace, remaining committed to seeking a military victory on the battlefield. As recently as February 2026, the Russian foreign minister reaffirmed the Kremlin's maximalist war aims, which have remained essentially unchanged since the start of Russia's 2022 invasion of Ukraine. These aims include subjugating and demilitarizing Ukraine; annexing the Luhansk, Donetsk, Zaporizhzhya, and Kherson provinces; delegitimizing Ukrainian statehood; undoing NATO enlargement since 1997; and, overall, reorganizing the European security architecture in accordance with Russian demands.[52]

US Army soldiers assigned to the 1st Battalion, 16th Infantry Regiment, 1st Armored Brigade Combat Team, 1st Infantry Division, prepare the AT4 anti-tank weapon during a platoon live-fire training exercise in the Novo Selo Training Area, Bulgaria, December 5, 2025 (US Army photo by Sergeant Adel Pacheco Alvarez).

Sidebar: Paratroopers assigned to the 1st Battalion, 503rd Infantry Regiment, and allied nations conduct a multinational holiday airborne operation at Juliet Drop Zone in Italy on December 11, 2025 (US Army photo by Sergeant Christopher Sanchez).

Concurrently, several European powers face severe fiscal and structural headwinds. Germany, formerly the continent's economic engine, anticipates stagnation will continue through 2026, while France grapples with significant fiscal constraints and political volatility. Similar growth deficits persist in the United Kingdom and Italy, though inflationary pressures are projected to ease. In contrast, the economic outlook for Poland and eastern Europe remains more robust, bolstered by EU-funded investment initiatives.[53]

On the governmental front, liberal-democratic systems across the continent are experiencing a decline in public support. Legislatures struggle with rising populist factions and a hollowed-out political center, complicating the formation of stable coalitions. In the EU's three largest economies—Germany, France, and Italy—structural reforms are stymied by high energy costs, expensive social mandates, and a legacy of overreliance on exports. These factors, combined with eroding institutional trust, have entrenched a period of prolonged economic stagnation.[54]

Shifting US Policy Toward Europe and European Perceptions

In 2025 and early 2026, US foreign policy toward Europe and NATO continued to shift, with the changing relationship codified in a new US national security strategy, a new US national defense strategy, and a new US Department of State agency strategic plan. Washington outlined plans to pivot its resources toward the Western Hemisphere and the Indo-Pacific, expecting European allies to transition into autonomous providers of their own conventional defense. This transition—framed as burden shifting in the new strategic guidance—would maintain the US strategic nuclear umbrella. A cornerstone of this realignment is the 2025 Hague Commitment, which mandates NATO allies target defense spending of 5 percent of their GDPs—subdivided into 3.5 percent for core military capabilities and 1.5 percent for resilience and critical infrastructure. From a US perspective, this "critical but more limited support" model is coupled with a geoeconomic strategy. This strategy aims to minimize Europe's energy dependence on Russia by providing US liquefied natural gas and nuclear exports, while simultaneously challenging the EU's enormous global influence as a "regulatory superpower."[55]

These US policy shifts are causing concerns in European capitals, particularly in the context of recent US tariff measures and the country's stated interest in taking over Greenland, a self-governing Danish territory. From Europe's perspective, US security guarantees for fellow NATO members seem less ironclad in 2026 than they did in the past. Observers worry the United States may aim to dismantle the post-1945 international order, with some European policymakers being increasingly convinced the era of unquestioned Pax Americana is over. Moving beyond reactive accommodation, these policymakers are indeed working to help the European continent evolve from a mere security consumer into an autonomous geopolitical actor capable of independent deterrence. Whether parts of the EU will steer

toward fully integrating their security and defense policies and institutions—or whether a European pillar within NATO will emerge from these changes in the transatlantic relationship—remains to be seen.[56]

Persistent Threat

Russia remains the primary threat to European and NATO security. Moscow's overarching strategy seeks to restore a neo-imperial sphere of influence by arresting NATO expansion and securing permanent dominance over Ukraine. To achieve this objective, the Kremlin aims to dismantle the post-1945 European security architecture by eroding allied cohesion and the credibility of mutual-defense guarantees. This strategy, executed through a high-intensity war of aggression in Ukraine, is vitally supported by the increasing use of asymmetric, hybrid warfare and nuclear signaling—all designed to paralyze Western decision making.[57]

Over time, the Russia-Ukraine War has solidified into a punishing war of attrition. Whereas Russia maintains the strategic initiative, it pays an exorbitant price for marginal gains. Comprehensive estimates for 2025 indicate Russian forces suffered more than 400,000 casualties (averaging 35,000 per month), bringing total losses since 2022 to over one million. Despite this cost, Russian territorial acquisitions remained negligible, with Russia seizing roughly 4,831 square kilometers in 2025, or less than 1 percent of additional Ukrainian territory. This tactical stagnation is compounded by a strained domestic economy, with Russia's 2025 GDP growth plummeting to 0.6 percent amid acute labor shortages and a systemic lack of the competitive technology required to drive long-term productivity.[58]

To sustain this high-intensity war of attrition, the Kremlin relies heavily on partnerships with China and Iran, bypassing strict Western sanctions and maintaining—in some areas, even expanding—its military-industrial capacity. In fact, China now serves as Russia's industrial lifeline, providing about 90 percent of Moscow's dual-use imports—including critical computer chips and machine tools—while also supplying 70 percent of the ammonium perchlorate needed for ballistic-missile fuel. Iranian support (at least until the combined US-Israeli bombing campaign began on February 28, 2026) was primarily kinetic. This support was characterized by the provision of thousands of Shahed-136 drones, which were used to attack the Ukrainian energy grid, and by the sharing of designs that have enabled Russia to make substantial advances in its own drone production.[59]

Currently, European strategic assessments do not expect a near-term Russian pivot toward peace in Ukraine. In response, as detailed in the next section, most European states have accelerated their rearmament efforts and increased financial and weapons support for Ukraine. Analysts suggest Russian President Vladimir Putin is strategically trapped, as the astronomical human and economic costs of the war now far outweigh the war's marginal territorial returns.

Domestic stability remains Putin's primary constraint. Having transformed Russia into a "war nation," Putin must achieve a significant victory to justify the investment and mitigate the risk of internal strife. Such strife may result from disillusioned veterans returning to Russia after a ceasefire in Ukraine.[60] Consequently, the Kremlin fears any settlement perceived as a failure could ignite a political crisis or provoke a military backlash against leaders in the Kremlin.[61]

Furthermore, a ceasefire favoring Russian interests would set a dangerous precedent, signaling brutal aggression can be rewarded and showing Europe is unable to secure its own environment. Beyond Ukraine, Russia has already hardened its stance through coordinated, hybrid campaigns. Moscow's nonlinear warfare involves the physical sabotage of critical infrastructure—as evidenced by the targeting of Baltic subsea cables—and the use of drones to probe European defenses beneath the threshold of conventional conflict. Additionally, the Kremlin employs malign financial and propaganda networks, such as Voice of Europe, to subvert democratic processes and amplify pro-Russian narratives. These efforts, combined with manufactured civil unrest such as the 2025 "Peace and neutrality, not our war" demonstrations in Madrid, allow Russia to maintain a permanent state of Europe-wide strategic insecurity without necessitating a direct military confrontation with NATO.[62]

Rearming Europe

To counter the Russian threat across the competition continuum, Europe is undergoing a systematic rearmament effort, marking the definitive end of the post–Cold War peace dividend. Whereas Russia's 2014 annexation of Crimea

US Army soldiers assigned to the 3rd Squadron, 2nd Cavalry Regiment, participate in Project Flytrap at the Joint Multinational Readiness Center, Hohenfels Training Area, Hohenfels, Germany, June 21, 2025 (US Army photo by Specialist Elijah Magaña).

US Army soldiers assigned to the 3rd Battalion, 8th Cavalry Regiment, drive M2A3 Bradley Infantry Fighting Vehicles during situational training exercise at Bemowo Piskie Training Area, Poland, January 21, 2026 (US Army photo by Private First Class Andre Gremillion Jr.).

prompted initial budget increases, the 2022 Russian invasion of Ukraine served as the catalyst for a fundamental restructuring of the continent's security architecture. In 2025, European NATO members increased defense spending by 16 percent over the previous year, with most states surpassing the legacy Wales Summit pledge of 2 percent of GDP on their way toward a new 5 percent target by 2035.[63]

Europe has also assumed the lion's share of support for Ukraine because US support collapsed by 99 percent in 2025. In response, Europe has surged its assistance to ensure the total amount of support remained stable, increasing financial and humanitarian aid by 59 percent and military aid by 67 percent over the 2022–24 average. Germany has emerged as a central pillar of this transition. By constitutionally exempting military investments from debt limits, Berlin has become the largest bilateral supporter of Ukraine, with a projected 2026 defense budget of €108 billion—more than double its 2021 spending levels.[64]

Despite this unprecedented fiscal mobilization and the EU's €150 billion Security Action for Europe loan facility, the transition toward rearming Europe is hampered by industrial fragmentation. Thus, rearmament remains constrained by industrial nationalism, as states prioritize domestic contractors over joint projects, thereby forfeiting critical economies of scale. The Future Combat Air System is a prime example: Franco-German industrial rivalries and divergent national requirements have pushed the development of a sixth-generation fighter jet toward near collapse. Consequently, Europe remains critically dependent on extra-European systems, with 70 percent of 2020–24 arms-procurement value being sourced from outside the continent.[65]

Finally, a fundamental shift in the European mindset is visible in European countries' differing approaches to force generation. To address chronic manpower shortages and the requirements of large-scale, attritional warfare, European states are reconsidering their models for military service. Nine NATO members—primarily in the Nordic countries and the Baltic states—maintain conscription as a cornerstone of national resilience, and other major powers are following suit. Germany's parliament recently voted on a new legal framework for voluntary military service, providing for a transition to compulsory service if security conditions worsen or recruitment goals are not met. Poland is implementing large-scale training for adult males, and France is scaling a 10-month national service to bolster reserve capacity.[66]

The Arctic and the High North

Rebuilding European deterrence also necessitates a focus on the high north—the European Arctic extending from Greenland to the Barents Sea. Historically a region of cooperation, this area has rapidly evolved into a contested, strategic space hosting critical undersea communication links, transit routes, and vast deposits of strategic minerals and hydrocarbons. The high north also provides a significant portion of Northern Europe's low-carbon energy via hydropower networks.[67]

Perhaps most significantly, the region hosts Russia's Northern Fleet in Murmansk, which provides the Kremlin with its submarine-based second-strike nuclear capability. Recent intelligence assessments indicate Russia could reconstitute forces for a regional war in the Baltic region and the high north within two years after a ceasefire in Ukraine. The region has also seen increased activity from non-Arctic powers, most notably China, which is leveraging its Polar Silk Road ambitions and military cooperation with Russia to project power far beyond its borders.[68]

In response to this deteriorating security environment, European states and NATO are aggressively bolstering the alliance's northern flank. In February 2026, NATO launched Arctic Sentry, aiming to increase allied presence in the area, with Sweden, Norway, and Finland leading maritime and aerial patrols to intercept potential Russian and Chinese incursions. Consequently, NATO has intensified surveillance within the GIUK Gap—the water corridor between Greenland, Iceland, and the United Kingdom—while expanding Joint Force Command Norfolk's boundaries to achieve the full integration of all Nordic allies' defense planning.[69]

Can Europe Deter Russia and Defend Europe?

In the short term, Europe will be unable to withstand a large-scale, conventional Russian attack without significant US support. The continent lacks critical strategic enablers, including sufficient satellite communications, strategic transport, and comprehensive, integrated air and missile defense. Whereas European NATO members

currently possess nearly 1.5 million active-duty personnel, their combat effectiveness is severely hampered by industrial fragmentation and a command structure that still fundamentally depends on US leadership and strategic assets. To establish credible conventional deterrence, Europe requires even more troops and significant annual increases in defense spending—increases that would ultimately enable European countries to fulfill the Hague Commitment of spending 5 percent of their GDPs on defense and security by 2035. Eventually, this transition might allow Europe to replace current US capabilities. The transition also necessitates consolidating Europe's defense industrial base to achieve the economies of scale required for high-intensity, attritional warfare.[70]

Beyond economic adaptation, Europe needs to adapt psychologically. A primary strategic obstacle is the Kremlin's belief Europe is deterred by its own fear of escalation, a perception Moscow reinforces through a "red line playbook" and hybrid warfare.[71] Russia uses informational capital—specifically, nuclear saber-rattling and threats of "unimaginable consequences"—to induce political paralysis.[72] These tactics have effectively exploited European internal frictions, as many states have historically remained hesitant to act decisively without US leadership and risk sharing. To counter this situation, European leaders must call Russia's bluff by adopting an active defense posture that imposes tangible costs on Russian hybrid aggression. Ultimately, Europe has the economic weight—being 10 times richer than Russia—to defend itself, but it must urgently develop a shared strategic culture and the political will to transition from a security consumer to an autonomous security provider.[73] As one recent report stated, "[t]o 'unpower' Russia, the EU must think and act in terms of power—and have the courage to use it."[74]

Conclusion

The relationship between the United States and Europe is undergoing a dynamic and ongoing shift. Amid the political aspects of maintaining a coalition and the uncertainty of the Russia-Ukraine War, Europe's future—and the United States' role in it—remains unclear. This ambiguity creates challenges that warrant further research, from examining what would constitute successful conventional deterrence in Europe to assessing how NATO would fight on the continent to addressing broader questions about successful contingency planning and the forecasting of international flash points.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by United States European Command, US Army Europe and Africa, and Security Assistance Group-Ukraine cover topics such as:

- Russian Training
- Adversary Lessons from Ukraine
- Offense Versus Defense Dominance

The Middle East

The fallout from the conflict between the United States, Israel, and Iran will have an unprecedented impact on the strategic environment of the Middle East. This conflict has the potential to erode old certainties and radically alter established patterns of strategic behavior. Features of the current strategic landscape may persist, though the way these features manifest will be inseparable from the results and long-term outcomes of the current conflict. Central to the Middle Eastern strategic environment is the region's global connectedness. At its core, the strategic importance of the Middle East remains unchanged.

The Middle East links the northwestern and southeastern hemispheres together, meaning much of the world's military and commercial traffic transits through the region. The Middle East contains well over 40 percent of the world's proven oil reserves, meaning the region shapes the global economy and energy market. Middle Eastern oil wealth also impacts everything from agriculture to artificial intelligence.[75] The Middle East's cultural, historical, and religious topography means regional events are covered in the global media landscape and are the subject of emotions and political action throughout the Western world. This dynamic, in turn, may lead countries to have disproportionate levels of strategic involvement as they recognize how the region can increase their international prestige, or how the region can harm the prestige of adversaries. These factors—the role of the Middle East as a nexus of trade and transportation, together with its significance in the global information environment—have amplified each other over the last year, thus keeping the world focused on this region.

The Middle East has consistently drawn the attention and intervention of outside powers including the United States, China, France, and Italy, while also exporting instability and the effects of regional conflicts to the rest of the world. These negative externalities can happen at the microlevel (encompassing terrorist attacks in the United States and Europe) or on the macrolevel (encompassing the global economic impact of Iran's decision to deny passage through the Strait of Hormuz). Consequently, regardless of the results of ongoing operations, the Middle East is set to continue being a region of interest to great powers, and ongoing competition between regional powers will continue to have global implications. Thus, as has been the consistent view

Sidebar: US Army soldiers conduct Special Purpose Insertion/Extraction System training with a UH-60 Black Hawk helicopter at Camp Buehring, Kuwait, August 29, 2025 (US Army photo by Captain Andrew Lightsey IV).

of the strategic estimate since 2023, the Middle East remains a region of strategic vulnerability and instability that will continue to draw the attention of the world's powers, great and regional alike.

