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CSIS | CENTER FOR STRATEGIC & INTERNATIONAL STUDIES

WARTIME FOOTING

A Two-Front Strategy to Confront China and Russia

AUTHORS

Seth G. Jones | Seamus P. Daniels | Riley McCabe | Daniel Byman

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Center for Strategic & International Studies
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ACRONYMS

ABCT: Armored brigade combat team

ACE: Agile combat employment

AI: Artificial intelligence

A2/D2: Anti-access/area denial

BCT: Brigade combat team

CCP: Chinese Communist Party

CMC: Central Military Commission

CONPLANS: Contingency plans

CRBM: Close-range ballistic missile

CTC: Central Theater Command

DMZ: Demilitarized zone

DPRK: Democratic People's Republic of Korea

ETC: Eastern Theater Command

GLCM: Ground-launched cruise missile

GMLRS: Guided Multiple Launch Rocket System

HIMARS: High Mobility Artillery Rocket System

IAF: Israeli Air Force

IBCT: Infantry brigade combat team

ICBM: Intercontinental ballistic missile

IDF: Israel Defense Forces

IRBM: Intermediate-range ballistic missile

ISF: Information Support Force

ISR: Intelligence, surveillance, and reconnaissance

JASSM-ER: Joint Air-to-Surface Standoff Missile–Extended Range

LRASM: Long-Range Anti-Ship Missile

M-SHORAD: Maneuver Short-Range Air Defense

MLR: Marine Littoral Regiment

MLRS: Multiple Launch Rocket Systems

MRBM: Medium-range ballistic missile

NATO: North Atlantic Treaty Organization

NMESIS: Navy-Marine Expeditionary Ship Interdiction System

NTC: Northern Theater Command

OPLANS: Operational plans

PLA: People's Liberation Army

PLAA: People's Liberation Army Army

PLAAF: People's Liberation Army Air Force

PLAN: People's Liberation Army Navy

PLARF: People's Liberation Army Rocket Force

ROK: Republic of Korea

SAM: Surface-to-air missile

SBCT: Stryker Brigade Combat Team

SEAD/DEAD: Suppression and destruction of enemy air defenses

SRBM: Short-range ballistic missiles

SSBN: Ballistic missile submarines

STC: Southern Theater Command

THAAD: Terminal High Altitude Area Defense

UAS: Unmanned aircraft system

USV: Unmanned surface vehicles

UUV: Unmanned underwater vehicles

WTC: Western Theater Command

EXECUTIVE SUMMARY

The United States and its allies face a serious and growing threat from an authoritarian axis led by China and Russia that will erode U.S. power and security if it is not effectively countered. Chinese leader Xi Jinping and the Chinese Communist Party have ordered the People's Liberation Army to be ready to conduct a successful invasion of Taiwan by 2027, and Russia continues to wage an aggressive war in Ukraine and a sabotage campaign across Europe that includes assassinations, bombings, and subversion.

This report outlines a U.S. defense strategy of flexible engagement built around a two-war planning construct and a rapid shift to a wartime industrial footing to counter an axis led by China and Russia. It prioritizes the Indo-Pacific first and Europe second, as well as deterring and, if necessary, defeating two major powers simultaneously with significant allied and partner involvement. To do so, the United States should focus on several steps:

- Expand and modernize its force structure to deter two multi-theater wars, one in the Indo-Pacific against China and another in Europe against Russia, while preparing for contingencies in the Middle East, Latin America, and other regions;
- Develop a new offset strategy focused on Air-Sea Battle in the Indo-Pacific and Air-Land Battle in Europe that blends advanced and lower-cost unmanned systems with long-range precision strike and nuclear modernization;
- Adopt a posture prioritizing dispersed, mobile, and survivable U.S. forces;
- Accelerate reforms to the defense industrial base to operate with greater speed and production capacity.

MULTI-THEATER THREATS

The United States is in an increasingly perilous international security environment. Europe has witnessed its largest land war since World War II as Russia continues its assault on Ukraine. Conflict persists involving the United States, Israel, and Iran in the Middle East. Tensions in the Taiwan Strait, East and South China Seas, and Korean Peninsula remain high, and U.S. forces conducted an escalating campaign in the Western Hemisphere that included the seizure of Venezuelan President Nicolás Maduro.

These dynamics have unfolded as authoritarian states, led by China and Russia, are undermining U.S. and allied interests and rapidly arming. An authoritarian China presents the most serious threat to the United States and its interests abroad, and the Chinese Communist Party's principles and values are antithetical to those of the United States and its democratic allies in stifling democracy, brutally repressing dissent, and eviscerating freedom of speech. The U.S. military has lost "overmatch"—the ability to militarily overwhelm an adversary in all the domains of conflict—in a war against China. China has swiftly modernized its military and rapidly advanced in all major domains of warfare, such as air, maritime, land, space, cyber, and nuclear capabilities. The People's Liberation Army (PLA) possesses formidable air and naval power, long-range precision strike systems, and advanced space and cyber capabilities that can threaten U.S. forces, bases, and logistics across the western Pacific. Meanwhile, Russia is rebuilding its military with external support, particularly from China, and will likely remain a significant threat to Europe and the United States.

China and then Russia are the two most significant great power threats to the United States because of their military capabilities and desire to expand their power and influence at the expense of the United States. The United States does not face the same degree of threat in the Middle East with Iran, in East Asia with North Korea, or in the Western Hemisphere with Venezuela, Cuba, or other state and non-state actors. Yet the United States is not adequately prepared for this security environment. Without urgent and rapid changes, the United States risks losing the ability to deter major conflict—especially in the Indo-Pacific—and to fight and win a protracted war in one or more regions.

Almost all U.S. force structure elements are low by historical standards. The total number of U.S. Air Force aircraft, U.S. Army active duty personnel, U.S. Navy ships, and U.S. Marine Corps active duty personnel are lower than at almost any time since 1950. In addition, China has made significant advances in some areas and its shipbuilding capacity is over 230 times larger than the United States. U.S. defense spending as a percentage of gross domestic product is also smaller than at any time since 1950. And according to a series of war games run by the Center for Strategic and International Studies, the United States still runs out of some critical long-range precision munitions after roughly a week of a conflict with China. The U.S. defense industrial base is not fully prepared for a protracted conflict, though there have been some positive steps in modernizing defense acquisition, spurring innovation, and strengthening supply chains. Production capacity is still insufficient, stockpiles of air defense interceptors and some long-range munitions are low, supply chains are brittle, acquisition systems remain slow and encumbered by peacetime norms, and the defense budget—especially the Pentagon's spending on procurement—is inadequate for the current environment.

A TWO-WAR CONSTRUCT

Based on these threats, the United States should adopt a two-war planning construct that focuses on deterring and defeating two major powers simultaneously: China in the Indo-Pacific and Russia in Europe. Allies must play a critical role in both theaters.

U.S. force posture, force structure, and the industrial base need to urgently adapt in multiple theaters. In some areas, such as munitions production, it will take between two and four years to produce sufficient stockpiles for a protracted conflict and are critical for deterrence by denial. China is moving at a rapid pace and any delay in developing and executing a strategy will only hasten their lead in such areas as shipbuilding and missiles. In the opening phases of a conflict, such as over Taiwan, traditional forces operating in traditional ways will not be effective or survivable.

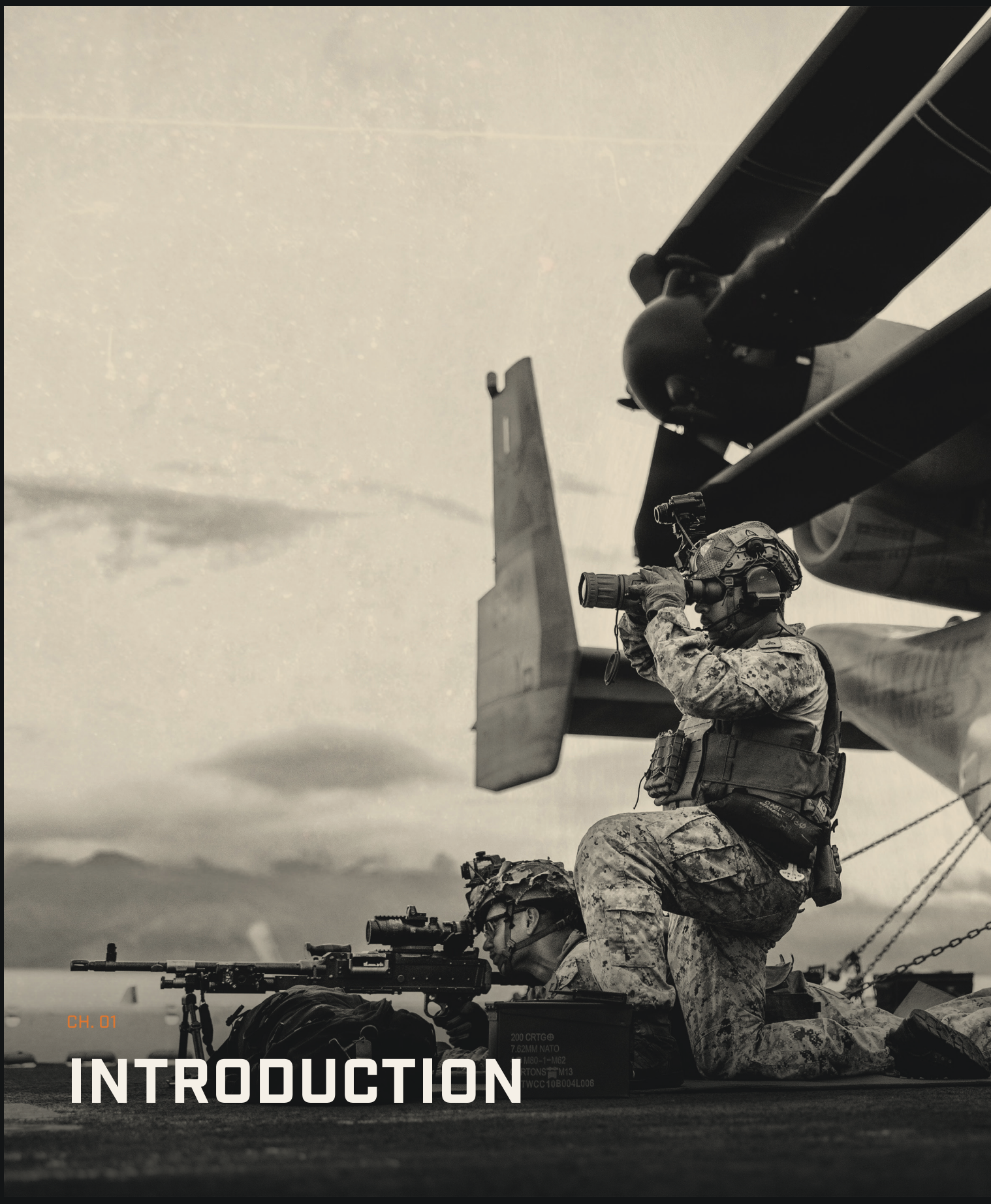
There is a growing need for smaller-footprint mobile systems and cheaper weapons that can be acquired en masse and pre-positioned in or near the battlespace. U.S. forces also must be postured differently—and be more dispersed—to survive and operate in a contested battlespace. Geographic prioritization should guide force posture. The U.S. Army should assume principal responsibility for Europe along with the U.S. Air Force, while the U.S. Navy, Marine Corps, and Air Force should lead in the Indo-Pacific. Allied and partner contributions—such as from the North Atlantic Treaty Organization (NATO), Japan, Australia, South Korea, the Philippines, and Taiwan—are essential. In the Middle East, the United States should continue to work closely with Israel and U.S. partners in the Persian Gulf to counter Iran and its partner forces.

Deterring two wars—and fighting and winning them if deterrence fails—demands shifting the U.S. industrial base to a wartime footing and increased defense spending to more rapidly develop, procure, and field new capabilities. A wartime environment requires a renewed focus on rapid production, minimized regulatory burdens, a robust workforce, and more effective leveraging of the United States' innovative commercial sector. Axis states are already moving in this direction, with China particularly scaling up defense production through military-civil fusion.

Building off the U.S. Indo-Pacific Command's concept of Hellscape, which involves massive numbers of underwater, surface, and aerial systems to target Chinese invasion forces, the U.S. military should refine concepts of Air-Sea Battle for the Indo-Pacific and Air-Land Battle for Europe. These concepts of operation should focus on rapidly striking at the center of gravity of a Chinese or Russian invasion force and crippling these countries' offensive campaigns. In addition, these concepts point to five priority areas for the industrial base: (1) a high-low mix of undersea capabilities, including submarines and unmanned underwater vehicles (UUVs); (2) a high-low mix of air capabilities, including cheap unmanned aircraft systems (UASs) and fifth- and sixth-generation fighters and bombers; (3) long-range precision strike systems, including cheaper systems that can be used in larger numbers; (4) air defense systems to counter missiles and UASs; and (5) other capabilities, such as advances in artificial intelligence (AI) and quantum, space, and cyber warfare. Such changes require years of sustained investment, capital expenditures, production, workforce development, and supply chain fortification.

THE CLOCK IS TICKING

U.S. leaders from President George Washington to Presidents Franklin D. Roosevelt and Ronald Reagan warned that peace is secured only through strength. Today's threats also echo the warnings that British Prime Minister Winston Churchill issued before World War II—warnings Britain and much of Europe ignored at great cost. The United States must not repeat the mistake of failing to counter adversaries that are arming. Building the force structure and industrial base required to deter and, if necessary, win a multi-theater war will take time. But delays will only raise the costs and risks. In an era of emboldened authoritarian rivals, the United States must act now.



CH. 01

INTRODUCTION

U.S. Marines with Battalion Landing Team scan for vessels on the flight deck of Wasp-class amphibious assault ship USS Boxer (LHD 4) while transiting the Surigao Strait.

SOURCE U.S. Marine Corps photo by Trent A. Henry

The global balance of power is undergoing a significant shift. Cooperation between China, Russia, Iran, North Korea, and other countries that are part of an axis of aggressors is altering the balance of power in ways that significantly affect the United States. The number of democratic and free countries in the world has declined for an astounding 20 consecutive years, highlighting the dangerous march of authoritarianism.[1] The dangers of war have increased. NATO Secretary General Mark Rutte remarked in December 2025, referring to the Russian threat, "We must be prepared for the scale of war our grandparents or great-grandparents endured. Imagine it, a conflict reaching every home, every workplace, destruction, mass mobilisation, millions displaced, widespread suffering and extreme losses."[2]

A growing body of evidence suggests that collaboration among Russia, China, Iran, and North Korea has increased, especially following Russia's 2022 full-scale invasion of Ukraine. China has provided significant military components to help Russia wage war in Ukraine, including semiconductors and microelectronics for use in Russian weapons systems and parts for fighter jets, drones, and other components and systems. Iran has provided Russia with drones, artillery shells, ammunition, and short-range ballistic missiles (SRBMs), while Russia has supplied Iran with multirole fighter jets, attack helicopters, and other weapons systems and components, as well as aid to Iran's space and missile programs and intelligence that has assisted Tehran in its war with Israel and the United States. Finally, North Korea has provided artillery rounds,

rockets, SRBMs, and even soldiers to Russia. In return, Russia has supplied North Korea with advanced technology for satellites, nuclear-powered submarines, and ballistic missiles.

Growing cooperation among China, Russia, Iran, and North Korea raises major questions about how the United States and its allies should respond, including in such areas as defense strategy, force structure, force posture, and defense industrial production. For example, growing axis cooperation could notably impact operational plans and military doctrine, such as those embodied in the U.S. Joint Warfighting Concept 3.0, National Military Strategy, Guidance for Employment of the Force, Joint Strategic Capabilities Plan, and military contingency plans (CONPLANS) and operational plans (OPLANS). More broadly, growing cooperation among China, Russia, Iran, and North Korea raises serious questions about how well the United States and its allies and partners are prepared to deter and—if deterrence fails—fight and win a multi-theater war.

The rest of this chapter is divided into two sections. The first provides an overview of the research design, including the main research questions. The second offers a road map for the rest of the report.

RESEARCH DESIGN

This report focuses on the defense implications of the evolving strategic landscape. It asks several questions:

- What is the current military balance between the United States (and its allies and partners) and axis countries in key regions?
- How might the security environment evolve? What are plausible future scenarios of cooperation between axis countries?
- What are the implications for defense objectives, strategy, and force planning?
- What are the implications for force structure, force posture, and global force management?
- What are the implications for the U.S. and allied defense industrial bases?

To answer these questions, this report focuses on five areas that are essential for a U.S. defense strategy: (1) the military balance, including across strategically important regions; (2) the future security environment, especially cooperation among axis countries; (3) U.S. defense objectives and strategy; (4) U.S. force structure, posture, and global force management; and (5) the defense industrial base.

The Military Balance

What is the current military balance between the United States (and its allies and partners) and axis countries in key regions? Chapter 2 examines the current intentions and military capabilities—actual and potential—of both sides: on one side, China, Russia, Iran, and North Korea; on the other, the United States and its key allies and partners. China, Russia, Iran, and North Korea are all undemocratic and eschew free markets and a free press. They have violently cracked down on democratic movements, developed state-run economic systems, and tried to suppress information among their populations. China and Russia, in particular, are revanchist and challenge a U.S.-led international system that has been committed since World War II to free market international economic institutions, bilateral and regional security organizations, the integrity of the borders of U.S. allies, and democratic political norms.

Evolution of the Axis

How might the security environment evolve? What are plausible future scenarios of cooperation between axis countries? Chapter 3 examines three possible trajectories. The first is weakening engagement. Under this scenario, cooperation with one or more axis countries wanes because of divisions and diverging interests. There is greater infighting among countries and a decline in overall cooperation. A second scenario is deepening bilateral relations, which increases bilateral cooperation between axis countries. A third scenario is a growing multilateral alliance, which involves the establishment of formal or informal multilateral arrangements and includes higher levels of cooperation, such as a multilateral treaty or other agreement that commits three or more signers to collective assistance in case of external attack.

Defense Objectives, Strategy, and Force Planning

What are the implications for U.S. defense objectives, strategy, and force planning? Growing cooperation

between U.S. adversaries raises several important issues related to U.S. force planning that are examined in Chapter 4, including the possibility that the United States may be involved in wars or contingencies in *multiple theaters at the same time*. Moreover, by almost all measures, U.S. force structure levels are at a historic low, posing concerns about the U.S. military's ability to respond to multiple contingencies. Deciding on an appropriate force planning construct depends, in part, on the severity and immediacy of the security challenges facing the country; the ability of the U.S. economy, as well as congressional willingness, to support various levels of public expenditure; the prioritization of domestic versus international needs; and other factors.

Force Structure, Posture, and Global Force Management

What are the implications for force structure, force posture, and global force management? In defense planning, force structure refers to the number, type, and capabilities of military units and equipment. Force posture refers to the military capabilities, personnel, footprint (including bases, facilities, and support infrastructure), and agreements that support defense operations and plans. U.S. posture is significantly influenced by agreements with host countries, which provide access to facilities, airspace, and territory.

Chapter 5 examines U.S. global force structure and posture options considering the threat landscape and contingencies, especially in the Indo-Pacific Command, European Command, and Central Command areas of responsibility. It analyzes such areas as ground forces, including air and missile defense; air forces; naval forces; logistics and enablers, including intelligence, surveillance, and reconnaissance (ISR); space and cyber capabilities; and nuclear forces.

Wartime Industrial Base

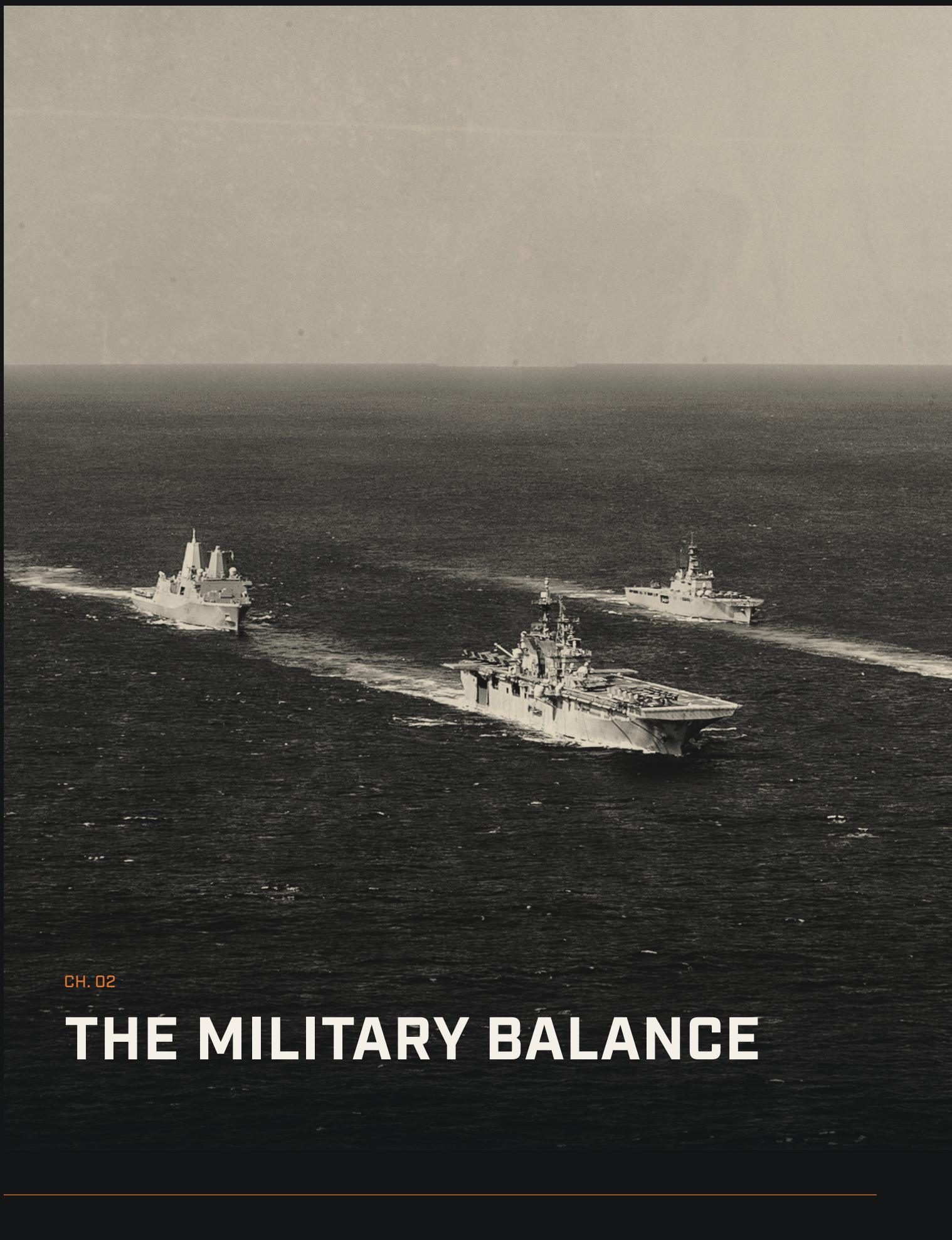
What are the implications for the U.S. and allied defense industrial bases? The defense industrial base includes the set of companies and government agencies involved in the research, development, design, production, delivery, and maintenance of weapons systems, matériel, and equipment for a country's armed forces.[3] In the United States, for example, the defense ecosystem consists of well over 60,000 companies and their subcontractors, which conduct research, produce goods, and offer services to the Pentagon and the intelligence community. With growing cooperation between U.S. adversaries, what steps should the United States take to strengthen the defense industrial base, including in cooperation with allies and partners?

Chapter 6 assesses the necessary industrial capabilities and concepts of operation. Key areas of the industrial base include contracting and acquisitions systems, munitions, supply chains, the defense workforce, and policies and regulations related to allies and partners, such as foreign military sales and technology transfer review policies and procedures.

Finally, Chapter 7 provides a summary of the main conclusions, including an overview of the axis threat (especially from China and Russia), the strategy of flexible engagement, and a reminder of the importance of peace through strength.

SECTION I

THE EVOLVING THREAT LANDSCAPE



CH. 02

THE MILITARY BALANCE

San Antonio-class amphibious transport dock ship USS New Orleans (LPD 18), Japan Maritime Self-Defense Force (JMSDF) Ōsumi-class tank landing ship JS Ōsumi (LST 4001), and JMSDF Hyūga-class helicopter destroyer JS Ise (DDH 182), sail in formation alongside America-class amphibious assault ship USS Tripoli (LHA 7) during exercise Iron Fist.

SOURCE U.S. Navy photo by Mass Communication Specialist 2nd Class Kaleb Shultz

This chapter examines the military balance between the United States, including its allies and partners, and the axis countries in geographic areas of strategic importance to the United States. In the Indo-Pacific, China has significantly closed the gap with the United States because of the PLA's aggressive modernization effort. Although the United States maintains an edge in some areas, like undersea warfare and nuclear forces, the U.S. military has not adapted its posture, concepts, or forward forces at a scale or pace commensurate with China's. Today, the PLA possesses sufficient regional air and naval combat power and long-range conventional precision strike capabilities to place U.S. bases, surface forces, and logistics networks in the western Pacific under serious risk in a high-intensity conflict. The PLA's modernization also raises the pressure and risk that U.S. allies and partners bear in the Indo-Pacific, both by increasing coercive PLA encounters in peacetime and by making U.S. allies' and partners' territory, bases, and forces more likely targets in a high-intensity conflict if they assist—or are perceived as prepared to assist—U.S. operations.

In Europe, the NATO-Russia military balance is in an uncertain transition because European militaries are not yet prepared to deter or fight a high-end conflict against Russia with little or no U.S. involvement. Despite major challenges in Ukraine, Russia is reconstituting its forces and defense industry with support from China and other countries, even as this effort is constrained by attrition, sanctions, and institutional weaknesses. NATO retains important qualitative advantages in the balance, particularly in air and maritime power and high-

end capabilities, but Russia still fields substantial land and nuclear forces and shows a high tolerance for costs. European states, despite new spending and modernization pledges, will depend on U.S. forces and enablers for years as new commitments materialize—a significant risk if the U.S. military becomes engaged in a major war in the Indo-Pacific. U.S.-European relations are also under severe strain. Accordingly, the pace of European modernization, Russian reconstitution, and changes in U.S. commitments could either strengthen NATO's advantages over a weakened Russia or create a window of vulnerability that Moscow could soon exploit.

In the Middle East, the October 7, 2023, Hamas attacks against Israeli kibbutzim and subsequent fighting in Gaza and between Israel and Iran and its proxies inaugurated a new phase in Israel-Iran competition. Israeli military operations devastated Hamas in Gaza and Hezbollah in Lebanon. This competition reached a new level in 2025 when Israel and the United States attacked Iran in an attempt to destroy its nuclear program and weaken Tehran. In 2026, Israel and the United States launched a large-scale air campaign that severely degraded Iran's command structure and navy as well as inflicted significant damage on Iran's missile, drone, and rocket capabilities. Israel, backed by U.S. support, currently enjoys a significant military advantage, particularly in airpower and missile defense, against Iran and its degraded network of proxies.

On the Korean Peninsula, South Korea (ROK) enjoys clear qualitative and technological superiority in conventional forces bolstered by U.S. support, whereas North Korea (DPRK) relies on nuclear weapons, ballistic missiles, and other capabilities to offset its conventional weakness by threatening catastrophic damage. The growing DPRK-Russia relationship is beneficial for the DPRK but does not transform the balance on its current trajectory.

In Latin America and Africa, the United States does not face the same type of threat it faces in the Indo-Pacific from China and North Korea, in Europe from Russia, and in the Middle East from Iran. In Latin America, for example, the United States faces a threat from illegal drugs, illegal immigration, and a range of state and nonstate actors. But these threats are generally best handled by law enforcement and intelligence agencies, not the U.S. military.

The chapter begins by briefly outlining its methodology and then provides an assessment of the military balance between the United States and China in the Indo-Pacific, NATO and Russia in Europe, Israel and Iran in the Middle East, and South Korea and North Korea on the Korean Peninsula. Each section examines the nature of the competition, key trends in the military balance, and uncertainties that could alter the balance in the future.

METHODOLOGY

Military power is the capacity of a state's armed forces to achieve specified political objectives through the use or threat of force. It is one component of overall state power, distinct from but supported by other elements of power, such as economic strength and technological innovation. Military power is difficult to measure. Traditional methods and estimates have often been criticized as impressionistic and crude, typically relying on simple quantitative metrics such as tabulations of weapons, numbers of troops, or the size of defense budgets.[1] However, simply adding up forces or budgets and comparing them is typically inadequate because doing so fails to measure an adversary's actual fighting ability, account for geography, or illuminate qualitative factors in military doctrine and organizational behavior. A more accurate understanding of a military balance requires considering force comparisons in real-world scenarios; specifying objectives, geography, and time horizons; and incorporating both quantitative and qualitative judgments about how militaries plan, adapt, and fight.[2]

This chapter is not an exhaustive net assessment of the military balance between the United States and its allies and partners, on one side, and their adversaries, on the other. Instead, it draws on primary sources and secondary analyses to summarize the nature of the competition in each region of interest and provide an abbreviated analysis of the balance, examining key trends in capabilities, doctrines, and other factors.

This assessment focuses on the Indo-Pacific, Europe, the Middle East, and the Korean Peninsula because these theaters are where the United States is most likely to confront major threats from the axis states over the next three to five years and where conventional military balances are most salient. The choice of these regions does not imply that other areas or other types of threats are unimportant. The United States faces significant challenges from terrorism,

transnational criminal networks, cyber actors, and nonmilitary hazards such as pandemics, and U.S. competitors are increasingly active in Africa, Latin America, and the Arctic. However, this chapter concentrates on the regions in which state-based military power is most likely to threaten U.S. interests in the near term.

THE UNITED STATES AND CHINA IN THE INDO-PACIFIC

The United States has been the strongest military power in the Indo-Pacific since the end of World War II, leveraging forward bases, carrier aviation, long-range bombers, and logistics nodes to project and sustain combat power.[3] China, however, is dedicated to building a "world-class" military to compete with that of the United States.[4] Over the past several decades, the PLA has undergone a significant effort to transform a bloated, army-centric force into a leaner, more professional joint military better suited for modern operations along China's periphery and, potentially, beyond.[5] As described in more detail in Chapter 6, the Chinese defense industrial base has rapidly accelerated the design and production of modern ships, aircraft, tanks, missiles, and other systems, enabling the PLA to field an increasingly large and capable force that narrows long-standing equipment gaps with the United States.

U.S. efforts so far have not matched the scale or speed of the PLA's changes, and historical advantages for the United States in the Indo-Pacific are decreasing. China has significantly closed the gap in such areas as regional air and naval combat power, long-range conventional precision strike, and air and missile defense. The United States retains the advantage in other areas, including undersea warfare, long-range power projection and global logistics, nuclear forces, and the integration of high-end capabilities with a network of regional allies and partners. This section analyzes key trends in the military balance, including in posture, organization, and doctrine, as well as land, air, and sea combat power. It also considers key uncertainties that could influence the balance in the near future.

Nature of the Competition

Chinese President Xi Jinping has articulated a long-term national strategy to achieve the "great rejuvenation of the Chinese nation on all fronts" by 2049, including the development of a "world-class" military.[6] Chinese plans also include completing defense modernization by 2035. As discussed in more detail in Chapter 6, China has established a defense industry that is operating on a wartime footing with the capability to leverage advanced technology, such as AI and quantum, and produce weapons systems at mass and scale.[7] The PLA, born as the armed wing of the Chinese Communist Party (CCP), has always had as its principal function supporting the CCP in its pursuit and maintenance of political power. As such, China continues to expand its political, economic, and military interests—including basing and infrastructure—in Asia, the Middle East, Africa, Latin America, and Europe.

Chinese leaders likely view competition with the United States, including in the Indo-Pacific, as a continuous struggle to protect China's security and expand Chinese power and influence. Chinese strategy documents routinely argue that the PLA must prepare for the intervention of a "powerful enemy" (强敌), which is a euphemism for the United States.[8] This framing reflects an enduring expectation that U.S. forces would likely intervene in any major regional conflict involving China, particularly one over Taiwan. As a result, Chinese officials view the PLA as an essential tool to deter U.S. intervention through visible strength and, if deterrence fails, to fight and defeat engaged U.S. forces.

Posture, Organization, and Doctrine Transformations

The United States and China are competing in the Indo-Pacific for economic, political, and military power and influence. Beginning with U.S. President Donald Trump's first administration and continuing through President Joe Biden's administration and the second Trump administration, U.S. Indo-Pacific Command has continued to increase its global share of assigned modernized forces. The United States maintains a substantial forward-deployed posture in the Indo-Pacific, anchored in Japan and South Korea. Roughly 375,000 military and civilian personnel fall under U.S. Indo-Pacific Command, including about 20,000 U.S. Army personnel in South Korea, mainly from the Eighth Army and Second Infantry Division at Camp Humphreys, with air and missile defense, intelligence, signals, armor, fires, and aviation capabilities.[9] Nearly

20,000 marines from III Marine Expeditionary Force are based on Okinawa, alongside Army air defense, aviation, and intelligence units in Japan, plus 9,000 personnel in Guam and rotational marine deployments to Darwin, Australia.[10] U.S. forces are also engaged in an intense exercise schedule that involves constantly cycling forces into and out of the region.[11]

At sea, the Seventh Fleet, based in Yokosuka, Japan, is the U.S. Navy's largest forward-deployed fleet and typically fields 50–70 ships and submarines, including a permanently forward-deployed aircraft carrier in Yokosuka, 10–14 cruisers and destroyers, 4 amphibious ships at Sasebo, and 8–12 nuclear-powered submarines, supported by a sizable logistics flotilla run from Singapore.[12] U.S. air posture includes four fighter squadrons in Japan, including two F-15C/D squadrons based at Kadena Air Base in Okinawa (set to be replaced by F-15EX fighters) and two F-16C/D squadrons out of Misawa Air Base (set to be replaced by F-35 fighters).[13] In South Korea, two F-16C/D squadrons operate out of Kunsan Air Base, and a third operates out of Osan Air Base.[14] The U.S. Air Force is drawing down its A-10 presence in Osan.[15] The 374th Airlift Wing operates C-130J and C-12J aircraft out of Yokota Air Base in Japan.[16] Additionally, the U.S. Marine Corps operates two F-35B squadrons out of Marine Corps Air Station Iwakuni, in addition to frequent unit deployment programs of Marine F-35B/Cs.[17]

This posture gives the United States immediate access to key theaters like the Korean Peninsula, the Taiwan Strait, and the East and South China Seas, but it is also vulnerable to improving Chinese medium- and long-range strike capabilities. Most U.S. ground, air, and naval forces are concentrated on a relatively small number of large, well-known bases and ports in Japan, South Korea, and Guam, mostly in unhardened shelters and all within range of the PLA's growing inventory of ballistic and cruise missiles (Figure 2.1). The same characteristics that make Yokosuka, Kadena, Sasebo, Camp Humphreys, and Guam valuable hubs—such as their deepwater ports, airstrips, and large fuel and munitions storage facilities—also make them targets.