Underlying Transnational Drivers of Volatility

Although many underlying factors drive the region's volatility, three of the largest transnational drivers of instability are becoming progressively more acute. These drivers will continue to be a source of turbulence that shapes, and is shaped by, the strategic decisions of both great powers and regional powers in the Middle East. If unmitigated, the situation of transnational minorities; the status of Palestinian refugees in Lebanon, Syria, and Jordan; and the increasing strain of repeated drought cycles and rising annual temperatures will all continue to threaten regional stability. The challenge posed by the situation of transnational minorities is particularly acute across Iraq, Syria, Lebanon, Israel, and Türkiye. This challenge is not new, though it has intensified.

Next, relations between the Kurds and the Syrian government deteriorated rapidly with Syria's January 2026 invasion of Kurd-controlled areas of the country. This deterioration was enabled by the gradual withdrawal of US protection for the Kurdish minority, which began in 2019 and culminated before the final offensive in an announcement stating the United States no longer needed the Kurdish paramilitary in Syria.[76] Syria defeated the Kurdish forces, but the situation is not truly resolved and has cross-border implications for Kurdish areas and forces in northern Iraq. How Syria's Ahmed al-Sharaa government will govern the Kurdish population

Soldiers assigned to US Army Central guide in a UH-60 Black Hawk during a Pathfinder School field training exercise in United States Central Command's area of responsibility, January 27, 2026 (US Army photo by Captain Bernard Jenkins).

(and what response this governance might elicit from Kurds in Syria and elsewhere in the Middle East) remains to be seen.

In southern Syria, a similar problem had a different result. Israel intervened to protect the Druze, a transnational religious minority. Israel has a close relationship with some members of this minority. Israel's support for the Druze effectively carved out a Druze enclave in Syria and led to fighting between Israel and Syria.[77] This state of affairs, in turn, caused the regional adversaries of Israel and Türkiye to face the risk of military escalation.

The situation of Palestinians in the refugee camps in Lebanon, Syria, and Jordan continues to serve as a potential source of volatility. Because these camps provide few economic opportunities and cannot resolve the refugee status of their residents, the camps are a continual source of radicalization and insecurity in the Middle East. The October 7 attack and the wars that followed have increased this threat. The UN Relief and Works Agency for Palestine Refugees in the Near East, which provides support and services to residents, has slashed its budget significantly, reducing the already-limited opportunities available to Palestinian refugees.[78] Consequently, protests have broken out in the camps in Lebanon and threaten to spread across the region. These protests may not become the spark that reignites the issues they represent, though the protests point to a cycle of amplifying tension that may affect the region.

The entire Middle East is impacted by the cycle of repeated droughts and high temperatures, especially countries that partly rely on an agricultural sector or that do not have the advanced infrastructure or financial resources necessary to begin mitigating the cycle of severe weather. Severe drought conditions and high temperatures strain already-limited water resources, which in turn can cause agricultural collapse. This situation causes displaced individuals to enter already-overburdened cities and to attempt to migrate to Europe and North America. In Syria, this cycle contributed directly to the collapse of the Bashar al-Assad regime and to the 2026 Iranian Protests. Some countries are already mitigating the risks posed by droughts and high temperatures. For example, Saudi Arabia and the United Arab Emirates invested heavily in desalinization, which has mitigated water crises in those countries.[79] But these efforts increased the countries' domestic energy demand, providing China with an opportunity to gain a regional foothold by providing low-cost, green energy solutions. Israel has taken a mixed-method approach to this problem, exploring a wide variety of mitigative measures, including desalinization and brackish-water agriculture, to decrease its likelihood of experiencing a single point of failure.[80] For other countries in the region, such as Jordan, Lebanon, Iran, and Iraq, repeated droughts and higher temperatures continue to threaten stability and their ability to weather other crises.

US Army soldiers assigned to Bravo Company, 5th Battalion, 101st Aviation Regiment, 101st Combat Aviation Brigade, conduct daytime UH-60 Black Hawk aerial gunnery practice at Camp Buehring, Kuwait, September 3, 2025 (US Army photo by Sergeant Brianna Badder).

Gaza: US Prestige and an International Force

In fall 2025, the United States announced it had brought an end to the Israel-Hamas War that had been raging since Hamas launched its October 7 attack. In doing so, the United States staked a significant amount of regional prestige on its ability to fulfill the terms of the ceasefire conditions it imposed. Under the US plan, an international security force would deploy to Gaza to disarm Hamas and demilitarize Gaza. This initial action was to be followed by a new government, reconstruction, and economic rehabilitation. These measures would be implemented while Israel withdrew.

Half a year later, the international security force appears smaller than the United States implied it would be and apparently lacks any will to disarm Hamas, which retains control of half the territory. At the same time, Israel shows no signs of withdrawing. Instead of a resolved war, the situation in Gaza appears to be on the verge of devolving into a frozen conflict. Despite Hamas's past ties to Iran, the 2026 Iran war is unlikely to alter the dynamic in Gaza, as Hamas has insulated itself, to some extent, by establishing close ties to Türkiye and Qatar. These ties essentially make Gaza a second line of contact in the growing regional tensions between two US partners—Israel and Türkiye. The lack of a resolution to the Israel-Hamas War, therefore, retains the potential to harm US prestige, degrade trust in US guarantees, and serve as a source of future volatility.

The 2026 Iran War and Regional Volatility

The conclusion of the 2026 Iran war may be the single most consequential event in the Middle East in decades. From energy markets to regional alignments and alliances, and even some countries' domestic politics, much of the strategic future of the region hangs on the outcome of this conflict. For example, Hezbollah has dominated politics in Lebanon for 30 years. Now, Hezbollah has been weakened and is facing a renewed Israeli ground offensive. At the same time, the Lebanese government has vowed to disarm Hezbollah. One of Hezbollah's primary sources of resilience is Iran's ability to fund, equip, train, advise, and assist it.

M142 High Mobility Artillery Rocket Systems provide support during Operation Epic Fury in United States Central Command's area of responsibility. Part of this photo was blurred for security purposes (US Army photo).

If Iran comes out of the 2026 Iran war with either a changed regime or nothing left to give, Hezbollah may find itself in a terminally precarious state. On the other hand, if Iran survives the US-Israeli onslaught, Hezbollah may become a resurgent force in Lebanon.

If the Iranian regime weathers the current storm, the regime will likely double down on its partnership with China, increasing the extent of China's developing influence in the region. Simultaneously, the Gulf Arab States would be forced to contend with the fact that a regional actor defied the United States, damaged the Gulf Arab States, and lived to reconstitute itself, implicitly threatening to bring the Persian Gulf under fire at will. The Gulf Arab States would either have to increase their own defense capabilities or truly agree on a way to accommodate Iran. Additionally, if the Iranian regime survives the conflict, the regime will likely race toward a nuclear breakout. These processes would only be amplified if the United States implemented the approach outlined in the 2025 *National Security Strategy of the United States of America*—an approach that aims to deprioritize the region and shift the burden of security to friendly regional powers.[81]

On a macrolevel, if Iran is crippled or experiences a regime change, then profound change is possible in the Middle East. For decades, Iran has been one of the most significant sources of instability and volatility in the region. Iran—one of the dominant powers in the Middle East—has supported sources of destabilization, including militant groups and transnational

criminal enterprises both in the region and worldwide. Should Iran no longer be able to fulfill these roles, the country will leave a vacuum into which other powers both inside and outside the region may step. Iran and other Middle Eastern countries would not be the only powers to feel the consequences of an Iranian defeat. Before the 2026 Iran war, Gulf Arab States such as Saudi Arabia, the United Arab Emirates, and Qatar were engaged in the beginnings of a Chinese-backed détente with Iran.[82] When the conflict broke out and Iran launched unprovoked attacks against these states, the Chinese-brokered agreements were proven valueless, and China doubled down on its support for Iran.[83] Should the United States emerge victorious, it will be able to harm Chinese inroads and interests in the Middle East.

The 2026 Iran war also places the Iraqi government and Iranian proxies in Iraq in a difficult spot. The Iraqi government's options are to side with Iran, side with the United States, or try to maintain neutrality. Siding with Iran would likely entail severing military, if not diplomatic, ties with the United States, which would give militias carte blanche to attack US and Israeli targets throughout the region. Siding with the United States would likely provoke Iranian proxy militias to expand the scope of their attacks to include the Iraqi government and Iraqi security officials and organizations. These expanded attacks would likely stall the government-formation process and lead to protests staged by a population uninterested in taking sides. The last option is to maintain neutrality, which will become increasingly difficult as Tehran's sense of urgency grows. The Iranian government has never been able to control its proxy militias, but Iran is pressuring those militias to act.

Although the Iraqi government will certainly denounce attacks on Iran, it may not take any substantive steps to support Iran, for several reasons. First, the United States is still a valuable security partner in containing the Islamic State of Iraq and Syria, and the United States provides the Iraqi military with weapons, equipment, and other forms of security assistance to which the military will likely not want to lose access. Second, the United States is a valuable economic partner. In 2024, Iraq's trade with Iran was valued at $11–12 billion. Iraq's trade with the United States was also valued at $12 billion.[84] Iraq seemingly cannot afford to lose the partnership of either Iran or the United States, so the pressure to remain neutral will likely prevail, especially if the conflict shows signs of de-escalating.

Iran's proxy militias in Iraq are harder to predict. The militias remained on the sidelines during Israeli operations in Gaza, Lebanon, and the 12-Day War with Iran. But starting in March 2026, the militias have conducted hundreds of attacks on US and peshmerga forces, as well as on oil infrastructure in Kurdistan.[85] Exacerbating the situation, Iraq has only been exporting oil via tankers, and the current fighting has effectively stopped these exports. Iraq could export oil through the Iraq-Türkiye pipeline in northern Iraq, but the pipeline has operated intermittently since it was shut down in 2025 because the Kurdistan Regional Government was using it to bypass revenue-sharing

arrangements with Baghdad. Consequently, Iraq—which receives 90 percent of its revenue from oil exports—is on the precipice of a financial crisis.[86] This situation could eventually pressure both Kurdistan and Iraq at least to turn a blind eye, if not openly sanction, militia activity against US forces and facilities.

Despite recent attacks, Iraqi militias have shown signs of wanting to return to the sidelines. In mid-March 2026, US forces struck militia facilities throughout Iraq in response to militia attacks in Kurdistan. After these strikes, Kata'ib Hezbollah, one of the more prominent pro-Iran militias, offered to pause its attacks on the US embassy in Baghdad. Kata'ib Hezbollah specified conditions the United States and Israel will likely not accept—ceasing Israeli attacks in southern Lebanon, ceasing attacks in residential areas of Iraq, and withdrawing CIA operatives to the US embassy—though these conditions did not include ceasing operations against Iran.

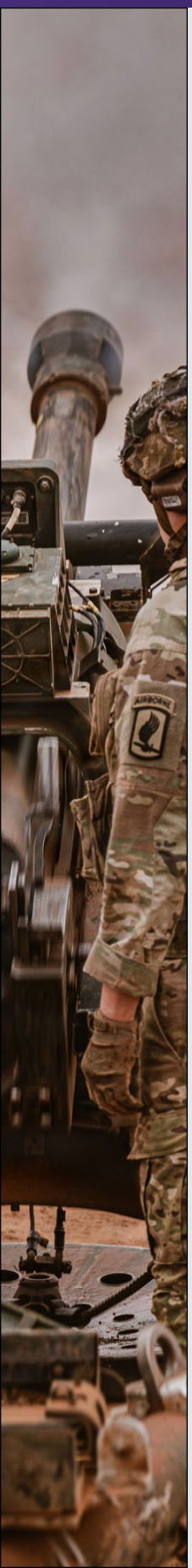
This point suggests room may exist for agreement.[87] The militias have become large organizations with significant political and business interests, suggesting they have much more to lose from supporting Iran now than they did in the past.[88] Whether those interests will make the militias resilient to Iranian pressure remains to be seen. But the United States may have an opportunity, through a combination of cooperation with the Iraqi government and pressure on the militias, to keep the militias on the sidelines.

Conclusion

The 2026 Iran war and the underlying causes of regional instability highlight the volatility of the Middle East. The extent of regional-power and great-power competition in the Middle East underlines the region's importance. Taken together, regional conflicts demonstrate an inherent tension in US policy. Despite the region's importance and the repeated involvement of US forces, the US government remains committed to withdrawing many of its forces and deprioritizing the Middle East. Given the events of the past year and the broader context of strategic history, if the United States intends to achieve its goals, it will need to thread a needle. The United States will simultaneously have to withdraw capabilities from the region, reassure partners, deter both regional and great-power rivals, and maintain the flexibility to respond to rapid changes in the Middle Eastern strategic environment. As of now, how the United States can accomplish these tasks remains unclear.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by United States Central Command and US Army Central cover topics such as:

- Autonomy in the Middle East
- Water Scarcity
- Adapting to China's Presence



Africa

The US approach to engaging with African countries is evolving, particularly with the release of the 2025 *National Security Strategy of the United States of America* and the *2026 National Defense Strategy*. Washington now seeks to engage with the continent through clear US interests that include emphasizing the protection of the homeland, investing in economic opportunities, and encouraging burden sharing with US allies and partners.[89] This agenda presents opportunities for collaboration between the United States, international organizations like the African Union, regional economic communities in Africa, and individual African nations. Such collaboration will enhance US national security and economic-investment opportunities. To help understand where collaborative opportunities exist, this section focuses on areas that may pose a threat to US security interests or areas in which the United States can influence the security environment to advance its foreign policy goals. But the United States is not the only actor involved in the continent. Other external powers are also deepening their involvement across Africa, leveraging partnerships, resources, and strategic locations to expand their influence, secure economic advantages, and advance their broad geopolitical ambitions. Combined, these factors provide the building blocks of a risk-versus-reward framework for future US investments and engagements on the often-neglected African continent.

Sidebar: US soldiers assigned to Assassin Battery, 4th Battalion, 319th Airborne Field Artillery Regiment, 173rd Mobile Brigade Combat Team (Airborne), fire a M119A3 howitzer in preparation for an African Lion 26 live-fire exercise at Cap Drâa, Tan-Tan, Morocco, April 17, 2026 (US Army photo by Sergeant Christopher Sanchez).

Country Assessments

Africa's security environment continues to evolve amid persistent internal conflicts, rising interstate tensions, and threats from violent extremist organizations. Despite enduring pockets of instability, the continent still presents opportunities for the United States to expand its engagements in alignment with the priorities outlined in the 2025 *National Security Strategy of the United States of America*.

Somalia

In early 2026, the Somali National Army—with the assistance of clan-based militias, international security partners, and increased US air strikes—targeted al-Shabaab to reclaim strategic areas.[90] But since 2025 al-Shabaab has been on the offensive in southern and central Somalia, reversing fragile security gains the federal government made

in previous years. At the same time, the Islamic State of Iraq and Syria continues to pose a serious threat in Puntland—a region in northeastern Somalia.[91] These matters are complicated by shortfalls in funding for the African Union Support and Stabilization Mission in Somalia and by weak Somali security institutions.

Persistent political fragmentation and tensions between the Somali federal government and federal member states are further compounding the security situation. These issues are rooted in the ambiguous authorities granted in the country's constitution.[92] The federal government has sought to reform the electoral process and redraw the federal map, angering some federal member states and clan leaders, who accuse the government of attempting to centralize power.[93] In December 2025, Somalia held its first direct election since 1969. The election selected local council members to serve in Mogadishu and is seen as a trial run for direct elections on the national level. But opposition parties have labeled the elections as flawed and one-sided.[94] The run-up to and outcome of Somalia's 2026 elections will be pivotal in shaping the country's political and security trajectories.

In late 2025, Israel recognized Somaliland's independence, which drew a sharp response from Somalia and is another factor impacting Somalia's trajectory. Somalia called the recognition a "flagrant assault" on Somalian sovereignty.[95] The announcement also drew heavy criticism from the African Union, the Arab League, Gulf Arab States, and countries in the Horn of Africa, many of which argued Somaliland's recognition as an independent state sets a dangerous precedent that could exacerbate tensions in the region. Ethiopia, having signed a memorandum of understanding with Somaliland to gain access to the Red Sea in early 2024, has taken a cautious and muted approach.

A US Army infantryman assigned to Alpha Company, 2-134th Airborne Infantry Battalion, 45th Infantry Brigade Combat Team, Nebraska Army National Guard, and a Tanzania People's Defence Force soldier participate in a field training exercise demonstration at the closing ceremony for Justified Accord 26, Msata Military Training Base, Msata, Tanzania, March 11, 2026 (US Army photo by First Lieutenant Tucker Chase).

Ethiopia

Ethiopia will hold elections in June 2026—its first elections since the end of the Tigray conflict in 2022. This effort comes amid ongoing friction between the federal government and the Tigray regional government, continued conflicts among militias in the Amhara and Oromiya regions, and rising tensions between Ethiopia and Eritrea.[96] Ethiopia's current prime minister, Abiy Ahmed, is seeking to extend his term. Ahmed is seen as a reformer and

a modernizer but has been criticized for his efforts to consolidate power and his intolerance of dissent.[97] These elections come at a critical inflection point for Ethiopia. Relations between Addis Ababa and Asmara have deteriorated since the end of the Tigray conflict, during which the two countries were briefly allied against the Tigray People's Liberation Front. In early 2026, Ethiopia accused Eritrea of massacring Ethiopian civilians in the city of Aksum during the Tigray conflict, occupying Ethiopian territory along the two countries' shared border, and supporting armed groups inside Ethiopia. Eritrea denies all these accusations.[98] Bilateral relations between Ethiopia and Eritrea are also strained due to landlocked Ethiopia's aspirations to gain direct access to the Red Sea. Ethiopia could fulfill these aspirations through the Eritrean port of Assab, a renewed memorandum of understanding with Somaliland, or an even heavier reliance on Djibouti.

Sudan

The Sudanese civil war, now in its third year, has evolved from an internal power struggle into an increasingly regionalized conflict fueled by external support from various regional powers. The war has arguably resulted in the world's worst humanitarian crisis.[99] Diplomatic efforts have yielded little progress toward resolving the conflict, despite the participation of a range of actors, including the Quad—a group consisting of Egypt, Saudi Arabia, the United Arab Emirates, and the United States.[100] Ongoing support for the Sudanese Armed Forces (primarily from Egypt) and the Rapid Support Forces (primarily from the United Arab Emirates) has prolonged the conflict and brought deadly results.[101] Russia has a direct interest in the Sudanese civil war, as it has shown interest in establishing a naval facility in Port Sudan since at least 2017. Russia's initiative stalled amid the overthrow of former President Omar al-Bashir and the beginning of the civil war. But Russia's interest in the naval facility has been revived amid the current conflict. Russia is now negotiating with the Sudanese Armed Forces, offering Russian military support in exchange for the rights to establish a naval facility.[102] This adjustment highlights the competing economic and security interests among external actors. As the war continues, large-scale displacement and migration into neighboring states heighten the risk of regional spillover, putting strain on bordering nations and potentially increasing regional instability.

Libya

Libya's ongoing political fragmentation has created a permissive environment for external actors, particularly Russia, to expand their influence along the Mediterranean Sea while undermining regional stability. The country's strategic location, which links the Sahel to Europe, enables the flow of migrants, weapons, and extremist networks, thereby increasing security risks for US allies and partners.[103] The United States has cautiously reengaged with Libya through security engagements aimed at stabilizing the country and countering Russian influence. These engagements have

included the US Navy making port calls to Tripoli and Benghazi in 2025 and United States Africa Command inviting Libya to join Exercise Flintlock in 2026.[104] At the same time, Libya's energy sector, which holds Africa's largest known petroleum reserves, provides economic-investment opportunities to US companies. For example, Chevron Corporation signed a memorandum of understanding with Libya's National Oil Corporation in late 2025 and early 2026.[105] In sum, Libya represents a protracted conflict in which US involvement can shape the outcome of a strategically contested and important environment.

Nigeria

Strife and Islamist extremism continue to hamper economic growth and stability in Nigeria, a nation with the potential to become a global power. Nigeria's security forces are stretched thin, combating widespread lawlessness, armed bandits, and insurgencies orchestrated by Boko Haram and the Islamic State of West African Province in the country's vast northern provinces. Christian communities targeted by these groups have appealed for international support, a call the United States has heeded by providing military support to Abuja. In December 2025, the United States conducted air strikes against militants in Nigeria, building upon prior American support for A-29 Super Tucano aircraft and AH-1Z Viper attack helicopters.[106]

Still, even with this new American support, Nigeria, its neighbors, and its international partners will need to coordinate their efforts to turn the tide against lawlessness and violence. Nigeria is Africa's largest nation by population and contains some of the continent's largest oil reserves. Consequently, Nigeria has the population, educational system, entrepreneurialism,

US Army explosive ordnance disposal technicians assigned to the 720th Ordnance Company, 18th Military Police Brigade, and Kenya Defence Forces engineers with the 10th Engineer Battalion, clear unexploded ordnance from a training range at the Kenya Army School of Infantry, Isiolo County, Kenya, February 26, 2026 (US Army photo by Staff Sergeant Raquel Birk).

media, and resources to support sustained economic growth. Nigeria's population is projected to reach 450 million people by 2050, up from 228 million in 2023.[107] Security and stability in Nigeria could yield substantial dividends for Nigeria, the United States, and the global economy, curbing regional, conflict-driven migration and unlocking the potential of Nigeria's considerable oil wealth and human capital.

Central and Southern Africa

American peace efforts, investments, and mineral deals in Central and Southern Africa have the potential to reshape the region for decades to come. In 2025, Rwanda and the DR Congo signed the Washington Accords for Peace and Prosperity, a US-brokered agreement that reaffirms each party's commitment to reducing conflict in the eastern region of the DR Congo. Despite this agreement, the March 23 Movement has continued to clash with the Congolese military and government-aligned militias in the eastern DR Congo. In response, the United States has sanctioned the Rwandan Defense Force for its support of the March 23 Movement and is working with the DR Congo to secure mining interests from the rebels.[108] The DR Congo is the world's leading supplier of cobalt and is one of the most important producers of copper, coltan, gold, and other minerals. In comparison to current routes, the American-backed Lobito Corridor project has the potential to bring Congolese and Zambian minerals to global markets far more cheaply, and American development in the corridor has spurred further foreign, direct investments.

Angola, led by President João Lourenço, has emerged as a critical partner in the United States' regional initiatives and remains an energy and security powerhouse. Lourenço led the regional peace efforts that were eventually folded into the Washington Accords for Peace and Prosperity. Additionally, at the heart of the Lobito Corridor project is the resuscitation and revitalization of Angola's longest rail line. The corridor plays a central role in the country's efforts to reinvest oil profits into economic diversification. The United States and Angola have also moved forward with developing closer security ties as Angola seeks to modernize its military and gradually upgrade or replace aging Russian, Cuban, and Chinese equipment.[109] The Armed Forces of Angola is a storied and accomplished force, and military

Contre-admiral Said Zebakhe of the Royal Moroccan Navy greets Brigadier General Shawn Fuellenbach, assistant adjutant general, Utah National Guard, September 16, 2025, at the Port of Casablanca as part of Maroc Mantlet 2025 (US Army National Guard photo by Sergeant First Class Timothy L. Beery).

modernization—including the modernization of land, sea, air, and space assets—could help the force play an even greater role in regional stability.

Burden Sharing and the Role of Middle Powers

In recent years, middle powers have played an increasingly large role in the African security sector, growing their foreign military sales and actively combating terrorism. Türkiye, for example, has become one of the leading external military powers in Africa, playing a major role in supporting Somalia against al-Shabaab, the Islamic State of Iraq and Syria, and threats to the territorial integrity of the state. Türkiye trains and equips the elite Gorgor unit of the Somali military and is working on developing offshore hydrocarbon resources and a spaceport in Somalia. Across Africa, Türkiye's drones are ubiquitous, particularly the Bayraktar TB2, which performs intelligence gathering, scouting, and reconnaissance as well as ground-attack roles.[110]

The United Arab Emirates, Qatar, and Saudi Arabia have all increased their military roles on the continent, hand in hand with the significant investments these countries have made in energy, infrastructure, and critical minerals. The remaining question is whether these powers, which are relatively new to Africa, will focus on stability operations or on competing against one another through proxy wars. Europe has also shown a renewed interest in the continent, particularly in energy, infrastructure, and outer space. Some of Europe's recent marquee African investments are in or near conflict zones, including the TotalEnergies project in Mozambique and the Luigi Broglio Malindi Space Center in Kenya, not far from the Somali border.

China and Russia: An Expanding Footprint

China is adjusting its economic and security approach in Africa, shifting from expansive infrastructure projects toward more targeted investments, such as investments in critical minerals and minor infrastructure projects. This transition, combined with the expansion of trade and political engagement, reflects a deliberate effort to consolidate influence and embed African economies within Chinese-led supply chains. Whereas China is still limited in the security domain, it has modestly expanded its military engagement through more frequent exercises and training activities, signaling a gradual and cautious evolution of its security role. Beijing's expanded security engagements include the Peace Unity-2024 joint military exercise between the People's Liberation Army and the Tanzania People's Defence Forces (the largest Chinese military deployment to the region) and the Eagles of Civilization 2025 joint air exercise with Egypt (China's first large-scale deployment of the People's Liberation Army Air Force in Africa).[111] Together, these trends continue to challenge Western models of engagement.

In contrast to Beijing, Moscow has expanded its presence in Africa primarily through an opportunistic, security-first approach. Russia is deepening its ties

to regimes that are facing internal instability or deteriorating relations with Western partners. Following the dismantling of the Wagner Group and the group's rebranding as the Africa Corps, Moscow consolidated its role as a security provider and backer of military-led regimes in countries such as Mali, Burkina Faso, Niger, and the Central African Republic. Russia is also seeking to expand its footprint in Sudan along the Red Sea. Through its military cooperation and limited economic investments, Russia has been able to secure influence at a relatively low cost. In doing so, Moscow continues to displace Western partners and position itself as an alternative partner for fragile states.

Conclusion

The dynamics discussed in this section illustrate Africa remains a region of significant risks and opportunities to advance US strategic interests. Persistent instability in key states threatens regional stability and economic-investment opportunities for the United States while also creating opportunities for external actors to expand their influence. Therefore, advancing US interests in this environment will require focused engagement, strengthened partnerships with essential partners, and selective investments that enable the United States to shape outcomes in alignment with US national interests. This scoping of engagements and the deliberate selection of efforts require the United States to analyze both where it can maximize its return on investment and where it can assume risk in conceding influence on the continent to external actors.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by United States Africa Command, US Army Europe and Africa, and the US Army Southern European Task Force, Africa, cover topics such as:

- Security Vacuum in Africa
- Scaling Back Efforts in Africa
- Prioritizing Efforts in Africa

The Polar Regions

The polar regions—the Arctic and Antarctica—are experiencing rapid changes, both physical and strategic. As their natural climatic boundaries and physical features evolve, countries are keen to claim resources such as oil, gas, fisheries, and rare earth minerals, while also expanding research and defense efforts. The polar regions have become a new frontier of great-power competition, serving as increasingly important strategic focal points. The most prominent example of this shift is the Arctic, which is gaining importance for homeland security as US adversaries escalate their activities in these previously remote areas.

The Arctic and Homeland Defense

The Arctic's proximity to the United States, especially Alaska, presents both risks and opportunities, thereby requiring greater situational awareness, durable infrastructure, and strong coordination with allies and partners. Recently, Alaska Senator Dan Sullivan emphasized the importance of Alaska to US military power: The state is the cornerstone of missile defense, has more than 100 fifth-generation fighter jets, and hosts the 11th Airborne Division (the Arctic Angels), which was reactivated in 2022.[112]

To enable more effective homeland defense, the US Department of War has shifted Greenland from United States European Command's area of responsibility (AOR) to United States Northern Command's AOR. This shift is significant because Greenland's geographic location enhances the strategic options for homeland defense by providing early warnings in case of attack, supporting missile defense, and facilitating access to North Atlantic and Arctic routes. Given its proximity to the United States and its place in the Western Hemisphere, Greenland is increasingly important to the homeland—a reality recognized in emerging US strategy.[113]

Still, Greenland's shift from the United States European Command AOR to the United States Northern Command AOR creates additional requirements for coordination between the two combatant commands. Denmark (an Arctic NATO nation) finds Greenland (a Danish autonomous territory) to be a focal point of American defense. Meanwhile, Denmark has been an important security cooperation partner, having the "highest value

Sidebar: A US Army soldier assigned to 1st Battalion, 5th Infantry Regiment, 1st Infantry Brigade Combat Team (Air Assault), 11th Airborne Division, engages with a simulated opposing force during Joint Pacific Multinational Readiness Center 26-02 in the Yukon Training Area, Alaska, February 22, 2026 (US Army photo by Specialist Brandon Vasquez).

As part of a joint airborne exercise, soldiers assigned to 2nd Infantry Brigade Combat Team (Airborne), 11th Airborne Division, and paratroopers assigned to the 3rd Battalion, The Royal Canadian Regiment, parachute into Malemute Drop Zone, near Joint Base Elmendorf-Richardson, Alaska, February 7, 2026 (US Army photo by Sergeant First Class Ian Morales).

of proposed U.S. government arms transfers in 2025."[114] Consequently, whereas Greenland has become an essential component of US homeland defense planning for United States Northern Command, it still remains a factor in European security and collective defense in the Arctic and Europe. This role makes Denmark important to United States European Command's planning regardless of the shift in authority.