As a result, the United States is attempting to reshape its Indo-Pacific posture to be more mobile, distributed, resilient, and lethal.[18] For example, it is forward deploying more advanced capabilities and rotational forces, including additional attack submarines in Guam, F-35 squadrons in Japan, and regular bomber and large-force air rotations through northern Australia.[19] It is also beginning to base or rotate new ground-based antiship and land attack systems in the region, including the Typhon midrange missile system in the Philippines and Japan, while reclaiming and recertifying smaller airfields and expanding access in locations such as the Philippines, Papua New Guinea, and Palau to support dispersed operations across a wider arc of territory.[20]

Doctrinally, U.S. services are revising how they plan to fight in the theater in order to match this more distributed posture. U.S. Indo-Pacific Command has developed a concept called Hellscape, which is discussed in more detail in Chapter 6, that focuses on the use of tens of thousands of UUVs, UASs, submarines, and other systems—all working in tandem to engage thousands of targets across the western Pacific.[21]

The Air Force is practicing agile combat employment (ACE) concepts that emphasize operating fighters and other aircraft from austere, rapidly established locations using small mobile support packages.[22] The Navy is refining Distributed Maritime Operations and related concepts to spread surface combatants, submarines, and unmanned systems over a wider area while preserving the ability to mass fires.[23] The Marines, as part of Force Design 2030, are prioritizing sea denial and littoral operations by using a stand-in force that remains forward deployed in support of the fleet, relying on smaller, more mobile units to establish temporary expeditionary advanced bases, provide sensing, and deliver antiship and land attack fires in contested littorals.[24]

Organizational reforms are intended to make these concepts executable. The Marines activated the 3rd Marine Littoral Regiment (MLR) in Hawaii in March 2022, redesignated the 12th Marine Regiment as the 12th MLR on Okinawa in November 2023, and made plans to form another MLR in Guam in 2027.[25] MLRs are naval formations built around small littoral combat teams with organic sensors and antiship missiles, leveraging amphibious platforms to disperse across island chains and perform strike as well as air and missile defense coordination while generating sea-denial fires inside PLA weapons ranges.[26] The Army activated the Third Multi-Domain Task Force in Hawaii in September 2022 to integrate long-range precision fires, air and missile defense, electronic warfare, cyber, and space support to detect, disrupt, and strike PLA

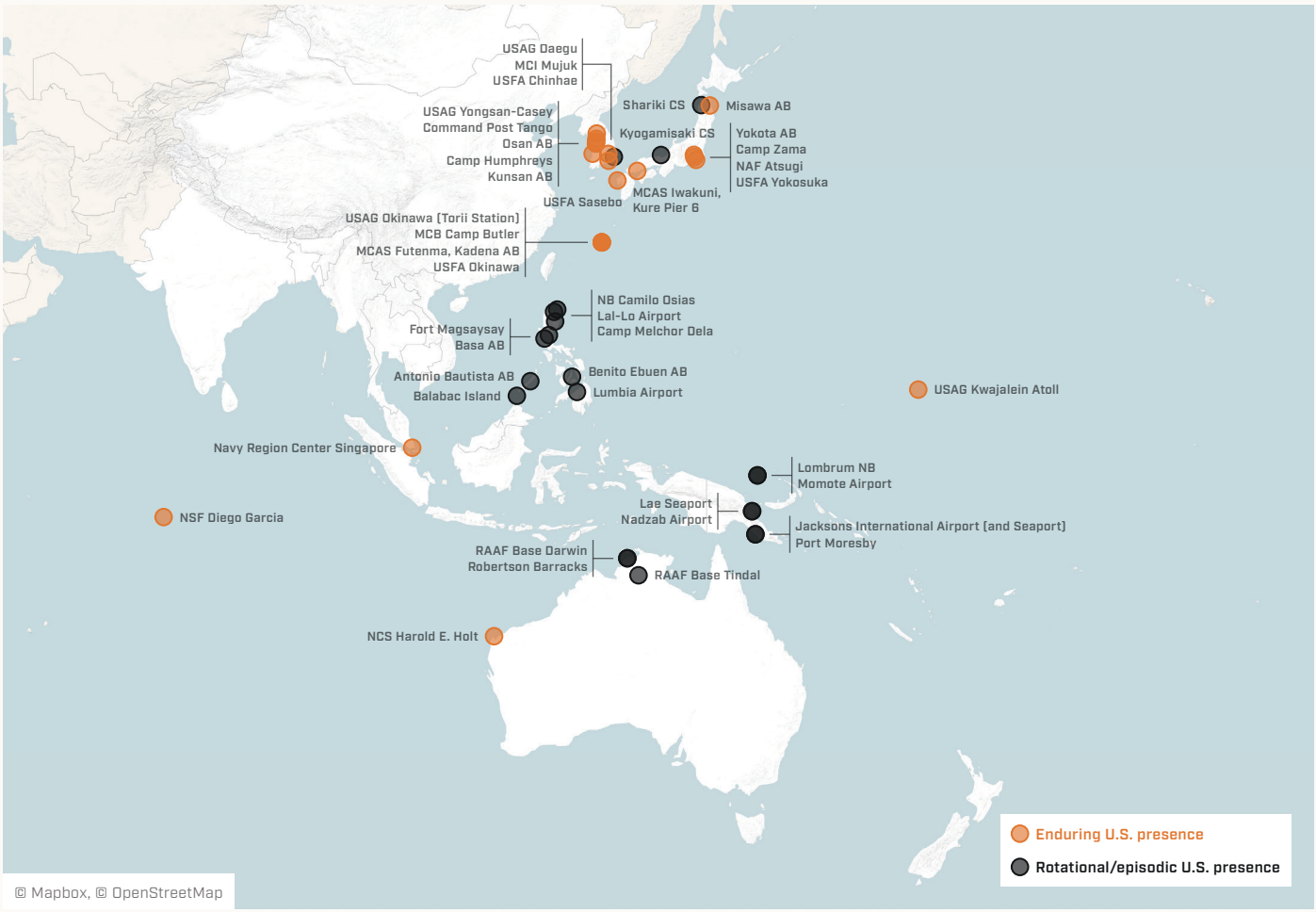


FIGURE 2.1 U.S. Basing in the Indo-Pacific

SOURCE Luke A. Nicastro and Andrew Tilghman, *U.S. Overseas Basing: Background and Issues for Congress*, CRS Report No. R48123 (Washington, DC: Congressional Research Service, July 2024), https://www.congress.gov/crs_external_products/R/PDF/R48123/R48123.3.pdf.

forces.[27] The Navy established Surface Development Squadron One in May 2019 and Unmanned Surface Vessel Division One in May 2022.[28]

Both organizational changes aim to field more distributed, lower-signature manned and unmanned surface and littoral forces rather than rely on a handful of large, concentrated, and more easily targetable ships. In parallel, the Air Force is reorganizing around new "units of action"—including Air Task Forces, announced in 2023, and follow-on Deployable Combat Wings, which the Air Force expects to replace the task forces in 2026—to package aircraft, command elements, and support teams into formations that can split and operate from multiple smaller airfields in support of ACE.[29] Across the services, these changes are meant to produce more numerous, mobile, and independently survivable units that can complicate Chinese targeting, absorb initial strikes, and continue to generate combat power under sustained attack.

At the same time, the United States is trying to reduce the vulnerability of its major fixed hubs. Some efforts are underway to harden and defend Guam and other key bases through improved missile defenses, passive protection, and redundancy in fuel and munitions storage—though these efforts need to be accelerated.[30] More broadly, the United States is also attempting to increase stockpiles of precision munitions and expand industrial capacity to sustain a protracted conflict.[31]

As highlighted in Chapter 6, these adaptations remain incomplete and face serious constraints, including limited industrial capacity, technical challenges in areas such as missile defense, and uncertainty over whether, when, and how allies might allow U.S. forces to operate from their territories in a war against China. The relentless growth of the PLA's long-range conven-

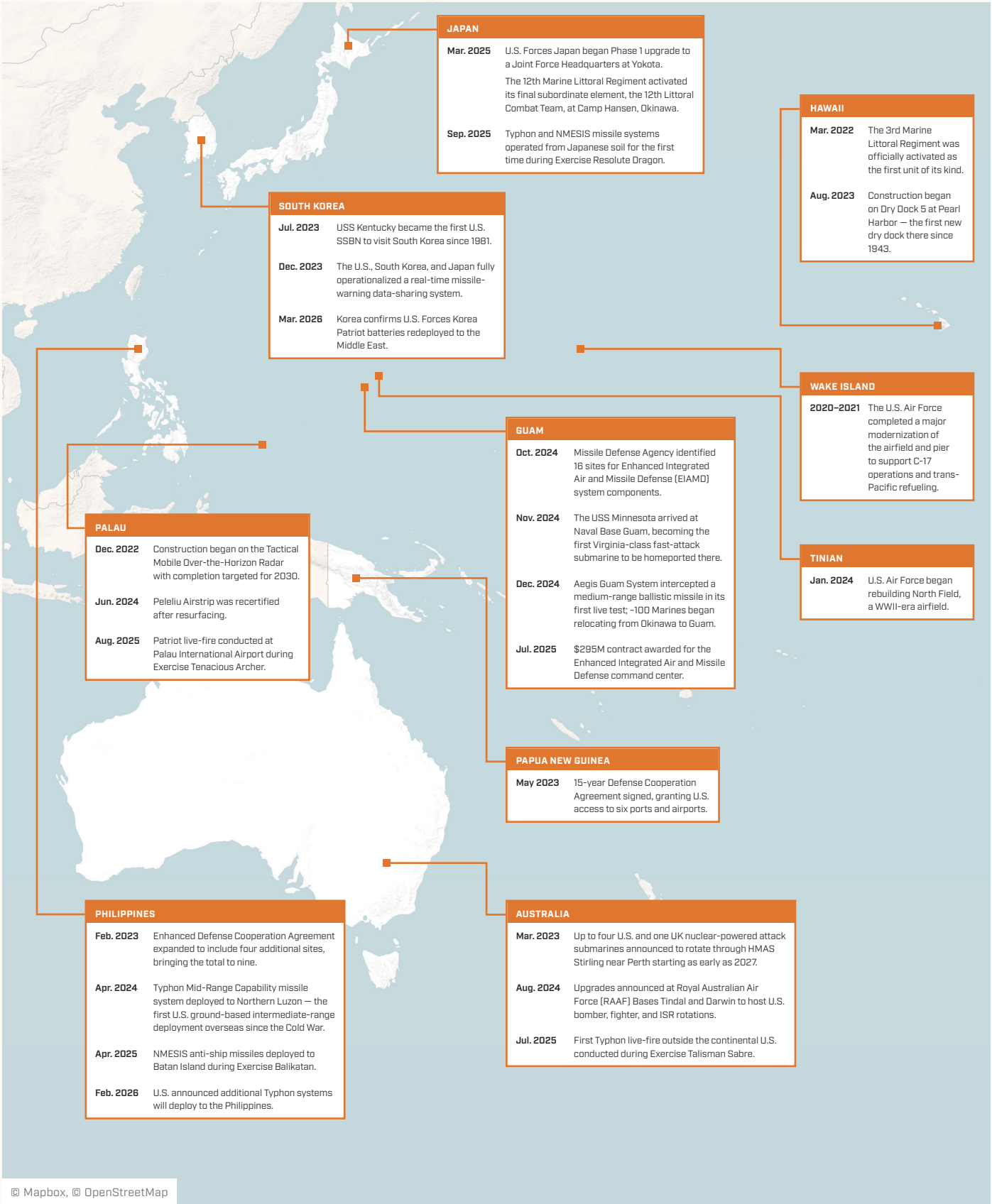


FIGURE 2.2 Select U.S. Force Posture and Organizational Developments in the Indo-Pacific

SOURCE CSIS.

tional strike systems is outpacing efforts to defend and harden fixed bases and surface ships. The result is a U.S. posture that is somewhat more flexible and survivable but still in transition and vulnerable to Chinese attack.

On the other side of the balance, the PLA maintains a fundamentally regional military posture. This posture is reflected in the organization of the PLA's theater commands, which are organized to manage peripheral contingencies. The Eastern Theater Command (ETC) is oriented toward Taiwan and the East China Sea and is responsible for military affairs related to the Taiwan Strait and Senkaku Islands.[32] Among China's theater commands, the ETC has the highest concentration of amphibious-capable forces. Major PLA units located within the ETC include the 71st, 72nd, and 73rd Group Armies; two People's Liberation Army Air Force (PLAAF) bases; two destroyer flotillas; four frigate flotillas; a landing ship flotilla; two submarine flotillas; and one People's Liberation Army Rocket Force (PLARF) base.[33]

The Southern Theater Command (STC) is responsible for Southeast Asia border security and territorial and maritime disputes in the South China Sea.[34] PLA units located within the STC include the 74th and 75th Group Armies, two PLAAF bases, an aircraft carrier, two destroyer flotillas, three frigate flotillas, a landing ship flotilla, two submarine flotillas, a submarine base, and two PLARF bases.[35]

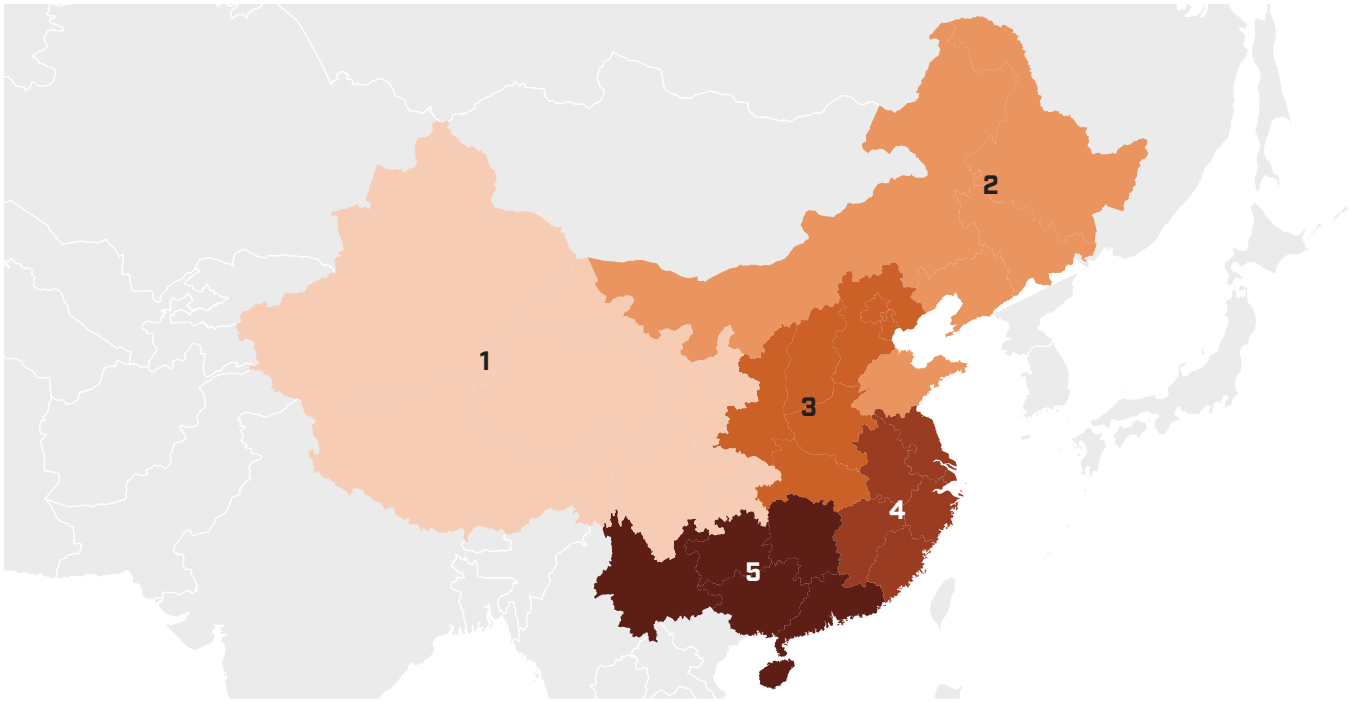
The Western Theater Command (WTC) is responsible for responding to conflict with India, border interactions with Central Asian states, and what the CCP refers to as the "three evils" of terrorism, separatism, and extremism in Tibet and Xinjiang.[36] PLA units located within the WTC include the 76th and 77th Group Armies and ground forces subordinate to Xinjiang and Xizang Military Districts, three PLAAF bases, and two PLARF bases.[37]

The Northern Theater Command (NTC) is responsible for operations along China's northern periphery and border security with North Korea, Russia, and Mongolia.[38] PLA units located within the NTC include the 78th, 79th, and 80th Group Armies; an aircraft carrier; two destroyer flotillas; two frigate flotillas; two submarine flotillas; a submarine base and its four marine brigades; two PLAAF bases; one special mission aircraft division; one transportation search and rescue brigade; and one PLARF base.[39]

Finally, the Central Theater Command (CTC) is responsible for defending Beijing and supporting other theater commands, including surging support during wartime.[40] Major military units under the CTC military include the 81st, 82nd, and 83rd Group Armies; the PLAAF's 13th Transport Division, 34th VIP Transport Division, 36th Bomber Division, Airborne Corps, Wuhan and Datong bases, and Shijiazhuang Flying Academy; and one PLARF base.[41]

China's military posture is optimized for border security, territorial disputes, and high-intensity conflicts in the western Pacific and along its land borders rather than for global power projection. Although PLA forces are most densely concentrated along China's eastern coast, the PLA leverages the depth of the Chinese mainland to make its forces and capabilities more difficult to target. For example, PLARF missile forces are dispersed across the vast Chinese mainland, allowing systems such as the DF-26 intermediate-range ballistic missile and DF-17 medium-range ballistic missile to threaten targets throughout the Indo-Pacific from interior launch sites. Survivability is further enhanced by an extensive and technologically advanced underground facility program designed to conceal and protect command and control nodes, logistics hubs, and missile forces from kinetic attacks.[42] The Joint Logistic Support Force is concentrating on improving readiness by integrating civilian transportation methods to move forces across the country, relying on military representative offices and dispatch centers to route military traffic rapidly across the Chinese interior during mobilization.[43] These improvements are designed to enhance the reinforcement and resupply of border and coastal forces, improving the PLA's readiness for regional contingencies (Figure 2.3).

The PLA has also undergone an extensive process of organizational and doctrinal transformation over the past decade, beginning in the early years of Chairman Xi's tenure. These reforms were instituted to ensure the political loyalty of the PLA to the CCP and enhance the force's ability to "fight and win" (能打仗、打胜仗) wars.[44] The organizational overhaul centralized control under the Central Military Commission (CMC), with Xi at the top. In 2015 and 2016, the four former Cold War–era general departments were abolished and replaced by 15 smaller departments, commissions, and offices—a move designed to improve internal management and dismantle entrenched, corruption-prone power centers.[45] Furthermore, the seven military



1 Western Theater Command

RESPONSIBILITIES

Conflict with India, border interactions with Central Asian states, and what the CCP refers to as the "three evils" of terrorism, separatism, and extremism in Tibet and Xinjiang.

SELECT PLA UNITS

- 76th and 77th Group Armies and ground forces subordinate to Xinjiang and Xizang Military Districts
- three PLAAF bases
- two PLARF bases

2 Northern Theater Command

RESPONSIBILITIES

Operations along China's northern periphery and border security with North Korea, Russia, and Mongolia.

SELECT PLA UNITS

- 78th, 79th, and 80th Group Armies
- an aircraft carrier
- two destroyer flotillas
- two frigate flotillas
- two submarine flotillas
- two PLAAF bases
- a submarine base and its four marine brigades
- one special mission aircraft division
- one transportation search and rescue brigade
- one PLARF base

3 Central Theater Command

RESPONSIBILITIES

Defending Beijing and supporting other theater commands, including surging support during wartime.

SELECT PLA UNITS

- 81st, 82nd, and 83rd Group Armies
- the PLAAF's 13th Transport Division, 34th VIP Transport Division, 36th Bomber Division, Airborne Corps, Wuhan and Datong bases, and Shijiazhuang Flying Academy
- one PLARF base

4 Eastern Theater Command

RESPONSIBILITIES

Oriented toward Taiwan and the East China Sea and responsible for military affairs related to the Taiwan Strait and Senkaku Islands.

SELECT PLA UNITS

- the 71st, 72nd, and 73rd Group Armies
- two People's Liberation Army Air Force (PLAAF) bases
- two destroyer flotillas
- four frigate flotillas
- a landing ship flotilla
- two submarine flotillas
- one People's Liberation Army Rocket Force (PLARF) base

5 Southern Theater Command

RESPONSIBILITIES

Southeast Asia border security and territorial and maritime disputes in the South China Sea.

SELECT PLA UNITS

- 74th and 75th Group Armie
- two PLAAF bases
- an aircraft carrier
- two destroyer flotillas
- three frigate flotillas
- a landing ship flotilla
- two submarine flotillas
- a submarine base
- two PLARF bases

FIGURE 2.3 PLA Posture, Select Units by Theater Command

SOURCE DOD, *Military and Security Developments Involving the People's Republic of China 2025* (Washington, DC: DOD, 2025), https://media.defense.gov/2025/Dec/23/2003849070/-1/-1/1/ANNUAL-REPORT-TO-CONGRESS-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2025.PDF and DOD, *Military and Security Developments Involving the People's Republic of China 2024* (Washington, DC: DOD, 2024), https://media.defense.gov/2024/Dec/18/2003615520/- 1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF.

regions were consolidated into the five joint theater commands, removing service headquarters from the operational chain of command and empowering these new commands to focus on joint planning, training, and transitioning efficiently to a wartime footing.[46] Additionally, the People's Liberation Army Army (PLAA) was downsized to improve efficiency and overall war-fighting capability, while aviation, missile, and maritime forces saw increases in personnel.[47] The PLA also stood up new services around this time, including elevating the Second Artillery Force to a full service in 2015 (renamed as the PLARF) and creating the Joint Logistic Support Force in 2016.

The most recent PLA organizational refinement occurred in April 2024. The CMC dissolved the PLA Strategic Support Force, which was created in December 2015 to centralize information warfare capabilities. Its functions were broken out into the Aerospace Force, the Cyberspace Force, and the new Information Support Force (ISF)—all reporting directly to the CMC. The CMC tasked the ISF with coordinating military networks and communications systems, establishing the current system of four services and four support forces.[48] These continuous systematic reforms are intended to ensure the PLA achieves its modernization benchmarks.

The doctrinal transformation accompanying these organizational reforms redefined the nature of modern warfare for the PLA. Several of the PLA's core operational concepts are rooted in the doctrine of "systems confrontation" (体系对抗) and "system destruction warfare" (体系破击战), in which victory is attained by disrupting, paralyzing, or destroying the key functions and vital nodes of an adversary's operational systems in order to collapse its overall combat effectiveness.[49] The ability to execute joint firepower strikes is a crucial element of this doctrine. The PLA's "firepower strike system" (火力打击体系) envisions coordination among multiple services—such as PLARF missile assets, PLAAF airpower, and People's Liberation Army Navy (PLAN) assets—to deliver substantial precision kinetic strikes.[50]

Taken together, PLA organizational reforms, doctrinal evolutions, and geographic advantage give China a growing ability to generate large, coordinated joint firepower against U.S. and allied targets in the Indo-Pacific. Trends in the near-term balance in posture, organization, and doctrine therefore tilt toward increasing danger for the United States, since China's structural and doctrinal modernization is already well advanced. Many of the most important U.S. posture and organizational changes will become meaningful only if they are resourced, politically sustained, and translated from concepts into practiced wartime routines over the next several years.

Land, Air, and Sea Capability Modernization

In addition to changes in posture, organization, and doctrine, the military balance in the Indo-Pacific is shaped by the underlying capabilities that give those concepts combat power. Overall, the historic U.S. advantage is eroding as China rapidly expands the quantity and quality of its military systems across the land, air, and sea domains. In the land domain, China now holds most forward U.S. bases at risk through the expansion of PLARF, PLAAF, and PLAN missile systems, while the United States and key partners race to strengthen long-range fires and air and missile defense. In the air and maritime domains, the PLA is eroding U.S. superiority with fifth-generation fighters, improved air defense systems, a growing carrier force, and the world's largest surface fleet, measured by number of hulls. Nevertheless, the United States retains important strengths in undersea warfare, global reach, and the integration of high-end systems with allies.

The military balance between the United States and China in the land domain in the Indo-Pacific is increasingly characterized by a shift toward medium- and long-range precision strike capabilities. The PLARF has executed a dramatic modernization and expansion of its missile capabilities, including equipping brigades in eastern China with the DF-17 medium-range missile carrying a highly maneuverable hypersonic glide vehicle and expanding its inventory of dual-capable DF-26 intermediate-range ballistic missiles, which can hold distant targets such as Guam at risk (Figure 2.4).[51] At the same time, the PLAA is modernizing maneuver and fire support by incorporating long-range precision fire assets such as the PCH-191 multiple rocket launcher, though some combat brigades still operate a mix of modern, older, and obsolescent systems that may underperform in high-intensity operations.[52]

In response, U.S. ground components are prioritizing long-range fires and air and missile defense. The Marines are shedding heavy armor in favor of

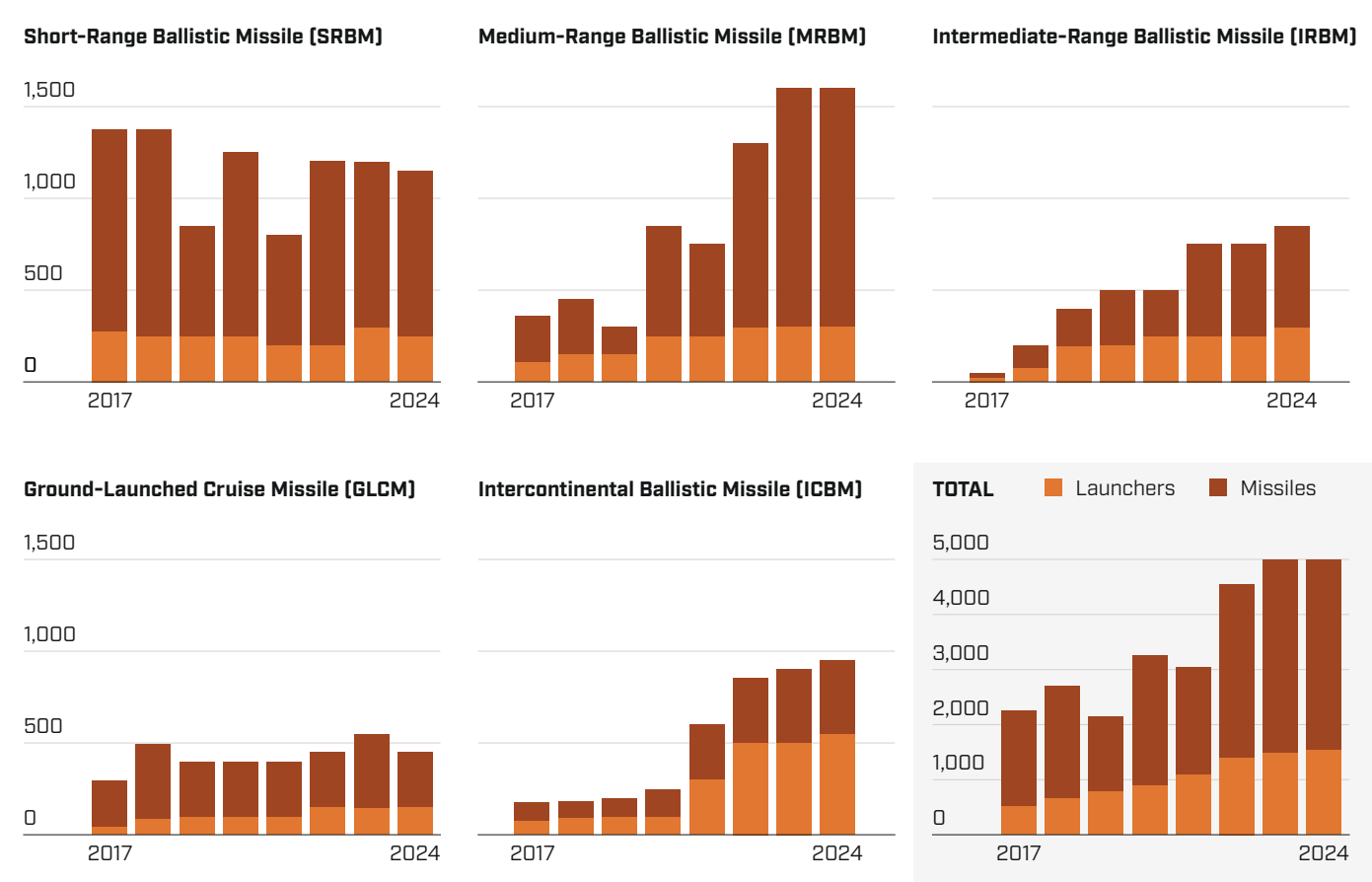


FIGURE 2.4 Inventory of Select PLA Missile Systems, 2017–2024

SOURCE Compiled from DOD, *Military and Security Developments Involving the People's Republic of China 2025*; and previous report iterations through 2018.

lighter distributed formations focused on island defense and long-range missile strikes, and the Army, despite relatively flat budgets compared to those of the Navy and Air Force, is investing in air and missile defense programs such as Maneuver Short-Range Air Defense (M-SHORAD) and emphasizing long-range fires.[53] The U.S. approach leans heavily on arming regional partners like Taiwan, which is acquiring High Mobility Artillery Rocket System (HIMARS) launchers and munitions to strengthen its defenses. The United States is also ramping up industrial capacity for key precision munitions, including increased annual output of HIMARS launchers and Guided Multiple Launch Rocket System (GMLRS) rounds, in an effort to restore magazine depth strained by global commitments and prepare for a high-intensity conflict.[54]

The military balance in the air domain is largely defined by the PLA's aggressive pursuit of modern high-end capabilities across all operational segments, challenging established U.S. qualitative superiority.[55] China is rapidly fielding advanced multirole combat aircraft, including fifth-generation fighters like the J-20; significantly upgrading its naval air projection capacity with the launch of the catapult-equipped Fujian-class carrier; and expanding its long-range strike capabilities through the development of low-observable strategic bombers like the H-20 and the nuclear-capable H-6N variant.[56] Additionally, the PLA is developing and producing sophisticated and attritable UASs. The U.S. response centers on maintaining a qualitative military advantage through sustained investment in next-generation platforms, such as the fifth- and sixth-generation fighter aircraft programs, advanced munitions like the forthcoming AIM-260 air-to-air missile, and the continued fielding of highly capable assets like the F-35 family and the B-21 bomber. The U.S. strategy also heavily leverages allies by facilitating the deployment of U.S. air systems from regional bases and airstrips.

The military balance in the sea domain is characterized by the PLAN's aggressive fleet construction and modernization, challenging long-standing U.S. maritime dominance in the Indo-Pacific. The PLAN now possesses the world's largest navy, measured by hull count, though it lags the U.S. Navy in total tonnage.[57] China is rapidly closing the qualitative gap in key naval technologies through the fielding of advanced platforms, such as the Fujian-class aircraft carrier, which launched in 2022 and features electromagnetic catapults, allowing for more air operations at sea.[58] China is also expanding its strategic nuclear deterrent by equipping its Type 094 strategic ballistic missile submarines (SSBNs) with the longer-range JL-3 submarine-launched ballistic missile, extending the reach of its strategic strike capability.[59] The United States retains advantages in overall naval tonnage (largely bolstered by its carrier fleet) and capacity for global deployment, but U.S. surface ships operating in the first island chain, and likely the second as well, are vulnerable to PLA long-range fires. Various wargames have highlighted the vulnerability of U.S. surface ships in a war with China in the Indo-Pacific, including through the potential losses of carriers, destroyers, and cruisers.[60]

Uncertainties

Several uncertainties could alter the judgments made in this section. As discussed in more detail in Chapter 3, China could receive additional aid from other axis countries—particularly Russia. For example, Russia's navy is more competent than China's in submarine and antisubmarine warfare, and Moscow could provide Beijing with advanced technology to reduce submarine noise (or "quieting") and improve acoustic sensors.

Perhaps most importantly, the PLA's actual combat effectiveness remains uncertain because it hinges on how well each side plans campaigns and integrates and adapts in wartime. Misjudging either U.S. or PLA competence, such as overestimating China's joint proficiency or underestimating the United States' ability to fight in a degraded environment, could skew assessments of who can generate and sustain effective combat power in a war. China has not fought a major war since the 1979 border war with Vietnam, where it performed relatively poorly. Some Chinese analysts—and even President Xi himself—have referred to the PLA's lack of combat experience as "peace disease" (和平病).[61] Relatedly, Xi's purge of over 100 senior PLA officers for alleged corruption raises questions about the integrity of the PLA's logistics, maintenance, training data, and command culture, but its true operational capabilities remain opaque.[62] If corruption has deeply distorted readiness, Chinese forces may underperform in high-intensity operations.[63]

Similarly uncertain is the role of U.S. allies and partners. Basing rights, overflight, and active operational support from Japan, the Philippines, Australia, South Korea, and others would dramatically increase U.S. combat power and resilience, but the behavior of U.S. allies in a crisis is uncertain. Domestic politics, fear of Chinese retaliation, and divergent risk calculations could produce anything from robust coalition operations using allied territory as key hubs to a far more constrained U.S. campaign fought from a smaller set of bases farther from the fight.[64]

Sudden technological leaps in offensive systems or countermeasures could also rapidly change the character of the fight and the overall balance. Both the United States and China are investing heavily in military research and innovation programs. For example, a breakthrough in unmanned swarming systems, hypersonic missile defense, AI, or quantum computing could sharply tilt the advantage toward the innovator, whereas unexpected vulnerabilities like cyber exploits in a key platform could neutralize expensive systems and undermine existing balance estimates.

The military balance also looks different in a scenario with months of rising tension, visible mobilization, and pre-positioning than in one where hostilities occur quickly with limited warning. If China can seize the initiative in a compressed timeline by striking before U.S. forces can disperse or surge into the theater, Beijing could exploit temporary advantages. Beijing could also use the element of surprise by rapidly transitioning from an "exercise" to a quarantine, blockade, or other military operation. Conversely, if the United States and allies get a clear warning of impending PLA military action, they can potentially blunt PLA advantages by dispersing forces, hardening bases, and flowing additional combat power forward. This is particularly relevant in a major contingency like a Chinese amphibious invasion of Taiwan.

The potential for nuclear escalation represents one of the most profound and unpredictable variables in any great power conflict. While the United States and China both maintain credible second-strike capabilities, their doctrines and thresholds for nuclear use

vary and are often deliberately ambiguous. Unclear thresholds, dual-capable systems, and coercive nuclear rhetoric could lead one side to self-limit operations to avoid crossing red lines or, conversely, embolden more aggressive conventional moves under the belief that nuclear threats will deter the other side from responding robustly. Finally, how leaders in Washington and Beijing perceive domestic political control and public tolerance for casualties will shape their willingness to escalate, absorb costs, and accept operational risk. Leadership turnover, economic crises, or public fatigue could make decisionmakers either more cautious and inclined to avoid confrontation or more willing to gamble militarily.