Adversaries and the Arctic

China, a self-declared Arctic state since 2018, has been closely monitoring events in Greenland, as the island's "resources are naturally alluring to the Chinese government and Chinese companies."[115] Nevertheless, according to the most recent annual threat assessment of the US Intelligence Community, released in March 2026, China's engagement in the polar regions is limited.[116] Still, China has advanced its strategic and geopolitical interests in the Arctic through its symbiotic relationship with Russia. In December 2025, Iris A. Ferguson, former deputy assistant secretary of defense for Arctic and global resilience, stated: "Beijing is increasingly eyeing the Arctic as a domain that would further China's power assertions and economic resources."[117]

Central to China's Digital Silk Road—a key part of the Belt and Road Initiative—are the satellite ground stations and fiber-optic cables China is emplacing in the Arctic, as well as the icebreaker ships China is developing to support its Arctic operations.[118] China's penetration of the Arctic is both a commercial and a military threat to the United States, as China claims to possess a deep-sea cable-cutting capability that could disrupt regional communications in the event of a conflict.[119] China may have

already employed this capability elsewhere, with Taiwanese authorities alleging two Chinese vessels cut two subsea cables, an act that disrupted communications for 14,000 residents of Taiwan's Matsu Islands for nearly six weeks.[120] This cable-cutting capability was examined in the *Asia Times*: "China's cable cutter signals a new era in which information warfare may begin not in cyberspace but 4,000 meters under the sea."[121] This capability adds to China's icebreakers, which have deployed dual-use surveillance buoys—equipped with scientific instruments that also collect vital information on submarine operations and tracking—in Arctic waters.[122]

China is interested in the Antarctic as well, as this region's interoceanic passages—the Drake Passage, the Strait of Magellan, and the Beagle Channel—can serve as alternatives to the Panama Canal in the event of a war against the United States.[123] In the Antarctic, China is positioning itself for a potential 2048 review of the Antarctic Treaty, aiming to discuss the region's future governance and strategic environmental protections. According to a recent analysis, "[t]he possibility of a renegotiated Antarctic Treaty that could open Chinese access to areas that China occupies and has extensively surveyed poses a security nightmare for the U.S."[124] The Chinese government currently has five scientific-research stations in the Antarctic and will soon complete its sixth.[125]

Although China's presence in the polar regions is growing, Russia is the United States' primary challenger in the Arctic, seeking to advance its interests there amid global balance-of-power competition.[126] Moscow aims to expand and strengthen its presence in the Arctic by boosting maritime trade, extracting natural resources, and increasing Russian military operations.[127] Russia is also actively flexing its instruments of national power in the region, as the Arctic represents a renaissance in frontier defense. Russia's Arctic posture is designed to assert Moscow's maritime economic claims to the region, control the information environment, and prepare for a potential conflict against the United States and its Nordic allies.[128] In the resource-rich Russian sector of the Arctic, "Moscow turns to Chinese and BRICS partners for capital and technology, using Arctic oil, gas, and the Northern Sea Route to sustain its war economy."[129]

Furthermore, as the Russia-Ukraine War enters its fourth year, Russia's economic interests in the Arctic have not diminished. Russia remains committed to directing

US Army soldiers from the 11th Airborne Division conduct a foot march during Joint Pacific Multinational Readiness Center 6-02 exercise in the Yukon Training Area near Fairbanks, Alaska, February 17, 2026 (US Army Reserve photo by Specialist Cole Moore).

military and economic resources to the region, usually with China's backing. The strategic dangers of Russian investment in the region arise from the concentration of Russia's Arctic forces there, especially on "the Kola Peninsula, which hosts about two-thirds of Russia's second-strike nuclear capabilities."[130] But most important, the region is "home to Russia's Northern Fleet, including seven of the country's nuclear-armed ballistic missile strategic submarines."[131]

Conclusion

Although space may be the only area more remote than the Arctic and Antarctica, the polar regions' terrestrial and maritime domains will be another frontier of great-power competition. As these regions become increasingly vital to US national security, several challenges must be considered.[132] For example, with dynamic environmental conditions and the rising strategic influence of near-peer competitors, the polar regions are evolving into key commercial and strategic hubs, and the US military must increasingly prepare to defend them. Another important factor is, given their demanding terrain and extremely cold climate, the polar regions present a very complex operational environment that challenges troop movements. Additionally, the regions' geographic locations are characterized by limited satellite coverage, causing communication to be unreliable. Dynamic environmental challenges also include increasing fuel demands for operations, as well as requirements for specialized materiel and maintenance across all classes of supply.[133]

Finally, given the polar regions' extreme weather conditions and limited transportation hubs, the Joint Force must also deal with the tyranny of distance. In Alaska, for example, the distance between Anchorage and Juneau is more than 500 miles, and the distance between Juneau and Utqiagvik is roughly 1,100 miles. Given these distances, tasks such as search and rescue, support for commerce, and protection of the strategic environment will be demanding. More analysis is needed to identify where and how the Department of War should concentrate its efforts in the polar regions and to assess how such a reprioritization could affect traditional military operations and acquisitions.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by United States Transportation Command cover topics such as:

- Force Posture in the Arctic

Sidebar: Students in the School of Advanced Military Studies explore the futures-based concept planning method through war gaming alongside Army tools like design methodology, the rapid decision-making process, Joint planning and execution frameworks, and the principles of war, March 31, 2026, Fort Leavenworth, Kansas (US Army photo by Jim Shea).

Strategic Competition

Historically, US strategic documents have made implicit references to the phenomenon of strategic competition, sometimes calling it great-power competition, interstate competition, or superpower competition.[134] But these documents have been slow to recognize a particularly virulent form of strategic competition—strategic rivalry. Similarly, Joint Force doctrine has yet to embrace the concept fully. This omission is nontrivial because strategic rivals have been responsible for 80 percent of wars from antiquity to the present.[135] Rivalries and their wars form the proverbial vicious cycle: Armed disputes fuel rivalries, and rivalries instigate armed disputes.[136] Given this information and some 40 ongoing interstate rivalries, the Joint Force would do well to enhance its understanding of strategic rivalries and its potential role in them.[137] The Joint Force should do so with an eye toward enhancing its capacity to conduct large-scale combat operations, as well as with a view toward increasing its ability to wage limited wars, counterinsurgencies, and proxy conflicts more effectively. These latter categories of conflict may well become first-resort, Clausewitzian instruments of policy in rivalries in which no party wishes to risk nuclear escalation.

Rivalry Versus Competition

States have long pursued their own interests as a matter of course. But doing so in a comparatively benign, business-as-usual manner open to bargaining is one thing; this kind of behavior typifies strategic competition in a general sense.[138] Quite another thing is for states to prioritize the pursuit of one particular interest—the weakening of another state's capacity to compete—and to do so in a manner that weaponizes bargaining; this type of behavior captures the spirit of strategic rivalry, which is closer to the nature of war than to the essence of peace.[139] The United States and the People's Republic of China are currently engaged in a strategic rivalry, and so are dyads such as India and China, Russia and the United States, Russia and Europe, China and Japan, Israel and Iran, the United States and Iran, and Iran and Saudi Arabia.[140]

Furthermore, the study of rivalries has begun to alter how scholars and other experts view armed conflict and its causes. For instance, the theory that posits arms races cause wars overlooks the underlying driver of an arms race—the rivalry

dynamic. Because disputes among rivals are responsible for most wars, this dynamic is increasingly seen as a primary cause of armed conflict. Reducing the incidence of war may come down to old-school diplomatic efforts to find long-term solutions to disputes among rivals, rather than the promises of democratic peace theory. The two most frequent causes of armed conflict among rivals are (a) spatial motives, a rival's desire to gain specific territories; and (b) positional motives, a rival's desire to improve its ranking regionally or globally.[141] In the ongoing Russia-Ukraine War, a Russian victory over Ukraine would allow Moscow to gain additional territory and would boost Russia's status as a great power vis-à-vis other states within the region. Likewise, a Chinese conquest of Taiwan would yield similar results for Beijing's regional and global status. Ideology forms a distant third reason for conflict among rivals, reflecting a clash of worldviews often driven by underlying territorial or positional motives. Similarly, motives related to ethnic differences, political dissidence, scarce resources, and market access surface less frequently than traditionally supposed.[142]

Notably, when rivals go to war, they tend to go to war with each other; their conflicts typically involve "the same set of states."[143] Rivals thus learn to read (or misread) each other and to develop behavioral expectations accordingly. For this reason, "the earlier outcomes of an enduring conflict are likely to affect the subsequent outcomes."[144] Whereas this observation speaks volumes about the importance of credibility and the utility of a tailored approach to deterrence, it may also tempt readers to see rivalries as binary or dyadic. Yet, as the leading scholar of strategic rivalry has noted, "any given rivalry tree is apt to be located in a larger forest of rivalry trees."[145] One should, therefore, view a given rivalry as part of a constellation of other rivalries. Hence, the rivalry between the United States and China exists within the context of the rivalries between India and China, Japan and China, and Russia and China. A military clash involving one (or a combination) of the latter sets could trigger a US policy response, followed by some form of intervention by elements of the Joint Force. In this context, a potential clash would be shaped by whether deterrence had failed. For example, if deterrence vis-à-vis a cross-strait invasion of Taiwan held, then the rivalry would likely push the potential conflict to the periphery (anywhere outside the immediate vicinity of Taiwan). Indeed, such a situation occurred in the Cold War: Deterrence in central Europe held, and conflict moved to the periphery as a result (for example, Africa and parts of Africa).

Research also shows 55 percent of modern (post-1815) strategic rivalries ended peacefully, and 45 percent ended when one side lost its capacity to compete, either through military action or through some form of political or economic coercion.[146] These data suggest the probability of any strategic rivalry—such as the one between the United States and China—ending peacefully is practically a coin toss.

International military servicemembers participate in breakout groups and policy discussions during the Multilateral IAMD Summit and Senior International Leader Event – Pacific 2025 (US Army photo by Sergeant First Class William A. Tanner Sr.).

Implications for the Joint Force

To contend with its own strategic rivalries—or any other rivalry that might affect it—the United States will need its armed forces to revisit the limited-war theory and counterinsurgency doctrine of the Cold War. The United States will also need to reconsider its military policies for proxy wars (and, by implication, its doctrine for security force assistance). Whereas the United States rightly considers itself to be in a strategic rivalry with China, that rivalry will not necessarily lead to a major clash of arms over Taiwan or for control of the Indo-Pacific region. Instead, the struggle for both territory and position could feature a series of discrete operations—akin to Operation Midnight Hammer or Operation Absolute Resolve—aimed at securing US access to critical minerals and other resources or denying the same access to the People's Republic of China. A Joint strike might also render a critical check to a rival's positional adventurism in the Arctic, South America, or Africa; such actions would not necessarily trigger an escalation to a large-scale war.

The strategic rivalry between the United States and China may also involve sundry limited conflicts, much like the Cold War's brushfire wars, which helped preserve the international order and the global balance of power in favor of the free world. Ironically, these wars, which at times required counterinsurgency capabilities, also revealed the limits of US military might. Discrete operations crippled many of the United States' foes but did not win its wars, and the US military earned less-than-stellar grades against the insurgencies of the era. Perhaps the most salient example of these limits is the Vietnam War, which exposed the operational inflexibility of US forces: These forces performed well in conventional fights, but they struggled "to shift gears and engage in counterinsurgency tasks as and when required."[147] Any intelligent strategic rival will surely exploit such inflexibility.

Regarding proxy wars, NATO missed an opportunity between 2014 and 2022 to arm and train Ukraine as a preferential partner and a willing proxy. Training and arming did happen, but not on a scale sufficient to deter the Kremlin's full-scale invasion in 2022. A deliberate and systematic "steel porcupine" strategy in Ukraine would have strengthened the denial pillar of NATO's deterrence strategy.[148] Unfortunately, Brussels had assumed it would fight Russia directly if war came; thus, the alliance lacked the military policies

and operational doctrine to transition efficiently to a proxy form of warfare, which became the war's character by default.[149] Likewise, the United States should not assume it will fight China only directly should war come, and it should ensure its policies and doctrine can support a deliberate, proxy-style fight if that option emerges.

In sum, the Joint Force cannot deter a large-scale, protracted conflict unless the force is prepared to win one. At the same time, the Joint Force will need to give other kinds of conflict equal priority, as they may become the principal instruments of policy—the chess moves that ultimately lead to success, just as they did during the Cold War. Unfortunately, dual priorities will ultimately become dueling priorities, a reality that will not be welcomed by commanders whose training schedules are already overcrowded. Preparing to conduct large-scale combat operations against a major foe is surely the heaviest of heavy lifts, and much labor remains for US policymakers, industry leaders, and military professionals. But forgoing the hard-won lessons of the Cold War—the defining strategic rivalry of the second half of the twentieth century, along with its various brushfire wars—risks nullifying that labor.

Given the considerations presented in this section, topics for further inquiry include whether and how a better understanding of interstate rivalry could reduce strategic uncertainty and assist the US military in finding efficiencies in force-sizing metrics, force posture, and force-structure design. Knowing certain states within and across the areas of responsibility of US combatant commands are more likely to cause crises or engage in armed conflicts with their rivals should provide a defensible rationale for resource prioritization. But further research, especially in the form of war gaming, is needed to identify the limits and risks of such an approach.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by HQDA G-4, United States Strategic Command, US Army Space and Missile Defense Command, and US Army Cyber Command cover topics such as:

- Logistics Targeting by Strategic Competitors
- The Evolution of the Nuclear Mindset and Strategic Stability in a Multipolar World
- Strategic Missile Defense

National Preparedness

The secretary of war's speech at the National War College on November 7, 2025, focused on the urgent need to change the existing acquisition system and the defense industrial base (DIB). This call to a wartime footing is both for the organizations that design and build weapons and for the entire war-fighting enterprise, as the *2026 National Defense Strategy* seeks to prepare the Department of War for the possibility of prolonged combat.[150] In preparing the nation for war, the war-fighting enterprise relies both on the US military and on the US economy and infrastructure, such as highways, rail lines, power grids, natural resources, and manpower. The US Army War College Press's *Academic Year 2025–26 Annual Estimate of the Strategic Security Environment*, published in July 2025, highlights the call to address the health of the DIB's production capacity.[151] This year's section builds on that analysis by exploring how the Department of War aims to regain a wartime footing through improving the speed and scalability of key-weapons production, strengthening supply chains, and restoring the manpower-mobilization enterprise.

Sidebar: Soldiers from the 1st Battalion, 13th Infantry Regiment, recite the oath of enlistment during the Family Day Soldier Induction Ceremony at the US Army Training Center on February 18, 2026, at Fort Jackson, South Carolina (photo by Nathan Clinebelle).

The Need for Speed

The Department of War is laser focused on introducing speed into the process of designing and building weapons and munitions. This section focuses on munitions, of which modern combat operations expend substantial amounts—especially precision-guided munitions (PGMs). These types of weapons include offensive and defensive weapons such as the air-launched Long Range Anti-Ship Missile and the Standard Missile-6, a ground- or sea-launched missile that can intercept a drone, cruise missile, or aircraft.[152] In 2023, the Center for Strategic and International Studies war-gamed a Chinese military invasion of Taiwan, and in 2025 analyzed a blockade of the same island.[153] Both scenarios did not end well for the United States and its allies, resulting in losses of ships, aircraft, and personnel, as well as the high expenditure of PGMs. The war game revealed, within the first month of the conflict, the US military fired "about 5,000 long-range precision missiles, primarily JASSMs and LRASMs" and "expended its global LRASM inventory within the first few days in all scenarios."[154] These war games did not account for PGMs expended in a simultaneous conflict, such as the United States' ongoing operations against

Iran. The United States and its allies are concerned about the long production lead times required to replace PGMs that are critical to the Indo-Pacific theater and to modern combat operations more broadly. The Department of War is beginning to address this issue but needs to do more to ensure the DIB can truly support a wartime footing.

Recent changes to presidential and Department of War policies and strategies are removing barriers and increasing the speed of weapons design and production. Executive Order 14265, issued in April 2025, commits "to ensuring that the United States military possesses the most lethal warfighting capabilities in the world. America's defense industrial base is central to this effort."[155] The Department of War's *Acquisition Transformation Strategy* likewise provides a road map to regaining the capability and capacity to equip the military for war.

US Army Space and Missile Defense Command officials cut the ribbon at the dedication ceremony for the Digital Simulation and Analysis Center at Redstone Arsenal, Alabama, August 7, 2025 (US Army photo by Allen Meeks).

The strategy identifies the shortcomings of capability development and the need to "deliver weapons at the speed of relevance."[156] The primary issue is that the DIB takes too long to produce the PGMs required for large-scale combat operations. The July 2025 strategic estimate described how the DIB is facing the challenge of rapidly increasing its production of 155mm artillery rounds—a relatively simple munition.[157] The challenge posed by PGMs is an order of magnitude greater in complexity and scale than the challenge posed by 155mm artillery rounds.

In the aforementioned war games, the US military "expended its global LRASM inventory within the first few days in all scenarios."[158] According to government data, in 2023, the production lead time for the Long Range Anti-Ship Missile was 24 months. These data meant, if a production line was required to surge, 24 months was the amount of time required to "deliver the *first* missiles—not the *last* ones."[159] Some of the existing challenges that impact the speed of production are the long lead times for producing critical subcomponents such as solid-propellant rocket motors.[160] The US Navy is making headway in this area by increasing the production capacities of existing vendors and contracting with new companies to minimize single points of failure.[161] The Department of War is also leveraging the Defense Production Act's Title III, which "allows the President to incentivize the domestic industrial base to expand the production and supply of critical materials and goods."[162] In September 2025, the government invested more than $32 million to "expand the solid

rocket motor (SRM) industrial base," bringing in two small businesses to expand this critical base and strengthen the supply chain.[163] Other defense companies that comprise the commercial side of the DIB, such as RTX Corporation, are also increasing their PGM production to help refill inventories.[164] The production of complex defense systems involves critical and strategic materials that are sourced using global supply chains. These materials include rare earth elements, many of which are imported from overseas, making them extremely vulnerable to embargoes and slowdowns.

Strengthening Supply Chains

China is a key part of the US military's existing supply chains for critical and strategic materials. Currently, China dominates 90 percent of the global supply chain for rare earth elements, which are required for defense and commercial production.[165] In 2022, magnets in the F-35 fighter jet's engine were found to be sourced from China. This revelation led to a holistic reexamination of the supply chains of many rare earth elements.[166] China produces more than 90 percent of the world's "high-performance rare earth magnets" and has shown it will leverage this near monopoly through export controls.[167] This dominance also includes market manipulation, as China has flooded the market with raw materials such as nickel and cobalt. This practice drives down the prices of raw materials, making mining in the United States—and developing a competing supply chain—uneconomical.[168] Thus, strengthening the military's supply chains will take time.

The US government is implementing new policies to reshore and strengthen the supply chains of critical and strategic materials. The recent Executive Order 14285 and presidential memorandum "Simplifying the Funding of Energy Infrastructure and Critical Mineral and Material Projects" are encouraging and funding projects that will reshore or secure future supply chains.[169] One example of such projects is the reopening of the Stibnite Gold Project in Idaho, a gold-mining operation that will also extract antimony sulfide.[170] The Department of War used Defense Production Act Title III funding to award more than $50 million in support of the Stibnite Gold Project. This award coincided with the Russia-Ukraine War and the recognition of critical vulnerabilities in munition supply chains.[171] Additionally, a smelting facility is scheduled to open in Montana. This facility will process antimony sulfide into military and commercial production–grade antimony, a key component of explosives, night-vision technology, and infrared sensors.[172] But the depth of the problem is great. According to the US Geological Survey, "Of the 50 mineral commodities identified in the '2022 Final List of Critical Minerals,' the United States was 100% net import reliant for 12, and an additional 28 critical mineral commodities (including 14 lanthanides, which are listed under rare earths) had a net import reliance greater than 50% of apparent consumption."[173]

Although self-reliance is preferable, military planners have always used external methods to mitigate supply-chain risks in the event of an emergency or war. Such methods

include leveraging allies and partners to secure the supply chains of strategic and critical materials during wartime. Today, friend shoring can reduce US dependence on China for these materials.[174] The current and previous administrations have begun the process of friend shoring, which will take time but help the nation move toward a wartime footing that will improve deterrence.

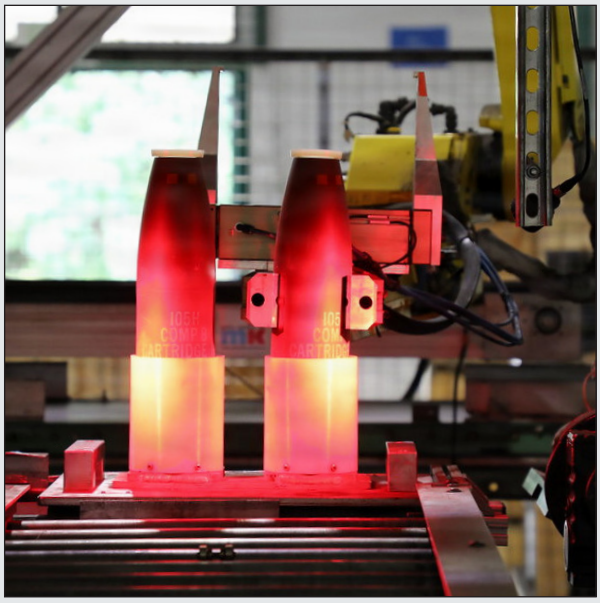
Stockpiling is a second way to address the supply-chain conundrum. Stockpiling provides insurance so a nation can continue its wartime production and support mobilization in the event of an emergency or war. The National Defense Stockpile has existed in different forms since Congress passed the Strategic and Critical Materials Stock Piling Act of 1939. This law was necessary because, though the United States has abundant natural resources, the country was and still is "deficient or insufficiently developed to supply the industrial, military, and naval needs of the country for common defense."[175]

Throughout the Cold War, the stockpile deterred the Soviet Union by ensuring the United States had the materials on hand to support the DIB, even if supply chains broke or slowed down due to conflict. In the late 1980s, at the height of the Cold War, the stockpile held materials valued at $9.6 billion.[176] Today, this same stockpile is a shell of its past self and consists of 50 strategic and critical materials worth only an estimated $1 billion.[177] A recent government assessment found the stockpile required an investment of more than $14 billion to replenish 88 materials and cover the military and civilian industries.[178] The stockpile includes critical materials such as antimony and cobalt, the latter of which is used in the production of batteries and in alloys supporting jet engines.[179] Replenishing the stockpile still requires much more work, and the process of reshoring will take time and resources. Reopening mines and processing facilities, as well as friend shoring, will strengthen supply chains but cannot replace strategic stockpiles. To increase its resilience, the United States must also rapidly increase the holdings within the National Defense Stockpile. The country must maintain an adequate supply of critical and strategic materials to provide a credible deterrent and continue production in the event of a national emergency.

Restoring the Manpower-Mobilization Enterprise

The outbreak of a European land war in February 2022 has reenergized concerns the United States and Europe are unprepared to mobilize. During the Cold War, the mobilization of manpower and equipment was a key component of deterrence. The Selective Service System was operational from 1948 through 1973, and though it did not operate at its maximum capacity, the system was integrated into the nation's approach to maintaining a large, standing military. Additionally, during the Cold War, the United States conducted large-scale mobilization exercises at the Joint and governmental levels.

The atrophy of the US mobilization enterprise began with the fall of the Berlin Wall in 1989 and the subsequent end of the Cold War. The last major



The refurbishment of 155mm munitions takes place at Blue Grass Army Depot (US Army photo by Dori Whipple, Joint Munitions Command).

national-level mobilization exercises were Nifty Nugget, Proud Spirit, and Proud Saber, conducted in the late 1970s and 1980s. These exercises identified major issues in transportation, manpower, and stockpiles, leading to significant improvements in strategic readiness.[180] Similarly, from 1969 through 1993, the US Army conducted annual Return of Forces to Germany exercises, which rehearsed the process of defending Europe from a Soviet invasion. These exercises stress tested logistics and transportation systems by rapidly moving military units from the United States to Germany.[181] The collapse of the Soviet Union and the ensuing military drawdown brought an end to these national- and service-level exercises. The Russia-Ukraine War is ongoing and tensions in the Indo-Pacific are increasing due to China's militarization. These factors have caused many national security professionals in academia, think tanks, and Congress to call attention to the United States' lack of preparedness.

Section 383 of the National Defense Authorization Act for Fiscal Year 2026 requires the Department of War to conduct a mobilization and readiness study to assess its ability to conduct Joint mobilization. This study will evaluate reserve components (that is, the US National Guard and Army Reserve), using Nifty Nugget as a model. The act directs the study to focus on moving forces into the Indo-Pacific area, testing "maritime sealift, airlift, rail, road networks, and prepositioned stocks."[182] Similarly, others have called for an Indo-Pacific exercise based on Return of Forces to Germany.[183] These activities are a start, but the Department of War needs to do much more to conduct a thorough analysis of how the enterprise reacts to the mobilization of its existing forces and to the expansion of the military.

The United States has not implemented total mobilization since World War II. Total mobilization occurs when all components of the military expand past their existing end strength. Total mobilization would only be implemented in a national emergency or in wartime and requires action from the president and Congress.[184] Each element of the mobilization enterprise requires testing, including the Selective Service System's process for notifying selected individuals and providing a better understanding of their skills and abilities. Is United States Military Entrance Processing Command, which will medically qualify the individuals selected for conscription, ready to increase its throughput rapidly? Are the

services prepared to expand to train, equip, and transport the individuals selected? Will emerging technological skills require a different kind of draftee than in the past? For example, in Ukraine, the mobilization of the civilian populace has tapped into cyber and information technology, leveraging drones and autonomous systems to offset a manpower deficit. These systems must work in concert to build the force necessary to meet the national emergency at hand.

Conclusion

Ensuring the nation has a robust and tested mobilization system, which can expand both military manpower and the economy, is a whole-of-government challenge. Increasing the speed of key-weapons production, strengthening US strategic stockpiles, and mobilizing the nation's manpower (and brainpower) for war are imperative parts of strengthening the nation's wartime footing. Attaining the codified goal of peace through strength will require effort and focus. Just as importantly, achieving this goal will require prioritization. These priorities must be based on a further exploration of the characteristics and requirements of a future war. The need for PGMs in large-scale combat cannot be overstated and requires the DIB to expand to supply critical components. These exquisite systems, however, must be balanced against the need for mass-produced munitions such as 155mm artillery rounds. In turn, the military must better appreciate the optimal mix of high-end, expensive capabilities and low-end, affordable capabilities. Finally, if the Department of War is to rebuild the National Defense Stockpile to attain a wartime footing, it must assess (1) where to make direct investments, (2) what critical materials should be reshored to strengthen supply chains, and (3) how to adjust policies to enable and incentivize the DIB to produce the munitions and equipment necessary for the next fight.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by the Office of the Secretary of the Army, Assistant Secretary of the Army (ASA) – Manpower & Reserve Affairs, HQDA G-4, and the Office of the Chief of Army Reserve cover topics such as:

- Sustaining the All-Volunteer Force
- Army Reserve Recruiting and Readiness
- Strategic Logistics

Force Modernization

The Department of War (DoW) is undergoing a generational change in how it defines and builds the tools the US military uses to win wars. This department-wide transformation is moving rapidly to get the right capabilities into the hands of war fighters. On November 7, 2025, in an auditorium at the National War College, Secretary of War Pete Hegseth gathered an audience of civilian and uniformed leaders who are responsible for the Department of War's internal processes. Also gathered were leaders from industry, who play a key role in developing and providing the cutting-edge materiel that gives US war fighters a competitive advantage.[185] Secretary Hegseth asserted existing defense processes are too slow, bureaucratic, redundant, and full of misaligned incentives. He stated the players in the room are not delivering the equipment the department needs at a speed and scale that would allow it to sustain a war-fighting advantage.

A Call to Action

Secretary Hegseth's speech incorporated the ideas of many of the system's observers, who had drawn similar conclusions and proposed new ways to address the underlying issues with the existing system.[186] The system had gone through many acquisition programs that were canceled before they delivered capabilities, others that took decades to deliver capabilities, and some that delivered capabilities war fighters did not need. These issues resulted in a system that seemed more focused on complying with processes than on achieving outcomes. Bureaucratic structures diffused authority across organizations and resulted in a slow, risk-averse system that rewarded individuals for following steps more than for delivering the right capability on time.

Concurrent with his speech, Secretary Hegseth directed the Department of War to tear down old structures and processes and "transform the entire acquisition system to operate on a wartime footing" and focus on results.[187] In the speech, he evoked the arsenal of democracy President Franklin D. Roosevelt first called for via radio broadcast in a fireside chat before the United States entered World War II—said his objective was to build and rebuild the arsenal of freedom.[188]

The Department of War is moving quickly to refine structures and processes and align incentives to achieve DoW priorities. Organizational change

Sidebar: The ULTRA, a fully autonomous, AI-driven tactical ground vehicle designed to operate in complex, GPS-denied environments, is staged for a reconnaissance mission during Panther Avalanche at Fort Bragg, North Carolina, January 29, 2026 (US Army photo by Specialist Nicole Miller).

Secretary of War Pete Hegseth delivers remarks at the National War College at Fort McNair, Washington, DC, November 7, 2025 (US Department of War photo by US Navy Petty Officer First Class Alexander Kubitza).

is difficult to achieve, and leaders play essential roles in realizing change that delivers desired results.[189] Leaders describe the purpose of changes, align structures with incentives, and can move the organizational culture to instantiate changes.

Secretary Hegseth was clear in his speech: The Department of War is speeding up the development of critical capabilities for war fighters. This effort is shared by most, if not all, important stakeholders. Arguing for a slow process that delivers irrelevant capabilities would be illogical. Still, as Secretary Hegseth described in his speech, several existing issues are misaligned with the desired outcome and can slow processes, including fragmented accountability, broken local incentives, and government behavior that disincentivizes industrial investment and efficiency.[190] As the department redesigns the structures that support acquisition, it will need to focus constantly on outcomes.

Reform Efforts

Defense-acquisition professionals use the concept of big-A acquisition, or the big A, when they talk about delivering capabilities.[191] The big A includes the systems that (1) define and validate capability needs and requirements, (2) allocate programs and resources, and (3) manage the acquisition and delivery of goods and services. Right now, all three systems are being revised.

Requirements

In January 2026, the Department of War replaced the much-maligned Joint Capabilities Integration and Development System with a new Joint Force Requirements Process.[192] The new process focuses the Joint Requirements Oversight Council on prioritizing Joint operational problems and capability gaps, better connects these gaps to the department's resourcing processes, and delegates the validation of most capability requirements to the

services. The US Army and other services are refining their individual processes to focus on speed, early and frequent input from war fighters and industry partners, and knowledge based on prototypes and experiments. The proponents of the Joint Requirements Oversight Council manual intend to learn from the first year spent implementing the new processes and plan to incorporate updates at the end of 2026.

Resourcing

Two reform initiatives are designed to speed up the alignment of resources with war-fighter needs. The first is the Requirements and Resourcing Alignment Board, cochaired by the deputy secretary of war and the vice chairman of the Joint Chiefs of Staff. Together, the leader of the Department of War's resourcing processes and the head of the requirements-oversight body will enable the department to align strategic priorities, capability requirements, and budget decisions. This effort should speed up the allocation of resources so emergent requirements are quickly resourced. The second new initiative, the Joint Acceleration Reserve, is a sum of money managed by the DoW comptroller. The comptroller can efficiently use the reserve to allocate resources to the most critical problems and the most promising and effective solutions.

In addition to broad DoW changes, the Army is undergoing significant processual and structural changes, including changes in how it builds its program objective memorandum and budget. The secretary of the Army directed a new process called central programming, which aims to make the Army program more coherent and responsive to senior leaders' inputs. The program evaluation groups the Army formerly used to build the program objective memorandum were stovepiped around the functions legally assigned to the Army. Since these functions are listed in Title 10 of the US Code, they are commonly referred to as Title 10 functions.[193] Instead of using program evaluation groups, the new, central programming process empowers a series of panels, each of which allocates the resources across all Title 10 functions to a portfolio of capabilities. The Army is using central programming for the first time in 2026 as it builds its fiscal year 2028–32 program objective memorandum; the service intends to learn from and update the new process as required.

Industry partners and academia compete at xTechOverwatch for Unmanned Systems (hosted by US Army Training and Transformation Command) for opportunities to continue development projects integrated within the US Army, October 23–29, 2025, Bush Combat Development Center – Innovation Proving Ground, Bryan, Texas (US Army photo by Austin Thomas).

Acquisition

Significant efforts are underway to remove the stovepipes in the acquisition system. The Department of War is streamlining and updating the acquisition and financial-management regulations. The goal of these updates is to delegate decision-and-review authority, reduce documentation requirements, and prioritize competitive prototyping. The Department of War directed the creation of a wartime production unit to speed up capability development. It also directed the creation of a new mission-engineering-integration activity that can quickly move emerging technology from concept to the force. The Department also directed the military services to establish portfolio-acquisition executives (PAEs) as the officials accountable for portfolio outcomes. These executives have the corresponding authority to structure programs; make prudent trade-offs between cost, performance, and schedule; use modular, open-systems architectures; and align contracting officers directly with the PAEs.[194]

Following DoW guidance, the Army stood up six PAEs focused on different capabilities. Each PAE consolidates eight functions under one office: requirements, sustainment, systems centers, resourcing, acquisition, contracting, testing and evaluation, and foreign military sales.[195] The Army PAEs will be able to make trades across their portfolios and prioritize efforts in each area based on war-fighter needs and technological breakthroughs.