NATO AND RUSSIA IN EUROPE

The European military balance is in flux. Russia has placed its economy and defense industry on a war footing; it is working to regenerate mechanized forces, institutionalize battlefield adaptations, and expand precision strike capabilities, aided in part by support from China, Iran, and North Korea. Yet this effort is constrained by ongoing attrition on the battlefield in Ukraine, Western sanctions, and institutional weaknesses. NATO retains important qualitative advantages, particularly in air and maritime power and high-end capabilities, but Russia maintains a significant nuclear arsenal, a large military force, and a demonstrated willingness to absorb costs. European allies remain heavily dependent on U.S. forces, enablers, and logistics for high-intensity war fighting, even as they commit to ambitious defense spending and modernization goals that will take years to translate into high-end combat power. The result is a looming window of vulnerability in which a premature or rapid U.S. drawdown could shift the local balance in Russia's favor before European reforms fully materialize.

This section examines the nature of NATO-Russia competition in Europe, assesses Russia's military reconstitution efforts and prospective timelines, and analyzes trends in readiness, capabilities, and European dependence on U.S. power. It concludes by identifying critical uncertainties that could significantly reshape the balance and the risks to NATO in the coming decade.

Nature of the Competition

Russia remains the most significant military threat to NATO. Russia's objectives are revisionist, aiming in the near term to subjugate Ukraine and subsequently in the long term to shift the balance of power in Europe and contest NATO enlargement.[65] In addition to invading Ukraine, Russia frequently employs sabotage and subversion, as well as threats of nuclear escalation, against NATO countries to achieve its goals without direct armed conflict.[66] Russian political and military leaders assess that the United States is, and will remain, Moscow's "main enemy" (главный враг), viewing NATO support for Ukraine as participation in the war and as an attempt to expand its power and encircle and weaken Russia.[67] To confront NATO, Russia is reconstituting its military capabilities with substantial support from authoritarian partners, including China, Iran, and North Korea.[68]

Russian Military Reconstitution

The Russian military has absorbed catastrophic losses in personnel and equipment since its full-scale invasion of Ukraine began in February 2022, resulting in a degraded force structure. Russian forces suffered roughly 1.2 million casualties between February 2022 and December 2025, with over 325,000 fatalities (Figure 2.5).[69] Equipment losses are also significant, particularly among ground forces, which have lost large numbers of their most modern main battle tanks, armored fighting vehicles, infantry fighting vehicles, and other pieces of equipment.

Despite this degradation, Russia remains resolute, has placed its economy and defense industry on a war footing, and is systematically attempting to reconstitute its capabilities. The Russian military has successfully recruited personnel to offset losses and expand its forces, announcing plans in September 2024 to increase the strength of the armed forces to 1.5 million active service members.[70] The Russian defense industrial base, discussed in more detail in Chapter 6, has also increased its production and refurbishment of military systems. Since 2022, Russia has expanded its defense industrial base by mobilizing hundreds of thousands of workers, refurbishing large legacy stockpiles, and sharply increasing output of munitions and drones.[71] For example, annual production of 152 mm artillery shells rose from about 250,000 in 2022 to more than 1.3 million in 2024.[72] Production of 9M723

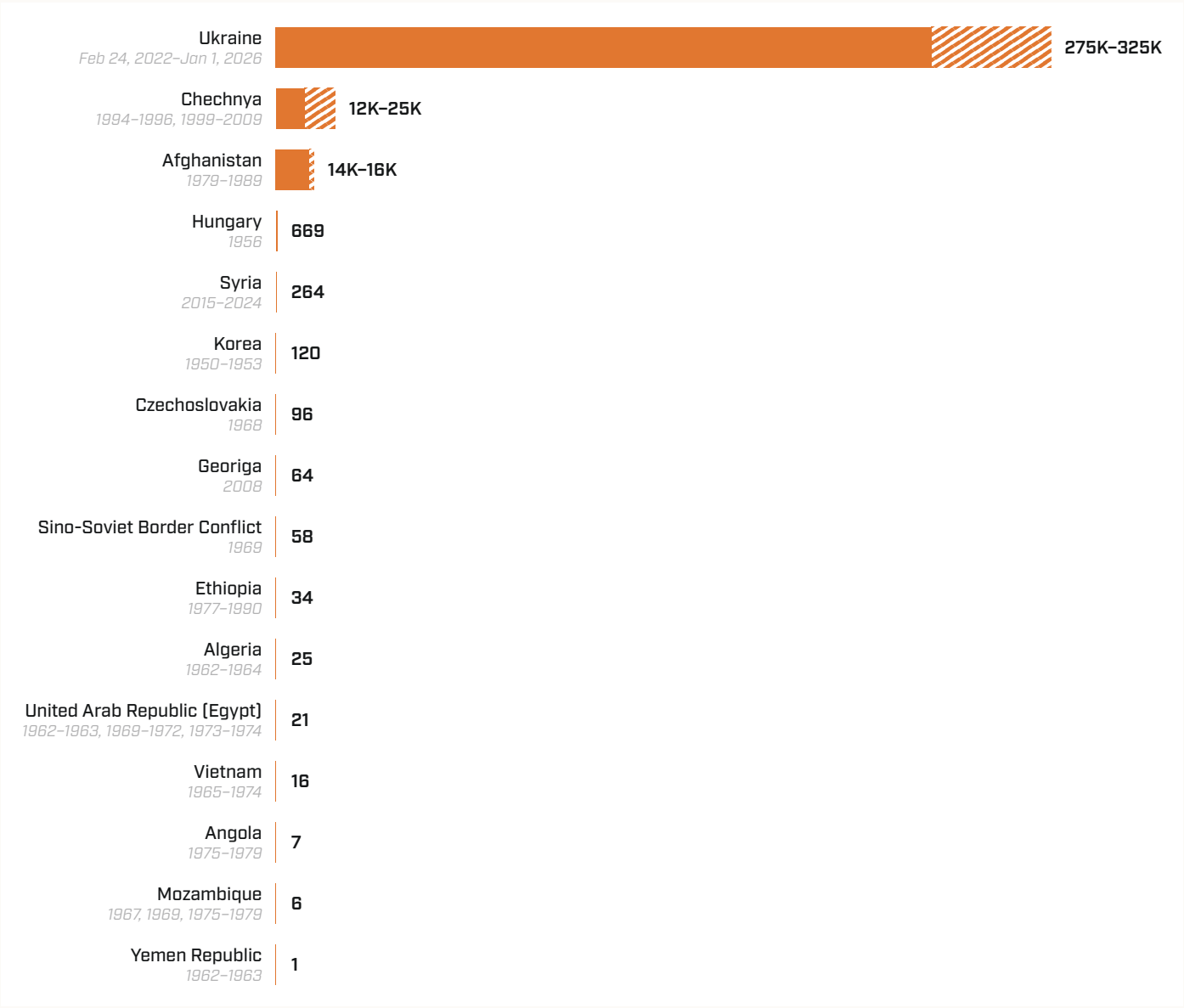


FIGURE 2.5 Estimated Russian Fatalities in Selected Soviet and Russian Wars, 1950–2025

SOURCE Aggregated from various sources.[76]

Iskander ballistic missiles rose from 250 in 2023 to 700 in 2024.[73] Despite this surge, Russia's defense industry faces serious constraints. For example, Russia has had to draw down from its Soviet-era stocks of main battle tanks and armored personnel carriers to keep its units equipped, decreasing frontline unit quality.[74] Heavy losses and reliance on refurbished armored vehicles could create major shortfalls given current attrition and limited new production capacity.[75]

In addition to offsetting immediate losses, the Russian military is committed to a large-scale, long-term reconstitution effort aimed at restoring mechanized maneuver capabilities and creating a force capable of fighting a major conventional war with NATO.[77] This vision rejects accepting the current status of the force—largely optimized for positional warfare in Ukraine—as a permanent state.[78] Russian reconstitution has three primary focuses.[79] First, Russia is attempting to restore mechanized maneuver capacity by rebuilding large armored formations and developing technological adaptations like anti-drone systems to enhance armor survivability. Second, Russia is institutionalizing effective tactical adaptations developed in Ukraine, such as specialized assault detachments, dismounted infantry tactics, and precision tactical

fires utilizing drones. Third, Russia is investing in new precision strike capabilities.

"Even a partially or inefficiently reconstituted Russian military will still pose a serious conventional challenge to NATO."

The likelihood of Russia successfully meeting its reconstitution goals may be affected by institutional flaws and by the demands of its ongoing war in Ukraine. Although the Russian military is a learning organization, the simultaneous task of expanding, reorganizing, and reequipping forces while engaged in a protracted war is inherently difficult. Russia's command culture, characterized by pervasive false reporting and a tendency to punish failure, further impedes the rigorous internal lessons necessary for coherent reform.[80] This cultural inertia increases the risk that Moscow will design an inefficient or overly optimistic reconstitution plan intended to field the force it desires rather than the force it realistically can staff and equip given battlefield losses and international sanctions. However, even a partially or inefficiently reconstituted Russian military will still pose a serious conventional challenge to NATO.

European intelligence services broadly assess that, following a ceasefire in Ukraine, Russia could rebuild forces for a major war with NATO in roughly five years, though specific estimates vary. Danish intelligence services judge that Russia could be ready for a regional war in the Baltics in about two years and a larger war in Europe in five years.[81] Estonian intelligence predicts Russia could reconstitute its army for large operations within three to five years, whereas Norwegian, Ukrainian, and German assessments put full reconstitution further out, in five to ten years.[82]

Trends in Readiness, Capabilities, and European Dependencies

The military balance in Europe between NATO and Russia is characterized by an asymmetry that generally favors NATO qualitatively and Russia quantitatively. It is also shaped by substantial European dependence on U.S. military power, a dependence that may evolve as Washington places greater priority on the China challenge in the Indo-Pacific.

The land domain represents Europe's primary area of weakness in the balance. While Russia's ground forces have suffered great attrition in Ukraine, Russia maintains substantial military mass and has demonstrated combat readiness, including the ability to push large portions of its force structure (some analysts estimate 50–60 percent) to the front line.[83] European nations, operating across roughly 30 separate national militaries, struggle with readiness challenges. As of 2025, 20 of 30 European NATO or EU members could field professional ground forces of fewer than 15,000 troops.[84] NATO has responded to the heightened threat along the eastern front since Russia's 2022 invasion of Ukraine by increasing its forward presence and developing updated deterrence plans requiring larger forces.[85] Eastern NATO members such as Poland and the Baltic states are also investing in fortified defensive belts.[86]

Nonetheless, NATO's posture along the eastern front heavily depends on a substantial U.S. presence. The United States maintains approximately 90,000 troops in Europe and pre-positioned equipment sufficient to equip two armored brigade combat teams (ABCTs) across four sites in Germany, Belgium, and the Netherlands, with a fifth site planned for Poland (Figure 2.6).[87] For a large-scale conventional war, the United States might need to deploy a combined force of 128,000 troops, including a U.S. Army corps headquarters, four division headquarters, and seven ABCTs.[88]

In addition, European NATO states have significant dependencies on the United States for enabling capabilities, without which European members would struggle to conduct high-intensity operations. Critical dependencies fall across several domains. In ISR, the United States operates 246 military satellites, compared to just 49 for European NATO members, highlighting Europe's difficulties with independently gathering intelligence and providing real-time targeting data.[89] In logistics and mobility, European states lack sufficient means for airlift and other logistical transport.[90] Another critical dependency is high-end long-range munitions and missile defense. European states lack sufficient quantities of long-range precision strike munitions, relying heavily on U.S. supply chains.[91] Furthermore, U.S. missile defense systems, including the Aegis Ballistic Missile Defense System and Patriot batteries deployed in Poland and Romania, are critical for protection against Russian ballistic missile threats.[92] If a major crisis elsewhere, such as in the

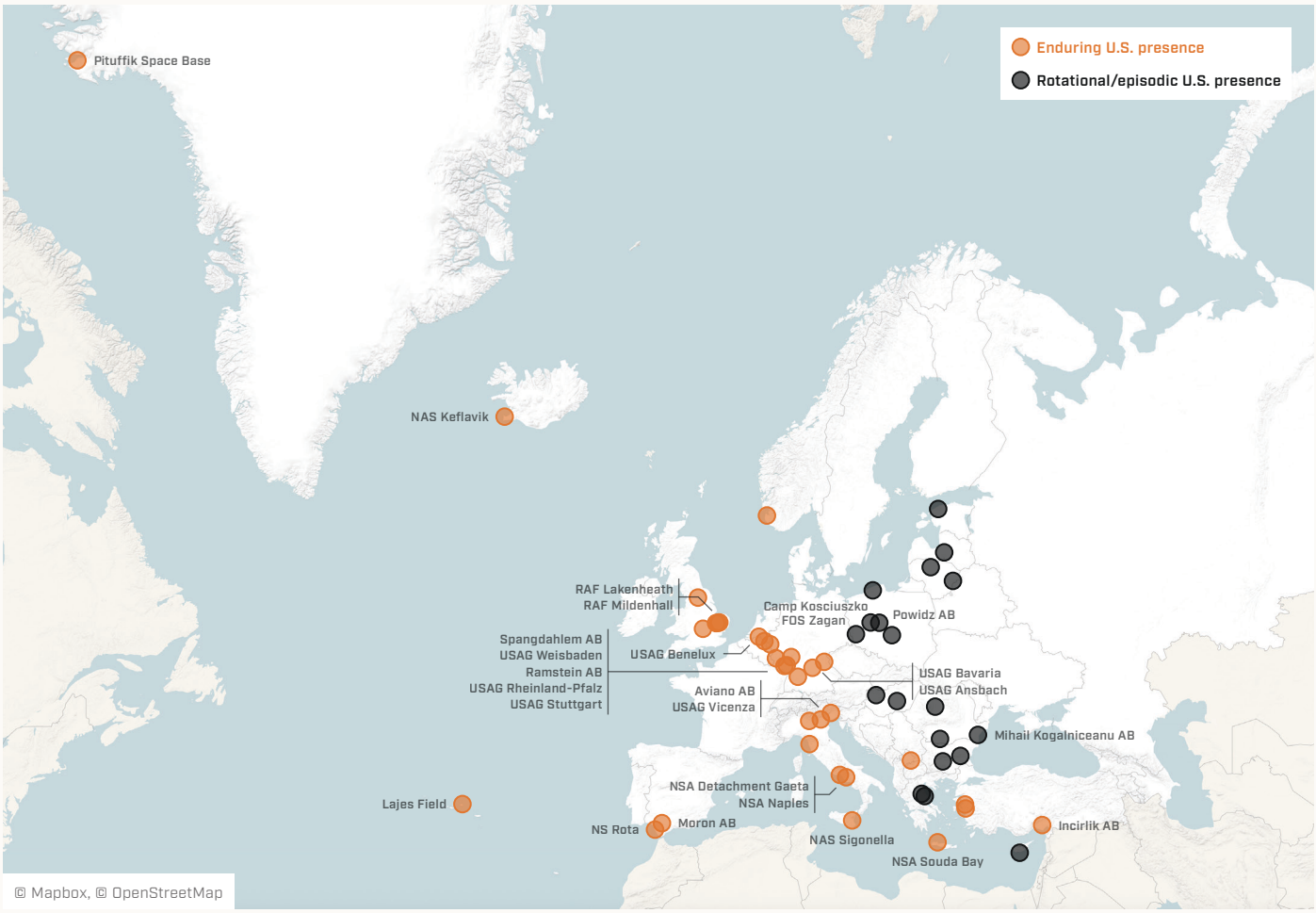


FIGURE 2.6 U.S. Basing in Europe

SOURCE Nicastro and Tilghman, *U.S. Overseas Basing*.

Indo-Pacific, drove the redeployment of high-demand U.S. assets—such as F-35s and F-22s, Patriot and Terminal High Altitude Area Defense (THAAD) batteries, RQ-4 and RC-135 ISR systems, and stocks of long-range precision munitions—Europe would face acute shortfalls in air superiority, air and missile defense, intelligence collection, and deep-strike capacity, significantly weakening NATO's position against Russia.

NATO holds a significant advantage over Russia in the air domain, with European NATO members fielding over 1,500 fighter aircraft against fewer than 1,000 for Russia.[93] This advantage is compounded by the technological superiority of fifth-generation platforms like the F-35. However, this air superiority is vulnerable without support from the United States, particularly concerning essential operational needs like air and missile defense, large stockpiles of munitions, and interoperability of platforms and systems.[94] U.S. air capabilities in Europe include fighter, attack, rotary-wing, tanker, and transport aircraft that perform close air support, air interdiction, air defense, in-flight refueling, long-range transport, and support of maritime operations. These forces include seven squadrons of fighter aircraft. Four squadrons are based at Royal Air Force Lakenheath in the United Kingdom under the 48th Fighter Wing, including two squadrons of F-35A aircraft and two F-15E squadrons. Two squadrons of F-16 aircraft are stationed at Aviano Air Base in Italy under the 31st Fighter Wing, and one additional F-16 squadron is stationed at Spangdahlem Air Base in Germany under the 52nd Fighter Wing. In the maritime domain, NATO has regional superiority over Russia, but European navies face acute capability gaps in antisubmarine warfare and seabed warfare without the United States.[95]

The balance between NATO and Russia is changing as a result of emerging divergent U.S. and European priorities. European NATO members have responded

by agreeing to an ambitious target of 5 percent of GDP spending on defense and security by 2035, though 1.5 percent may include defense-related activities such as cybersecurity, infrastructure protection, and civil preparedness.[96] Still, this target is higher than current U.S. defense spending as a percentage of GDP and aims to enhance capabilities and reduce reliance on the United States. Even if successful, this transition creates a potential window of vulnerability over the next decade. A substantial U.S. downsizing could weaken deterrence by tipping the balance in Russia's favor before European states can execute profound reforms.

Uncertainties

Several uncertainties could alter the judgments made in this section. The speed and effectiveness of Russian reconstitution could be affected by several factors, including the state of the war in Ukraine and assistance from foreign partners such as China, Iran, and North Korea. As discussed in more detail in Chapter 3, axis and other countries could provide additional weapons and components, multilateral exercises and training, defense industrial cooperation, deployment of soldiers, and defense pacts or treaties that deepen cooperation.

In Ukraine, prolonged high-intensity conflict will continue to impose heavy personnel and equipment losses, diverting newly raised units and fresh production to the front and slowing the rebuilding of a force optimized for large-scale operations against NATO. By contrast, a ceasefire or frozen conflict that reduces attrition would free up manpower, resources, and time for reorganization, training, and modernization. In both cases, the extent to which China, Iran, and North Korea provide weapons systems, components, technology, and financial relief to Russia could offset sanctions and accelerate reconstitution or, if constrained, leave Moscow's plans under-resourced and delayed.

Changes in the speed or scale of a U.S. military drawdown in Europe would significantly reshape the balance. A rapid or larger-than-expected reduction in U.S. forces, enablers, and pre-positioned equipment would widen NATO's vulnerability window and could increase incentives for Russian risk-taking. By contrast, a slower or more limited drawdown would buy time for European forces to modernize and assume greater responsibility. Later sections of this report offer recommendations for the U.S. military posture in Europe to maintain deterrence against Russia.

Relatedly, European modernization trajectories will determine whether NATO's advantages can be sustained as U.S. priorities shift. If European states translate their spending commitments into timely, coherent investments in high-readiness forces, enablers, and munitions stockpiles, they can offset some effects of a U.S. drawdown and narrow capability gaps. However, delays in procurement, political reversals, or fragmented national efforts could leave Europe with larger budgets but limited near-term combat power, prolonging dependence on U.S. forces.

Additionally, nuclear signaling by Russia and NATO allies could significantly alter perceptions of risk and willingness to engage in high-intensity warfare. More frequent or aggressive Russian nuclear threats might erode confidence in NATO's conventional deterrent and increase pressure for risk-averse behavior, constraints on support to Ukraine, or additional nuclear reassurance measures. Conversely, clear and credible allied nuclear messaging could reinforce deterrence and reduce Moscow's belief that nuclear coercion can compensate for conventional disadvantages.

Finally, domestic political developments in Russia, the United States, and European states could introduce substantial uncertainty into current trajectories. In the United States and Europe, electoral outcomes and shifting public opinion could sustain current commitments to defense spending and Ukraine or precipitate retrenchment, slower modernization, and reduced transatlantic cohesion. In Russia, leadership change or economic stress could weaken support for prolonged competition or, alternatively, drive more aggressive behavior to shore up regime legitimacy.

ISRAEL AND IRAN IN THE MIDDLE EAST

After Hamas attacked Israel on October 7, 2023, the competition between Israel and Iran and its proxies entered a new phase. After the attacks, Israel destroyed much armed forces, rocket and missile systems, and other military capabilities of Hamas and killed much of its leadership. In 2024, Israel also devastated the Lebanese Hezbollah. In both cases, the fighting continues to this day, at times with limited Israeli strikes and in other cases, as in March 2026, large-scale air and land

attacks on Hezbollah. For both of these groups, the fighting is largely one-sided, and both are less able to inflict harm on Israel than they were in 2023.

The conflict between Israel and Iran also escalated in this period, with the United States at times joining in. In 2024, Iran launched drones and missiles at Israel—the first time it directly attacked Israel instead of using proxies—but Israel conducted only a limited retaliatory strike, focusing on Iranian military installations. In June 2025, Israel launched a large-scale, surprise air campaign, targeting Iran's nuclear facilities, missile bases, and military leadership, with the United States joining in to attack Iranian nuclear sites. In 2026, both the United States and Israel have engaged in a massive air campaign against Iran, attacking missile, drone, rocket, and other sites, sinking much of the Iranian navy, and killing Iran's senior political and military leadership, among other targets. These strikes exposed the limits of Iran's deterrence strategy, inflicted severe damage on some Iranian partner forces, and emphasized a pronounced Israeli advantage in the regional military balance. Tehran, however, has proved able to attack energy infrastructure, military bases, and other targets in U.S. regional partners such as Qatar, Saudi Arabia, and the United Arab Emirates and has shown its ability to close the Strait of Hormuz, actions that have imposed significant costs on the world economy as well as losses for these countries.

In the near term, the military balance is tilted strongly in Israel's favor. Israel's qualitative edge in airpower, missile defense, and suppression of enemy air defenses is substantial and benefits from sustained U.S. matériel and operational support. Although Israel has nuclear weapons, this did not stop Iran from conducting two major missile and drone salvos against Israel in October 2024 and June 2025, respectively. Finally, the degradation of several of Iran's regional partners has sharply reduced Tehran's ability to threaten Israel indirectly. However, the potential regeneration of these groups, the trajectory of Iran's nuclear program, and domestic politics in Israel and the United States could all narrow Israel's margin of advantage in the long term. Iran may also continue to find asymmetric ways to strike back at the United States and Israel, raising the cost of military operations for its enemies.

The rest of this section analyzes the nature of Israel-Iran competition, assesses Israel's conventional and nuclear advantages and its dependence on U.S. support, and evaluates the degradation of Iran's partners. It concludes by identifying key uncertainties that will shape the future balance.

Nature of the Competition

Iran's initial post-1979 strategy was designed primarily to increase regime survivability, but Iran also fought a bitter war with Iraq and tried to spread its revolution throughout the Muslim world. Iran saw the United States and Israel as bent on overthrowing the Islamic revolution and Israel as an illegitimate state.[97] The regime's anxiety was particularly acute following the U.S. invasion of Iraq in 2003, especially when coupled with U.S. rhetoric indicating it might seek regime change in Iran.[98] Iran's stance became more offensive in the mid-2010s, driven by increased confidence in its defensive capabilities, with the expressed intent to expand influence and control across the Middle East.[99] In particular, Iran tried to take advantage of the Arab Spring and changes in government while deploying troops and otherwise aggressively supporting Syrian dictator Bashar al-Assad against an opposition backed by the United States and various Arab governments.

Iran's strategy against Israel relied heavily on deterrence by punishment. Iran enforced its policy primarily through a substantial missile arsenal and the projection of power via the country's partners, an informal Iran-backed network that includes Hezbollah, Hamas, the Palestinian Islamic Jihad, the Houthis, and other militia groups in the greater Middle East. However, Iran's deterrence strategy is increasingly under strain following successive military blows incurred since late 2023 by Israel and the United States, and many of its proxies are weak and hesitant to join Iran, even when the regime is under direct attack.

Israel's Growing Missile and Airpower Dominance

Israel maintains an overwhelming qualitative superiority in airpower over Iran, a disparity exposed during recent exchanges that culminated in Operation Rising Lion in June 2025 and Operation Lion's Roar (the parallel operation to the U.S. Operation Epic Fury) in 2026. The Israeli Air Force (IAF), one of the world's most capable air forces, fields advanced platforms like the F-35I Adir and heavily modified F-15I and F-16I aircraft. In contrast, Iran's conventional air fleet is old, primarily consisting of

U.S. aircraft manufactured before the 1979 Islamic Revolution, and its wider conventional forces struggle with obsolescent equipment.[100] Iran has sought to address this disparity by fielding modern surface-to-air missile (SAM) systems around strategically important sites.

Notwithstanding Iran's attempt to improve its air defenses, Israel was able to achieve air superiority over Iran in only a few days during Operations Rising Lion and Lion's Roar, despite Tehran being nearly 1,000 miles from Israel's nearest air base.[101] In 2025, Israel sustained this superiority until the ceasefire without losing a single manned aircraft or pilot, and the 2026 operation were similarly one-sided.[102] The IAF effectively degraded Iran's missile force and integrated air defense system through layered attacks, severely curtailing Iran's ability to coordinate large retaliatory missile barrages.[103] Israeli counterstrikes also successfully disabled or destroyed Iran's most advanced air defense capability, the Russian S-300 system.[104] Moreover, Iran's direct missile attacks in April and October 2024 revealed significant limitations in the ability of its missiles and UASs to penetrate advanced defenses and inflict serious damage in Israel.[105] However, in 2024 and in subsequent years, some Iranian attacks on Israel have penetrated Israeli defenses (and even more did so against U.S. Gulf partners in 2026), suggesting that Iran can still inflict some harm on its enemies as well as create pressure by threatening the flow of oil and natural gas through the Strait of Hormuz. Nevertheless, the results of these engagements reveal that the military balance is strongly in Israel's favor.

The United States is a vital defense partner for Israel, both in partnering for combined military operations against Iran and providing substantial annual foreign military financing that secures key Israeli procurements like F-35I fighters and supplying essential assets, including THAAD batteries, to compensate for depleted Israeli interceptor stocks.[106] The need for this depth was highlighted during the June 2025 war, where defense against approximately 500 Iranian missiles consumed nearly all Israeli interceptor stocks and several years' worth of U.S. production of high-end THAAD and SM-3 systems.[107] Iran's strikes in 2026 have similarly strained Israel's air defense stocks. These high expenditure rates underscore that while Israel possesses technological superiority over Iran, the sustainability and depth of its missile defense capacity remain highly dependent on continuous U.S. matériel and technological support.

Beyond security assistance, the United States maintains a substantial and rotational military presence across the Middle East (Figure 2.7). Kuwait hosts approximately 13,500 U.S. personnel at several installations across the country, most notably the headquarters of U.S. Army Central at Camp Arifjan and the headquarters of the 386th Air Expeditionary Wing at Ali Al Salem Air Base.[108] The 386th Wing provides airlift support via C-17 and C-130 aircraft and also operates MQ-9A Reapers for ISR. Camp Arifjan also serves as the operational command post for the 1st Theater Sustainment Command. Qatar hosts approximately 6,500–10,000 U.S. military personnel, predominantly at Al Udeid Air Base, the forward headquarters of U.S. Air Forces Central Command.[109] The air base is also home to the Combined Air Operations Center, which provides command and control of airpower across the region, and the 379th Air Expeditionary Wing, the largest expeditionary wing in the world.

Bahrain hosts Naval Support Activity Bahrain, the headquarters of U.S. Naval Forces Central Command and the Fifth Fleet. Approximately 8,000 U.S. military personnel are stationed in the country.[110] The United Arab Emirates hosts approximately 3,500 U.S. personnel and is the home of Al Dhafra Air Base and the 380th Air Expeditionary Wing, which provides ISR, command and control, and aerial refueling missions.[111] In January 2026, Iraq's Ministry of Defence announced that approximately 2,000 U.S. soldiers remain in Erbil, the capital of the Kurdistan Regional Government following an earlier drawdown from approximately 2,500.[112] The United States maintains roughly 1,500 troops in Syria, mostly in the northeast, but is reportedly consolidating, and probably reducing, its presence from eight bases to a single air base in Damascus to help enable a U.S.-brokered security pact between the new Syrian government and Israel.[113]

Overall, while numerous national defense strategies have argued that the United States would do less in the Middle East, U.S. presidents from Trump to Biden to Obama have continued to engage in the Middle East. Consequently, the United States may remain an important presence in the region.

Israel's Nuclear Anxieties

The nuclear balance between Israel and Iran is defined by Israel's established, though officially unacknowledged, nuclear capability and Iran's potential to obtain

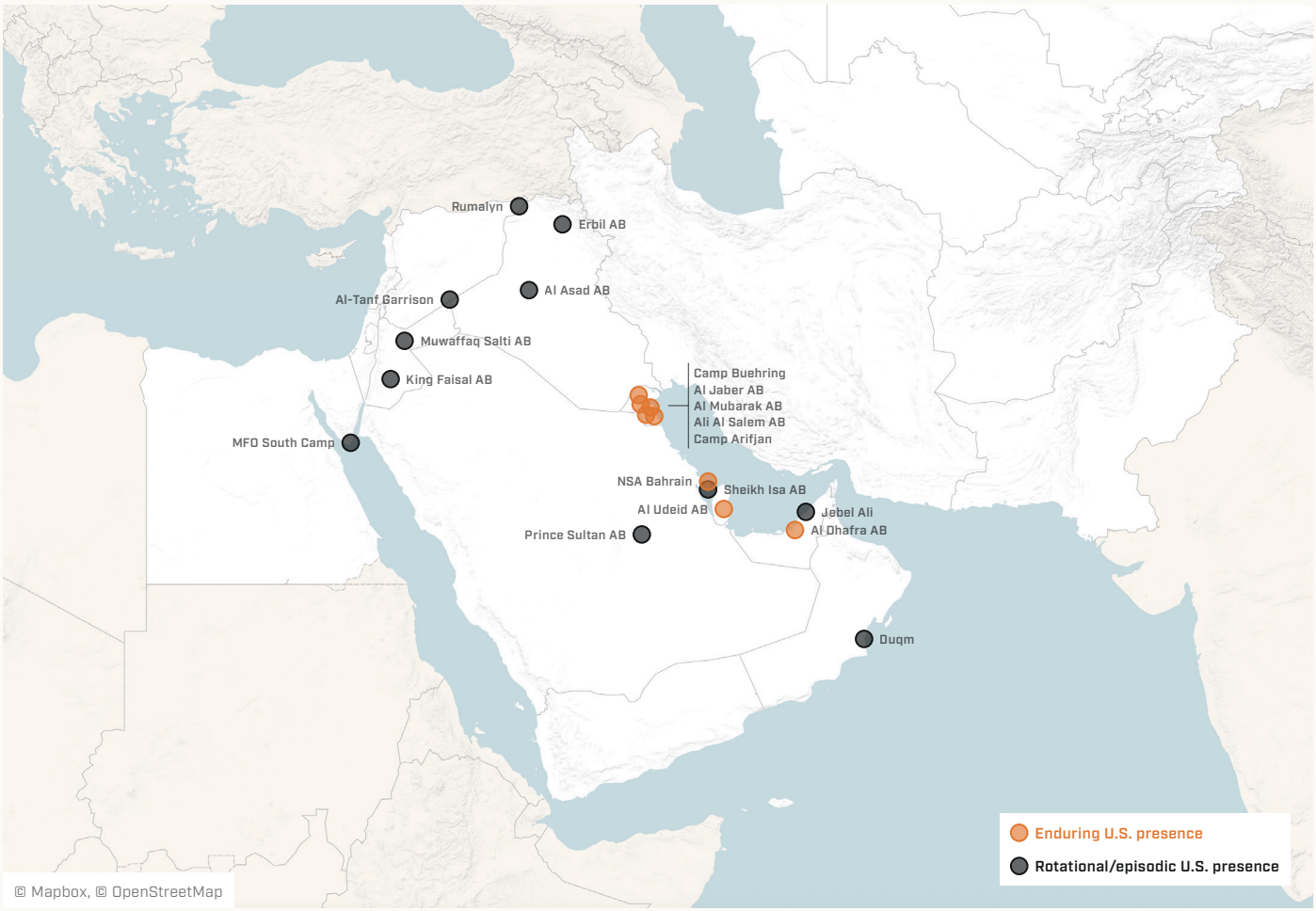


FIGURE 2.7 U.S. Basing in the Middle East

SOURCE Nicastro and Tilghman, *U.S. Overseas Basing*.

nuclear weapons. Iran's nuclear program and the risk of weaponization drive much of Israel's military actions against it, including covert actions and the 2025 and 2026 conventional strikes in coordination with the United States against enrichment sites, centrifuge manufacturing facilities, senior nuclear scientists, and other targets. These Israeli and U.S. operations degraded the Iranian nuclear program, with some estimates suggesting the 2025 strikes set Iran's nuclear weapon development back by one to two years, while the 2026 strikes have set back Iran's missile program and perhaps further damaged Iran's nuclear program.[114]

While Israel holds a major advantage in the military balance, the nuclear balance is increasingly central to the competition and a key driver of escalation dynamics. If Iran views a nuclear deterrent through weaponization as the most reliable means of offsetting Israel's military superiority, and if Israel views preventing an Iranian nuclear weapon as an existential imperative, both sides are likely to remain locked in cycles of preemptive action and nuclear hedging. This dynamic sustains Israeli military predominance in the near term but also heightens the risk of future conflict and the potential for nuclear escalation in the long term. In addition, while Iranian leaders have sought the destruction of the state of Israel since the 1979 revolution, new leadership in Iran might be more (or less) aggressive in pursuing this goal, driven both by ideological hostility and the humiliation of their 2025 defeat and their losses in 2026. Israel, for its part, may see future U.S. administrations as less supportive of its use of military force against Iran, affecting its willingness to strike in many circumstances.

Degradation of Iran's Partners

The cumulative defeats suffered by Iran and its partners since late 2023 have tipped the military balance further in Israel's favor and exposed critical weakness-

es in Iran's overall strategy. This decline has severely curtailed Tehran's capacity to project force and influence, reducing the threat Iran poses to Israeli and U.S. regional interests.

The core of this degradation involves the western flank of Iran's partners. The Israel Defense Forces (IDF) inflicted severe attrition on Hamas in Gaza, resulting in the decapitation of its leadership and shifting Hamas operations to small-cell guerrilla warfare.[115] Some estimates projected that Israel killed 17,000 fighters, or roughly half of Hamas's strength before October 7, 2023.[116] Similarly, and far more consequentially, the IDF inflicted significant losses on Hezbollah in Lebanon, Iran's most dangerous and strategically important partner force. In September 2024, Israel began a campaign of intense air strikes across Lebanon. The following month, Israel launched ground operations in southern Lebanon, entering towns and villages to clear Hezbollah fighters, equipment, and infrastructure and to seize key ridgelines along the border from which Hezbollah had previously launched attacks.[117] Hezbollah's leadership acknowledged that it suffered a 45 percent casualty rate during the Israeli campaign from October to November 2024.[118] When Israel and Iran clashed directly in 2025, Hezbollah stayed out of the fray—a major coercion success for Israel. Hezbollah did join Iran after Israel and the United States attacked in 2026, but it has inflicted only limited harm on Israel while suffering losses of leaders and weapons systems and being forced out of territory in southern Lebanon near the Israeli border.