External Stakeholders

Changes to all three big-A systems are interrelated and will impact one another. At the same time, stakeholders outside the Department of War can impact the success of systemic changes. Industry partners will need to react to systemic changes because the emphasis on speed will require companies to change some of their internal systems, and the department may need to change how it incentivizes industry behavior. The Department of War wants to open the playing field so nontraditional partners can join the group that provides capabilities.[196] But choices need not be either-or, pitting nontraditional partners against traditional partners. Instead, the department should look to build both-and solutions. Much of the DoW workforce will need to learn how incentives work for nontraditional partners and empathize with the partners' concerns and issues.

Congress is an important stakeholder in these reforms. In 2025, in the Senate Committee on Armed Services and the House Armed Services Committee, Senator Roger Wicker introduced the FoRGED Act and Representatives Mike Rogers and Adam Smith introduced the SPEED Act. Both acts focus on changing the rules to provide the right capabilities to the war fighter quickly.[197] Many of the provisions of these acts made it into the National Defense Authorization Act for Fiscal Year 2026, and the Senate Committee on Armed Services and the House Armed Services Committee are clearly champions of these changes.

Appropriations Committees, however, have not been as supportive in enabling the Department of War to reprogram appropriated funds without coming back to Congress.[198] A 2024 report by the Commission on Planning, Programming, Budgeting, and Execution Reform recommended budget-line consolidation and increases in reprogramming thresholds so the department could react more quickly to a changing environment.[199] To date, appropriators have resisted these recommendations. In the 2026 appropriation, they did not raise reprogramming or allow the Army to consolidate budget lines for equipment to counter unmanned aircraft systems. This equipment is an example of a capability the Army needs to field and evolve rapidly.[200]

Conclusion

Although the reforms described in this section are nascent, the Department of War is trumpeting some early successes. In February 2026, United States Central Command confirmed the first use of a LUCAS drone in the 2026 Iran war.[201] The drone was developed by SpektreWorks, a start-up in Phoenix, Arizona, that reverse engineered the Iranian Shahed one-way attack drone and fielded it to the US military in eight months.[202] The speed of this effort is promising.

Earlier in February 2026, the Pentagon selected 25 vendors who will compete for $150 million worth of orders to deliver small, inexpensive unmanned aircraft systems as part of the DoW Drone Dominance program.[203] Vendors will bring their equipment to Fort Benning, Georgia, where military-drone operators will fly and evaluate the prototypes, resulting in orders within a month. The Drone Dominance program sends a clear demand signal to industry and provides capabilities to war fighters quickly. The goals of the program are to acquire capabilities quickly, learn and iterate to improve capabilities, and reduce costs—clearly aligned with the Department of War's change effort.

This change effort is nascent and shows much promise but will require the attention of the department's leaders—military and civilian—to ensure it succeeds. Leaders at all levels must align incentives to encourage behaviors consistent with desired outcomes. A wartime footing demands leaders who provide clear priorities, quickly iterate and learn, and break through obstacles to get the right capabilities into the hands of war fighters. Finally, to be successful, these reforms require bottom-up refinement and innovative analyses of the future characteristics of warfare.

The *Estimate*'s appendix includes a list of strategic research questions that directly relate to the analysis provided in this section. Questions sponsored by the Office of the Secretary of the Army; Assistant Secretary of the Army (ASA) – Acquisition, Logistics, and Technology; the US Army Space and Missile Defense Command; and the Military Surface Deployment and Distribution Command cover topics such as:

- High-Low Capability Mix
- Modernization of Acquisition Processes
- Application of AI for Global Transportation Planning

Academic Year 2026–27 Strategic Questions Research List (SQRL)

This list of strategic issues, a tailored compilation of 105 questions provided by 47 organizations across the Department of War (DoW), augments the US Army War College's accompanying assessment of regional, national, and institutional challenges by offering insight into pressing matters impacting defense organizations. The list will help the research community focus on topics important to the US Army and the broader defense enterprise.

Questions are listed under the organizations sponsoring the research. Engagements with the sponsors can foster the refinement of research questions and facilitate the submission of research that addresses a critical topic outlined in this list. To enable this engagement during the research process, the organizations have identified points of contact. The US Army War College Strategic Research and Assessment Department maintains the corresponding list, and prospective researchers can request contact information from the Strategic Research and Assessment Department.

Questions marked by this icon indicate archival collections are available at the US Army Heritage and Education Center. Please contact AskRidgway@usawc.libanswers.com for research support.

Sidebar: As part of Arctic Aloha 26, US Army paratroopers assigned to the 2nd Infantry Brigade Combat Team (Airborne), 11th Airborne Division, land on Malemute Drop Zone at Joint Base Elmendorf-Richardson, Alaska, November 14, 2025 (US Army photo by Correy Matthews).

Office of the Secretary of the Army

1. The Moon Shot

What revolutionary capabilities or processes could emerge or mature over the next five to 10 years if the Army leverages current, cutting-edge, and commercially available artificial intelligence and machine-learning (AI/ML) technologies? What problem sets and cases would these capabilities and processes address to give the Army a decisive advantage over its adversaries? What business practices and staff processes could these capabilities augment or enhance to reduce headquarters staffing and free up manpower for operational forces?

This question demands outside-the-box thinking and a survey of novel ideas that account for the changing characteristics of the modern battlefield—not simply an assessment of ongoing efforts or a push for natural evolutions of existing systems.

2. Authorities

What new authority, policy, or process changes would accelerate the Army's capabilities-development and acquisition processes, specifically to leverage public-private partnerships with the tech industry to identify, create, and field emerging technological capabilities rapidly?

Addressing this question requires a deep analysis of existing processes and authorities, as well as where they reside. Whereas identifying adjustments to processes and authorities within the Army's control is essential, researchers should address all pertinent processes and authorities and suggest potential approaches to influencing change outside the Army, including in the Office of the Secretary of War.

3. High-Low Capability Mix

What is the appropriate mix of high-end yet costly capabilities (for example, M-1 Abrams tanks and AH-64E Apache attack helicopters) and low-end, affordable, and attritable systems (for example, first-person-view unmanned systems) across the Army's operational forces to balance core war-fighting requirements and emerging threats? What are the doctrinal implications of a high-low-mix Army? These questions require an assessment of current force structure and doctrine, and an understanding of emerging capabilities, as seen in Ukraine, and how those capabilities can neutralize core war-fighting doctrinal competencies. The insights gained in answering these questions will inform resourcing, capability allocations by unit type, and force-structure changes in future Army Transformation Initiative decisions.

Office of the Chief of Staff, US Army

4. Indo-Pacific Strategy

What is the Army's role in the execution of a denial strategy against China in the Indo-Pacific? What does the Army bring to the fight and how does it contribute to the Joint Force?

5. Value of Landpower

In a multidomain conflict with China, especially given the ubiquity of space-based capabilities and increasing reliance on autonomous systems, what is the appropriate role for Landpower?

6. Unmanned Warfare

The media and trade shows are dominated by the latest unmanned and autonomous technologies. Does the rise in this potential shift to unmanned warfare across the land, air, and sea domains represent a revolution in military affairs? Why or why not?

Assistant Secretary of the Army (ASA) – Manpower & Reserve Affairs (M&RA)

7. Sustaining the All-Volunteer Force

As the Army competes for talent and implements a "next-generation Army service model" for the digital age, how can it sustain the health of the All-Volunteer Force? Research should assess the interconnected challenges of retaining mid-career leaders through more fluid, project-based career paths while simultaneously evolving the Army's value proposition, marketing, and recruiting strategies to attract successfully future generations (Alpha, Z, Y, and X) shaped by AI and shifting views on public service. This topic allows for a broad discussion on personnel challenges or a focused study on a specific aspect, such as nontraditional incentives or the effects of new service models on the force.

8. Personnel Impacts of the Homeland as a Theater of Operations

What are the long-term personnel and readiness implications of the Army's expanding role in homeland defense missions? The research should analyze how to balance training for domestic operations with large-scale combat operations (LSCO) readiness and examine the effects of these dual-role requirements on soldier morale, recruitment, and retention, particularly within the National Guard, and propose specific legal, ethical, and training frameworks to mitigate the risk of harm to US citizens and prevent moral injury to servicemembers.

ASA – Installations, Energy, and the Environment (IE&E)

9. Risk, Readiness, and Resource Allocation

Given the Army's finite budget for facilities, how should it comprehensively assess risk to balance investments in energy resilience objectively against other critical infrastructure priorities, such as unaccompanied housing, child development centers, and mission-essential training facilities? This research should propose a framework that quantifies the operational readiness impact of infrastructure deficits in both areas, allowing Army leaders to make data-driven, defensible decisions on resource allocation that balance immediate quality-of-life needs with the strategic imperative of ensuring mission continuity during a catastrophic utility failure.

10. Degraded Resupply: An Institutional Challenge

Should the nation's next conflict be fought against a near-peer adversary, sustainment operations will be challenged across all war-fighting domains. What kind of instruction should be integrated into institutional training and leader development courses to prepare leaders at the tactical and operational levels to operate efficiently and dominate future contested environments in which resupply operations may be severely degraded? How should this instruction be adapted in response to the new formations and new capabilities being deployed? Research should address the mitigation of risk to all classes of supply and services.

ASA – Acquisition, Logistics, and Technology (AL&T)

11. Integrating Unmanned Systems

What is the optimal operational concept for integrating unmanned systems, specifically one-way attack and loitering munitions, into armored formations to offset reliance on exquisite and expensive systems or munitions to shape all-arms maneuver operations on the modern battlefield?

12. Modernization of Acquisition Processes

How can emerging technologies such as AI and blockchain be leveraged to streamline defense acquisition workflows, enhance efficiency, and improve transparency? The research would analyze real-world applications and pilot programs to identify opportunities for innovation and scalability within acquisition systems.

ASA – Financial Management and Comptroller (FM&C)

13. Fiscal Preparation of the Environment

To what extent can combatant commands leverage fiscal preparation of the environment (FPE) to achieve economic effects and generate tangible operational and tactical military advantages in a near-peer competition? This question can be addressed by analyzing a specific region, or researchers could approach it more broadly across regions to understand the varying levers of FPE and what variables impact its success.

14. Money as a Weapon System

Beyond traditional contracting and pay agent support, what is the next evolutionary step for money as a weapon system in the context of great-power competition?

Headquarters, Department of the Army (HQDA) G-1

15. Human-Machine Teaming

Given the strategic certainty that widespread artificial general intelligence integration will fundamentally alter the cognitive and leadership roles of every soldier, how must the Army redesign its leader development models and cultural norms to cultivate a force that excels at integrated human-machine teaming, ensuring human capital remains the decisive element?

16. AI and Personnel Analytics

As the Army moves toward AI-driven personnel analytics, algorithms will inevitably influence career-altering decisions. What ethical guardrails, oversight mechanisms, and cultural principles must the G-1 establish to forge unwavering trust in this new paradigm, ensuring efficiency gains do not come at the cost of the Army's values or the individual soldier's dignity?

HQDA G-2

17. People's Liberation Army Operational Endurance

How long can the People's Republic of China sustain a protracted conflict? What is the People's Liberation Army's operational endurance? This research should incorporate lessons from the Russia-Ukraine War with respect to sanctions and military reconstitution and examine how these lessons may inform and influence the People's Republic of China's decision making.

18. Logistics Targeting by Strategic Competitors

How are China and Russia refining their hybrid warfare doctrines to integrate cyber-physical attacks against military and commercial logistics networks? This research should assess the potential effects these types of attacks could have on the US Army's ability to project and sustain combat power across multiple theaters, particularly its reliance on vulnerable civilian partners. One potential approach could be to examine how the Army and United States Transportation Command could adapt their intelligence and counterintelligence postures to detect and counter adversaries' use of nontraditional methods—from hacking commercial logistics software to exploiting public webcams and dual-use infrastructure—to gain granular, real-time intelligence on force and supply movements.

HQDA G-3/5/7

19. Support to Homeland Defense

What are the core total Army (all components) force contributions in support of homeland defense? How should the Army transform organizations to support the Golden Dome, border security, and federal law enforcement? What are the critical capabilities needed to provide these functions? What risks do these changes pose for the total Army, the Department of War, and US national security? How could the total Army be shaped to maximize its effectiveness and responsiveness for the differentiated demands of homeland defense missions and global expeditionary operations requiring capability to seize, hold, and defend limited key terrain? This research should focus on force constructs, equipment templates, and components.

20. Burden Sharing

Given the *2026 National Defense Strategy*'s emphasis on burden sharing and providing "critical, but more limited support" to allies and partners, what is the US Army's role in fostering a network of capable allies and partners? Within the paradigm of burden sharing, does the Army need a new model for security cooperation, given reductions in security force assistance brigades and other similar capabilities? What best practices could the Army build upon to incentivize and enable burden sharing, including with respect to foreign military sales and technical interoperability? Should the Army develop a single, global approach to burden sharing or should it vary by region?

21. Cross-Service Integration

Long range, cross-domain, precision effects allow the Army to operate more widely and routinely in the air-land seam, beyond the fire support coordination line, and into and through the increasingly active and congested air and maritime domains. As the Army invests in and fields advanced capabilities such as long-range precision fires, one-way attack unmanned aircraft systems, and electromagnetic warfare weapons, what changes are required across DOTMLPF-P (doctrine, organization, training, materiel, leadership and education, personnel, facilities, and policy) to integrate Army operations into battlespace and domains historically dominated by other services? At the service level, how might changing Army capabilities create new interservice dependencies or opportunities for collaboration? What changes to service functions are necessary to optimize Joint interoperability and war fighting at the operational level?

22. Posture Shift

Given the *2026 National Defense Strategy*'s pivot to a "peace through strength" model that prioritizes homeland security and the deterrence of China, several key questions emerge for the US Army's global posture. What specific changes must the Army implement in the USEUCOM, USAFRICOM, and USCENTCOM areas of responsibility to build a more robust and persistent presence in the Indo-Pacific that effectively demonstrates strength? How can these realigned forces be actively used in strategic competition to create and sustain advantages for US national objectives? What are the principal risks to the Army, the broader Department of War, and US national security that result from this significant strategic shift? What measures can the United States take to mitigate these risks, ensuring mission success in the Pacific while maintaining a credible deterrent in other critical regions?

23. Military Personnel Exchange Program

How can the US Army more strategically leverage its Military Personnel Exchange Program with allies and partners around the world to align with national strategic and military goals? At what echelons do the exchanges yield the greatest return on investment over time to enhance and strengthen international relationships and build greater interoperability in the event of large-scale conflict?

HQDA G-4

24. Strategic Logistics

Given the emphasis on distributed operations in "Army transformation and acquisition reform," the increased forward presence in the Indo-Pacific, and advanced manufacturing, what strategic adjustments to the Army's logistics and sustainment architecture (including pre-positioning, industrial-base modernization, and supply chain resilience) are required, and how should the G-4 lead the implementation of these changes to ensure total Army readiness in a contested environment?

25. Organizational Clothing and Individual Equipment (OCIE)

Accurately forecasting the demand for organizational clothing and individual equipment (OCIE) is challenging due to changing operational tempos, new unit activations, deployments, and equipment life cycles. These inaccurate forecasts can lead to costly overstocking of some items or critical shortages of others, impacting soldier readiness. In some cases, such as on the Korean Peninsula, the Army stocks OCIE for Korean Service Corps personnel and Korean Augmentation to the United States. How can the Army develop and implement a predictive model to forecast OCIE demand more accurately and link it into the transportation system to ship the stocks quickly to the point of need?