Furthermore, the collapse of the al-Assad regime in Syria in December 2024 was a major setback for Tehran, as Syria, which had been one of the clerical regime's only allies, served as Iran's main land route to the Levant, disrupting Tehran's ability to reinforce its proxies in Lebanon and the Palestinian territories, as well as its project to build an integrated air defense network.[119] The presence of Iranian and Hezbollah forces in Syria also represented an additional border state where Israel faced a threat.

The Houthis in Yemen are the one exception among Iran's Middle East partners. The Houthis remain largely intact and appear to have emerged strong in the face of Western air strike campaigns. They continue to project power through missile and UAS attacks against Israel and international shipping. However, the Houthis' geographical distance from Israel limits their role in the balance compared to that of Hezbollah or Hamas.

This widespread degradation has severely undermined Iran's concept of deterrence by punishment through proxy encirclement. If left unchecked, these proxies will likely succeed in rebuilding their strength. However, for now, Israel enjoys a substantial military advantage over Iran and its proxies, having successfully eliminated the immediate threat of coordinated operations.

Uncertainties

Several uncertainties could alter the judgments in this section. Axis countries—particularly Russia and China—could provide additional assistance, as discussed in Chapter 3. Examples range from medium- and long-range missiles to fighter aircraft, helicopters, air defense systems and munitions, intelligence on common enemies, space and counterspace capabilities, and cyber and nuclear capabilities. The timeline of Iran's nuclear development remains contingent on Iran's risk calculus, technical progress, potential negotiations, and external disruption. Continued Israeli covert action and periodic large-scale attacks like those in 2025 and 2026 could slow Iran's advances, prolonging Israel's window of military superiority.

Additionally, the pace and extent of Iran's proxy regeneration will shape the future balance. If Hamas, Hezbollah, and other groups can rebuild leadership, force structure, and infrastructure over the next several years, Iran could partially reconstitute a more credible multifront threat to Israel. Alternatively, sustained Israeli and U.S. pressure could keep these organizations fragmented and degraded, limiting Iran's ability to threaten Israel indirectly and preserving Israel's current advantage. The degree of proxy recovery will thus influence whether the recent shift in the balance is temporary or more enduring.

Finally, domestic politics in Israel and the United States introduce significant uncertainty into the durability of the current alignment and the level of military effort each is willing to sustain. In Israel, leadership changes, public exhaustion with prolonged conflict, and backlash over casualties and other costs could reinforce hard-line preferences for decisive confrontation with Iran or generate pressure to prioritize de-esca-

lation. In the United States, electoral outcomes and shifting public opinion could sustain robust security assistance and operational cooperation with Israel or, alternatively, produce constraints on arms transfers and operational support.

SOUTH KOREA AND NORTH KOREA ON THE KOREAN PENINSULA

The Korean Peninsula remains heavily militarized and shaped by the legacy of the 1950–53 conflict, which concluded with an armistice but no formal peace treaty, leaving North and South Korea technically at war. Diplomacy between the two countries has broken down in recent years. While the ROK-U.S. alliance enjoys clear qualitative and technological superiority in conventional forces, the DPRK relies on nuclear weapons, ballistic missiles, cyber, and other capabilities to offset its conventional weakness and threaten catastrophic damage. Recent increases in DPRK-Russia cooperation are beneficial for the DPRK but not transformational for the balance. The rest of this section considers the nature of ROK-DPRK competition on the Korean Peninsula, assesses ongoing military modernization efforts, and examines the growing relationship between the DPRK and Russia. It concludes by identifying uncertainties that could shape the balance in the future.

Nature of the Competition

The DPRK's primary strategic objectives center on ensuring the survival of the Kim regime. Recognizing the qualitative inferiority of its conventional military forces despite having one of the world's largest armies on paper, Pyongyang's strategy leverages such capabilities as nuclear weapons, ballistic missiles, and cyber warfare to offset South Korea's technological superiority. The DPRK's military posture involves forward deploying conventional weaponry along the demilitarized zone (DMZ), emphasizing the possibility of a surprise attack. In late 2023, North Korean leader Kim Jong-un abandoned decades of strategic flexibility by rejecting reunification and formally declaring the ROK an "invariable principal enemy," increasing the risk of escalation.[120]

Military Modernization

Competition on the Korean Peninsula is characterized by significantly divergent military modernization efforts. The ROK is actively pursuing qualitative superiority and enhanced deterrence capabilities through increased defense investments. The ROK defense budget is expected to increase by 8.2 percent from 2025 to 2026.[121] Procurement plans emphasize advanced conventional assets such as tactical surface-to-surface missiles, SAM systems, and additional combat aircraft.[122] The ROK also launched a new Strategic Command in October 2024 to coordinate these major conventional assets with the U.S. extended deterrence architecture.[123] ROK forces, supported by the U.S. alliance, are among the best equipped and trained in the region and possess a significant qualitative advantage over DPRK forces.

The DPRK is focusing its modernization on sustained investment in nuclear weapons and diversified ballistic missile delivery systems, exemplified by tests of solid-propellant ICBMs and the unveiling of tactical nuclear attack submarines such as the *Hero Kim Kun-Ok*.[124] The DPRK also boasts one of the world's largest conventional forces, with 1.2 million active personnel, though these forces rely on increasingly obsolete Soviet-era and Chinese-origin equipment and many are poorly trained.[125] Nonetheless, the DPRK maintains the ability to threaten significant destruction.

DPRK-Russia Cooperation

The military relationship between the DPRK and Russia has deepened dramatically over the last two years, culminating in a mutual defense pact signed in 2024. The relationship is mostly defined by the DPRK supplying matériel and soldiers for Russia's war in Ukraine. Pyongyang reportedly supplied approximately 5.2 million artillery shells between August 2023 and April 2025, meeting up to 40–60 percent of Russia's frontline requirements.[126] Additionally, North Korea has supplied indigenously developed weapons, such as at least 100 Hwasong-11 series ballistic missiles, seizing the opportunity to field-test them in the conflict.[127] The estimated revenue from these arms sales is reported to be $19.2 billion, representing a massive cash windfall for the isolated regime, especially considering the DPRK's GDP in 2023 was estimated at just $23.3 billion.[128] Its growing relationship with Russia provides an opportunity

for Pyongyang to circumvent international sanctions and fund its military programs.

In return for exporting defense matériel to Russia, North Korea has likely received technical assistance for spy satellites and improved air defense systems.[129] Furthermore, the deployment of around 11,000 North Korean soldiers to Ukraine (with some deployed to the Russian Kursk region) provides DPRK troops with valuable experience in modern ground warfare.[130] Overall, this deepening cooperation strengthens the DPRK's position in the balance with the ROK by providing cash, technology, and limited combat experience. However, these gains may improve the DPRK's ability to threaten the ROK only marginally, and they likely do not alter the military balance on the peninsula.

Uncertainties

Multiple uncertainties could alter the judgments made in this section. Changes in the DPRK-Russia relationship could influence the future balance on the Korean Peninsula. If Moscow deepens military cooperation by providing more advanced missiles, space, air defense, or ISR capabilities, and if arms purchases continue at current or higher levels, Pyongyang could gradually convert cash, technology, and combat experience into more meaningful improvements that degrade the ROK's qualitative advantage in the balance. Conversely, if Russian needs decline, sanctions pressure increases, or Beijing seeks to limit Moscow-Pyongyang cooperation, the flow of resources and technology to the DPRK could slow, leaving the current marginal impact on the balance largely unchanged. Indeed, Beijing is wary of increased cooperation between Russia and North Korea, since Beijing seeks to be the only outside power that shapes North Korean policy. In addition, China fears that an aggressive North Korea would increase the willingness of Japan, South Korea, and other regional states to cooperate with the United States and with each other, spurring their own military buildups. How the relationship between Russia and the DPRK evolves will thus determine whether recent gains for Pyongyang remain incremental or grow more significant.

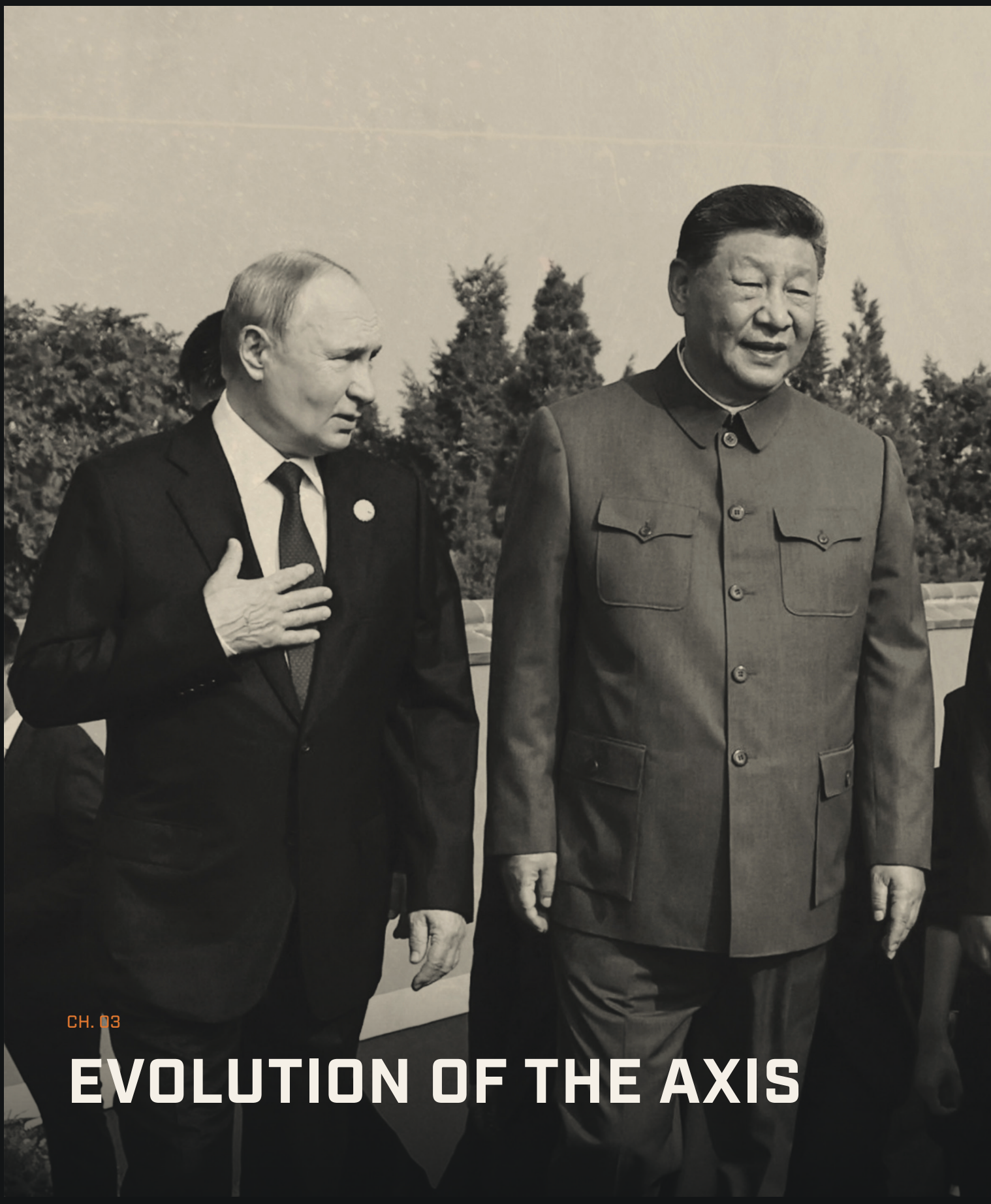
Developments in nuclear escalation dynamics could also introduce substantial uncertainty into the military balance. Further advances in the DPRK's warhead numbers, delivery systems, and tactical nuclear options, combined with shifts in its doctrine for early or limited nuclear use, could undermine confidence in ROK-U.S. conventional superiority and strain crisis stability. In response, changes in U.S. extended deterrence posture, nuclear-related debates in South Korea, and the deployment of new missile defense and strike capabilities could either reinforce deterrence or fuel arms racing and nuclear proliferation in South Korea. The interaction of these nuclear developments on both sides will likely shape future risk calculations and the credibility of deterrence on the peninsula.

CONCLUSION

As this chapter argues, China has sharply reduced the long-standing U.S. military edge in the Indo-Pacific. Extensive PLA reforms and sustained investment in modern capabilities have transformed China into a far more capable regional force. Beijing now fields large numbers of sophisticated air and naval assets, paired with long-range precision missiles, which can threaten U.S. bases, ships, and logistics nodes across the western Pacific. These developments have narrowed the gap that once decisively favored the United States. Across Europe, the balance between NATO and Russia is shifting in unpredictable ways. Moscow has faced major challenges in Ukraine but is actively rebuilding its forces and industrial base with material support from China, Iran, North Korea, and other partners. NATO, which is under serious strain because of U.S.-European tensions, continues to hold qualitative advantages, especially in air, maritime, and high-end capabilities. But most European militaries remain reliant on U.S. intelligence, logistics, and enablers. Whether NATO strengthens its lead or experiences a period of heightened vulnerability depends on how quickly Europe adapts, how effectively Russia regenerates combat power, and the tenor and severity of political tensions between the United States and Europe.

In the Middle East, the Hamas attacks of October 7, 2023, and the subsequent escalation between Israel, the United States, Iran, and Iran's partner groups, have ushered in a new phase of the Israel-Iran rivalry. Israel, supported by the United States, still commands a marked edge in airpower, intelligence, precision strike, and missile defense, and the wars of 2025 and 2026 have weakened Iran's militarily and demonstrated Israeli and U.S. military superiority. On the Korean Peninsula, South Korea maintains technological and qual-

itative superiority in conventional forces, while North Korea seeks to compensate for its deficiencies through nuclear weapons, ballistic missiles, cyber, and other asymmetric tools. Although growing cooperation between Pyongyang and Moscow provides some benefits to the DPRK, it does not fundamentally change the military balance at present. Threats to the United States in other regions, such as Latin America and Africa, remain significantly lower, though countries such as China are attempting to expand their reach in both regions. Over the next three to five years, axis cooperation could impact the military balance in all theaters, an issue the next chapter examines in detail.



CH. 03

EVOLUTION OF THE AXIS

Russia's President Vladimir Putin walks with China's President Xi Jinping and North Korea's leader Kim Jong Un before a military parade.
SOURCE Alexander Kazakov/Pool/AFP/Getty Images

This chapter builds off the previous chapter's conclusions on the military balance by examining future cooperation between axis countries.[1] It asks a central question: What are possible security arrangements between axis countries over the next three to five years? To answer this question, the chapter outlines three possible scenarios: weakening engagement, deepening bilateral relations, and a multilateral alliance.[2] Under *weakening engagement*, cooperation between one or more axis countries wanes because of divisions and diverging interests. In this scenario, there is greater disagreement and a decline in the overall degree of cooperation between some or all axis countries. Under *deepening bilateral relations*, cooperation between axis countries increases in such areas as the defense industrial base, though cooperation remains largely bilateral. Under *multilateral alliance*, axis countries establish formal or informal multilateral arrangements and cooperate more closely in several areas, such as the development of a multilateral treaty or other agreement that commits three or more signers to collective assistance in case of external attack.

The most likely future security arrangement over the next three to five years is deepening bilateral relations between axis countries, led by China and Russia. China is by far the strongest power among the axis countries, with 85 percent of the combined population, 88 percent of the combined GDP, and 66 percent of combined military spending.[3] Axis countries are likely to increase military exports and imports; expand the scale and scope of exercises and training; expand de-

fense industrial cooperation; deepen bilateral treaties or pacts that commit the signatories to greater military cooperation and, potentially, mutual defense in case of attack; and deploy soldiers to fight in the wars of other axis countries. The possibility of greater cooperation has significant implications for U.S. and allied defense planners, which are explored later in this report.

"The most likely future security arrangement over the next three to five years is deepening bilateral relations between axis countries, led by China and Russia."

The rest of this chapter is divided into five sections. The first examines axis security cooperation. The second provides an overview of weakening engagement. The third examines deepening bilateral relations between axis countries. The fourth explores the establishment of a multilateral alliance. The fifth outlines indications and warnings to assess future trends in security relations.

SECURITY COOPERATION

Like all countries, axis countries cooperate for numerous reasons. One of the most important reasons is a negative one: fear of a threatening adversary or adversaries.[4] Security cooperation among countries is generally the product of compromise since the interests of countries and their notions of how to secure them are never identical. This reality makes cooperation—including such arrangements as alliances—a matter of expediency.[5] Many security relationships have largely been scraps of paper because countries did not share common interests beyond general objectives. The Franco-Russian alliance of 1935 and 1944 as well as the Anglo-Russian alliance of 1942 are good examples of the limitations.[6]

Security arrangements can be divided into at least two categories. The first category is the type of institutional arrangement. Bilateral cooperation involves exercises, training, and other activities between two countries. Multilateral cooperation includes activities between three or more countries. The second category involves the degree of cooperation, which hinges on the costs and risks a country is willing to accept in a relationship. The greater the level of security cooperation, the more costly it is to back out and the more likely a country will be to risk tangible assets (such as the lives of its soldiers, money, or a commitment to defend others in case of armed attack) or make important diplomatic sacrifices to support its partners.[7]

Low levels of cooperation include activities that have limited costs and risks for countries. These types of relationships are mostly symbolic, and countries are unwilling to make any meaningful sacrifices. British Prime Minister Lord Palmerston famously quipped that England has "no eternal allies," but its "interests are eternal and perpetual."[8] Examples include military and dual-use exports and imports, short-duration training and exercises, and military-to-military visits. These instances of cooperation do not require countries to give up much autonomy, do not seriously risk national security, and may be terminated with limited costs. Medium levels of cooperation involve more costly arrangements. One example is integrated defense industrial arrangements such as codevelopment, coproduction, cosustainment, joint ventures, and mergers and acquisitions. Countries are willing to accept some risks with defense production, which is generally sensitive, by integrating the development and production of some advanced weapons. High levels of cooperation involve sacrificing tangible assets to fulfill commitments. Examples include sensitive war planning, joint war fighting, and treaties or other agreements that commit the signers to collective assistance in case of external attack. These types of commitments involve highly sensitive activities and the willingness to expend blood and treasure for other countries.[9]

Table 3.1 provides an overview of the three security arrangements for China, Russia, Iran, and North Korea: weakening engagement, deepening bilateral relations, and a multilateral alliance. These possibilities are not meant to be exhaustive but rather illustrate several plausible future security arrangements.

Several factors are likely to impact the type of security arrangement among the axis countries. First is the degree of common threat, since countries tend to increase cooperation to prevent stronger powers from dominating them.[10] Axis countries facing a growing external power or threat will likely increase security cooperation. The severity of the threat could be affect-

SECURITY ARRANGEMENT	SUMMARY	TYPE OF ARRANGEMENT	DEGREE OF SECURITY COOPERATION
Weakening Engagement	Security cooperation weakens between axis countries	Bilateral	Low levels of cooperation: ▪ Limited exports and imports of military and dual-use items ▪ Limited joint exercises and training
Deepening Bilateral Relations	Security cooperation deepens but remains largely bilateral	Bilateral	Medium levels of cooperation: ▪ Increase in exports and imports of military and dual-use items ▪ Growth in the scale and scope of joint exercises and training ▪ Rise in defense industrial cooperation, including codevelopment, coproduction, and cosustainment of key weapons components and systems; joint ventures; and mergers and acquisitions ▪ Creation or deepening of bilateral treaties or other agreements that commit signers to collective assistance in case of external attack ▪ Deployment of soldiers to fight in wars with another axis country
Multilateral Alliance	Cooperation deepens and becomes multilateral	Multilateral	High levels of cooperation: ▪ Significant increase in exports and imports of military and dual-use items ▪ Notable growth in joint exercises and training, especially for a joint or multifront war ▪ Significant rise in defense industrial cooperation ▪ Creation of a multilateral treaty or other agreement that commits signers to collective assistance in case of external attack ▪ Deployment of soldiers to fight in wars with one or more axis countries ▪ Establishment of a multilateral military structure that includes a military committee, joint war plans, and other committees to cooperate at the strategic, operational, and tactical levels

TABLE 3.1 Overview of Axis Security Arrangements

SOURCE CSIS.

ed by the military power of an adversary country or alliance (including its offensive military capabilities); geographic proximity, since adversaries that are closer are more likely to pose a greater threat; and the assessed intentions of the adversary country or alliance, which could vary from benign to malign intentions.[11] Second is the level of ideological solidarity, including shared political, cultural, or other traits or common interests.[12] The more interests that countries share, the likelier they may be to cooperate.[13] Third is domestic politics, including the preferences and decisions of leaders.[14] Regime change, including the death of a leader, could impact the degree of cooperation and the type of security arrangement. It is conceivable that a future leader could move in a different direction from Xi Jinping, Vladimir Putin, or others. Alternatively, these leaders could persist and develop stronger bonds that increase the prospect for cooperation.

WEAKENING ENGAGEMENT

In this scenario, bilateral relations between China, Russia, Iran, and North Korea become more tenuous, though axis countries might continue to cooperate in some form. This scenario assumes a weakening of bilateral security arrangements and declining levels of cooperation. Examples might include decreasing exports and imports of military and dual-use items. There might also be a decline in joint exercises and training, which are more symbolic than substantive.

There are already periodic disagreements between the countries, which could worsen over time.[15] Chinese leaders have expressed concern about Russia's warming military relations with an erratic North Ko-

rea, including a strengthening of Pyongyang's missile capabilities.[16] Some Russian leaders have objected to China's growing influence in Central Asia.[17] Iranian leaders were also frustrated with the lack of concrete Chinese and especially Russian military assistance during and after U.S. and Israeli military operations in 2025 and 2026.[18] As Afshar Soleimani, Iran's former ambassador to Azerbaijan, remarked, "If Putin really wanted to help Iran, he should have, at least, given Iran several S-300 or even S-400 systems in exchange for the drones he took from Iran. Or he should have given Iran several Su-35s."[19] In addition, China and Russia did not provide meaningful military assistance to Venezuela in 2025 or 2026, before or after Operation Absolute Resolve, the U.S. operation that led to the capture of Venezuelan President Nicolás Maduro.

In addition, China's theft of Russian technology and know-how created friction between Beijing and Moscow. For example, China likely stole technology from Russia's Su-33 fighter aircraft to develop the J-15 carrier-based fighter.[20] China has also frequently breached agreements with Russian arms suppliers by reverse engineering Russian equipment to produce its own weapons systems. China likely copied Russian Su-27 fighters to develop its J-11 fighter and reverse engineered the S-300 SAM system to produce its HQ-9 SAM system.[21]

In sum, weakening engagement would include a general fraying of military and security ties between axis countries. Several factors could lead to such an outcome. First is a declining threat environment, which would reduce the need for axis security cooperation.[22] Examples include the end of wars in Ukraine, a weakening of NATO, or a significant decrease in defense spending among major powers in Europe or Asia.[23]

A second factor is fraying common interests. Examples might include growing divisions on such issues as territorial disputes (such as a flare-up over the sovereignty of islands in the Persian Gulf), diplomatic détentes with other countries that create fissures, or even warming relations between some axis countries that threaten others (such as warming relations between Russia and North Korea raising concerns in China). In addition, there could be growing ideological fissures between axis countries, such as between the CCP, the Russian Orthodox Church, and revolutionary Shia Islam.[24]

Third, domestic challenges could weaken bilateral relations. The death or removal of a leader—such as the killing of Ali Khamenei in February 2026—could lead to a shift in foreign policy and a decision to decrease axis cooperation. China's economic situation could worsen due to a deepening property crisis, gloomy consumer confidence, trillions of dollars in local government debt, rising youth unemployment, and an aging society. These factors could cause China to turn inward and become more isolationist, unwilling to spend money or diplomatic energy on foreign entanglements. Under Chairman Mao Zedong, for example, China was largely autarkic and inward looking, and Mao advanced such principles as "putting the house in order before inviting guests."[25] Russia's economy could also worsen because of continuing economic sanctions, high inflation, a labor shortage, slow economic growth, or the persistence of the Ukraine war, causing it to turn inward. Of course, it is also possible that domestic challenges could cause some leaders to take risky ventures overseas—sometimes termed a "diversionary war."[26]

DEEPENING BILATERAL RELATIONS

Under deepening bilateral relations, cooperation between axis countries would increase. The anchor of the relationship is Beijing due to its size and military, economic, and technological power, though relations between Beijing and Moscow are particularly important. Overall, axis countries continue to develop closer bilateral ties in defense industrial production, including emerging technologies that have significant military capability, such as AI and quantum computing. A deepening coalition could include cooperation in several areas.

First, arms exports and imports between axis countries continue under deepening bilateral relations, but they grow in scale and scope. After all, bilateral trade significantly increased between Russia and China. Axis countries might also expand arms sales to the Global South, continuing recent trends. Between 2020 and 2024, for example, the main suppliers of arms to Africa were Russia, which accounted for 21 percent of total African imports of major arms, and China, which accounted for 18 percent.[27]

Second, axis countries might broaden the scope and frequency of exercises and training missions to

improve joint war fighting, intelligence sharing, command and control arrangements, and interoperability. They might also train for war in multiple theaters at the same time. While many of these instances could be bilateral, there might also be an increase in multilateral exercises and training missions.

Axis countries have already started moving in this direction. Between 2017 and 2024, for example, China and Russia conducted roughly 100 joint military exercises in a growing number of geographic areas, including Asia, Europe (including the Mediterranean), the Middle East, the Arctic, and Africa.[28] Joint exercises between axis countries have included efforts to integrate each other's military equipment and facilities, as well as establish temporary joint command centers.[29]

Axis countries have also conducted numerous training missions (Figure 3.1). For example, China and Russia conducted eight joint bomber flights between 2019 and 2024.[30] In July 2024, China and Russia flew Xi'an H-6 and Tu-95 Bear long-range bombers, respectively, on a joint patrol off the coast of the United States. As one analysis concluded, "This incident was the first of its kind for the two countries, showing a willingness of Beijing and Moscow to extend cooperation to their strategic nuclear forces and signaling their continued testing of U.S. resolve, including through actions in proximity to the U.S. homeland."[31]

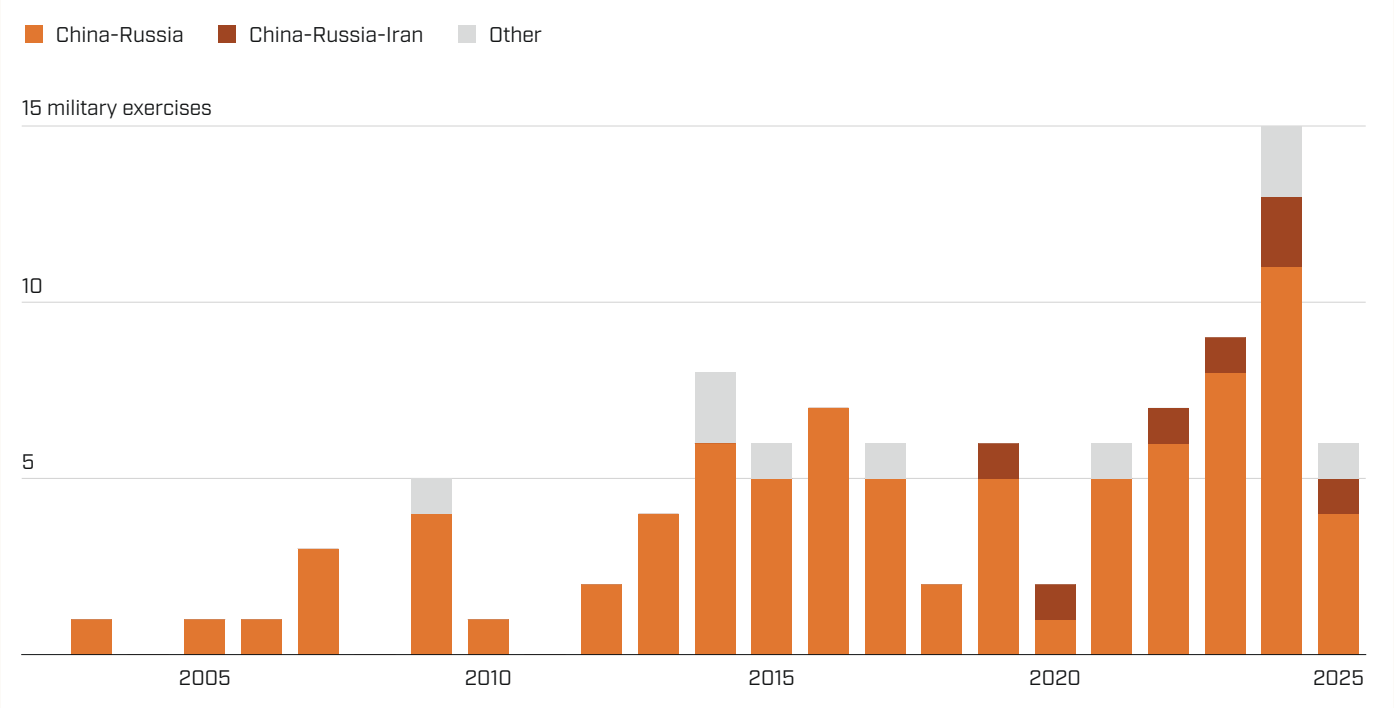
The two countries have also held live-fire naval drills in the South China Sea and have frequently flown and sailed together near Taiwan, Japan, and South Korea.[32] In addition, China and Iran have participated in joint military drills and cooperated in maritime operations, counterpiracy, and search and rescue operations.[33] China, Russia, and Iran have also conducted joint naval drills—including Marine Security Belt 2025 in the Gulf of Oman—to improve cooperation in such areas as maritime strike and search and rescue operations.[34]

Third, axis countries could deepen bilateral defense industrial base cooperation. A modern-day defense industrial base involves the production of defense and dual-use items by commercial companies and state-owned enterprises across multiple domains. Militaries also require software and may use a wide range of technologies, including emerging technologies such as AI, quantum computing, synthetic biology, automation, and new energy.

Axis countries—including China and Russia—could increase cooperation in such areas as unmanned

FIGURE 3.1 Joint Military Exercises Between Axis Countries

SOURCE: Brian Hart, Bonny Lin, Maria Snegovaya, and Mona Yacoubian, "CRINK in Ten Charts," CSIS, *Commentary*, November 24, 2025, https://www.csis.org/analysis/crink-10-charts.



and autonomous platforms, integrated air and missile defense, space and counterspace, missiles, and emerging technologies like AI and quantum.[35] Cooperation could take several forms: the codevelopment, coproduction, and cosustainment of weapons systems or components involving industrial firms from two or more axis countries; joint ventures; or transnational mergers and acquisitions.

Some axis countries have already moved in this direction. For instance, Russia increased coproduction with Iran of Geran-1 and Geran-2 drones, the Russian names for Iran's Shahed-131 and Shahed-136 drone, respectively. With Iranian aid, Russia constructed a massive factory in Yelabuga, roughly 566 miles east of Moscow, which may be producing more than 5,500 drones per month.[36] Several axis countries have also cooperated in space and counterspace.[37] In February 2024, for example, a Russian rocket carried an Iranian satellite into orbit.[38] There have also been some indications that Russia could aid North Korea's limited space program.[39] However, the core of space cooperation would likely be China and Russia, which have signed agreements related to the transfer of space and missile defense technology, increased cooperation between their GLONASS and BeiDou systems, and cooperated in other areas of space, such as in ballistic missile defense and space debris monitoring. Russia could aid China in developing ground- and space-based missile warning systems that would raise the effectiveness of China's existing missile defense systems and speed the development of new systems. China and Russia could also develop a joint missile early warning system, which would indicate a significant deepening of the relationship.[40]

Fourth, axis countries could increase their commitment to defend each other in case of external attack through a deeper bilateral treaty or other agreement that commits signers to collective assistance. These types of agreements have been common among allies. In 1936, for example, Germany and Italy agreed to the Rome-Berlin Axis agreement, which evolved into the Pact of Steel signed by Adolf Hitler and Benito Mussolini on May 22, 1939. The most important relationship is between China and Russia, which agreed to what they called a "no limits" friendship in February 2022 and then reaffirmed it in February 2025.[41] China-Russia relations could deepen if the two countries' leaders

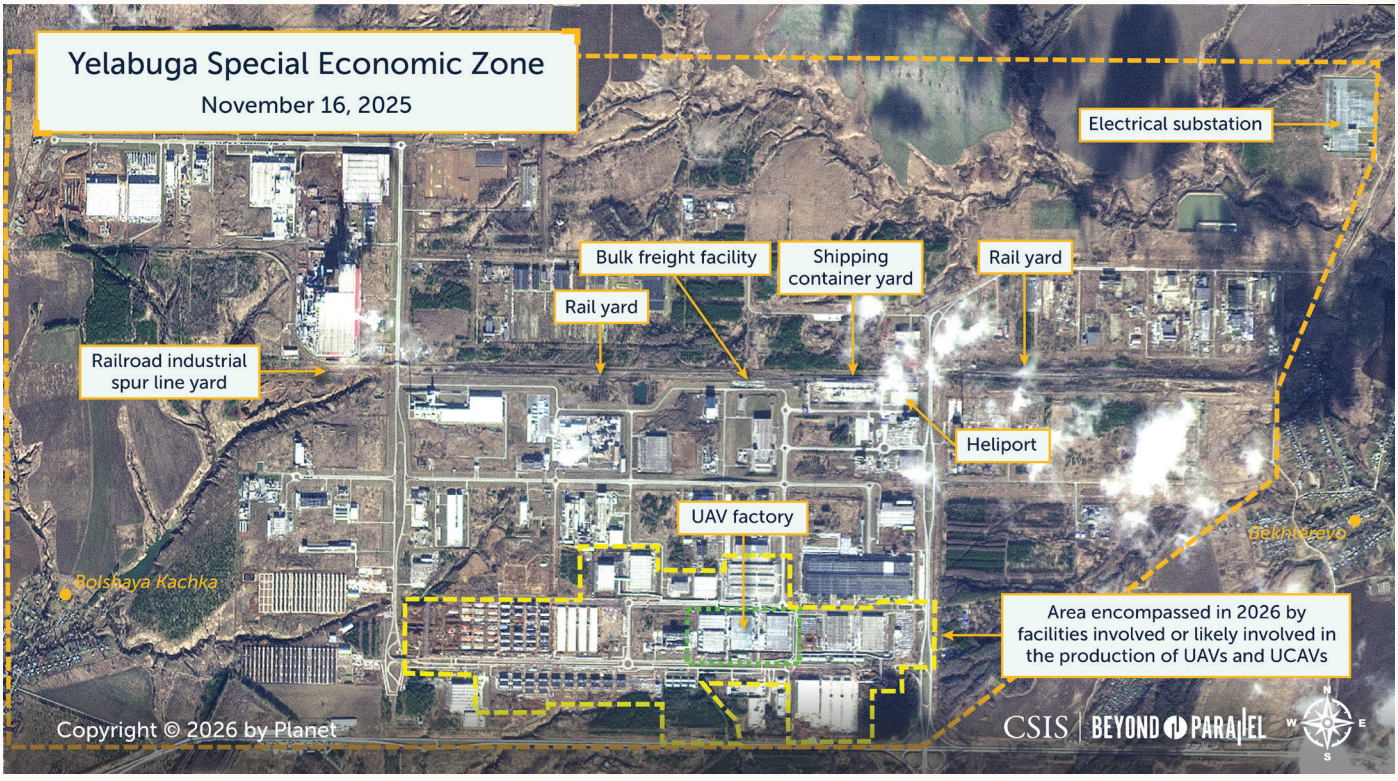


FIGURE 3.2 Satellite Imagery of Yelabuga Drone Facility

SOURCE CSIS Beyond Parallel.

commit to collective assistance in case of an armed attack. In addition, bilateral relations have strengthened with other axis countries.