HQDA G-6

26. Communications Talent Management

Given rapid advancements in communications technology, how can the Army leverage existing talent for emerging requirements without risking the degradation of current missions? This research should examine which military occupational specialties related to communications are already—or will soon become—legacy positions, and how servicemembers and civilians in these specialties could be upskilled with new skills and aptitudes. If possible, this analysis should weigh the benefits of reclassifying or retraining existing servicemembers and civilians against deliberate recruiting efforts.

27. Dynamic Spectrum Sharing

Given the tension between the increasing military communications requirements of modern warfare and civilian industry and the desire of commercial telecom providers to expand broadband access, how can the Army, or the broader Department of War, leverage and implement a dynamic spectrum-sharing capability to maximize the use of the spectrum most efficiently? This research should account for the differences between military and industry requirements as they pertain to modernizing the associated technologies and the underlying challenges involved in implementing the capability. An aspect of this project could also address how any recommendations would impact coalition warfare.

HQDA G-8

28. Fiscal Agility in Next-Generation Command and Control (NGC2)

The Army is moving toward an integrated, software-centric command-and-control (C2) architecture. The G-8 needs to lead the transition from the traditional hardware-buying funding to more flexible resourcing. How can the Army's resourcing framework be restructured to support the continuous, iterative procurement of AI-driven C2 applications, and what specific metrics should the G-8 use to measure "decision advantage" value against dollars spent in a nonlinear acquisition cycle?

29. Strategic Realignment: The Golden Dome and Hemispheric Defense

The *2026 National Defense Strategy* introduces a significant focus on homeland and hemispheric security, including the Golden Dome air and missile defense initiative. What are the resource–trade-off implications of prioritizing the Golden Dome missile defense and border security support missions over traditional "overseas contingency" force structures, and how must the Army's program objective memorandum adjust its prioritization to reflect this 2026 pivot?

HQDA Office of the Surgeon General

30. Sustaining Medical Equipment Modernization

How can the Army best sustain a medical equipment posture for the operational force that remains relevant and ready? Given the rapid innovation of medical technology and equipment, what risks may be posed to operational forces? Medical equipment and technology advance much faster than the life cycle of standard Army equipment. What solutions can ensure a relevant, financially sustainable operational medical force?

31. Medical Operations in LSCO

How does US Army medicine need to adapt to LSCO? What structural or organizational adjustments are necessary to account for the expected casualties of modern war? This research can address potential adaptations across the DOTMLPF-P framework as a starting point for understanding current issues. Additionally, this research should account for the risk of failing to modernize medical operations and the associated opportunity costs of any proposed recommendations.

HQDA Office of the Chief of Engineers

32. Engineering Victory: Aligning Theater Design, Posture, Engineering, Logistics, and Strategy for Protracted Conflict

The success of the entire strategic enterprise—from joint reception and staging to sustaining multidomain operations—will depend on the ability to establish, protect, and maintain ports, airfields, strategic and operational lines of communication, logistics nodes, and forward operating positions rapidly. Given many of the Army's core construction, engineering, and sustainment capabilities reside in the reserve components, how can the Department of War synchronize strategic policy, Joint logistics, and engineering efforts to open, set, and sustain the theater for a protracted LSCO scenario, particularly in the Indo-Pacific? Research should provide actionable recommendations that bridge the gap between engineering, logistics, and strategy, ensuring the Joint Force can deploy, fight, and win without culminating prematurely.

33. Engineering Restoring Dominance in Counter-Mobility and Landmine Warfare

Considering the demonstrated effectiveness of landmines in recent LSCO, such as the Russia-Ukraine War, what specific and comprehensive DOTMLPF-P changes are required to field a modernized, multi-echelon landmine warfare capability? How must the Army balance the development of low-cost, expendable, and attritable systems for employment en masse against the continued quest for advanced, networked munitions to achieve intended obstacle effects? What policy adjustments, industrial base mobilization, and training adjustments in the context of deliberate transformation, are required to regain dominance in this critical war-fighting area for future conflicts? This analysis should provide actionable recommendations for fielding a modernized, multi-echelon, counter-mobility capability that can effectively disrupt, turn, fix, and block a peer adversary and enhance the effectiveness of US fires and maneuver.

HQDA Office of the Chief of Chaplains

34. Spirituality and Cognitive Warfare

How might mental health, spirituality, and individual resiliency function as protective factors against cognitive warfare, especially as China continues to bolster its capabilities? How does China see its core socialist values intersecting with cognitive warfare? Does China believe its values inform this kind of warfare, other types of warfare, or protection against adversary activity?

35. Reevaluating Educational Experience

How might the talent-based recruiting programs for young digital natives redefine the necessity of college or advanced degrees for key military occupational specialties (MOS) across the Army and the Joint Force? If applied toward cyber or information specialties, how do these new standards impact other specialties to include professional officers? Where else (to include physical fitness, height and weight, and permanent change of station) should standards adapt to MOSs?

HQDA Office of the Provost Marshal General

36. Human-Machine and AI Integration into the Protection War-Fighting Function

How can the Military Police (MP) Corps leverage AI and real-time data fusion and subsequently operationalize this fusion across the MP enterprise to gain an edge in anticipating and neutralizing future threats and hazards? This study should focus on the implications of protection-focused predictive AI tools and the development of AI target recognition. Focusing on these areas will enable future MP formations to identify threats in the rear area and enable the Army to address the problem of protecting contested logistics during LSCO both on land and in the littorals.

37. Detention Operations in United States Indo-Pacific Command

How does the Army, as part of the Joint Force, execute detention operations in the Indo-Pacific region? What are the implications of adversary anti-access/area-denial capabilities for the Army's ability to conduct detention operations in a contested environment? This study should look at the potential impacts of reserve force delays in the Indo-Pacific theater (such as power-projection issues or competing security requirements), partner-nation agreements (regarding detention operations), the capacity of partner-nation MP formations, and possible changes to doctrine or policies to account for identified impacts.

Director of the Army National Guard

38. Reserve Component Support to Homeland Defense

Should the Army redesign its reserve component forces to enable the prioritized homeland defense mission? This research should consider whether the Army should continue to use its current structure and task organize to support homeland defense missions or design purpose-built forces for homeland defense as part of its force structure. How would these different options impact training, readiness, and modernization?

39. Army National Guard Role in Establishing Deterrence

What is the role of the Army National Guard in establishing deterrence by denial within the Western Hemisphere and the Indo-Pacific? This research should assess how the Army, as well as the geographic combatant commands, can use the Army National Guard within campaigning activities to support the provision of critical but limited support to allies and partners. Approaches can examine the transformation of existing programs like the State Partnership Program or novel concepts for employing the unique capabilities within the reserve components.

Office of the Chief of Army Reserve

40. Army Reserve Recruiting and Readiness

How can the Army Reserve best adapt its approach to stationing to drive improvements in recruiting and, ultimately, readiness? This research should examine potential structure modifications that support improving unit manning levels and assess how the Army Reserve can posture forces to support the Army and the Joint Force.

United States Northern Command (USNORTHCOM)

41. Civil Support to Defense Activities: A New Paradigm for Homeland Defense

How should the Department of War define and operationalize civil support to defense activities (CSDA) to leverage interagency capabilities and resources effectively during homeland defense operations within the continental United States. This question explores the doctrinal, organizational, and procedural shifts required to implement a CSDA framework. Research should propose a formal definition for CSDA, contrasting it with the established defense support of civil authorities (DSCA) model. It should also develop a standardized request mechanism, akin to a reverse request for assistance, to enable the Department of War to solicit specific capabilities from civil agencies. Key considerations include navigating disparate authorities, ensuring rapid resource allocation, and establishing unified C2 structures in a time-constrained environment in which interagency interoperability is paramount for a successful defense of the homeland.

42. Protecting the Homeland: A Joint Force Strategy for Counter-sUAS Defense of Critical Infrastructure

What is the optimal framework for the Joint Force to conduct real-time and steady-state counter-small unmanned aerial system (C-sUAS) protection of defense critical infrastructure, and how can the Department of War incentivize or direct unified service investment to field these capabilities rapidly? Given the proliferation of low-cost, high-lethality sUAS technology by malign actors, this research must address the unique challenges of operating within American airspace and the inconsistent threat perception and prioritization across the services, each responsible for its own installation protection. The study should propose Department of War–level strategies to stimulate joint investment and recommend a multilayered defense concept integrating federal, state, and local partners. Furthermore, it should examine the legal authorities and C2 mechanisms required for a cohesive and agile national defense against the C-sUAS threat.

United States Southern Command (USSOUTHCOM)

43. China's Military Projection in Latin America

This research should apply an appropriate and standardized framework and methodology to develop a comprehensive analysis of the current and future capabilities of China to project military power in the Latin American and Caribbean region over the next three to five years. Focus countries should include Argentina, Brazil, Chile, Ecuador, Mexico, and Peru and address potential dual-use infrastructure.

44. The Role of AI in Enhancing Regional Security

This study should explore how AI can be integrated into training, exercises, and operations to address transnational threats, improve decision making, and enhance operational readiness in the Western Hemisphere. This research should examine the applications of AI in regional security, focusing on its role in threat detection, predictive analytics, and optimizing disaster response. It should also explore how AI can be incorporated into training programs and exercises to improve interoperability with partner nations. Finally, the study could address ethical considerations and propose strategies for integrating AI into SOUTHCOM's training and operational frameworks.

United States Army Western Hemisphere Command (USAWHC)

45. Transnational Threats

How can the Army enable regional partners within the Western Hemisphere to counter the growing influence of transnational criminal organizations and terrorist organizations effectively? This study should develop a comprehensive analysis of ways and means for regional partners to address transnational threats over the next three to five years.

46. Hospital Outflow in Large-Scale Conflict

Historical precedent has demonstrated the feasibility of converting large civilian venues into temporary medical facilities. The Hotel2Hospital Project has shown promise in developing a framework for converting hotels into temporary hospitals. How can the Department of War develop a more resilient and effective medical response strategy for future large-scale conflicts, ensuring the US health-care infrastructure can withstand the immense pressures of a national crisis?

47. Setting the Theater for Homeland Defense and Power Projection

Given the strategic emphasis on the homeland, and as the Theater Army for US Northern Command, how should United States Army Western Hemisphere Command approach setting the theater to balance the unique requirements of homeland defense with the institutional requirements of force projection? This research can explore the problem from numerous perspectives, including examining shifting authorities, varying governmental responsibilities, and doctrinal adjustments specific to the homeland.

United States Indo-Pacific Command (USINDOPACOM)

48. Burden Sharing

The 2025 *National Security Strategy of the United States of America* and the *2026 National Defense Strategy* demand a major shift in burden sharing, expecting allies and partners to do more on certain aspects of regional security. One example is the Republic of Korea taking primary responsibility for deterring North Korea with critical but more limited US support. What are the strategic and operational implications of burden sharing with northeast Asian allies like the Republic of Korea and an increasingly militarized Japan? Are those burden sharing implications different when compared to allies like Australia or other NATO allies with stakes in the Indo-Pacific region?

49. Deterrence by Denial

The *National Security Strategy* and the *National Defense Strategy* both direct a strong denial defense along the First Island Chain. Conceptually, does deterrence by denial apply as equally to geographies like Oceania and Diego Garcia as it does to the First Island Chain?

US Army Pacific (USARPAC)

50. Posture and Sustainment in the Pacific

How can the Joint Force generate new options for overcoming the challenges of sustainment? How does posture evolve to permit consistency while avoiding being targetable? How do Landpower forces prioritize efforts or determine thresholds to maximize readiness while distributing nodes to avoid overconcentration?

51. Protracted Warfare

How can land forces generate options for policymakers that expand the battlefield without escalating response? What preparations—active or passive—can be executed in campaigning oriented toward protraction in conflict? How do strategic deception and information management shape protraction options?

United States Forces Korea (USFK)

52. The South Korean Conditions-Based Operational Control Transition Plan

The Conditions-Based Operational Control Transition Plan transitions wartime operational control to South Korea and increases burden sharing while maintaining a robust United States–South Korea alliance. This shift may reshape command relationships, interoperability, and contingency-response capabilities. How will United States Forces Korea adapt its operational and planning frameworks to support parallel and combined command structures while ensuring effective deterrence and response to regional threats (such as China, North Korea, and Russia)?

US Eighth Army (EUSA)

53. South Korea as a Power-Projection Platform

What impact does the US force presence in South Korea have on a People's Republic of China crisis or contingency response?

54. Replacing the Korean Rotational Force with a Permanent Brigade Combat Team

This study should research and examine the economic, operational, and quality-of-life benefits of replacing the nine-month rotational Stryker brigade combat team of the Korean rotational force operation with a permanent Stryker brigade combat team stationed in South Korea.

US Forces Japan (USFJ)

55. Interoperability Assessment

How should US Forces Japan measure interoperability with its Joint Operations Command? This research should identify and distinguish factors of interoperability that are specific to this relationship as well as more general interoperability measurement approaches.

56. Japan as a Power-Projection Platform

How can the US Army enable US forces to project power from Japan? How does this effort differ from US power projection in South Korea or other allied nations?

US Army Japan (USARJ)

57. Enhancing Deterrence in the Pacific

How can the US Army best leverage forward-deployed posture in Japan to enhance deterrence against adversaries in the Indo-Pacific, considering the evolving security environment and the capabilities of regional allies?

58. Transforming US Army Japan

How should Multidomain Command – Japan organize for competition, crisis, and conflict, assuming it must maintain its current bilateral roles, perform Army forces responsibilities, and conduct multidomain operations?

United States European Command (USEUCOM)

59. Strategic Impacts of the Proliferation of Unmanned Systems

How has the mass proliferation of unmanned systems used in the Russia-Ukraine War impacted how both nations wage war? This research should move beyond the tactics of new technologies to explore the strategic implications of these changes. A potential approach could be to focus on the direct and indirect impact technology is having on the other war-fighting functions like C2, intelligence, sustainment (to include enterprise structure of manufacturing), and protection. Another path could explore broader institutional changes and adaptations across the DOTMLPF-P framework.

60. Russian Training

How has Russian training—in theory and practice—changed throughout the Russia-Ukraine War, and what are the potential long-term consequences of these adjustments?

United States Africa Command (USAFRICOM)

61. Scaling Back Efforts in Africa

How could the United States leverage military partnerships and basing agreements in Africa to advance future strategic objectives, including securing access to critical natural resources and safeguarding key sea lines of communication?

62. Security Vacuum in Africa

How would a prolonged United States–Iran war reshape strategic competition in Africa, and what long-term security vacuums might China, Iran, or Russia exploit at the expense of US influence?

US Army Europe and Africa (USAREUR-AF)

63. Historical Analysis: Reconstitution

How have major powers, including Russia, historically reconstituted military forces after heavy losses, and how can NATO integrate reconstitution planning into the Eastern Flank Deterrence Initiative construct?

64. Historical Analysis: The Defense

How have armies historically layered reconnaissance, fires, and maneuver in defense-in-depth operations, particularly against mass and momentum in warfare? Conversely, how have adversaries historically bypassed or degraded defensive lines? What lessons can NATO draw from these historical defensive operations and how can these lessons inform the Eastern Flank Deterrence Initiative?

65. Historical Analysis: Military Assistance

How has the United States historically provided military assistance to foreign nations engaged in conflict without becoming a direct combatant? How do these lessons apply differently to a land-locked country like Ukraine versus an island like Taiwan? How can the United States prevent or mitigate the impact of adversarial or opportunistic actors from applying these same lessons to frustrate US military operations?

United States Army Southern European Task Force, Africa (SETAF-AF)

66. Economic Investments in Africa

How can the Department of War best support private investment opportunities in Africa to enable co-development and coproduction in industries that could support US interests?