In 2021, China and North Korea renewed their 1961 Treaty of Friendship, Cooperation, and Mutual Assistance for an additional two decades. The treaty promotes peaceful cooperation in the areas of culture, economics, technology, and other social benefits between the two nations. Article 2 declares that the two nations undertake all necessary measures to oppose any country or coalition of countries that might attack either nation.[42] In March 2021, China and Iran agreed to a 25-year strategic partnership, which includes Chinese investment in Iran and imports of discounted Iranian oil to China.[43] In June 2024, Russia and North Korea signed a Treaty on Comprehensive Strategic Partnership, which commits the countries to mutual military and other assistance if the other is invaded.[44] In January 2025, Russia and Iran signed a 20-year pact that formalized close ties between the two countries.[45] However, the pact does not constitute a military alliance and requires no direct obligations from either party—and Moscow did little when the United States and Israel attacked Iran in 2025 and 2026. Overall, a future development in which there is deepening bilateral relations would likely involve building and expanding these commitments, including, perhaps, relations between Iran and North Korea.

Fifth, a deepening coalition could entail increased combat assistance, including the deployment of soldiers, to other axis countries engaged in wars. Examples include China, Iran, and North Korea providing military assistance to Russia for its war against Ukraine. In late 2024, North Korea sent approximately 12,000 combat forces to Russia's Kursk Oblast, where Ukraine seized Russian territory in August 2024. The forces were initially used for mine clearance and frontal assaults on fortified positions, and they suffered significant casualties. Nevertheless, in early 2025, North Korea deployed roughly 3,000 additional soldiers for combat against Ukrainian forces.[46] Another example of deepening cooperation is Russia providing weapons and intelligence for targeting operations to the Houthis in Yemen, an Iranian partner force and U.S.-designated terrorist organization.[47]

Several factors could lead to deepening bilateral relations. One is an increased threat, such as an arms race with the United States, European countries, or such Asian countries as Japan, South Korea, or Australia. Significant increases in defense spending from the United States and its allies in Europe and Asia—as well as advancement in such capabilities as fifth- and sixth-generation aircraft, nuclear weapons, bombers, submarines, and ballistic, cruise, and hypersonic missiles that could be viewed as offensive—could increase the threat perception in Beijing, Moscow, Tehran, and Pyongyang. A further escalation of conflict with Iran in the Middle East, a protracted war in Ukraine, or an escalating crisis in the South China Sea, East China Sea, or Taiwan Strait could also increase the perception of threat among axis countries.

Another factor is growing common ideological interests, including against the West. As one assessment concluded about the axis, "There is a shared anti-Westernism, opposition to democracy, and embrace of authoritarian alternatives."[48] Strengthening ideological interests could occur because of growing opposition to U.S. and other Western power, influence in international institutions, and democracy.

A final factor is the persistence or deepening of strong ties between axis leaders. Most significant would be a deepening of ties between Xi and Putin, who could serve as the linchpin of deepening ties.

Although this scenario of deepening bilateral relations assumes growing cooperation, there are still limitations to security cooperation. Chinese, Russian, and other leaders would be reluctant to establish a multilateral relationship because of concerns about the costs and benefits. Any benefits, such as military assistance in case of war, would be undermined by the costs, such as obligations to defend an unreliable member. China, in particular, would have the most to lose in a multilateral alliance. It has the largest defense budget, economy, and population and does not necessarily need significant multilateral cooperation. Russia might also worry about closer relations with Iran and North Korea, which are viewed in some quarters as pariahs. There might also be concerns in Iran and North Korea about stronger relations. Great powers have historically pushed around weaker allies, which is why Niccolò Machiavelli warned weak nations about the dangers of making alliances with stronger ones except by necessity. He warned, "You are left his prisoner, and princes should avoid as much as they can being at the discretion of others."[49]

MULTILATERAL ALLIANCE

A final scenario is a multilateral alliance in which axis countries begin to establish multilateral arrangements that include high levels of cooperation, such as an agreement that commits signers to collective assistance in case of external attack.[50] A multilateral alliance would likely involve strengthened relations in several areas, such as an increase in the scale and scope of exports and imports of military and dual-use items, multilateral joint exercises and training, integrated defense industrial cooperation across three or more countries, and deployment of soldiers to fight in wars with other axis countries.

Such an alliance would differ from weakening engagement and deepening bilateral relations. Axis countries might establish a multilateral arrangement—such as a treaty, defense pact, nonaggression pact, entente, or other agreement—committing signers to collective assistance in case of external attack or other types of arrangements. This agreement could be overt or covert. Historical examples include the Treaty of the Holy Alliance of 1815 among Austria, Prussia, and Russia; the Atlantic Charter of 1941 that established NATO; and the Warsaw Pact during the Cold War, which included the Soviet Union and Soviet satellite countries in Eastern Europe.[51] During World War II, the Tripartite Pact, also known as the Berlin Pact, was an agreement among Germany, Italy, and Japan signed in Berlin on September 27, 1940. It was supposedly a defensive military alliance that Bulgaria, Hungary, Romania, Slovakia, and Yugoslavia eventually joined.

However, a multilateral alliance among axis countries would not necessarily involve a formal treaty. Not every multilateral alliance, even ones that call for common policies and actions, involves a legal codification of agreements. The Concert of Europe was an informal consensus among five main powers: Austria, France, Great Britain, Prussia, and Russia. Initially envisioning regular congresses among the great powers to resolve disputes, the powers instead held congresses on an ad hoc basis to prevent or resolve conflicts. The Holy Alliance—Austria, Prussia, and Russia—used the system to oppose revolutionary and liberal movements and weaken the forces of nationalism.[52]

Axis countries could also establish a multilateral military structure that includes a military committee, joint war plans, and other committees to cooperate at the strategic, operational, and tactical levels. The Warsaw Pact had a unified command under Soviet leadership. In the 1960s, for example, the command structure included a Combined Armed Forces Command, located in Moscow, which comprised military officers from all the Warsaw Pact countries. The formal chain of command then ran through the Eastern European defense ministers down to the various military districts and field commands.[53] There has frequently been a difference between multilateral alliances in peacetime and wartime. Wartime alliances have tended to include the total interests of the contracting parties regarding the waging of war and peace settlements. Alliances during peacetime have tended to be limited to a fraction of the total interests and objectives of the parties.[54]

Several factors could lead to a multilateral alliance. The first is a major increase in the threat, such as the outbreak of war between one or more axis countries and the United States, one or more European states, Japan, Taiwan, South Korea, or other countries. Another possible cause could be nuclear proliferation to South Korea, Japan, Poland, or another country, which could increase the threat perception in one or more axis countries. A second factor is growing ideological solidarity or other common interests, especially against the West. A significant increase in the power and influence of the United States and its democratic allies and partners could exacerbate tensions with axis countries and deepen their cooperation. Third is domestic politics. Regime change in one or more axis countries could bring to power a leader who is more revanchist and willing to expand axis cooperation. In particular, strong, ambitious, and expansionist leaders in Beijing or Moscow could push for greater multilateral collaboration to aggregate power among axis countries.

CONCLUSION

Different future security arrangements would have different implications for U.S. and allied defense planners. For example, under weakening engagement, defense planners might be less concerned about a multi-theater war and the possibility that conflict in one theater could spread to other theaters. There might also be more opportunities to exploit fissures between these countries and widen tensions. Under a

multilateral alliance, defense planners would have to prepare for the possibility of fighting a coalition war across multiple geographic theaters.

Deepening Bilateral Relations

The most likely future security arrangement is deepening bilateral relations. Axis countries led by China and Russia will likely increase military and dual-use exports and imports; expand the scale and scope of bilateral and potentially multilateral exercises and training; construct joint military bases; integrate defense industrial cooperation; deepen bilateral treaties or pacts that commit the signatories to greater military cooperation and, potentially, mutual defense in case of attack; and deploy soldiers to fight in the wars of other axis countries. Yet deepening bilateral cooperation does not preclude divisions between these countries. A growing body of evidence suggests that axis countries are not unified actors and that there are differences in their capabilities and willingness to engage in cooperation. Still, the data shows a clear pattern of accelerated bilateral cooperation—especially since Russia's 2022 full-scale invasion of Ukraine—demonstrating how these countries can work together to challenge the United States and its allies and partners.[55]

A deepening of bilateral relations between axis countries is likely for several reasons. First, perceptions of a common threat will probably intensify. European countries, such as Germany and France, and Asian countries, such as Japan and South Korea, are likely to raise defense spending and strengthen their defense industrial bases. Consequently, an arms race is more likely than a détente. In addition, war involving Russia is likely to continue in Europe; conflict is likely to persist between the United States, Israel, and Iran; and there is a significant risk of tension and possibly conflict in the Taiwan Strait, South China Sea, and Korean Peninsula. Consequently, security competition between axis countries and democratic countries in Europe, Asia, and the Middle East will likely remain significant.

Second, a deepening of common interests is likely among axis countries, which aim to undermine democracy and increase their power and influence in multilateral institutions such as the United Nations and other international and regional institutions.[56] A particular focus may be balancing against what axis countries view as U.S. imperialism or hegemony. As historian Philip Zelikow concludes,

> All three of the major anti-American partnerships during the last hundred years were founded on a common core. In each case, the partners believe that the United States is the leader or anchor of a domineering imperial or neo-imperial system. They believe this hegemonic system strains in every way to block or strangle their nation's aspirations. They rally others to their cause, to the resistance, others who also feel oppressed.[57]

Third, domestic factors are likely to cause increased security cooperation among axis countries. Xi and Putin—the linchpins of the axis—are unlikely to step down in the next three to five years.[58] There is also little evidence that Putin will curb his revanchist interests in Ukraine or other areas, such as Eastern Europe, Central Asia, the Middle East, or Africa, or that Xi will curb his expansionist ambitions in Asia and other areas.

"Axis countries still lack a strong common ideology that binds them and China still wants diplomatic relations and trade—not conflict—with Europe and most of Asia."

Weakening engagement is unlikely because the threat environment appears to be increasing, not decreasing, and the relationship between Xi and Putin appears to be strong. In addition, a multilateral alliance is also unlikely, at least for the moment. Axis countries still lack a strong common ideology that binds them, and China still wants diplomatic relations and trade—not conflict—with Europe and most of Asia. For Beijing, in particular, there appear to be few benefits and too many costs with establishing a multilateral alliance.

Indications and Warnings

Looking ahead, there are several indications and warnings worth monitoring:

- **Arms exports and imports:** Is there an overall increase or decrease in exports and imports of military and dual-use items? Are axis countries shipping more or fewer military or dual-use items by ship, rail, truck, or air? Is the scope of areas expanding or shrinking, including in

sensitive areas such as nuclear weapons, space, stealth, hypersonics, and emerging technology?

- **Joint exercises and training:** Are exercises and training efforts primarily bilateral or multilateral? Do exercises and training efforts prepare for large-scale combat against U.S., European, or Asian countries, including across land, air, maritime, space, and cyber domains? Do they include closer command and control arrangements and sensitive intelligence sharing?
- **Defense industrial base:** Is there an increase or decrease in bilateral or multilateral defense industrial cooperation between axis companies and state-owned enterprises, including codevelopment, coproduction, cosustainment, joint ventures, and mergers and acquisitions?
- **Treaties and defense pacts:** Do axis countries create or deepen bilateral or multilateral treaties or other agreements that commit signers to collective assistance in case of external attack? Or is there a weakening of commitments? Are agreements formal or informal? Are they covert or overt?
- **Military aid during war:** Do countries provide military assistance, such as weapons, troops, and intelligence, to other axis countries during wars? What types of aid are they willing to provide? Are axis countries willing to shed blood for each other, including through combat deployments?
- **Military structure:** Do axis countries establish a military structure that includes a military committee, joint war plans, or other committees to cooperate at the strategic, operational, and tactical levels? Or is there insufficient trust to establish a multilateral military structure?
- **Expansion of countries:** Is there an increase or decrease in the number of axis countries? Are there new ones, such as Venezuela, Belarus, Cuba, or Nicaragua?

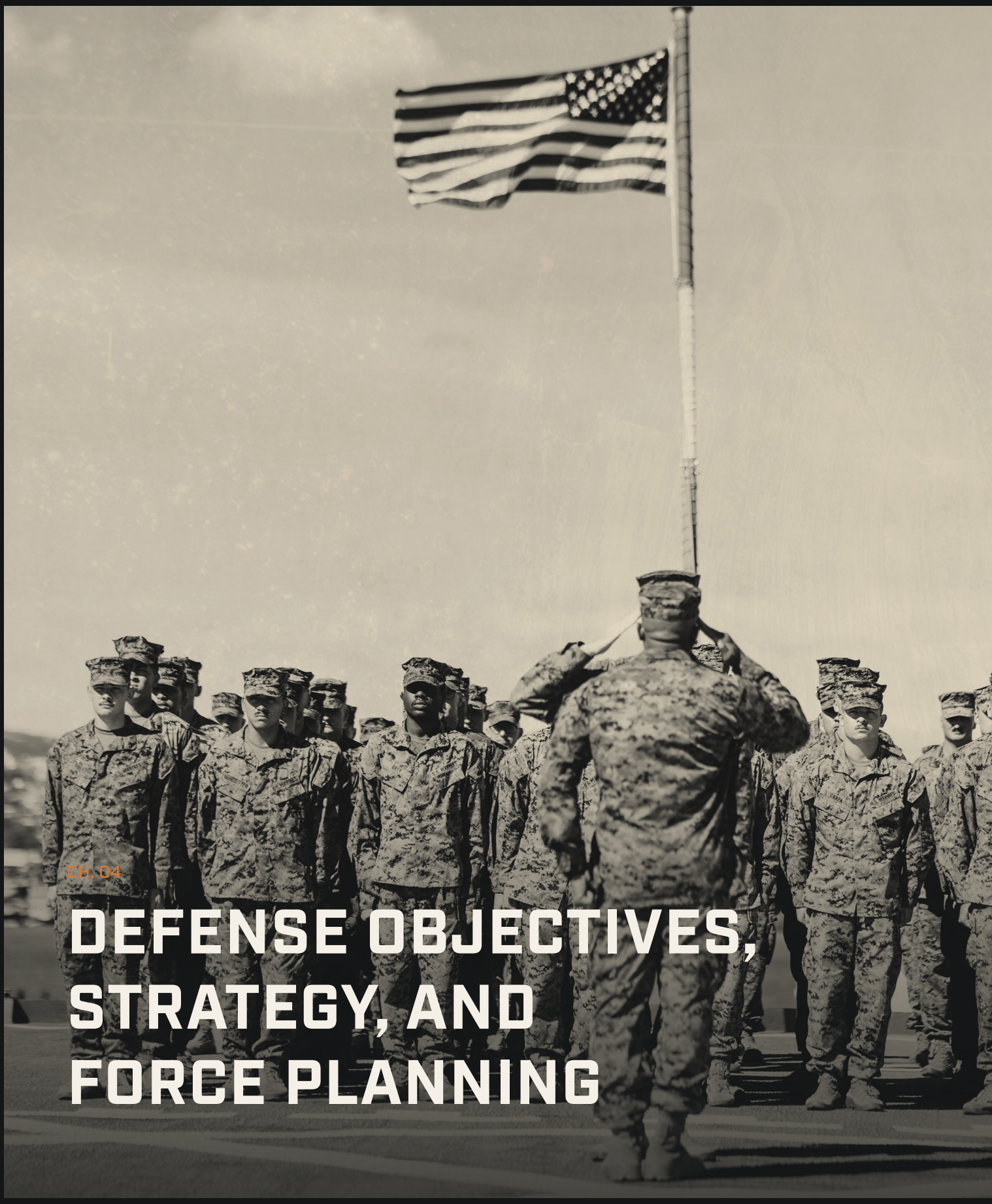
In addition, several indications and warnings might cause axis relations to strengthen or weaken:

- **Arms buildup:** Is there an arms race, including a significant increase in defense spending, between axis countries and their competitors in Europe, Asia, and the United States? Do countries build offensive capabilities (or capabilities that could be used for offensive operations)?
- **Nuclear proliferation:** Is there a proliferation of nuclear weapons, including in such countries as South Korea or Japan? Or do potential nuclear states refrain from building nuclear weapons?
- **War:** Does war persist in Europe and the Middle East? Is there a new outbreak of war? Is there an end to a major war, such as a ceasefire or peace agreement in Ukraine? Is there a major decrease in the intensity of conflict?
- **Regime change:** What is the future of Iran? Is there a change in leadership in one or more axis countries? Is a new leader more or less inclined to strengthen axis relations or to expand territory? Or is there a continuity of leaders in the core axis countries of China and Russia?
- **Domestic instability:** Is there significant domestic economic, social, or political instability in one or more axis countries that could impact axis relations? Or is there relative stability within axis countries?
- **Future of NATO:** Does NATO strengthen or weaken as an organization? Are there growing divisions among NATO countries?
- **Divisions and fissures:** Are there increases or decreases in policy fissures between axis countries? How serious are the differences and in what areas?

Answers to these questions provide useful indicators of the strength or weakness of axis relations. Still, the conclusion in this chapter that axis cooperation will likely deepen—particularly between China and Russia—has major implications for U.S. and allied defense planners. As the next section argues, they should plan for the possibility that an axis country might receive direct and indirect military assistance from one or more other axis countries during a conflict. They should also plan for the possibility that war in one theater might spread to other theaters, creating the concerning possibility of multi-theater war.

SECTION II

TWO-WAR PLANNING CONSTRUCT



CH. 04

DEFENSE OBJECTIVES, STRATEGY, AND FORCE PLANNING

U.S. Marine Corps Lt. Col. renders a salute during a promotion ceremony aboard amphibious dock landing ship USS Ashland (LSD 48) at Cebu, Visayas, Philippines.

SOURCE U.S. Marine Corps photo by Gunnery Sgt. Manuel Serrano

The likelihood of axis cooperation over the next three to five years—along with shifts in the military balance between the axis and the United States and its allies and partners—has direct implications for U.S. defense strategy and force planning. This chapter examines how U.S. defense planners should shape strategic objectives and develop U.S. forces in light of axis cooperation and the possibility that the United States will need to deter—and, if deterrence fails, fight—simultaneous wars in multiple theaters. It identifies U.S. defense objectives and assesses the force planning construct defense officials should use in the context of historical defense plans, current U.S. national interests, and the evolving threat environment.

Ultimately, U.S. interests rest in protecting the homeland, U.S. citizens, and democratic values and processes. The United States also has an interest in maintaining free trade and freedom of navigation, as well as supporting its allies and partners. China and Russia pursue revisionist agendas that seek to undermine those interests and have increased cooperation with each other and with Iran and North Korea. Based on its national interests, the primary U.S. defense objectives should be to deter and defend against attacks on the United States and its core allies and partners; deter and counter irregular and gray zone activities below the threshold of conventional conflict; prevent state and nonstate actors from acquiring, proliferating, or using weapons of mass destruction; and ensure freedom of commerce.

"The Pentagon should adopt a two-war planning construct that prioritizes the deployment of U.S. forces to the Indo-Pacific to deter and, if necessary, defeat China."

Based on these objectives and multi-theater threats, the Pentagon should adopt a two-war planning construct that prioritizes the deployment of U.S. forces to the Indo-Pacific to deter and, if necessary, defeat China. In Europe, NATO allies would take the lead—with U.S. support—in defending the European theater against Russian aggression. The risk of becoming involved in multiple simultaneous conflicts across two fronts is heightened given the growing ties between U.S. competitors.

The rest of this chapter is divided into three sections. The first provides a historical overview of U.S. defense objectives and force planning parameters since World War II. The second examines current U.S. national interests, the threat environment, and U.S. defense objectives over the next three to five years. The third assesses different force planning constructs and defense capabilities necessary to compete with and deter the axis countries. It also discusses the role of allies. The force planning construct informs the force structure and posture recommendations in Chapter 5.

THE EVOLUTION OF U.S. DEFENSE STRATEGIC OBJECTIVES AND FORCE PLANNING

Strategy is the alignment of ends and means. Defense planners rely on force sizing and shaping frameworks to determine and allocate means to achieve strategic ends.[1] Since at least the 1960s, the U.S. force planning construct has played a central role in the formulation of U.S. defense strategy and defense planning by articulating the number and types of conflicts the U.S. military should be prepared to deter and respond to.[2] It is defined by the capacity of the joint force to simultaneously conduct multiple contingencies and maintain global engagement during times of war and peace.[3] The construct is shaped by defense planning scenarios that pose different contingencies and missions that U.S. forces may be forced to respond to or carry out.

U.S. defense strategy and force planning parameters are influenced by a number of factors, including national interests, the threat environment, the level of risk the nation is willing to accept, and the resources the country is willing to invest in defense.[4] As those variables have changed to varying degrees for the United States over time, strategy and the force planning construct have also evolved, thus driving further shifts in force structure, capabilities, and posture to better align resources with defense objectives. Table 4.1 provides an overview of the shift in defense planning constructs since the 1960s.

U.S. defense strategy and planning have evolved considerably between the end of World War II and today. Despite facing only one primary competitor in the Soviet Union, U.S. strategic objectives and defense planning changed significantly during the early Cold War under the administrations of Harry S. Truman and Dwight D. Eisenhower. While neither conceived of a force sizing and shaping framework in the formal construct of the number of wars the United States would face, they instead utilized scenarios relying on a combination of nuclear deterrence, coalition forward defense, massive retaliation, and conventional reinforcement and general mobilization in the event of a Soviet invasion.[5]

The Truman administration attempted to limit the spread of Soviet influence and communism through a strategy of containment. As articulated in National Security Council Paper NSC-68, containment involved limiting the spread of communist and Soviet influence across the globe. The strategy, which took on newfound significance after North Korea invaded South Korea, called for a buildup of military forces, both conventional and nuclear, to deter and defend against acts of Soviet and communist aggression. In response to the Korean War and this shift in strategy, the Truman administration dramatically increased defense spending and the size of the military following the reductions made in the wake of World War II.

The Eisenhower administration sought to reduce defense spending, which had grown significantly to accompany this military buildup, as it aimed for a more sustainable strategic approach to defense. The administration pursued its New Look strategy in 1953, which

Strategy/Administration	Force Planning Construct
1960s (Kennedy-Johnson)	Two major wars and one half war
1970s (Nixon-Carter)	One major war and one half war
1980s (Reagan)	Two major wars and two half wars
1991–92 Base Force (Bush)	Major regional contingencies
1993 Bottom-Up Review and 1997 QDR (Clinton)	Two major regional conflicts (or two major theater wars in 1997 QDR)
2001 QDR (Bush)	Swiftly defeat two threats, one decisively
2006 QDR (Bush)	Win two conventional campaigns, or one conventional and one irregular
2010 QDR (Obama)	Win two large land campaigns, or one large air/naval campaign and a conflict in a second theater
2012 DSG and 2014 QDR (Obama)	Defeat one regional enemy in a major campaign and deny the objectives of a second
2018 NDS and 2022 NDS (Trump-Biden)	Defeat one great power adversary in one region and deter opportunistic aggression in a second region

TABLE 4.1 Past U.S. Defense Strategic Force Planning Constructs

NOTE DSG = Defense Strategic Guidance; NDS = National Defense Strategy; QDR = Quadrennial Defense Review.

SOURCE Authors' analysis; Frank Hoffman, "Mission-Based Force Planning," *Parameters* 55, no. 2 (Summer 2025): 5–27, https://press.armywarcollege.edu/parameters/vol55/iss2/3/; Jim Mitre, "A Eulogy for the Two-War Construct," *Washington Quarterly* 41, no. 4 (2018): 7–30, https://doi.org/10.1080/0163660X.2018.1557479; and Eric V. Larson, Force Planning Scenarios, *1945–2016: Their Origins and Use in Defense Strategic Planning* (Santa Monica, CA: RAND Corporation, 2019), xiii–xiv, https://www.rand.org/pubs/research_reports/RR2173z1.html..

NATO adopted in 1957.[6] The strategy relied on "massive retaliation" to deter a Soviet invasion of Western Europe as U.S. and NATO forces faced a significant numerical disadvantage against the Soviet Union in Europe. The policy of massive retaliation emerged from a strategy review known as Project Solarium, which affirmed the goals of the Truman administration's containment strategy. However, the strategy document that eventually emerged, NSC 162/2, outlined a more economically sustainable deterrent based on a retaliatory nuclear response.[7]

Strategic objectives and force structure again shifted as the John F. Kennedy and Lyndon B. Johnson administrations traded massive retaliation for the "flexible response" approach during the 1960s and 1970s.[8] The Kennedy administration sought a more balanced approach to defense since it believed that massive retaliation was no longer a credible deterrent given the expansion of Soviet nuclear capabilities.[9] As the formal planning construct took on a more formal role in defense planning, the flexible response strategy was defined by a two-and-a-half-war model.[10] This required U.S. forces to be sized for and capable of fighting two simultaneous major wars in Europe and Asia and responding to a smaller conflict—or half war—elsewhere.[11] A half war is a smaller and limited contingency, often referred to as a "brushfire conflict."[12]

The Richard M. Nixon administration sought to take advantage of the divide that emerged between the Soviet Union and China in the Sino-Soviet War of 1969. It pursued détente with the Soviet Union while normalizing relations with China in an effort to drive a wedge between the two states.[13] This decoupling and easing of tensions led defense planners to rely on a less ambitious one-and-a-half-war construct, which planned for a single major war in either Europe or China and a half war elsewhere.

However, heightened aggression from the Soviet Union with the invasion of Afghanistan led the Jimmy Carter and Ronald Reagan administrations to take a more forceful response. The former issued its Carter Doctrine, which said the United States would respond with force to a Soviet invasion of the Persian Gulf, and began a military buildup toward the end of its term, accompanied by a significant increase in defense spending. Defense planners under the Carter administration

initially maintained the one-and-a-half-war model, but they later focused on the Soviet threat to Southwest Asia and the Persian Gulf. The administration also considered the demands of a three-theater conflict (Europe, Southwest Asia, and Korean Peninsula) later in its tenure as it began to build up and modernize military forces.[14]

The Reagan administration's strategy of "peace through strength" led to a significant expansion of the buildup that started under the previous Carter administration. The Reagan administration increased the defense budget and the number of U.S. military forces and capabilities in Europe, deploying Pershing 2 nuclear missiles to West Germany and conducting NATO's Able Archer 83 exercises in 1983.[15] At the same time, Reagan officials launched arms control talks with the Soviet Union, including the Intermediate-Range Nuclear Forces Treaty, Strategic Arms Limitation Talks, and Conventional Armed Forces in Europe Treaty.[16] The Reagan administration shared the concern over a multifront war that emerged later in the Carter administration, leading to what could be considered a two-and-two-halves-war construct that would involve Europe, Asia, and the Pacific.[17]

Since the end of the Cold War, defense planners have largely relied on a two-war planning construct requiring U.S. forces to defeat two regional adversaries—as opposed to great powers—in overlapping time periods.[18] Yet the consensus around a two-war construct has been heavily debated in the post–Cold War era.[19]

Under the George H. W. Bush administration, Chairman of the Joint Chiefs of Staff Colin Powell developed the Base Force plan, which held that global conflict was increasingly unlikely, whereas regional conflicts were becoming more likely. U.S. planners designed the initial assumptions for the Base Force before the collapse of the Soviet Union and Warsaw Pact, but the Bush administration concluded that its military design and end-strength determinations were still relevant.[20] Under the plan, the administration sized its military forces to ensure the United States could use decisive force in a regional conflict in one part of the world and still have sufficient forces to deter or fight in another region.[21]

With the collapse of the Soviet Union, the Clinton administration embraced a "peace dividend" as it drew down forces and reduced defense spending. However, U.S. global commitments increased despite cuts to force structure as the military took on greater humanitarian operations. Based on the 1993 Bottom-Up Review and the 1997 Quadrennial Defense Review, the Clinton administration aimed to counter two major regional threats nearly simultaneously. The primary scenarios involved a North Korean attack on South Korea and an Iraqi attack on Kuwait and Saudi Arabia.[22]

The George W. Bush administration sought strategic change as it aimed to transform the U.S. military and "skip a generation" of military technology to secure a decisive advantage.[23] The 2001 Quadrennial Defense Review outlined a force planning construct to swiftly defeat two threats—including one decisively—through regime change.[24] Following the terrorist attacks on September 11, 2001, the administration orchestrated a modest evolution of the planning construct by outlining the need to win two conventional wars—or one conventional and one irregular campaign—in the 2006 Quadrennial Defense Review.[25]

The Obama administration's initial defense strategy prioritized current operations in Afghanistan and Iraq rather than planning for longer-term contingencies.[26] The 2010 Quadrennial Defense Review called for forces to win two large land campaigns or one large air-naval campaign and a conflict in a second theater.[27] The Obama administration then undertook another defense review and issued the 2012 Defense Strategic Guidance following passage of the Budget Control Act of 2011, which aimed to reduce the federal deficit.[28] The Defense Strategic Guidance marked a significant shift by moving from a two-war construct to calling for a force capable of "committ[ing] to a large-scale operation in one region" while also "*denying the objectives of—or imposing unacceptable costs on—an opportunistic aggressor in a second region*."[29] As one analysis concluded, this shift "merely codified what had been long true: The United States could not simultaneously defeat two major powers in large-scale ground wars and, instead, needed to settle for less maximalist objectives."[30] The 2012 Defense Strategic Guidance also announced the military would "rebalance toward the Asia-Pacific region" and ultimately would "no longer be sized to conduct large-scale, prolonged stability operations"—what amounted to a call for a "tacit reduction of ground forces."[31]

The 2014 Quadrennial Defense Review, largely in continuity with the 2012 guidance, "flesh[ed] out" the administration's force sizing construct and identified

the impact of the 2011 Budget Control Act and associated spending limits.[32] It maintained a defeat/deny framework in which U.S. forces would be sized to defeat one regional enemy in a major campaign and deny the objectives of a second adversary in another campaign.[33]

The Trump administration's 2018 National Defense Strategy marked a significant departure from previous strategies by arguing that the threat environment was dramatically shifting. It identified great power competition with China and Russia as the primary challenge for the United States. The strategy established a force construct in a wartime environment to defeat a great power adversary in one region and to deter opportunistic aggression in a second region.[34] In light of budget constraints, the administration prioritized modernizing U.S. forces over expanding capacity.

The Biden administration's 2022 National Defense Strategy was largely a continuation of the 2018 Trump National Defense Strategy, though it more narrowly defined China as the "pacing challenge." It called for a force capable of deterring opportunistic aggression.[35] However, the 2022 Commission on the National Defense Strategy, mandated by the U.S. Congress, considered that the strategy's force-sizing construct was "inadequate for today's needs and tomorrow's challenges."[36] Instead, the commission called for a "Multiple Theater Force Construct."[37]

The second Trump administration's 2026 National Defense Strategy marked a dramatic shift away from the 2018 and 2022 strategies. It prioritized four ranked lines of effort: defend the homeland, deter China, increase burden sharing with allies and partners, and "supercharge" the defense industrial base.[38] Its top priority of securing the homeland through border security and dominance of the Western Hemisphere notably shifted the Pentagon's focus away from the great power competition identified by the first Trump administration.

U.S. INTERESTS, THE THREAT ENVIRONMENT, AND DEFENSE OBJECTIVES

To determine the force planning construct for sizing and shaping U.S. military forces over the next three to five years, it is necessary to first examine current U.S. national security interests and defense objectives. The United States has several main national security interests:

- protect the U.S. homeland and the security of U.S. citizens;
- promote and expand U.S. economic security;
- realize and defend U.S. democratic values; and
- defend and support vital U.S. allies and partners.

Protection of the homeland, support for free trade and democracy, and good relations with key foreign nations have been core interests of the United States since its establishment. But the United States needs to be judicious about how it achieves these interests. It makes little sense, for example, to impose democracy abroad, since the causes of democratization are typically economic and political factors, as well as other factors internal to a country.[39]

In addition, the United States maintains specific interests unique to particular regions. In the Indo-Pacific, China is building up its conventional military power. It relies on gray zone and irregular tactics to challenge the sovereignty of neighboring states, including U.S. partners, and freedom of navigation in the Indo-Pacific. China also threatens to use military force against Taiwan. In Europe, Russia's 2022 full-scale invasion of Ukraine poses a major threat to U.S. NATO allies. China, Iran, and North Korea have provided varying levels of support to Russia in its war. Russia has also conducted an aggressive sabotage and subversion campaign in Europe. Iran and North Korea additionally pose threats to the United States and its allies and partners. U.S. and Israeli operations against Iran, including Midnight Hammer and Epic Fury, have eroded its military capabilities. But the ongoing war has also inserted significant uncertainty with the assassination of key leaders and officials, and Iran has demonstrated that it can inflict costs on the United States and regional allies in asymmetric ways. The United States does not face the same degree of threat in Latin America or Africa.

The expanding military capabilities and actions of China and other axis states challenge long-standing assumptions in U.S. defense planning. The United States may not have time to forward deploy substantial numbers of conventional forces before beginning combat

operations, will likely face serious threats to its logistics and supply lines, and is unlikely to have overmatch and technological superiority over its adversaries.[40] Indeed, deploying more forces, such as land-based aircraft and large naval surface combatants, forward in the western Pacific risks exposing them to attack by China's large and growing arsenal of ballistic, cruise, and hypersonic missiles.

"Given the ambitions and capabilities of axis countries, U.S. forces should be prepared for two scenarios: a Chinese blockade or invasion of Taiwan and a Russian invasion of one or more of the Baltic states."

Given the ambitions and capabilities of axis countries, U.S. forces should be prepared for two scenarios: a Chinese blockade or invasion of Taiwan and a Russian invasion of one or more of the Baltic states.[41] In the first scenario, China might seek to heighten tensions with Taiwan, putting military and economic pressure on the island, while it prepares its own forces for a blockade or amphibious invasion. In the event that the United States becomes involved, China could strike U.S. forces and bases on land and at sea within missile range.[42] In the Baltic scenario, Russia might take advantage of a short mobilization period and a U.S. military that is tied down in the Indo-Pacific to limit NATO's ability to move sufficient forces to defend its eastern flank. It could strike NATO bases and assets in the lead-up to and during its invasion of the Baltic states by armored and mechanized battalions.[43]

However, defense planners should anticipate the possibility that the United States could be engaged in simultaneous conflicts in two theaters. While China and Russia have deepened bilateral cooperation, they may not necessarily take coordinated military action at the same time. Nevertheless, one possible scenario could involve Russia pursuing opportunistic aggression against NATO states while the United States is operationally engaged in the Indo-Pacific in a conflict over Taiwan.

Based on U.S. national security interests in the evolving international landscape, the United States has several defense objectives:

- deter and defeat attacks on the U.S. homeland, civilians, and military personnel;
- assure and assist allies and partners in deterring and defeating attacks on their territory and civilians;
- deter and counter irregular and gray zone activities and compete effectively below the threshold of conventional conflict to counter terrorist and other transnational threats;
- prevent state and nonstate actors from acquiring, proliferating, or using weapons of mass destruction; and
- maintain free trade and freedom of navigation.