67. Prioritizing Efforts in Africa

Considering the diverse geopolitical landscape of Africa, which nations offer the most strategic value for partnerships aimed at promoting security and stability to prevent the export of terrorist activities and/or to provide access to critical minerals, and which engagement strategies (for example, security-sector reform, capacity building, or joint exercises) provide the greatest return on investment (immediately or over the long term)?

Security Assistance Group – Ukraine (SAG-U)

68. Offense Versus Defense Dominance

The persistent surveillance and firepower provided by unmanned systems, their low cost, which allows widespread proliferation, and advances in electronic warfare in the Russia-Ukraine War seem to have shifted the offense-defense balance significantly toward the offensive. Do the emergent technologies developed in the Russia-Ukraine War mark a return to overwhelming defense dominance in war? If so, are these characteristics of contemporary war generalizable beyond Ukraine to wars the United States may fight in the future, and what are the larger strategic implications? What might shift the balance toward offensive dominance (or weaker defense dominance), and how should the United States structure its force in this environment?

69. Adversary Lessons from Ukraine

We have ample evidence Russia is learning, adapting, and innovating from its war with Ukraine. China, Iran, and North Korea are studying the war and making changes as well. Further, non-state actors and weak states may also learn a great deal from unmanned systems development. What lessons could US adversaries be learning from the Russia-Ukraine War, and how might they be implementing changes across the DOTMLPF-P in response to their observations? How will these lessons impact how they may fight the United States in the future or limit US involvement in a regional crisis?

United States Central Command (USCENTCOM)

70. Autonomy in the Middle East

As part of the US priority to help countries in the Middle East assume primary responsibility for their own defenses, to what extent can countries in the Middle East employ active border defense constructs to allow them to reduce long-term reliance on the United States? What would this defense construct look like, and is it sustainable?

71. Water Scarcity

How might water scarcity and desertification affect post-conflict stabilization and development efforts in Northern Africa or the Middle East, and what can be done to mitigate this problem in conflict-prone regions to allow for a reduced requirement for long-term US military support for security and stabilization?

US Army Central (ARCENT)

72. Adapting to China's Presence

How should the US military adapt its long-term theater posture and contingency plans in the Middle East to account for a regional environment where China increasingly translates its economic influence into strategic access and military advantage? Can this shift apply to other regions where China is growing its influence, such as Africa and South America?

73. Conventional Support to Irregular Warfare

What conventional military capabilities, such as theater-level engineering or cyber operations, offer disproportionate strategic effects against an adversary's core vulnerability? What specific command-and-control relationships and authorities would enable the use of these conventional capabilities alongside special operations forces to maximize their combined effectiveness in an irregular warfare campaign?

74. Burden Sharing and Security Cooperation

Are there specific incentives in security cooperation and foreign military sales that could guide partner investment toward capabilities that enhance their self-defense and contribute to shared regional security objectives? To what extent can multilateral exercises enhance these efforts and move regional partner forces from theoretical interoperability to a demonstrable, combined capability to defend against a real-world contingency?

United States Strategic Command (USSTRATCOM)

75. Future Force Posture and Theater Nuclear Concepts

The United States' forward-deployed nuclear weapons in Europe are critical to NATO's nuclear deterrence. Investments in the nuclear-armed sea-launched cruise missile will provide additional theater nuclear capabilities to the United States to meet security demands. Further, our adversaries continue to invest in theater nuclear weapons to offset the conventional advantage of the United States and create

deterrence challenges at the regional level. What are the implications for the Army of increasing theater nuclear forces? How will the Army have to adjust its conventional military campaigns to account for the potential of limited theater nuclear use? How should the Army prepare to increase its resiliency and operate through a nuclear environment to achieve objectives?

76. The Evolution of the Nuclear Mindset and Strategic Stability in a Multipolar World

As nuclear proliferation and modernization continue among adversaries, allies, and partners, how can the United States military balance deterrence with minimizing risks to global stability? How has the nuclear mindset evolved since World War II, given the lack of nuclear employment, and what are the implications for deterrence and escalation dynamics today? How do advancements in delivery platforms (for example, hypersonic missiles, theater-based systems) and defense platforms (for example, the Golden Dome) affect adversaries' first-strike and second-strike perceptions? What adjustments to force posture, operational concepts, and integration of conventional and nuclear capabilities are needed to achieve US objectives without increasing instability? This research could explore the intersection of nuclear psychology, technological advancements, and command-and-control structures, providing insights into how the Army and Joint Force can adapt while maintaining deterrence and stability.

United States Space Command (USSPACECOM)

77. Space Infrastructure

How can the Department of War improve identification and prioritization (for repair) of space-supporting infrastructure system vulnerabilities (including both hazards and threats)?

78. Cyber Security in Space

How can the Department of War develop and implement a comprehensive cyber defense strategy for military and commercial space systems that integrates AI/ML-enabled proactive defense capabilities, holistic cyber situational awareness, and standardized cyber risk calculation methodology to reduce vulnerabilities and protect critical space-based assets from cyberattacks?

United States Army Space and Missile Defense Command (SMDC)

79. Strategic Missile Defense

As the Army operationalizes the Golden Dome for America architecture to defend against advanced cruise missile and hypersonic threats, what are the primary policy, organizational, and resourcing challenges the Army must address to integrate this new mission successfully with its legacy role in strategic ballistic missile defense?

80. Space and High-Altitude Capabilities

What are the most critical space and high-altitude capabilities the Army must invest in over the next decade to enable multidomain operations at the theater level? What is the optimal model for transitioning these capabilities from the science and technology community into the hands of the war fighter?

United States Cyber Command (USCYBERCOM)

81. The Future of Cybersecurity Policy

What does restraint look like in cyberspace? To posture on every issue of concern to a command, domain, and the larger society is tempting. Given limited resources, however, most decisions involve trade-offs. Under these circumstances, what should be (de)emphasized in US cybersecurity policy? Why?

82. Risks Associated with AI

In the rush to capitalize on AI in national security, what are the risks of incorporating new vulnerabilities, not unlike in the creation and development of cyberspace itself? What are the implications of these vulnerabilities for the Department of War in the short term and long term? How can a nation apply AI tools in a strategic, productive, and quick manner?

United States Army Cyber Command (ARCYBER)

83. Countering Adversary Cyber Operations in the Indo-Pacific

How can US Army cyber and electronic warfare operations, as part of a combined Joint Force with key allies, effectively degrade, disrupt, and neutralize a peer adversary's integrated cyber campaign within its anti-access/area denial strategy in the INDOPACOM theater?

84. Building and Sustaining the Army's Cyber Force

Given the intense competition for talent and the global shortage of cybersecurity professionals, what strategic changes must the US Army implement across its DOTMLPF-P framework to recruit, train, and retain a cyber force capable of maintaining overmatch against peer adversaries through 2040?

85. Integrating Information Advantage at the Tactical Edge

How should the US Army evolve its doctrine, organizational structures, and materiel to integrate cyber and electronic warfare, and information operations fully at the tactical level (corps and below) to achieve and sustain "information advantage" in multidomain operations?

United States Special Operations Command (USSOCOM)

86. Adapting Special Operations Forces for the Homeland

Given USSOCOM's service-like and combatant command authorities, how should the special operations community adapt its counterterrorism mission and force employment to prioritize homeland defense? This research can examine the spectrum of threats but should include Islamic terrorists and narco-terrorists.

87. Special Operations Forces in the Pacific

How can special operations forces best contribute to deterring China—in the Indo-Pacific and globally with effects in the Indo-Pacific—under the *2026 National Defense Strategy* approach of "strength, not confrontation"? This research should incorporate the use of emerging technologies like AI and uncrewed systems to amplify US advantages and counter Chinese influence efforts and adversary alignment.

United States Army Special Operations Command (USASOC)

88. Irregular Warfare

How should special operations forces optimize for irregular warfare to influence and/or interdict peer-adversary capabilities proactively across the diplomatic, information, military, and economic instruments of power in a way that is below the threshold of conflict? This research can look at irregular warfare across a spectrum but should incorporate strategic sabotage and take into account the changing maneuver space of the mid-twenty-first century.

89. Restructuring Army Special Operations Forces (ARSOF)

How should the ARSOF enterprise restructure and what purpose-built organizations and capabilities are needed for special operations forces to operate successfully against peer adversaries, to include opportunities in the convergence of the space-special operations-cyber realms—the space-SOF-cyber triad and NEXUS constructs?

90. ARSOF Production

In what innovative ways must ARSOF operationalize the institutional force, produce enhanced soldiers, and conduct talent management reform to support operational force requirements? How can the ARSOF enterprise take better advantage of cutting-edge technology and advanced research insights to assess and upgrade rapidly the production pipeline for ARSOF soldiers?

United States Transportation Command (USTRANSCOM)

91. Force Posture in the Arctic

How can the Department of War (or the Department of the Army) most effectively adapt its force posture in the Arctic within the next five years to protect the high north and northern approaches to the homeland in great-power competition? This research should not be limited by existing infrastructure and should consider changes in access to and within the region.

92. Mitigating Airlift Vulnerability: Building a Resilient Army Surface Deployment Capability

The Joint Force's reliance on a limited strategic airlift fleet creates a significant vulnerability for deploying credible combat forces at the speed and scale required for a peer-level conflict. What are the most effective and feasible DOTMLPF-P changes the Army can make to its logistics enterprise to create a robust, responsive, and resilient surface deployment capability that meets combatant commander requirements while mitigating this vulnerability?

United States Army Materiel Command (AMC)

93. Total Army Power Projection Equipment

What conceptional or modifications to Army pre-positioned stocks in composition, storage locations, investment strategies, and sustainment requirements are needed to implement the Army's recently published *Total Army Power Projection Equipment (TAP2E) Strategy, FY2028–2032*? Conversely, what is missing from the strategy to enable operational relevance and fiscal sustainability?

94. Set the Theater

How can the Army integrate emerging technology and develop innovative solutions to assist its service component commands in preparation of the theater? Additionally, how can Army planners use digital tools during integrated planning to ensure timely and complete recommendations to Army senior leaders to address complex strategic challenges that span multiple theaters to address limited resources, timelines, decision points, and authorities across combatant commands?

95. Military Construction

How can the military construction process be reformed to accelerate the modernization of the organic industrial base (OIB)? The growing disparity in agility between the OIB and the defense industrial base presents a strategic challenge. What specific policy, funding, or procedural reforms would enable the OIB to match the execution speed of its private-sector counterparts and better meet mission-critical needs?

United States Army Transportation Command (ARTRANS)

96. Application of AI for Global Transportation Planning

The United States Army Transportation Command has large stores of transportation data in legacy transportation systems. How can AI help the Joint deployment and distribution enterprise apply new technology to existing data sets and processes to increase its decision advantage?

97. Historical Case Study Analysis: US Army–Operated Terminals During World War II

The United States Army Transportation Command was formed as the Military Traffic Management and Terminal Service in the post–World War II era. The command has a minimal organizational understanding of how military ocean terminals were structured, manned, and commanded during World War II. A historical study can help the United States Transportation Command better understand the gaps in its current terminals in the continental United States during large-scale mobilization and combat operations not seen since World War II. Of interest to the command are the locations of major World War II terminals in the continental United States, their organization, and how the Army worked with local and national elected leadership to select terminal locations. Understanding how major World War II combat units were organized for shipment and debarkation overseas at terminals in the continental United States would assist the command in preparing for the next major operation.

98. Historical Case Study Analysis: World War II Southwest Pacific Area Theater of Operations Ports of Debarkation

Conventional Army forces have long been absent from the land areas of the southwestern Pacific. This study would help twenty-first-century transportation planners understand the historical uses of key ports and terminals used by US forces during the last major land operation in this part of the world. It should focus on how access and basing rights developed from the late nineteenth century to the World War II period to inform planners of the geopolitical history of the region.

United States Army Transformation and Training Command (T2COM)

99. Strategic Implications of Emerging Disruptive Technologies

How will emerging and disruptive technologies like AI, autonomous robotics (including heterogenous swarms), hypersonic weapons, and directed energy shape the Army's ability to deter China in the future operational environment of 2045? What are the implications for force structure, doctrine, and acquisition?

100. Integrating Emerging Disruptive Technologies

Which combinations of emerging technologies like AI, autonomous robotics (including heterogenous swarms), hypersonic weapons, and directed energy can be paired with or incorporated into legacy platforms to accelerate transformation and generate low-cost scalable options for Army senior leaders? What DOTMLPF-P adjustments must be made to pair proposed legacy systems and emerging technologies?

101. Mission Command

How do Army commanders and staff integrate AI into decision-making processes and battle command systems while still enabling mission command? What risks does AI introduce into the trust between senior and subordinate commanders? How does AI improve or degrade a disciplined initiative?

Defense Security Cooperation University (DSCU)

102. Crisis Security Cooperation

Over the past two years, the security cooperation enterprise has had to respond rapidly to field demands from multiple partners in crisis, including Ukraine, Israel, and the Gulf states. Joint security cooperation response teams, like the Security Assistance Group – Ukraine, are one example of how security cooperation crisis response efforts coordinated. What lessons can the experience of the Security Assistance Group – Ukraine or other security cooperation crisis response efforts provide the Joint Force concerning training, equipping, and coordinating allied aid to partners in a crisis?

103. America-First Arms Transfer Strategy

On February 6, 2026, the president issued an executive order prioritizing American interests by using foreign purchases and capital to build American production and capacity. What key industrial capabilities would be most useful for the future force, and how can the US military leverage capabilities that may exist among allies and partners to help develop US-based industrial capabilities? How can new acquisition models, increased investment in niche industrial capabilities by allies, or co-production opportunities help meet administration priorities while enhancing burden sharing and strengthening the alliance?

National Counterintelligence and Security Center (NCSC)

104. Countering China

How can the United States counter PRC gray-zone activities within the territorial borders of the United States or allied nations? Examples of gray-zone operations include PRC land purchases near Department of War facilities, bases, and critical infrastructure and the PRC exploiting US academia and the US economy, including US companies and infrastructure, to steal technology and undermine Western businesses.

105. Countering Non-State Actors

What would a medium-term (two to three years) US strategy to counter the newly foreign-terrorist-organization–designated cartels or transnational gangs include? A response should address internal and external components and assess the elements of the US government that could play a role, accounting for unique authorities and capabilities. This project could also explore ways the United States could collaborate with foreign governments to eliminate the identified cartels or transnational gangs effectively.

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As part of Arctic Aloha 26, US Army paratroopers assigned to the 2nd Infantry Brigade Combat Team (Airborne), 11th Airborne Division, land on Malemute Drop Zone at Joint Base Elmendorf-Richardson, Alaska, November 14, 2025 (US Army photo by Correy Matthews).

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Dr. C. Anthony Pfaff
Director
Strategic Research and Assessment Department
and the US Army War College Press

Colonel Michael Long
Director
Futures Research Group

Colonel Kyle Marcrum
Director
Global Research Group

CONTRIBUTING AUTHORS

Mr. Bob Bradford
Professor of Defense and Joint Processes
Department of Command, Leadership, and Management

Dr. Brian Carlson
Research Professor of Indo-Pacific Security Studies
Global Research Group

Dr. José de Arimatéia da Cruz
Senior Environmental Research Professor
Futures Research Group

Major Brennan Deveraux
National Security Researcher
Futures Research Group

Dr. Michele Devlin
Professor of Environmental Security
Futures Research Group

Dr. Antulio J. Echevarria II
Professor of Strategic Competition
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Research Professor for Latin America
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Lieutenant Colonel Loris Lepri
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Assistant Professor of African Studies
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Lieutenant Colonel Paul Milas
Director of African Affairs
Global Research Group

Mr. Doug Orsi
Professor of DoD Systems
Department of Command, Leadership, and Management

Commander Travis Pantaleo
Faculty Instructor
Department of Distance Education

Dr. C. Anthony Pfaff
Director
Strategic Research and Assessment Department
and the US Army War College Press

Dr. Jacob Stoil
Research Professor of Middle Eastern Studies
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