U.S. forces must be sized and shaped to preserve and achieve U.S. interests and defense objectives.

REDEFINING THE TWO-WAR CONSTRUCT

Expanded cooperation among China, Russia, Iran, and North Korea poses a growing challenge to U.S. defense planning and U.S. efforts to appropriately size and shape the capabilities of its forces. The likelihood of increasing cooperation among adversary states threatens to expand a potential conflict with one state into a multi-theater war involving one or more powers. That challenge is exacerbated by the limited capacity of U.S. force structure and an industrial base that is not prepared for a protracted war. The rest of this section briefly examines three options.

The first option is to design a force to defeat one major power, such as China. In the next three to five years, such a construct might require limited expansion of U.S. capacity, with enhancements directed toward the readiness of U.S. forces to ensure preparedness for a near-term conflict through adequate training, maintenance, stockpiles of munitions, and spare parts.[44] In addition to readiness, the United States would need to direct investments toward the modernization and development of key capabilities.[45] Examples include hardened and dispersed bases, extensive pre-positioning of munitions and sustainment supplies, and a substantial number of attritable unmanned systems.

A one-war planning construct has several potential benefits. It requires limited additional capac-

ity and, consequently, fewer resources. Additional resources could be directed toward modernization and readiness at the expense of force structure. However, a one-war construct is too risky in a world with growing cooperation between axis countries and an increasing possibility of multi-theater war. This construct does not provide the capacity required to respond to simultaneous threats in multiple regions. In such a scenario, U.S. national interests could be placed at serious risk, and some defense objectives may not be achieved.

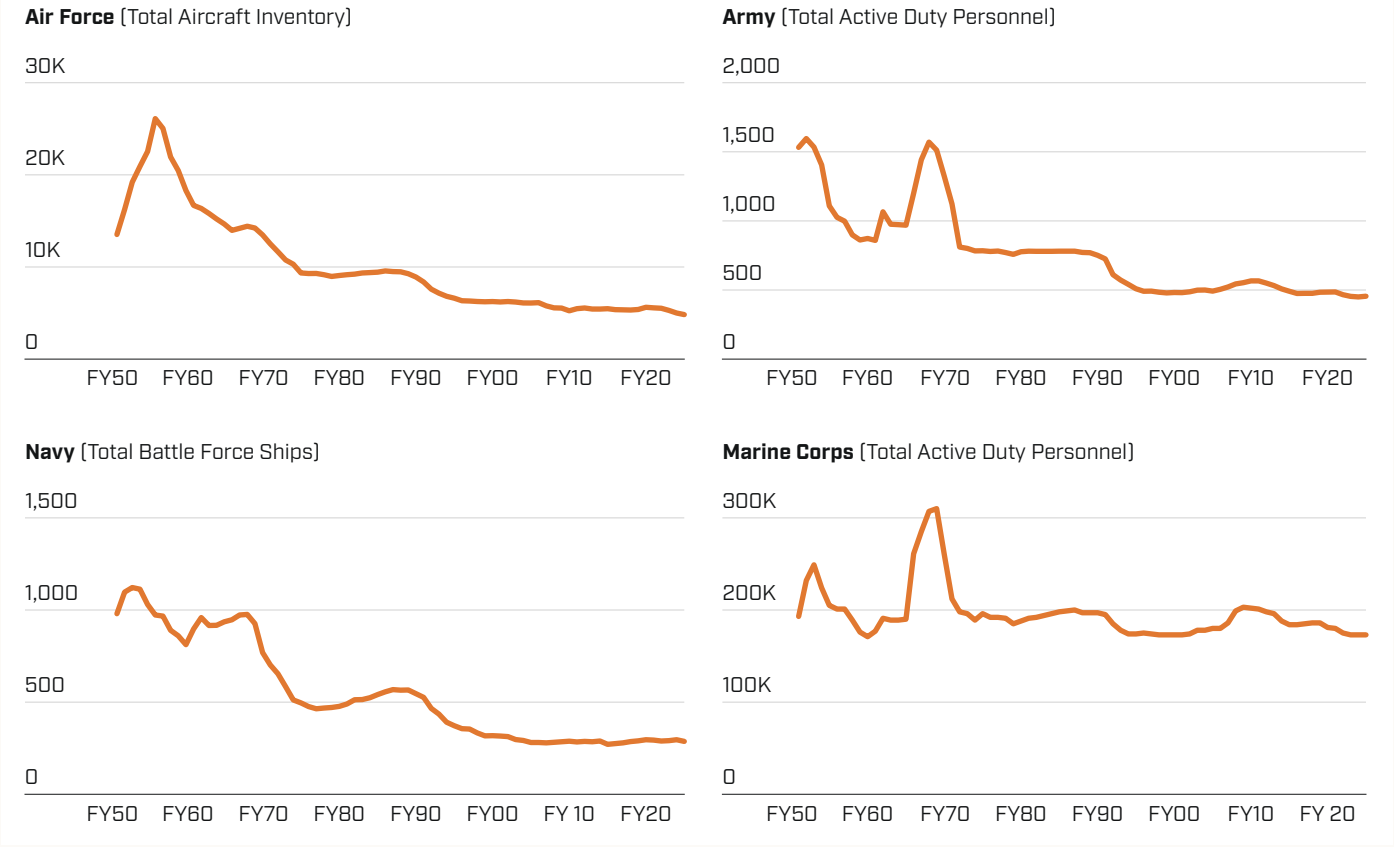
A second option is a force construct to fight two major wars simultaneously and to be prepared to fight *alone*. However, the United States at present cannot build a force to fight in a multi-theater conflict against two major adversaries on a relevant timeline and with the resources available. Nor would it be strategically prudent to deter or fight two major powers alone. The U.S. military is currently at its smallest size in the post–World War II era, measured by several force structure elements: Army end strength, Navy ship count, Air Force total aircraft inventory, and Marine Corps active end strength.

Most elements of the force—including Army end strength, Navy ship count, and the Air Force's total aircraft inventory—peaked in the 1950s following NSC-68 and the Korean War (Figure 4.1). A drop off in the wake of the Korean War for all force structure elements soon reversed with growing involvement in the Vietnam War (with the exception of the Air Force). U.S. force structure again decreased following the Vietnam War. That decline slowed or reversed for some elements during the Reagan administration, as the Navy grew 22 percent from a postwar low to a relative peak in 1987. However, the end of the Cold War led to further reductions in force structure. While the Navy's ship count and the Air Force's total aircraft inventory have largely decreased, Army and Marine Corps end strength increased during the peak of operations in Iraq and Afghanistan before declining again.

In addition, fiscal limitations and shortcomings within the defense industrial base, which are examined

FIGURE 4.1 U.S. Force Structure Elements, FY 1951–FY 2025

SOURCE Based on data from the FY 2025 DoD Green Book, Congressional Research Service, Mitchell Institute for Aerospace Studies, Air Force Magazine Almanac, and Naval Vessel Register.



in more detail in Chapter 6, would make it difficult for the military to rapidly generate additional force structure for a two-war force. Even if the Pentagon secured the fiscal resources from Congress necessary to expand capacity significantly in the near term, industrial base challenges inhibit its ability to procure and field new forces on a relevant timeline.[46] Moreover, it makes no sense to plan for major wars without including the forces of allies and key partners that would be directly and unavoidably affected by enemy aggression.

A third option is to adopt a redefined two-war force planning construct that prioritizes U.S. forces in the Indo-Pacific while relying on allies—with U.S. support—particularly in the European theater. It assumes that NATO forces would play a significant role if Russia threatened NATO member states on the alliance's eastern flank while the United States was engaged in the Indo-Pacific. Although U.S. forces would be involved in Europe, allied forces would assume a significant portion of operations, including in the early stages. In this scenario, the most relevant U.S. capabilities in the European theater would be nuclear weapons, ABCTs to counter a Russian advance, tactical aviation, and force enablers not needed in the Indo-Pacific theater. It is worth noting that U.S. allies and partners, such as Australia, Japan, the Philippines, and South Korea, would be helpful in any Indo-Pacific conflict, though their assistance is not necessarily assured.

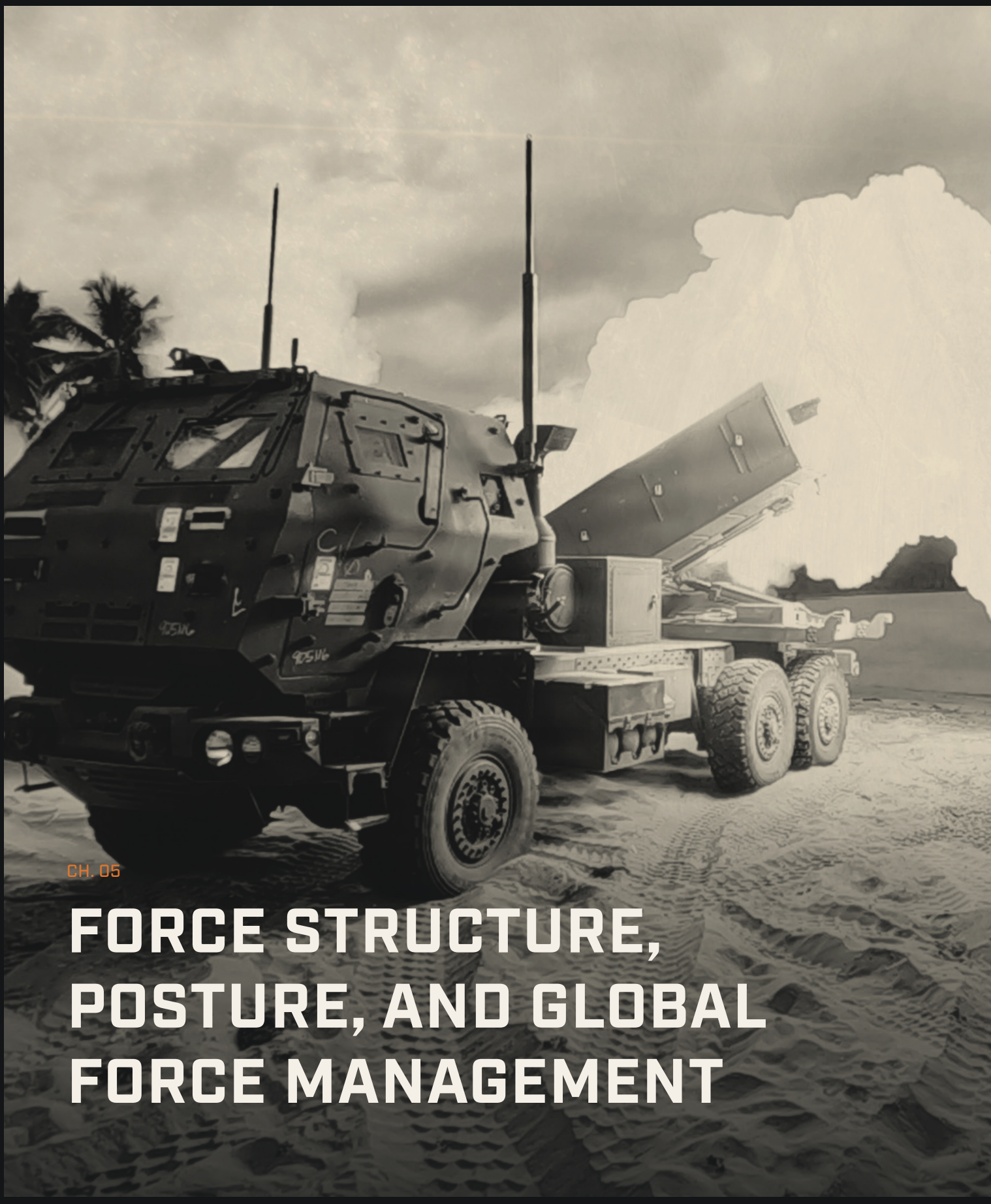
While the United States may provide only some forces, such as those outlined above, it could still provide weapons and other aid to bolster allied capabilities, as it did in Ukraine.[47] The primary benefit of this construct is that it maintains enough U.S. forces in partnership with allied militaries to respond to multiple threats *simultaneously*. While requiring some growth in defense spending to expand capacity where needed, modernize and improve readiness, and provide security assistance to allies and partners, the demands on government spending would not be as drastic as trying to build a force capable of fighting a multi-theater war on its own. Moreover, it would allow the United States to prioritize investments in new capabilities rather than sheer growth in legacy force structure. However, the operational concepts and posture under which U.S. forces fight and deploy require drastic change in some areas, as Chapters 5 and 6 identify, and allied and partner militaries need to increase their military capabilities in some areas in which they are reliant on U.S. assets. Moreover, U.S. leaders would still have to take a disciplined approach to global force management and the decision to deploy units and personnel, given their historically low levels and readiness concerns.

This two-war construct still incurs some risk. U.S. forces would have to rely on allies and partners to play a major role in helping deny a second major power in another theater, and it is uncertain how a conflict in the Indo-Pacific would unfold. It is unclear how long a protracted conflict might last, severely affecting the United States' ability to fight in multiple theaters. This construct is also likely to face limitations in generating adequate logistics and enabling capabilities for two theaters over the next three to five years. Despite these limitations, an allied two-war construct is the best option to deter—and, if deterrence fails, to fight and win a war against—axis countries in more than one theater.

CONCLUSION

U.S. defense strategy and planning parameters have evolved considerably since the start of the Cold War, shaped by changes in the threat environment and U.S. priorities. In light of the current threats U.S. adversaries and competitors pose and the deepening state of bilateral cooperation between axis countries, the United States faces the heightened risk of being drawn into simultaneous conflicts in multiple theaters. However, U.S. forces are not currently sized or postured to fight two major wars alone, and fiscal and industrial base limitations hinder the U.S. military's ability to rapidly expand capacity. Moreover, U.S. forces, posture, and operational concepts must undergo significant innovation over the next few years if they expect to effectively thwart aggression by the nation's most capable adversaries. All of this will cost money. In light of these realities, defense planners should use an allied two-war planning construct that prioritizes U.S. forces in the Indo-Pacific to deter and, if necessary, defeat China while NATO allies take the lead—with U.S. support—in defending the European theater against Russian aggression.

The following chapter provides a detailed overview of the types of force structure and military posture necessary over the next three to five years under this force planning construct. It also discusses the implications for global force management policy in a potential multi-theater conflict.



CH. 05

FORCE STRUCTURE, POSTURE, AND GLOBAL FORCE MANAGEMENT

A U.S. Army M142 High Mobility Artillery Rocket System fires for a training iteration in support of Exercise Balikatan 26.

SOURCE U.S. Army photo by Staff Sgt. Brandon Rickert

This chapter outlines the key points for U.S. defense planners under a strategy of flexible engagement and an allied two-war construct. It examines necessary changes to the U.S. global force structure and posture as it shifts toward a force planning construct for deterring and, if necessary, defeating two major powers simultaneously across two theaters—the Indo-Pacific and Europe—with allied forces in a major capacity. In particular, U.S. forces should be sized and shaped to work in close coordination with allies to counter the militaries of China and Russia. Cooperation between axis countries increases the probability that a conflict with one of these states will escalate into a multi-theater war.

This chapter describes how U.S. forces must adapt their capabilities, posture, and operational concepts to compete with China and Russia simultaneously. The modernization and growth of Chinese forces mean the United States has lost "overmatch"—the ability to overwhelm an adversary—in a war against China.[1] The U.S. military does not hold the same qualitative advantage in all domains it once did—China maintains significant quantitative advantages in some areas. Capability gaps also exist in NATO forces such that European militaries rely on the United States to fulfill certain missions.

While industrial base limitations and fiscal constraints may limit the ability of U.S. forces to grow considerably in the next three to five years to address all these shortcomings, planners can take steps to mitigate risk in terms of U.S. global force posture

and exploit the vulnerabilities of their adversaries. U.S. units and capabilities must be postured and deployed across the regions where they are the best fit for the local missions demanded. In some cases, this will necessitate rapidly developing and deploying new systems under innovative operational concepts. The military services also need to expand and bolster their key enablers and lines of communication and transport given their utility across all theaters, in addition to continuing to procure advanced strike and undersea platforms, bolster munitions stockpiles, and modernize the nuclear triad.

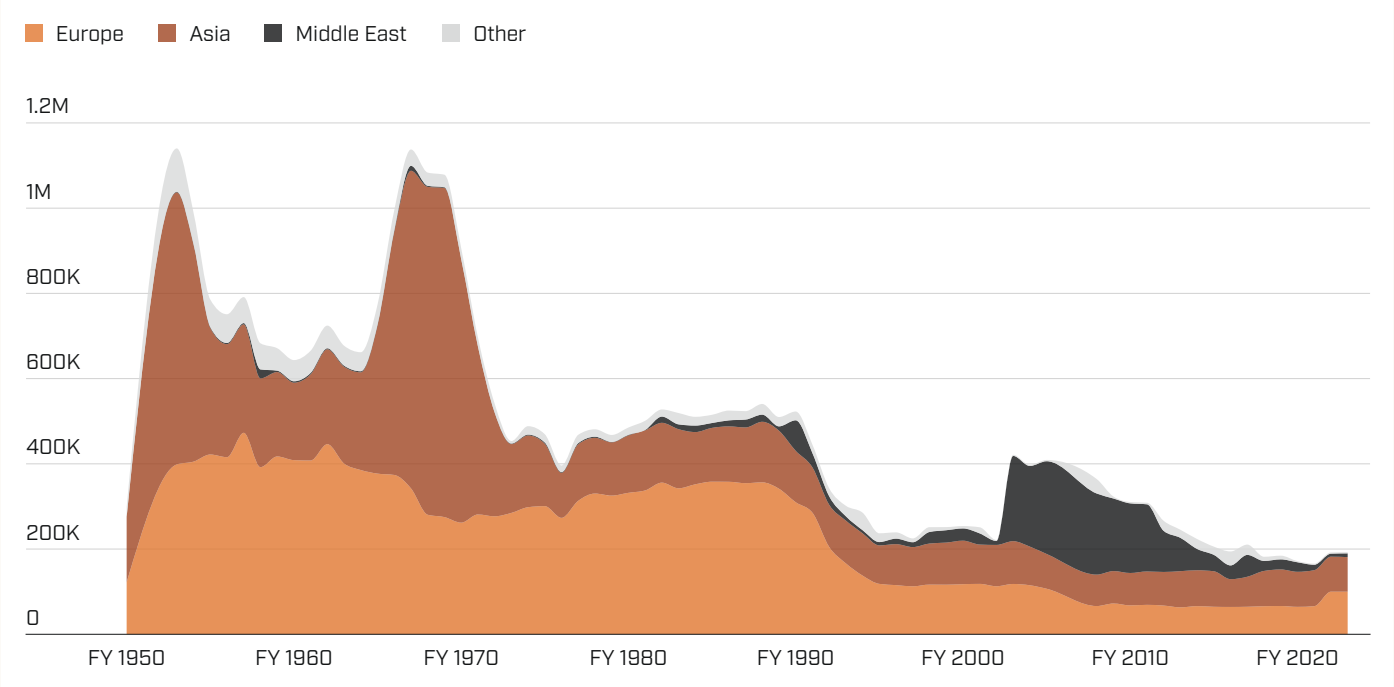
"The modernization and growth of Chinese forces mean the United States has lost 'overmatch'—the ability to overwhelm an adversary—in a war against China."

This chapter identifies key capability areas and operational priorities in specific regions that the Pentagon should address. In the Indo-Pacific theater, the military should prepare to rapidly transition from peace to war by forward deploying more combat power in survivable ways and ensuring the readiness of pre-positioned sites and logistics. It should also enhance its ability to conduct advanced strikes against Chinese forces while maximizing survivability through mobility, deception, and dispersal. In Europe, the United States should take a sustainable approach to its posture by permanently basing critical platforms like ABCTs in the region while helping allies and partners procure their own enabling capabilities, which the U.S. military largely provides today. European allies and partners need to play a critical role in supplementing U.S. forces and mitigating the risk associated with two simultaneous conflicts in different theaters.

The chapter begins with an overview of historical trends in global force posture and establishes a baseline of current U.S. force structure and force posture across multiple regions based on the military balance outlined in Chapter 2. It then identifies the most important capability areas and operational priorities by theater and provides recommendations for changes to existing U.S. force posture. As part of those recommendations, the chapter discusses the role of U.S. allies and partners.

FIGURE 5.1 U.S. Active-Duty End Strength by Region, FY 1950–FY 2023

SOURCE Compiled by authors from various sources.[2]



HISTORICAL TRENDS IN FORCE POSTURE

The distribution of U.S. forces globally has fluctuated historically with conflicts involving the U.S. military and changes in the security environment. Figure 5.1 shows the number of active-duty military personnel overseas by region. In the first half of the 1950s, the majority of U.S. end strength overseas was deployed to Asia, with the Korean War demanding a significant portion of U.S. forces (Figure 5.1). However, heightened tensions with the Soviet Union and NSC-68 also drove significant deployments of personnel to Europe. While more U.S. troops served in Asia during the Korean and Vietnam Wars, Europe hosted the most U.S. military personnel for the majority of the Cold War.

The conclusion of the Cold War in 1991 saw an overall decline in the number of U.S. active-duty service members stationed overseas. Most personnel still served in Europe and Asia. However, following the terrorist attacks on September 11, 2001, the U.S. military posture in the Middle East increased dramatically as the United States engaged in wars in Iraq and Afghanistan.[3] Following the surge in Iraq, the United States had over 190,000 active-duty forces in the Middle East by 2008, which constituted 52 percent of total U.S. forces overseas and over 66,000 active-duty forces in Europe and nearly 74,000 in Asia.[4] This deployment to the Middle East marked a significant increase from a decade earlier; the United States had just over 27,000 active-duty forces in the Middle East in 1998—roughly 11 percent of total U.S. forces overseas.[5]

While this posture continued into the early part of the Obama administration, officials began to rethink U.S. military posture, with the goal of pivoting--or--rebalancing to Asia.[6] The 2012 Defense Strategic Guidance stated that "while the U.S. military will continue to contribute to security globally, *we will of necessity rebalance toward the Asia-Pacific region*."[7] Yet the United States was once again forced to focus on the Middle East soon after. In 2015, following the Islamic State's seizure of territory in Iraq and Syria, the Obama administration increased the U.S. footprint in the region, though the total presence was still smaller than during the peak of the wars in Iraq and Afghanistan.[8] Despite the strategy's call for increased emphasis on the Asia-Pacific, no significant changes in U.S. posture were made to push forces to that region.

The strategy promulgated by the first Trump administration shifted the U.S. strategic focus from counterterrorism to strategic competition with China and Russia—and, to a lesser degree, Iran and North Korea.[9] As the 2018 National Defense Strategy observed that, "Inter-state strategic competition, not terrorism, is now the primary concern in U.S. national security."[10] The shift in strategic priorities highlighted a change in the U.S. focus to Russian activities in Europe and Chinese actions in the Indo-Pacific.[11]

The Biden administration's strategy tried yet again to shift away from the Middle East to focus on the Indo-Pacific, but the deterioration of the security environment in the region prevented the administration from realizing that objective. The administration's Global Posture Review identified the Indo-Pacific as the most important region for U.S. national security to "advance initiatives that contribute to regional stability and deter potential Chinese military aggression and threats from North Korea."[12] U.S. military assets, such as air and missile defense units, were shifted out of the Middle East toward other priorities. However, the Russian invasion of Ukraine led to a significant deployment of U.S. forces to Europe, surpassing 100,000 personnel. The Hamas attacks on Israel in October 2023 prompted the U.S. military to bring additional forces to the Middle East as the conflict escalated and Houthi forces in Yemen attacked international shipping in the Red Sea.

After taking office, the second Trump administration escalated the operation of naval and air assets in the Red Sea against the Houthis and redeployed additional units and capabilities, including air and missile defense, to the Middle East. In June 2025, the Air Force and Navy conducted strikes on Iranian nuclear sites as part of Operation Midnight Hammer, and in February 2026, they began a massive air and naval campaign against Iran in Operation Epic Fury. The Trump administration also dramatically increased the deployment of U.S. forces in the Western Hemisphere, including units at the southern border of the United States and significant naval and air assets in U.S. Southern Command to pressure the Maduro regime in Venezuela. Approximately one-third of the deployed U.S. Navy fleet was operating in U.S. Southern Command by late 2025.[13] The United States continued to maintain this robust presence through January 2026, when it conducted Operation Absolute Resolve to seize

Venezuelan President Nicolás Maduro and his wife.[14]

Following that operation, the United States conducted the largest buildup of air assets in the Middle East since preparations for the 2003 invasion of Iraq and deployed significant naval assets to the region ahead of Operation Epic Fury.[15] The war between U.S. and Israeli forces and Iran began on February 28, 2026, and led to the deployment of additional U.S. forces to the region over that time.

In the European theater, the Trump administration reduced the U.S. presence in Romania in 2025, which had grown following Russia's invasion of Ukraine.[16] In May 2026, the Pentagon announced that it would withdraw 5,000 military personnel from Germany in a reduction of its forces there and cancel the planned deployment of an artillery unit to Europe.[17]

A POSTURE OF FLEXIBLE ENGAGEMENT

To deter or prevail in two conflicts simultaneously with major powers across different geographic regions, the U.S. military should adopt a strategy of flexible engagement. However, to succeed in the face of advancing adversary capabilities, the United States must adapt to a new manner of war fighting and posture. Given limitations to U.S. force structure and the industrial base, defense planners need to judiciously allocate limited capabilities across multiple theaters and work with allies to enhance their readiness and fill capability gaps.

A strategy of flexible engagement prioritizes the deployment of key forces and capabilities to the Indo-Pacific while relying on allied capabilities in Europe. This section identifies capabilities and operational priorities for the U.S. military in different theaters. It first outlines needs across all regions, followed by specific recommendations for the Indo-Pacific, Europe, other theaters, and the homeland. It also identifies areas of potential risk and offers recommendations to mitigate them.

While seeking to maximize flexibility, this posture takes a realistic approach. It recognizes that military forces positioned across different theaters are not completely fungible. Units stationed in one region may not necessarily be swiftly repositioned to another, and any such transfer will demand the use of enabling capabilities like airlift, sealift, and refueling. Posture choices are thus made to optimize U.S. forces forward deployed in regions for the rapid transition from peace to war. Moreover, the successful allocation of forces and maintenance of military readiness will require effective global force management and a willingness to resist the urge to deploy military capabilities in response to every change in the security environment.

"A strategy of flexible engagement prioritizes the deployment of key forces and capabilities to the Indo-Pacific while relying on allied capabilities in Europe."

Global Posture Considerations

Although this section largely provides an overview of posture requirements by region, the U.S. military should adopt a number of overarching policies across all theaters.

Nuclear Modernization

The Pentagon should continue efforts to modernize U.S. nuclear forces as a strategic deterrent. U.S. nuclear forces and the second-strike capability they provide contribute to the defense of the homeland. However, the repeated delays and cost overruns within the modernization programs ensure nuclear costs consume a significant portion of the budget for developing and procuring new military capabilities—conventional or nuclear.

Enabling Capabilities

Such capabilities as ISR, airlift, and tankers are in high demand across all combatant commands' areas of responsibility but are limited commodities. Moreover, their effective deployment is hindered by capability gaps with allied and partner militaries, such as in NATO, where alliance forces are largely reliant on the United States. Enabling capabilities are a high priority to ensure an effective logistics chain and successful operations. While defense leaders and military services should prioritize procuring additional enabling assets to reduce stress on these forces and enhance logistics and transportation processes, they should also develop

short-term plans to mitigate risks by exploring commercial options.

Limitations on enabling capabilities increase the time it takes to transfer units and other capabilities between theaters while also taxing the readiness of those forces with the demands of a high operational tempo. Head of U.S. Indo-Pacific Command Admiral Samuel Paparo identified airlift and sealift shortcomings in testimony before Congress in 2025. He testified that transferring one Patriot battalion from Indo-Pacific Command to Central Command took 73 C-17 sorties.[18] In terms of sealift, the combat logistics force is only "60 percent of the actual requirements," according to Paparo.[19] The head of Military Sealift Command noted in April 2024 that there were not enough U.S.-flagged tankers to meet the needs of the Pentagon.[20] While the Military Sealift Command fleet could surge from 140 to 400 ships, it would still face challenges meeting demand, given personnel shortages.[21]

Munition Stockpiles and Missile Defense Assets

Munitions production is a critical area given the expected consumption rates of precision-guided munitions in a potential conflict with China. The expectations are based on public wargames, long-range fires and artillery expenditures in the conflict in Ukraine, and air and missile defense munitions in U.S. operations against Houthi forces in the Red Sea.[22] The war with Iran has certainly led U.S. forces to expend considerable munitions, including significant quantities of precision-guided munitions, having struck nearly 8,000 targets as of March 18, 2026.[23] This reduction in munition inventories poses a risk for U.S. forces to deter and prevail in future conflicts over the short to medium term.

The United States needs to increase its defense industrial capacity across the board, which is covered in more detail in Chapter 6. The Pentagon has taken some steps to bolster production and should continue to do so to produce enough offensive and defensive munitions in the event of a potential conflict.[24]

The Army should also prioritize the development and deployment of additional air and missile defense units, particularly Patriot battalions. Given the demand for missile defense capabilities from multiple combatant commands, Patriot battalions operate at the highest operational tempo of all army units and face significant readiness challenges given the stress on their personnel.[25]

Readiness

The U.S. Armed Forces already face significant readiness shortfalls across almost all domains and military services, including personnel shortages, maintenance delays and backlogs, low mission capable rates, and personnel fatigue and accidents.[26] Readiness challenges stem, in part, from the high operational tempo at which today's historically small U.S. military is currently operating, including operations against Houthi forces in the Red Sea, Operation Midnight Hammer against Iran, the deployment of numerous naval and air assets in the Western Hemisphere, and Operation Epic Fury against Iran. The Trump administration has also increased the deployment of such units as Stryker Brigade Combat Teams (SBCTs) on the southern border and National Guard units in major U.S. cities.

"The U.S. Armed Forces already face significant readiness shortfalls across almost all domains and military services, including personnel shortages, maintenance delays and backlogs, low mission capable rates, and personnel fatigue and accidents."

This persistent high operational tempo risks eroding military readiness and "hollowing out" the force. For example, the extension of naval assets such as the Ford-class aircraft carrier has disrupted its maintenance schedule and seemingly taken a toll on the morale of its sailors.[27] Accidents have also occurred stemming in part from the high deployment tempo.[28] For their part, Trump administration officials across the military departments have recognized the need to address the readiness challenge.[29] While this will necessitate additional funding in relevant budget accounts, rebuilding readiness also requires more disciplined global force management and a more sustainable approach from leadership regarding deploying military units and personnel.

Indo-Pacific Posture

Given the geographic expanse of the Indo-Pacific and the time it takes to move forces to and within the region, the United States should plan for a military posture that prioritizes the rapid transition from peace to war in the event of a contingency with China. The United States should maintain flexibility in its posture in order to maximize the survivability of its forces and challenge China's military decisionmaking. This posture is helpful for the operational concepts outlined in Chapter 6, including the evolution of Hellscape into Air-Sea Battle. Defense planners should consider the following operational priorities and capability areas.

Access and Rotational Deployments

The United States maintains critical alliances and partnerships with nations across the Indo-Pacific, with permanent forward bases and enduring presences at locations in South Korea, Japan, Diego Garcia, and other U.S. territories. The military also has access to installations and plans rotational deployments across a host of other allied and partner countries in the region, notably Australia and the Philippines.

While the United States' ability to expand its permanent presence in the region may be limited, it should seek to bolster its forward presence by increasing access agreements, investments in local military infrastructure, and rotational deployments throughout the region, as well as by conducting military exercises with partners and allies that build greater interoperability. Rotational deployments offer greater appeal to host nations, given the investment that accompanies the influx of U.S. personnel and logistics, while increasing U.S. capabilities in the region. In 2023, the United States reached an agreement with the Philippines to allow the U.S. military to operate from four new bases in the country—including three in the north—beyond the five it already had access to under its Enhanced Defense Cooperation Agreement, as shown in Figure 5.2.[30] Marine Rotational Force–Southeast Asia conducts rotational deployments to the Philippines annually, while the Army recently stood up its Army Rotational Force–Philippines.[31]

In 2026, following the deployments of HIMARS, expeditionary Patriot units, Mid-Range Capability "Typhon" missile systems, and the Navy-Marine Expeditionary Ship Interdiction System (NMESIS), the U.S. State Department announced that the United States would deploy additional advanced missile systems to the Philippines.[32] Beyond the Philippines, the United States has grown its rotational force presence in Australia (including Marine Rotational Force–Darwin) and will continue to do so with the stand-up of Submarine Rotational Force–West in 2027 under the Australia–United Kingdom–United States (AUKUS) agreement. The United States also signed a Defense Cooperation Agreement with Papua New Guinea in 2023 that allowed U.S. forces to operate out of bases and pre-position matériel in the country with the government's approval, and it is renovating a naval base there.[33]

FIGURE 5.2 U.S. Military Access in Philippines Under the Enhanced Defense Cooperation Agreement (EDCA)

SOURCE Justin Baquisal, *Forward and Seaward: Archipelagic Defence as a Military Strategy for the Philippines* (London: IISS, December 2025), 10, https://www.iiss.org/globalassets/media-library---content--migration/files/research-papers/2025/12/phillipines-maritime-strategy/archipelagic-defence-as-a-military-strategy-for-the-philippines.pdf.

While Indo-Pacific nations provide critical access to U.S. forces in peacetime, defense planners need to consider how access—both on-the-ground access for U.S. personnel and overflight access—could change in the event of a conflict with China. The Philippines has expressed some ambiguity on the issue, with President Ferdinand Marcos Jr. stating in 2023 that the Philippines would not allow its military "bases to be used for any sort of offensive action."[34] However, he has also said, "It's very hard to imagine a scenario where the Philippines will not somehow get involved" in a Taiwan scenario.[35] Defense planners should work to develop alternative operational plans in the event that U.S. forces are denied access due to the host nation's fear of facing military action by China, while diplomats should work to negotiate access and status of forces agreements in the region. However, policymakers can also take steps to improve the likelihood that host countries grant access during a conflict.[36] Increasing and normalizing access and operations requests for the host government in peacetime could reduce the risk that similar requests are decided during a conflict if they are considered regular and unlikely to cause escalation.[37]

Conventional Strike

U.S. conventional strike capabilities across various domains will play a vital role in holding adversary forces at risk in a potential conflict with China. Examples include the long-range strike capabilities from the Air Force's bomber fleet, long-range and theater fires from Marine and Army units, and strike capabilities from undersea Navy assets and future unmanned platforms.

The Air Force's bomber fleet, particularly the stealthy B-2, has significant utility against Chinese forces, as illustrated in multiple wargames.[38] The United States should look to increase availability and sortie generation rates by permanently forward stationing B-2, and eventually B-21, bombers closer to the theater or, at minimum, building the base infrastructure needed to support high-tempo bomber and tanker operations. Potential air bases could include Joint Base Elmendorf-Richardson in Alaska and Joint Base Pearl Harbor–Hickam in Hawaii (Figure 5.3). The Air Force

FIGURE 5.3 Potential U.S. Bomber Air Bases

SOURCE CSIS.

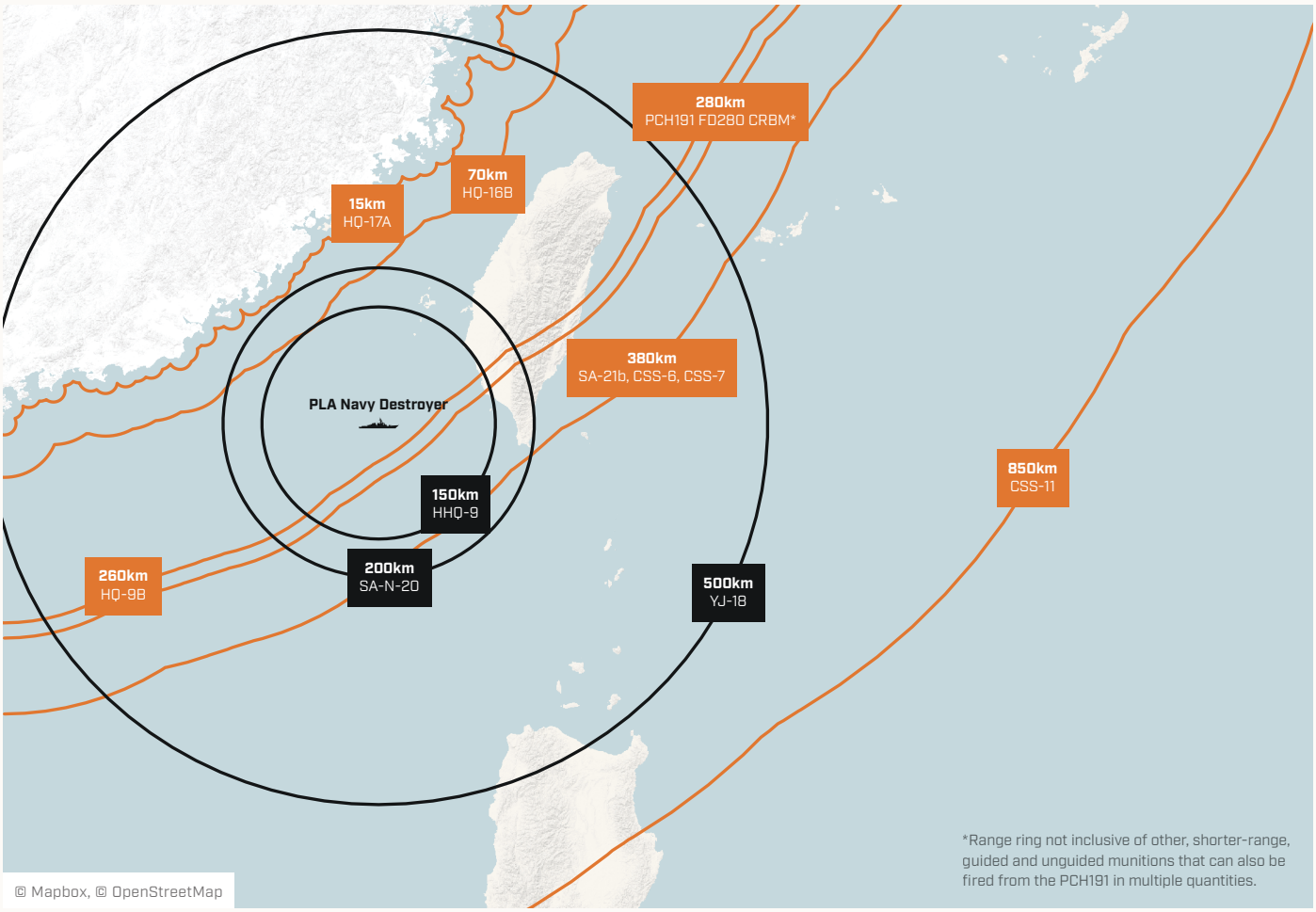


FIGURE 5.4 PLA CRBM, SRBM, and SAM Coverage over the Taiwan Strait

SOURCE U.S. Department of Defense, *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China* (Washington, DC: U.S. Department of Defense, 2025), 42, https://media.defense.gov/2025/Dec/23/2003849070/-1/-1/1/ANNUAL-REPORT-TO-CONGRESS-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2025.PDF.

could also consider forward stationing bomber aircraft in Australia pending an agreement with the government in Canberra. At the very least, the Air Force could increase rotational deployments of units, such as bomber task forces, in Australia without permanently stationing them on the continent. Permanently stationing bombers in or closer to the theater would require additional investment and construction to enhance existing air bases, ensure adequate fuel supplies, and create munitions depots. Defense planners should also ensure a capability gap does not emerge between the retirement of legacy platforms and the fielding of B-21 aircraft.

While the F-35 and fourth-generation aircraft may still have a role in a potential conflict, their deployment will likely follow the expenditure of long-range precision missiles by both China and the United States, when such aircraft are more survivable and of greater value. Planners need to consider the vulnerability of aircraft deployed to the region as targets for PLA missiles, both on the ground at air bases and within range of China's anti-access/area denial (A2/AD) systems.[39] Figure 5.4 shows China's close-range ballistic missile (CRBM), SRBM, and SAM capabilities. China has one of the "largest forces of advanced long-range SAM systems in the world."[40] Such capabilities, along with CRBM, SRBM, and other antiship missiles, place at risk both U.S. aircraft and surface ships operating in or near the first island chain.

Pending some dramatic breakthroughs in air base defense, the Air Force and Marine Corps should place greater priority on developing fighter-class unmanned aircraft that can be launched and recovered without reliance on runways or other fixed infrastructure. The

XQ-58 Valkyrie, developed by Kratos Defense, which both services have been experimenting with, may be a candidate for this mission.

The United States should also look to increase deployment of long-range precision fires and midrange fires capabilities to the region, such as Multiple Launch Rocket Systems (MLRSs), HIMARS, and other launch systems and munitions, to hold Chinese forces within range at risk.[41] Both the Marines Corps and Army may contribute to this mission through the use of mobile fires teams to rapidly set up, fire, and disassemble launch systems before moving on to increase survivability, including such systems as NMESIS.[42] The Marine Corps should serve as the primary ground combat element in the Indo-Pacific (beyond the Korean Peninsula), with MLRs as stand-in forces under the Expeditionary Advanced Base Operations concept.[43] However, the Army should still provide significant capabilities in theater by providing fires through its multidomain task forces and serve as a joint enabler for U.S. forces in the Indo-Pacific by coordinating logistics and sustainment, enabling rapid deployment, and providing persistent ISR capabilities, as well as air and missile defense capabilities.[44]

In terms of naval assets, Virginia-class attack submarines provide the most survivable strike option for U.S. forces, and their deployment to the Indo-Pacific should be prioritized over other combatant commands. Naval planners should also accelerate plans to develop and field UUVs and unmanned surface vehicles (USVs) to provide lower-cost attritable systems with strike and mining capabilities to target Chinese forces.

Mobility and Logistics

Given the size of the Indo-Pacific region, enabling capabilities are critical for the effective deployment and operation of U.S. forces. Airlift, tanker, and ISR systems should be prioritized for the Indo-Pacific to the extent that their deployment does not expose critical capability gaps for the United States and its allies in Europe. Indo-Pacific Command and subordinate service components should consider expanding their use of available commercial options to bolster the availability of enablers.

However, intra-theater lift poses a challenge within the Indo-Pacific Command area of responsibility given its geographic makeup. Ensuring the mobility of U.S. forces in the region—particularly those within Chinese missile range—is vital to maximizing their survivability.[45] The military should develop low-cost platforms for intra-theater mobility, including systems that allow for rapid shore-to-shore transportation, rather than rely on transportation via ships and ship-to-shore systems.

Given the challenges and potential long timelines to deploy U.S. forces and capabilities to the region, defense planners should ensure that the military has a distributed network of pre-positioned stocks of munitions and other vital capabilities. Such stocks should be maintained at a high level of readiness with easy access for forces to ensure the rapid transition from peace to war if necessary. Survivability of stocks should be enhanced through redundancy, dispersal, mobility, and deception, to include approaches for hiding in plain sight by making military storage sites indistinguishable from civilian assets. Distribution networks must be clearly delineated to ensure these stocks are transferred to war fighters in the field.

Regional component commands should also expand maintenance activities in the region with partners and allies. The Navy should take steps to enhance the overall availability of its ships by improving sustainment and maintenance practices. The service should explore opportunities to conduct greater maintenance, repair, and overhaul activities at allied shipyards in Japan and South Korea in order to take the burden off maintainers at U.S. naval bases.

Survivability and Dispersal

Enhancing the survivability of forces in theater is a critical priority for U.S. posture in the Indo-Pacific given the range and quantity of China's missile inventory. The United States maintains major permanent military bases, such as Kadena and Andersen Air Bases, within range of China's missiles. Figure 5.5 shows U.S. bases within range of different Chinese missiles and the inventory of those missiles based on estimates from the Pentagon's 2025 report on China's military and security developments. In the event of a conflict with China, the United States should limit *targetable* forces within missile range, including surface ships and fourth- and fifth-generation fighter aircraft at air bases in Japan, on Guam, and elsewhere in the second island chain. As wargames have demonstrated, these systems are targets for the PLA in the early days of a conflict, though they have more operational utility following the depletion of missile inventories by China

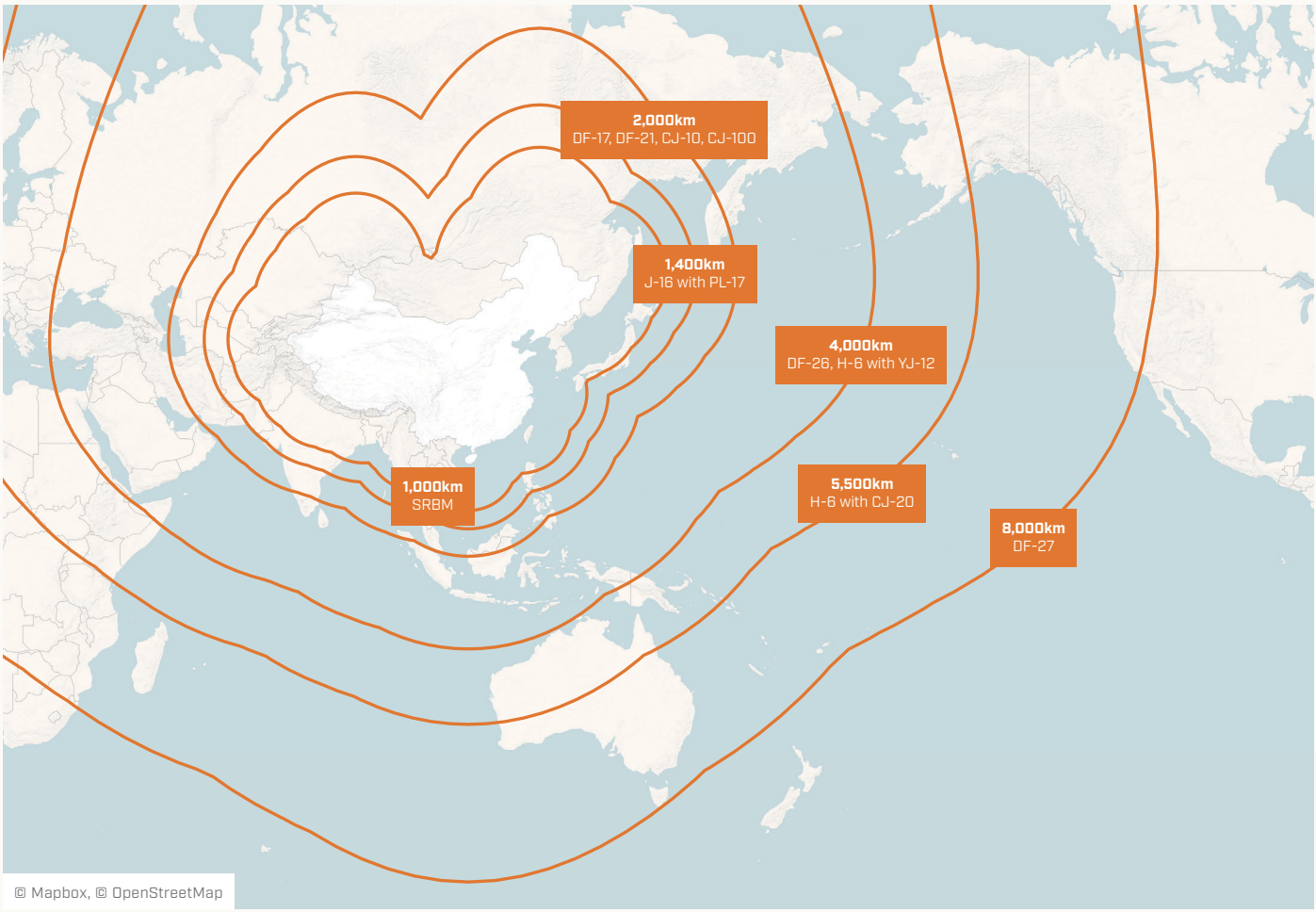


FIGURE 5.5 China's Conventional Strike Capabilities and Ranges

SOURCE U.S. Department of Defense, *Annual Report to Congress*, 2025, 79.

and the United States. In order to increase the survivability of U.S. forces, the United States should take a range of measures to limit the risk to its personnel and platforms, including dispersing assets and enhancing passive defenses through deception and hardening.

Defense planners should disperse U.S. forces to enhance their survivability through operational concepts such as ACE, which relies, in theory, on the use of small, dispersed air bases throughout the region for aircraft to use to refuel and rearm.[46] In addition to reducing the vulnerability of U.S. aircraft, the increase in forward operating sites would expand and diversify the number of target points for Chinese missiles from fixed to mobile aimpoints, limiting their overall effectiveness. A likely trade-off of increasing aircraft survivability under ACE is a reduction in sortie generation rates over time given the dispersal of forces.[47]

However, questions remain over the Air Force's ability to fully implement ACE in the Indo-Pacific. The service's ability to conduct distributed operations across numerous locations is currently constrained by its limited combat support capacity and personnel shortages, training deficiencies, and organizational confusion for the combat support community.[48] The Pentagon's inspector general initiated an evaluation of the Air Force's implementation of logistics requirements for ACE in the Indo-Pacific in May 2025.[49] The Air Force should consequently invest additional resources in its execution of ACE within the combat support community and the establishment and maintenance of forward operating sites. As discussed, the military services should simultaneously invest in fighter-class unmanned aircraft that are less reliant on runways and other fixed infrastructure.

Defense planners can take advantage of passive defenses beyond broader operational dispersal to bol-

ster on-base survivability. Defense planners should harden command and control and data transmission nodes, as well as fuel systems and munitions storage, against missile attacks. They should also leverage on-base dispersal, redundancy, and deception to improve survivability.[50] Notably, the Air Force's logistics enterprise must be able to mitigate attacks, respond, and ensure it maintains rapid runway repair capabilities.[51] Planners should adopt similar tactics with pre-positioned sites for all services and domains, which will be critical for ensuring the rapid and effective transition of U.S. forces from peace to war by creating redundant facilities to confuse Chinese targeteers.

A more promising approach would be to place an increased share of the nation's combat power in mobile systems that can operate away from fixed, targetable infrastructure. The war in Ukraine is showing that such forces can survive on the modern battlefield and generate significant combat power.

European Posture

Given the priority of the Indo-Pacific for U.S. strategy, the U.S. military should make trade-offs in terms of its posture in Europe and rely, in part, on the capabilities of its partners and allies in the event of simultaneous conflicts in both regions. Consequently, defense planners should take a sustainable approach to U.S. posture in Europe that leverages assets better suited to the theater than the Indo-Pacific while also working with allied militaries to procure systems that fill capability gaps currently met by U.S. systems.

Permanent and Sustainable Posture

The U.S. military should establish a European posture that enables it to deter and defeat Russian aggression in partnership with NATO allies while maintaining maximum flexibility to shift critical joint capabilities to the Indo-Pacific if needed. Army ground forces—particularly U.S. armor—should provide the bulk of the U.S. contribution to support NATO allies in Europe, given the utility of these forces to a land fight against Russian forces on the continent and their limited use in the Indo-Pacific beyond the Korean Peninsula.

Accordingly, the United States should permanently station an ABCT in Poland to shift its ground posture to a 4+2 model, which would involve reversing some U.S. troop withdrawals in 2026. The four BCTs would maintain the permanent SBCT in Germany and the infantry brigade combat team (IBCT) in Italy and Germany, in addition to the rotational IBCT in Romania—which was removed by the Trump administration in 2025—and the Polish-based ABCT with headquarters in Germany and Poland.[52] This enhancement of U.S. ground forces from pre–February 2022 3+1 levels would enhance NATO's deterrent capability and demonstrate U.S. commitment. It would also bolster interoperability with local forces and reduce the fiscal and long-term readiness costs associated with rotational deployments of ABCTs.[53] In the event of a contingency with Russia, U.S. ground forces would have to be prepared to cooperate and fight alongside the NATO multinational battle groups and other allied militaries.

The United States should also maintain its two F-35 squadrons in Europe. Given the vulnerability of fifth-generation fighters and other aircraft in the early phase of a conflict with China in the Indo-Pacific, F-35 aircraft could play a valuable role in a simultaneous war with Russia given their utility in the suppression and destruction of enemy air defenses (SEAD/DEAD). In the event of a sole conflict in the Indo-Pacific, Europe-based U.S. aircraft could also redeploy when their operational value has increased.

Building Partner Capacity to Fill Capability Gaps

A strategy of flexible engagement incurs some risk in relying on NATO allies to provide significant capabilities in the event of a conflict with Russia while the United States is simultaneously engaged in the Indo-Pacific. However, limitations in the capacity of U.S. force structure necessitate that the military work in lockstep with its partners and allies in Europe to ensure it can meet the demands of a two-war construct and simultaneous threats from China and Russia.

Consequently, U.S. European Command should take a proactive role in working with allied militaries in the region—including NATO—to address capability gaps within European forces. NATO militaries rely on U.S. forces to fulfill critical missions, including the SEAD/DEAD and command and control functions and networks. The U.S. military has also provided key enablers, such as airlift, ISR and targeting, integrated air and missile defense, airborne electromagnetic attack, and rapid resupply of munitions.[54] European militaries have taken steps to fill capability gaps in some areas, with some analysts reporting improvements in strate-

gic airlift and aerial refueling.[55] However, notable shortcomings remain in areas like integrated air and missile defense, ISR, SEAD/DEAD, and long-range strike.[56]

U.S. European Command should work with other NATO militaries to identify which capability gaps European states should act to fill first and propose potential solutions. This would ultimately diminish the reliance of non-U.S. NATO allies on U.S. capabilities and allow their militaries to play an expanded role in the defense of the continent.

As part of this effort, the Pentagon could consider establishing a new organization within U.S. European Command to coordinate broader security cooperation efforts with European partners, with representation from the services, the Office of the Under Secretary of Defense, and the Defense Security Cooperation Agency, and in close coordination with the Department of State.[57] It would interface with NATO headquarters and militaries to manage security assistance requests and arms sales, as well as provide guidance on the development of new capabilities.[58]

Finally, the United States could use special operations forces and security force assistance brigades to train and enhance allied capabilities, with a focus along NATO's eastern flank. It could also expand exercises with NATO militaries to build greater interoperability between partner forces and improve European readiness.

Other Theaters

This section briefly examines several other theaters: the Middle East, the Western Hemisphere, and Africa.

Middle East

The United States' military posture in the Middle East is dependent on the evolving threat environment. Ideally, the United States will not need to maintain as sizeable a presence in the Middle East following Israeli and U.S. campaigns against Iran and its partner forces and certainly not to the extent of the military buildup ahead of the war. However, U.S. forces should be withdrawn in phases to reduce the risk to U.S. interests and partners and allies in the region.

The United States had already reduced the number of its forces in the region prior to initiative Operation Epic Fury. In January 2026, Iraq's Ministry of Defence announced that all U.S. personnel had left bases in the country—with the exception of territory under the authority of the Kurdistan Regional Government, where likely fewer than 2,000 U.S. soldiers are based in Erbil.[59] The United States also reduced its presence in Syria from 1,500 personnel in July 2025 to 900 in February 2026, with a goal of withdrawing entirely from the country shortly after.[60] However, policymakers should continue to maintain a footprint in both countries to counter any resurgence by ISIS, reduce Iranian influence, and train, advise, and assist partner forces. The United States should also retain a special operations presence to conduct counterterrorism missions and security cooperation activities to train partner militaries.

The United States will need to maintain some forces in the region, particularly if Iran goes forward with its nuclear program and significantly rebuilds its missile and drone capabilities. While the United States could maintain some of its forces at bases in the Gulf in order to demonstrate its continued partnerships with host countries, it should consolidate air bases and reallocate some capabilities, such as airlift and ISR, to other theaters where they may be of greater utility. The Navy should retain some of its presence at Naval Support Activity Bahrain in order to deter aggression by Iranian maritime capabilities around the Persian Gulf. In the event of heightened escalation, such as Iranian or Houthi attacks on international shipping in the Red Sea, the United States may again deploy additional support from outside U.S. Central Command. The United States should focus its maritime posture on helping to ensure freedom of navigation through strategic choke points. In addition, the United States should rely on other naval assets, including Coast Guard patrol boats and fast-response cutters, Navy patrol boats, and independent destroyer deployments. When technologies mature, the Navy should leverage UUVs and USVs under NAVCENT Task Force 59.[61] As the war with Iran has shown, the United States should ensure it has developed and fielded sufficient minesweeping capabilities to counter the mining of the Persian Gulf by Iranian forces.

Western Hemisphere

Given the priority of deterring and defeating the threat of simultaneous aggression from China and Russia in the Indo-Pacific and Europe, the U.S. military should not dramatically increase its presence in the Western Hemisphere and U.S. Southern Command. It should scale back the naval and air assets built up under the Trump ad-

ministration to pressure and remove the Maduro regime in Venezuela and cease strikes on drug-running vessels. The Coast Guard is best suited to carrying out counternarcotics, illegal immigration, and other missions in the region. To counter the potential for increased Chinese and Russian influence and other transnational threats in the region, the United States could expand partner capacity-building missions with regional militaries.

Africa

Beyond a presence at Camp Lemonnier in Djibouti and other enduring locations, the U.S. military should maintain a limited posture on the African continent focused on building partner capacity, promoting regional security, and conducting counterterrorism missions where necessary. The United States should rely on foreign assistance efforts to build and realize U.S. objectives in the region.

Homeland Defense

Flexible engagement should involve bolstering the resilience of critical infrastructure that could come under threat in the event of a conflict with a major power like China or Russia. In terms of active defenses, the United States should pursue the expansion of air and missile defense systems for the homeland to counter advanced missile threats, as notionally proposed under the Trump administration's Golden Dome for America concept. However, it should determine the appropriate dimension of such defenses given the challenges of scaling such capabilities to counter advanced threats, along with the reality of limited financial resources and competing national security priorities.

The United States should also leave the security of the southern border to homeland security and law enforcement organizations rather than deploy U.S. military assets, which erodes their readiness. The deployment of the U.S. National Guard to major U.S. cities poses concerns over the appropriate use of the military within the homeland, as well as readiness issues.

CONCLUSION

As this chapter argues, the United States needs to balance deployments across commands and expand elements of its force structure to defeat two major powers. The U.S. military needs to reinforce vulnerable enablers, logistics routes, and communications networks, as well as acquire advanced strike systems, strengthen munitions stocks, and update the nuclear triad. Although budget and industrial constraints limit rapid growth, the U.S. military can reduce risks by prioritizing key regions and missions. The U.S. Army and Air Force should take the lead for deterrence and war fighting in Europe, while the U.S. Navy, Air Force, and Marine Corps should focus on the Indo-Pacific. Strong allied contributions, especially from NATO in Europe and several key allies and partners in the Indo-Pacific, remain essential. The United States should also be prepared to be flexible and quickly deploy forces to other regions—such as the Middle East, Latin America, and Africa—in response to crises, including to counter Chinese and Russian activity.

Nevertheless, questions remain. One of these questions is critical to this analysis: How should the U.S. defense industrial base support this force structure? The next chapter explores this issue in more detail.

CH. 06

HELLSCAPE AND A WARTIME INDUSTRIAL BASE

Thousands of completed (but not yet armed) and ready to ship shells are on view in the Scranton Army Ammunition Plant.

SOURCE Michael S. Williamson/ The Washington Post/Getty Images

This chapter outlines the wartime defense industrial base needed for a U.S. force capable of working with allies to deter—and, if necessary, fight and win—two simultaneous and protracted wars. As the historian Paul Kennedy concluded in *The Rise and Fall of the Great Powers*, "In a long-drawn-out Great Power (and usually coalition) war, victory has repeatedly gone to the side with the more flourishing productive base—or, as the Spanish captains used to say, to him who has the last escudo."[1] The chapter asks two main questions: What military concepts of operation should the United States develop against axis countries? What steps should the United States take to strengthen the defense industrial base?

As used here, the defense industrial base and the broader industrial ecosystem include the set of companies and government agencies involved in the research, development, design, production, delivery, and maintenance of weapons systems, matériel, and equipment for a country's armed forces.[2] The goal of the industrial base is to provide the U.S. military with what it needs to protect the homeland from threats, deter adversaries, and fight and win wars. In the United States, the defense industrial ecosystem consists of roughly 60,000 companies—from large established companies to small start-ups and their suppliers.[3] The Pentagon, Department of State, Department of Commerce, National Security Council, Congress, and other agencies also play important roles.

This chapter makes two main arguments. First, an important guide for the defense industrial base should be operational concepts to offset axis—especially PLA—

advantages, exploit their weaknesses, leverage U.S. and allied strengths, and ultimately defeat one or more adversaries in a war. Used in this sense, an "offset" is an effort that combines an operational concept and technology to negate an adversary's military advantages.[4] Building off the U.S. Indo-Pacific Command concept of Hellscape, a modern version of Air-Sea Battle is important for the Indo-Pacific and Air-Land Battle for Europe. Several capabilities are particularly important, such as a high-low mix of large attack submarines and cheap UUVs; a high-low mix of exquisite long-range missiles and cheap unmanned systems that can be mass produced; air defense; and stealthy fifth- and sixth-generation aircraft and bombers. In particular, the U.S. industrial base needs new and different weapons that are simpler, faster, and cheaper to produce in greater numbers.

Second, the United States must urgently focus its industrial base on mass production, supply chains, the defense workforce, and industrial cooperation with allies and partners. It should also increase the defense budget to at least 4 percent of GDP to expand industrial capacity and direct spending toward the more rapid development and procurement of new capabilities. Currently, the U.S. defense industrial base and broader ecosystem are unprepared for a protracted conflict, particularly one that occurs in more than one theater. There is limited urgency to maximize production; contracting and acquisitions systems reflect a peacetime mindset, while there are workforce, supply chain, and other challenges in serious need of reform.

"In 2025, the U.S. military fired a quarter of its THAAD missiles in a few days of operations against Iran—what amounted to billions of dollars of U.S. weapons that had taken years to develop and produce."

The 2026 U.S. and Israeli war with Iran has yet again highlighted deficiencies in the U.S. defense industrial base, particularly as relevant for China. The U.S. military has expended significant numbers of long-range missiles, such as Tomahawk land-attack cruise missiles and Joint Air-to-Surface Standoff Missiles, that hold significantly more value for a potential conflict with China than for the current conflict with Iran. The same is true for air defense munitions stocks, such as those for Patriot and THAAD systems, which have been increasingly depleted and put at risk air defense requirements for a war with China or other adversaries. Production for most of these missiles takes roughly two years, which means that there is no short-term solution to fix the problem. In 2025, the U.S. military fired a quarter of its THAAD missiles in a few days of operations against Iran—what amounted to billions of dollars of U.S. weapons that had taken years to develop and produce. In addition, Ukraine used roughly a decade's worth of U.S.-produced antitank weapons in only a few months of war in 2022.[5] Unless urgent changes occur, the United States will likely lose deterrence and increase the risk of multi-theater conflict.

The rest of this chapter is divided into three sections. The first examines the establishment of a new offset strategy to focus industrial production, especially Air-Sea Battle in the Indo-Pacific and Air-Land Battle in Europe. The second focuses on key areas of the U.S. defense industrial base, such as mass production, the defense workforce, supply chains, and cooperation with allies. The third provides a brief conclusion.

A NEW OFFSET

Based on the capabilities of U.S. adversaries, especially China, the United States needs to significantly revitalize its industrial base to deter—and, if necessary, fight and win—two simultaneous multi-theater wars. Successful efforts to improve deterrence and war fighting have typically required the combination of technology and operational concepts. Technology alone has never been sufficient. As Andrew Marshall, head of the Pentagon's Office of Net Assessment, argues,

> The most important competition is not the technological competition, although one would clearly want to have superior technology if one can have it. The most important goal is to be the first, to be the best in the intellectual task of finding the most appropriate innovations in concepts of operation and making organizational changes to fully exploit the technologies already available and those that will be available in the course of the next decade or so.[6]

During the Cold War, the United States succeeded in several major efforts to counter—or offset—Soviet advantages. The first offset was the Eisenhower administration's New Look, which involved offsetting the Red Army's conventional advantage in Central Europe by developing a concept to inflict massive retaliatory damage using nuclear weapons.[7] Beginning in the late 1970s, officials from the Carter and Reagan administrations developed and implemented Air-Land Battle and Assault Breaker—a second offset—to defeat Soviet forces attempting to invade Western Europe. The second offset led to a focus on stealth, precision weapons, and other advanced technology.[8] Led by General Nikolai Ogarkov, Soviet leaders conducted a massive exercise, Zapad-81, which involved responding to Assault Breaker advances.[9] He and other Soviet leaders became increasingly concerned that the Soviet Union was falling behind. As Soviet Minister of Defense Dmitry Ustinov remarked at a meeting of the Warsaw Pact Committee of Defense Ministers, the military balance between NATO and the Warsaw Pact was "at the moment not in our favor."[10] The second offset strategy provided the U.S. military and its allies with an operational advantage and strengthened deterrence.[11]

After the collapse of the Soviet Union, U.S. forces equipped with second offset capabilities demonstrated the power of the concept in the successful 1991 campaign against Iraqi forces during Operation Desert Storm. In the mid-2010s, Deputy Secretary of Defense Robert O. Work spearheaded a third offset that sought to use advanced technologies—such as AI, machine learning, and unmanned systems—to offset future Chinese and Russian capabilities.[12]

Today, the situation is different, particularly with Chinese advantages in mass and scale. The Pentagon and other organizations have developed some efforts, such as Hellscape, Assault Breaker II, and the various Joint Warfighting Concepts to offset axis advantages. But these either are too broad or lack sufficient detail to guide procurement and technological development. A U.S. offset today needs to evolve joint operational concepts to defeat China and Russia in a war by focusing on defense by denial and then link the operational concepts to capabilities. This involves an emphasis on Air-Sea Battle for the Indo-Pacific and Air-Land Battle for Europe. An offset that focuses on China and Russia does not exclude preparing for contingencies elsewhere, such as Iran in the Middle East or North Korea on the Korean Peninsula. But it does mean that the United States needs to prioritize defeating and deterring China, and secondarily Russia, much as the United States focused on the Soviet Union during the Cold War.

Hellscape and Air-Sea Battle in the Indo-Pacific

The U.S. concept of Hellscape is a useful place to begin for a joint concept of operations. As Admiral Paparo, commander of Indo-Pacific Command, remarked, "I want to turn the Taiwan Strait into an unmanned hellscape using a number of classified capabilities so I can make their lives utterly miserable for a month, which buys me the time for the rest of everything."[13] A Taiwan Strait scenario is also relevant for other types of conflicts in the region, such as in the East or South China Seas.

The broad goal of Hellscape is to slow down a Chinese invasion of Taiwan using drones and other capabilities, ideally from Taiwan.[14] Hellscape envisions using massive numbers of UASs, UUVs, and USVs to collect intelligence, conduct target acquisition, use electronic countermeasures, lay mines, and strike Chinese forces—including PLA surface vessels, aircraft, subsea vessels, air defenses, missile silos, and other capabilities. The type of unmanned systems for Hellscape includes a high-low mix of cheap (or "attritable") and more expensive platforms, such as high-altitude long-endurance UAVs and one-way attack and loitering drones that could be launched from surface ships, submarines, aircraft, and land.

Building off Hellscape, the scenario of a PLA invasion offers a useful example. The PLA would likely attempt to move troops, weapons, and matériel onto Taiwan or another territory through an amphibious landing, an air assault, airborne landings, or a combination of these means (Figure 6.1). PLA surface ships, submarines, aircraft, missiles, long-range fires, and other weapons systems would likely play important roles in the invasion, supported by cyber, space, and air defense capabilities. Consequently, a U.S. joint operational concept needs to include several components.

The first is moving with speed and maximizing maneuver, which requires pre-positioning platforms and stockpiling munitions. The United States would likely need to act within hours or days to prevent a territorial fait accompli. There may not be sufficient time for a slow and steady buildup of forces, much as the United

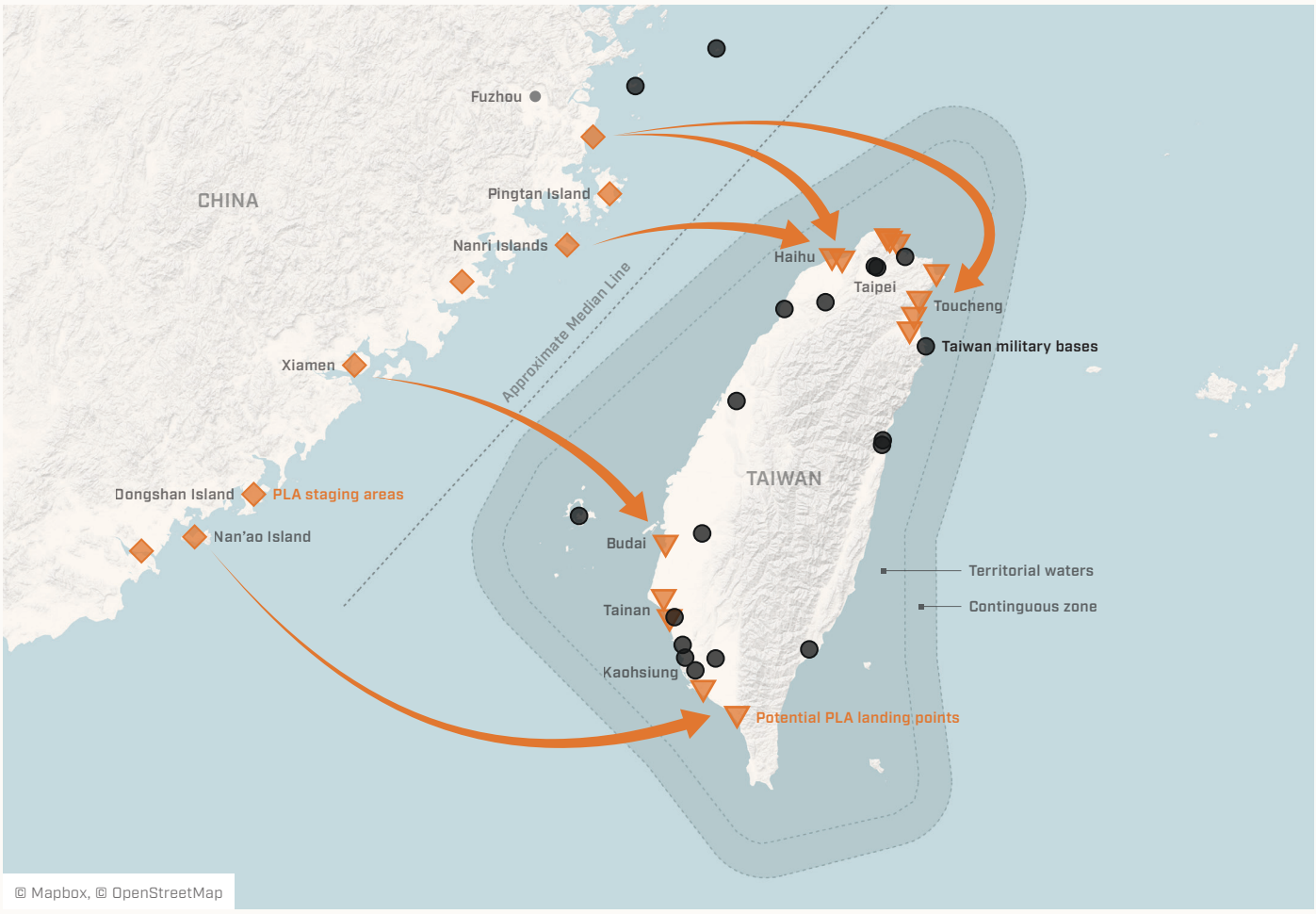


FIGURE 6.1 A Possible Chinese Invasion of Taiwan
SOURCE CSIS.

States accomplished before Operation Desert Storm. Consequently, the United States needs to posture its forces today in the Indo-Pacific for rapid engagement, such as deploying sufficient bombers to Australia and Alaska, hardening shelters for aircraft, establishing active defenses for missiles, and stockpiling sufficient quantities of fuel, spare parts, munitions, and other matériel that can be used for a fight.

Second, U.S. forces would need to rapidly strike at the center of gravity of the invasion force and cripple its offensive. For a China scenario, this would require identifying high-value targets, including PLA ships and aircraft carrying PLA soldiers, weapons systems, and equipment; rapidly moving information from sensor platforms to shooters; and precisely hitting and destroying PLA targets to deny China's attempts to conduct a successful invasion. Key targets include PLA ships, transport helicopters, and fixed-wing aircraft necessary for an invasion, as well as PLA air defenses, artillery, and operational command and control centers supporting the invasion force. To strike these targets, the United States would need to generate combat power that can operate both inside and outside the reach of China's strike systems. As U.S. General Ulysses S. Grant argued, "The art of war is simple enough. Find out where your enemy is. Get at him as soon as you can. Strike at him as hard as you can and as often as you can, and keep moving on."[15]

In the short term, a U.S. operational concept would need to withstand initial PLA attacks, degrade the performance of PLA battle networks and command and control systems, execute a suppression campaign against PLA long-range intelligence and strike capabilities, and target the PLA's air defense systems. In the long term, the United States would need to be prepared for a protracted campaign, maintain operational logistics, and increase defense industrial production for critical munitions and weapons systems, including air defense and long-range strike systems. The United

States also needs to take advantage of PLA weaknesses, such as in undersea platforms, and leverage U.S. strengths, such as significant experience in identifying, tracking, and engaging targets. Allies such as Japan, Australia, South Korea, and the Philippines would be helpful, though not necessarily assured.

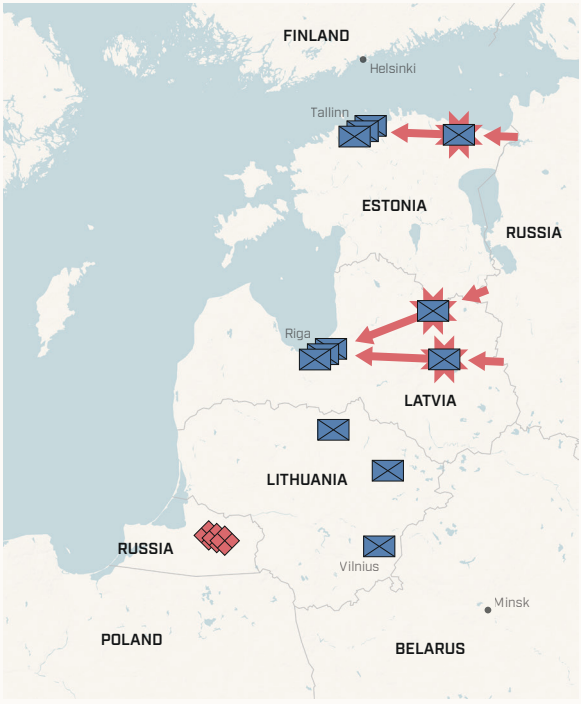
Air-Land Battle in Europe

In a European scenario, such as a Russian invasion of the Baltics, highlighted in Figure 6.2, the U.S. military and other NATO countries would need an operational concept capable of rapidly targeting the core of Russia's invasion force.

One component is pre-positioning forces and matériel in Eastern Europe and the Baltics. According to one set of wargames, "The longest it has taken Russian forces to reach the outskirts of the Estonian and/or Latvian capitals of Tallinn and Riga, respectively, is 60 hours. Such a rapid defeat would leave NATO with a limited number of options, all bad."[16] As Chapter 2 argues, Moscow is attempting to reconstitute its forces and defense industry with assistance from China and other countries, despite the Russian military's current struggles in Ukraine. Pre-positioning forces in NATO's eastern flank is essential to ensure a rapid NATO response. As Chapter 5 concludes, the United States can play an important role by adopting a 4+2 force posture in Europe, with sufficient forward-deployed maneuver forces, air defense capabilities, sensor platforms, unmanned systems (including UASs that do not require a runway), long-range precision strike missiles, and stockpiles of fuel, parts, and munitions.[17] NATO needs to posture forces in Eastern Europe—including some capabilities in the Baltics—for a rapid response to Russian aggression.

FIGURE 6.2 A Possible Russian Invasion of the Baltics

SOURCE David A. Shlapak and Michael W. Johnson, *Reinforcing Deterrence on NATO's Eastern Flank* (Santa Monica, CA: RAND Corporation, 2016), 6, https://www.rand.org/pubs/research_reports/RR1253.html.



Second, it is critical to be prepared to swiftly target Russian capabilities that support an invasion, such as Russian air defenses, artillery units, operational command and control centers, and logistics.[18] Delay could allow Russian ground forces to gain a decisive advantage because of the short distances involved. For example, the Estonian capital of Tallinn is roughly 125 miles from the Russian border. Much as in the Indo-Pacific, a U.S. Air-Land Battle concept needs to be prepared to withstand initial Russian attacks and fight a protracted campaign.

Capabilities for Air-Sea and Air-Land Battle

Several types of systems and technologies are important based on these concepts. The near-term goal should be to leverage capabilities that are effective and available *now*—or very soon. There should be five main defense industrial priorities based on Air-Sea and Air-Land Battle:

1. a high-low mix of undersea capabilities, including submarines and cheaper UUVs;
2. a high-low mix of air capabilities, including cheap and attritable UASs with fifth- and sixth-generation fighters and bombers;
3. long-range precision strike missiles;
4. air defense and systems to counter unmanned vehicles; and
5. other capabilities, such as space and counterspace, cyber, all-domain command and control capabilities, and software that leverages AI, which allow the U.S. military to operate a battle network.

High-Low Mix of Undersea Capabilities

The first priority includes capabilities that allow the United States to maintain an undersea advantage, especially against China. Of particular value is a high-low mix of attack submarines, such as Virginia-class nuclear-powered submarines, and relatively cheap UUVs and USVs. PLA capabilities are still relatively weak in antisubmarine warfare, and the PLA has serious difficulties finding U.S. submarines.[19] In multiple iterations of CSIS wargames, for example, U.S. submarines wreak havoc against Chinese ships, including large amphibious vessels, escorts, and logistics vessels.[20] U.S. submarines can hunt PLA targets, transit back to Yokosuka and other ports, reload, and return to hunting targets. Submarines are also needed to screen against Chinese submarines exiting the first island chain. The implication is straightforward: Attack submarines remain essential for deterrence and war fighting against China, though the U.S. military and industrial base have been slow to award contracts and build submarines.[21] The Navy should prioritize increasing the production of Virginia-class attack submarines from the current target rate of two boats per year (it currently only produces 1.2 per year) to three per year, given the asymmetric advantage the increase provides over competitors' capabilities.

The United States should also prioritize UUVs and USVs that remain effective despite substantial communications and GPS jamming. There will be U.S. submarine attrition in a fight against China, such as in the relatively shallow waters of the Taiwan Strait. Each loss would be tough, since a Virginia-class submarine has a crew of roughly 132 sailors and costs approximately $4.5 billion.[22] While UUVs are not yet as capable as attack submarines, they can be programmed to fulfill some critical missions, such as mine laying, intelligence collection, electronic warfare, and strike against PLA submarines and surface vessels. The Navy needs to step up its procurement of relatively cheap UUVs with longer ranges that can carry higher payloads and lay mines. U.S. partners and allies in the region, including Taiwan, also need these capabilities.[23]

High-Low Mix of Air Capabilities

Second is a high-low mix of manned and unmanned aircraft. Large numbers of relatively cheap UAVs, or drones, are critical for these operational concepts, particularly drones that do not need runways to launch. They can be used en masse and perform valuable missions in a war—such as ISR, battle damage assessment, electronic warfare, and strike—within range of adversary missiles and drones. They are also expendable since they are cheaper than fourth-, fifth-, and sixth-generation aircraft and do not risk casualties. Overall, they provide the United States with the ability to achieve "precise mass," or the deployment of large quantities of precision-guided systems for use in warfare.[24]

As Table 6.1 highlights, Ukraine and Russia have used hundreds of thousands of drones *per month* on the battlefield, as well as produced hundreds of thousands more per month in their respective industrial bases. The United States will need to produce substantial numbers of unmanned vehicles, including hundreds of thousands or more of relatively cheap tactical drones, decoys, and long-range one-way attack drones. The United States also needs to prepare the industrial base to surge production, which will require sufficient industrial infrastructure (e.g., capital expenditures) and components (e.g., supply chains) for unmanned production. In addition, AI-enabled autonomous platforms will likely be useful for individual systems, as well as swarms of drones operating in tandem and capable of withstanding heavy electronic interference.

Yet drones are not likely sufficient. As wargames and other analyses suggest, the United States and its allies still need manned bombers and fighters to win wars.[25] The range and high ordnance capacity of stealth bombers like the B-21 Raider would likely present China and Russia with a serious challenge. They may be based beyond the range of most of the adversary's conventional strike systems—including in the U.S. homeland—and may carry substantial payloads to attrit Chinese or Russian forces.

Manned fighter aircraft are also still important, especially stealth fifth-generation fighters (such as the F-35), since most unmanned systems do not yet have the strike capacity, speed, sensor packages, and battlefield management capabilities of advanced fighters. Sixth-generation fighters, such as the F-47, are important but are not a short-term solution. The dependence of manned aircraft on land bases and surface ships within range of thousands of enemy missiles remains problematic, particularly in a conflict against China. Fighter aircraft will likely have greater utility in a conflict with China after munition inventories have been depleted.

U.S. (and Japanese and Chinese) aircraft and naval losses could be high in a Taiwan conflict. Table

Drone Type	Role	Estimated Production *(monthly)*	Estimated Use *(monthly)*	Estimated Unit Cost
Ukraine				
First-person-view (FPV) drones	Conduct tactical antipersonnel, antiarmor strikes	600,000–800,000	350,000–550,000	$400–$700
Interceptors *(e.g., Octopus, Sting)*	Conduct counter-UAV activity	40,000–50,000	45,000–60,000	$3,500–$5,000
Deep-strike drones *(e.g., AN-196, Beaver)*	Orchestrate longer-range attacks on Russian targets, such as oil refineries	1,500–3,000	1,000–2,500	$30,000–$200,000
USVs *(e.g., Sea Baby, Magura V)*	Conduct antiship, bridge strikes	30–50	15–30	$250,000–$300,000
Russia				
FPV drones	Conduct tactical antipersonnel strikes, frontline assault	250,000–300,000	200,000–300,000	$400–$600
One-way attack drones *(e.g., Shahed, Geran-1/Geran-2)*	Orchestrate one-way strikes, including against infrastructure	2,500–3,000	3,500–5,000	$35,000–$50,000
Jammers, decoys *(e.g., Gerbera)*	Saturate air defenses by mimicking Shaheds; jam communications	2,000–2,500	2,000–2,500	$5,000–$10,000
Precision strike, ISR *(e.g., Lancet, Orlan)*	Conduct precision strikes, ISR	500–1,000 *(Lancet)* 80–100 *(Orlan)*	50–100 *(Lancet)* 80–100 *(Orlan)*	$20,000–$40,000 $90,000–$120,000

TABLE 6.1 Estimates of Ukrainian and Russian Drone Production and Drone Use, 2026

SOURCE CSIS estimates; and CSIS analysis drawn from multiple sources.[26]

6.2 shows losses according to three cases examined in wargames: a base scenario, pessimistic scenarios where China does relatively well, and optimistic scenarios where the United States, Japan, and Taiwan do relatively well. In addition, the United States needs to continue developing and fielding capabilities for manned-unmanned teaming and collaboration between manned and unmanned systems, such as the Collaborative Combat Aircraft.

Long-Range Precision Strike

Third is a major increase in precision-guided munitions, especially for long-range strike. As Table 6.3 shows, an overview of wargame results suggests that the United States could use hundreds of some types of missiles, such as the Long-Range Anti-Ship Missile (LRASM), and thousands of others, such as the Joint Air-to-Surface Standoff Missile–Extended Range (JASSM-ER), in the first four weeks of a Taiwan conflict. Munition usage is likely to be high in a protracted conflict. LRASMs, for example, are likely to be effective against PLA targets. But they are expensive, at roughly $2–$3 million per missile, and the United States does not have enough of them.[27] During the 2026 war with Iran, the U.S. military further depleted its stockpile of some long-range missiles—such as Tomahawks and JASSMs—creating significant risk for a possible conflict with China or other contingences. The JASSM-ER is also effective and comes with a lower price of roughly $1.0–$2.5 million per missile.[28] Consequently, the United States needs to ramp up the research, development, and production of cheaper long-range munitions. There has been some progress, including development of the Extended Range Attack Munition, which costs roughly $250,000 per missile.[29]

In multiple wargames, the U.S. military exhausted its inventory of LRASMs within roughly one week of a Taiwan conflict, and Taiwan used up its entire inventory of antiship cruise missiles after a week. It would be difficult to sustain a fight without long-range weapons.[30] Chinese defenses are likely formidable—especially in the early stages of a war—and would prevent some aircraft from moving

	Combat Aircraft Losses				Ship Losses			
	United States	Japan	United States/ Japan Total	China	United States	Japan	United States/ Japan Total	China
Base Scenario	270 *(206 USAF)*	112	382	155	17	26	43	138
Pessimistic Scenarios *(Favors China)*	484 *(412 USAF)*	161	645	327	14	14	28	113
Optimistic Scenarios *(Favors United States/Japan/Taiwan)*	200 *(151 USAF)*	90	290	18	8	16	24	129

TABLE 6.2 Estimated U.S., Japanese, and Chinese Air and Naval Losses in a Taiwan Strait Conflict

SOURCE Mark F. Cancian, Matthew Cancian, and Eric Heginbotham, *The First Battle of the Next War: Wargaming a Chinese Invasion of Taiwan* (Washington, DC: CSIS, January 2023), 94, https://www.csis.org/analysis/first-battle-next-war-wargaming-chinese-invasion-taiwan.

close enough to drop short-range munitions. U.S. bombers, such as the B-21 bomber, would generally employ LRASMs because they can fire them outside the range of Chinese missiles. But the problem is not just a shortfall of munitions or high costs—the production timelines for producing advanced munitions can be two years or more, meaning there are no quick solutions.[31]

Air Defense

Fourth are air defense systems, including those to counter unmanned threats. U.S. bases, forces, and other infrastructure abroad and at home could be at risk of being attacked by large numbers of unmanned aircraft; underwater, surface, and land systems; and cruise, ballistic, and hypersonic missiles. The United States and its allies need to devote significant resources to defenses against these threats or risk the kinds of losses that Ukraine and Russia have suffered. There are several priorities. One is developing new affordable types of technologies for defense, such as high-powered microwaves, directed energy systems, low-cost interceptors (including drones), AI-enabled processing, and long-range high-resolution active and passive sensors. These capabilities can complement current mobile SAMs, loitering SAMs, drone interceptors, decoys, passive defenses, and gun-based drone defenses.[32]

A second priority is stockpiling sufficient quantities of munitions for many of these systems, which are low. In 2025, the U.S. military fired over a quarter of its THAAD interceptors in a few days of operations against

TABLE 6.3 Estimate of U.S. Munitions Expenditure over One Week of a Taiwan Conflict

SOURCE CSIS estimates; and CSIS analysis drawn from various sources.[33]

Munition Type	Role	Estimated Use (one week)
Long-Range Anti-Ship Missile (LRASM)	Antiship	450–1,000
Joint Air-to-Surface Standoff Missile–Extended Range (JASSM-ER)	Land attack	3,500–4,000
Joint Air-to-Surface Standoff Missile (JASSM)	Land attack	3,000–5,000
Standard Missile–6 (SM-6)	Multirole interceptor	400–600
Tomahawk (Block V)	Long-range strike	400–1,000
Precision Strike Missile (PrSM)	Antiship	250–400
Harpoon	Antiship	400–800

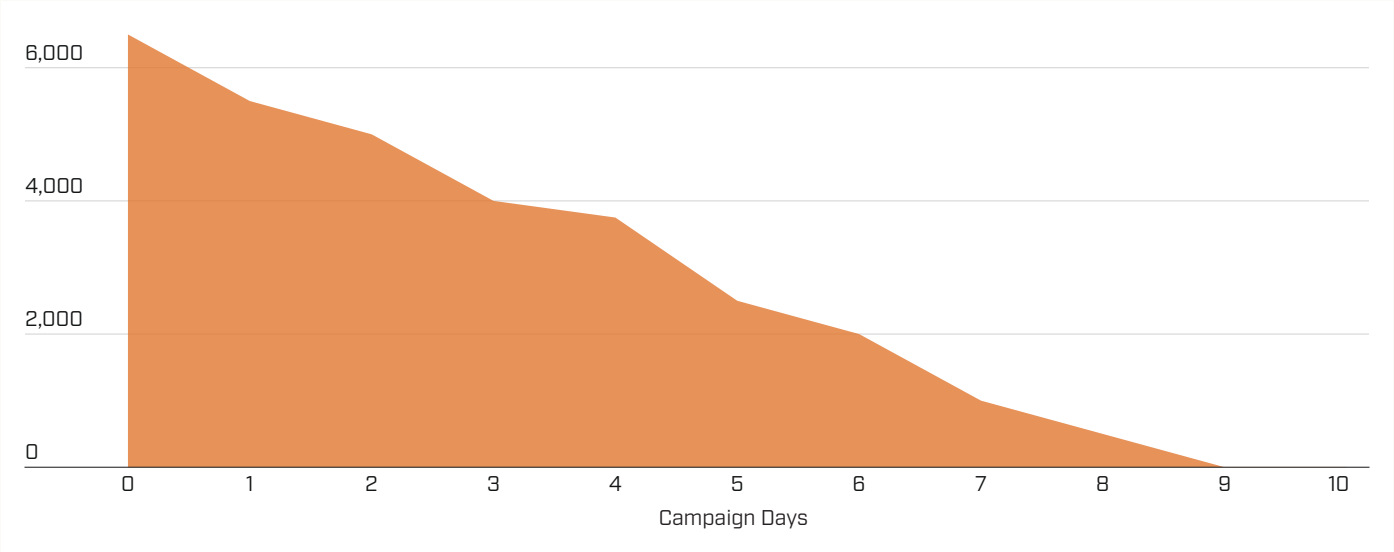


FIGURE 6.3 Use of U.S. Munitions in a Possible Taiwan Air Campaign

SOURCE Mark A. Gunzinger, *Affordable Mass: The Need for a Cost-Effective PGM Mix for Great Power Conflict* (Arlington, VA: Mitchell Institute for Aerospace Studies, November 2021), 19, https://www.mitchellaerospacepower.org/affordable-mass-the-need-for-a-cost-effective-pgm-mix-for-great-power-conflict/.

Iran.[34] In the 2026 war with Iran, the U.S. military has further depleted its air defense stockpiles for the Patriot and THAAD batteries. To make matters worse, Iran has struck and damaged at least one AN/TPY-2 radar used for the THAAD system. A THAAD battery cannot operate effectively without this radar, which serves as the system's "eyes" to detect, track, and provide targeting data for interceptors. The U.S. Army has only eight THAAD batteries, which are dispersed between the Middle East and Indo-Pacific.[35] Their extensive use in the Iran war, including the damage to at least one THAAD system, poses serious risk for wars against China and other adversaries.

Additional Capabilities

Fifth, other capabilities are also important, such as all-domain command and control systems and software that leverages AI, which allow the U.S. military to operate a battle network. So are space, cyber, electronic warfare, and some land capabilities. But other capabilities are not likely to be critical for these operational concepts. For example, surface ships are less likely to be useful in such areas as the first and second island chains in a war because of their vulnerability. Destroyers and aircraft carriers are highly exposed in a war despite their defensive systems.

REVITALIZING THE INDUSTRIAL BASE

In offsetting adversary capabilities, the White House needs to make revitalizing the industrial base for a protracted multi-theater war an urgent national priority. Recent Pentagon statements have been helpful, though the history of the U.S. defense industrial base suggests that presidents are critical in overseeing national industrialization.[36] Wars between major powers can be long in duration. The mean duration of interstate wars is roughly 15 months, though wars involving one or more major powers can last longer and span several theaters. The Crimean War lasted 28 months; the Russo-Japanese War, 16 months; the Korean War, 36 months; World War I, 52 months; World War II, over 60 months; and the Vietnam War, 121 months.[37] In addition, wars involving major powers use massive quantities of munitions, and weapons systems and platforms typically are destroyed and suffer substantial wear and tear from constant use.

The U.S. defense industrial base and broader ecosystem are currently unprepared for protracted and multi-theater wars with axis countries. This section focuses on several areas as part of an offset: mass production, strategic stockpiles, supply chains, the defense workforce, and industrial cooperation with allies and partners.

Mass Production

The United States needs to produce weapons systems at speed and scale, as well as design requirements and incentives for manufacturing. But the defense industrial base is hampered by an inability to produce critical weapons systems and matériel quickly—particularly those relevant for an offset—partly because of an anachronistic contracting and acquisitions system. Government officials and experts have long called for defense acquisition reform. One Pentagon study bluntly warned, "Major defense programs continue to take ten years or more to deliver less capability than planned, often at two to three times the planned cost."[38] While this prolonged period might be acceptable for peacetime, it is insufficient for a wartime environment and raises concerns about conflict and deterrence in multiple theaters.

Companies that want to deal with the Pentagon must comply with the Federal Acquisition Regulation, which includes the set of rules regarding government procurement. They also have to deal with the Defense Federal Acquisition Regulation Supplement, the rules and regulations established by the Pentagon to make sure that contractors and subcontractors follow specific cybersecurity best practices to protect sensitive information.[39] It is no wonder that numerous companies in the commercial sector have shied away from the defense sector. They have limited interest in trekking through a byzantine contracting and acquisition system and are deterred by the heavy regulatory burden and limited financial upside. The downside is that significant numbers of innovative commercial companies—including major technology companies—are not particularly active in the defense industrial base.

A defense industry operating on a wartime footing requires contracting and acquisitions processes that are faster, more flexible, and less risk averse. A range of tools can be used to speed up acquisition and contracting. Examples include Rapid Acquisition Authority, which allows the secretary of defense to bypass the normal acquisition process, such as competitive bidding rules, to meet the immediate needs of the military; Other Transaction Authorities, which allow Pentagon leaders to bypass the Federal Acquisition Regulation; Defense Production Act authorities; and other emergency and experimental authorities.[40]

Strategic Stockpiles

As wargames and analyses have demonstrated, the U.S. military has too few munitions and other systems for a protracted war.[41] The dilemma for the government is to match the *production rate* of defense systems to the *consumption rate* in a prolonged war. This is more art than science since it requires estimating the possible timelines and munitions usage in a future war. Several factors impact the duration and geographic expanse of wars. But it would be prudent to plan for longer wars rather than shorter ones.

The problem is that it is difficult to produce weapons quickly. Replacing the inventories for major defense acquisition programs at surge production rates takes an average of 8.4 years.[42] It can take over four years to produce some munitions, such as the SM-3 IIA; around three years to produce others, such as THAAD interceptors, SM-6, SM-3 IB, PrSM, Tomahawk, and JASSM; and over two years to produce the PAC-3 MSE.[43] These lead times are generally to deliver the first missiles, not the last ones, in a production order. Filling inventories requires sustained multiyear investment, as well as accurate projections of the rate of use. Missile obsolescence, tooling, and sub-tier capacity have not been a priority and are a major constraint.

"It can take over four years to produce some munitions, such as the SM-3 IIA; around three years to produce others, such as THAAD interceptors, SM-6, SM-3 IB, PrSM, Tomahawk, and JASSM; and over two years to produce the PAC-3 MSE."

In addition, it can take at least 18–24 months to implement investments in some factories to increase capacity to meet surging demands. There are also challenges in expanding facilities, such as munitions assembly plants, since companies are required to have sufficient standoff distance between the plant and the surrounding area to protect civilians from accidental explosions. Building a larger plant can involve purchasing additional land, securing permits, buying additional insurance, and taking other steps. All of

this takes time and money. Consequently, the United States needs to prepare stockpiles—and production rates—well in advance.

Supply Chains

Another challenge is a fragile supply chain. There is limited production of key weapons components, such as solid rocket motors, processor assemblies, castings, forgings, ball bearings, microelectronics, and seekers for munitions. There are also long lead times for some types of equipment, such as engines and generators. Dependence on a small number of companies—or even a single source—leaves the United States highly vulnerable to supply disruption.

In addition, the United States is highly dependent on some axis countries, especially China, for critical minerals. The Foreign Entity of Concern provision under the Inflation Reduction Act defined a foreign entity of concern as any organization "owned by, controlled by, or subject to the jurisdiction or direction of a government of a foreign country that is a covered nation," specifically China, Russia, Iran, or North Korea.[44] Along these lines, the United States imports from China some aluminum, which is pivotal for the production of military aircraft.[45] Russia is also a major producer of aluminum. The United States imports over 40 percent of its graphite from China, which is used in main battle tanks and submarines.[46] While China produces roughly 10 percent of the globe's lithium, cobalt, nickel, and copper, it controls the processing of between 65 and 90 percent of global supply for these metals. Examples include over 90 percent of processing for rare earths, nearly all of the global supply for graphite, over 60 percent for lithium, over 70 percent for cobalt, and over 40 percent for copper (Figure 6.4).[47] Cobalt, for example, is essential for producing superalloys used in jet engines, missiles, and submarines since it can withstand extreme temperatures and stress.

The U.S. military also depends on foreign governments, including China, for large cast and forged products, which are used in some defense systems.[48] Silicon metal is also predominantly mined in China (70 percent of the global total), with Russia as the second-largest producer (6 percent). Platinum is mainly mined in South Africa (71 percent) and Russia (12 percent).[49] China has weaponized critical minerals by restricting exports of such materials as gallium and germanium, which have military applications such as night vision devices and satellite imagery sensors; graphite, which is used in main battle tanks, fighter aircraft, submarines, artillery, and ammunition; and antimony and rare earth elements, which are vital to many defense technologies.[50]

Overall, the United States needs to maintain stockpiles of key munitions, minerals, chemicals, technology, and medical supplies—and stop relying on axis countries. The United States should increase funding to expand domestic production of components critical for deterrence and war fighting against axis countries

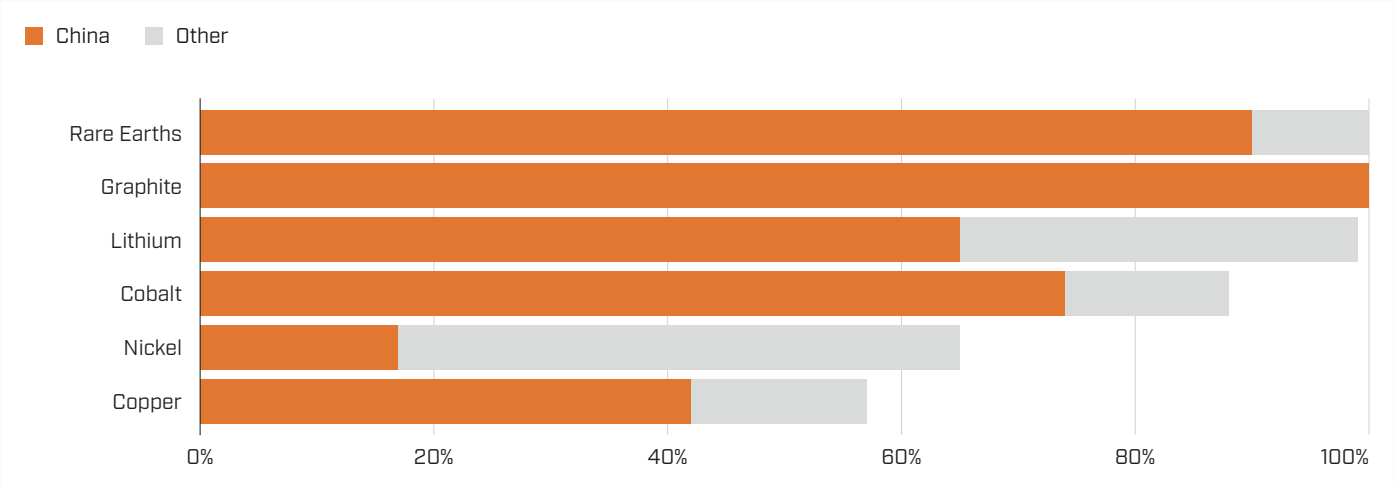


FIGURE 6.4 Share of Top Three Processing Countries for Selected Minerals

SOURCE Gracelin Baskaran, "Trade in Critical Supply Chains," CSIS, Statement Before the Senate Finance Committee, May 14, 2025, 3, https://www.csis.org/analysis/trade-critical-supply-chains.

across multiple theaters. Examples include cruise missile motor capacity expansion, solid rocket motor capacity expansion, energetics, and batteries. The Pentagon should also identify and establish stockpiles of critical parts, finished goods, and commodities needed to meet production requirements for conducting sustained military campaigns against adversaries. Examples include iron and ferroalloy metals, such as vanadium and molybdenum; nonferrous metals, such as gallium, germanium, and antimony; and industrial minerals, such as graphite and fluorite. A critical component of supply chains should be designing defense systems to maximize the use of easily available, low-cost components with robust commercial supply chains.[51]

The United States needs to use a wider range of tools to better advance its minerals diplomacy and enhance access to critical minerals with defense applications. The ultimate objective should be to secure reliable access to new sources of critical minerals. Success will depend on taking decisive action to boost mineral inflows to the United States. The Pentagon should consider increasing the use of defense industrial base programs, such as Defense Production Act Title III, to incentivize the expansion of existing sources within the supply chain and the establishment of new ones. Another example is evolving the Inflation Reduction Act's Section 30D provision for "friendshoring" critical minerals by expanding the definition of what constitutes an ally to include such mineral-producing countries as Argentina, Brazil, India, Indonesia, Namibia, Saudi Arabia, South Africa, Vietnam, and Zambia. Another is building partnerships with trusted allies that are augmenting their midstream processing capabilities, such as Australia, Canada, Japan, and Saudi Arabia. The U.S. government should also create a comprehensive incentives package focusing on minerals production and processing for vital industries, including defense. Tax incentives can encourage companies to make the necessary investments in critical minerals production and refining facilities amid uncertain and volatile market conditions in resource-rich allied nations.[52]

The Defense Workforce

Yet another challenge is the defense workforce. The U.S. labor market is unable to provide enough workers with the right skills to meet the defense demands of today and tomorrow. Hiring and retention are both problematic.[53] Skills in short supply range from welding to software engineering. The causes of workforce problems are varied, such as the erosion of U.S. manufacturing capacity, high cost of living near factories and shipyards, limited government subsidies, stiff competition from other sectors, and insufficient training from trade and vocational schools. Shipyards are particularly problematic, which is a challenge for building submarines. Some skill sets, such as nuclear welding, are difficult to acquire outside of Navy procurement. But the workforce shortage is widespread for engineers, electricians, pipe fitters, shipfitters, and metalworkers, among others.

"One important goal in revitalizing the defense industrial base is to focus on energizing and building the U.S. workforce."

One important goal in revitalizing the defense industrial base is to focus on energizing and building the U.S. workforce. It is telling that President Roosevelt dedicated an important part of his December 29, 1940, fireside chat on the "arsenal of democracy" to U.S. workers as the lifeblood of manufacturing, production, and innovation. As Roosevelt noted, "The worker possesses the same human dignity and is entitled to the same security of position as the engineer or the manager or the owner. For the workers provide the human power that turns out the destroyers, and the planes and the tanks."[54] He continued that rebuilding the U.S. industrial base was a national priority and encouraged workers to think of their activity as part of the great patriotic arsenal of democracy:

> I appeal to the owners of plants—to the managers—to the workers—to our own Government employees—to put every ounce of effort into producing these munitions swiftly and without stint. With this appeal I give you the pledge that all of us who are officers of your Government will devote ourselves to the same whole-hearted extent to the great task that lies ahead.

The Pentagon should look for opportunities to assist companies with upskilling and reskilling workers by offering financial incentives. One example is to increase investments in high schools, vocational schools, colleges, universities, and other institutions that train

and educate individuals for defense industrial base jobs, such as welders, engineers, electricians, pipe fitters, shipfitters, and metalworkers. Another example is to invest in institutions to address skill gaps in defense-related manufacturing and science, technology, engineering, and mathematics jobs. In addition, the United States needs to revitalize commercial shipbuilding by using long-dormant subsidies and other steps to invest in commercial shipyards, modernize and expand shipbuilding industrial capacity, and develop a more capable and competitive shipbuilding workforce.

Industrial Cooperation with Allies and Partners

A final challenge is defense industrial cooperation with allies. Since the end of the Cold War, the United States has fought with allies in every major military operation, from Bosnia and Kosovo to Afghanistan and Iraq. There are always problems working with allies, from differing interests and domestic constraints to interoperability. But it is virtually impossible to conceive of the United States fighting a war against China, Russia, Iran, or North Korea alone. Integration with allied defense industries is an important component of cooperation.

U.S. allies in Europe and Asia have significant capabilities: South Korea and Japan with shipbuilding; Japan, South Korea, and Taiwan with semiconductors; the United Kingdom with engines; Norway with antiship missiles and munitions; and Israel with air and missile defense—to name a few. Collaboration between AUKUS on nuclear-power attack submarines (Pillar 1) and advanced technology (Pillar 2), such as undersea capabilities and quantum technologies, is a good example of industrial cooperation.

Foreign companies in allied nations can play a critical role in the U.S. defense industrial base in several ways. One is by buying systems or subsystems from factories in the United States. A second way is to help repair or maintain U.S. systems and platforms, such as ships, at locations overseas. A third way is for foreign companies in allied nations to export systems and materials in which they have a comparative advantage or that are part of the defense supply chain.[55] A fourth includes such arrangements as codevelopment, coproduction, and cosustainment.

Doing this effectively will require revising some U.S. laws, policies, and provisions that have weakened the defense industrial base, especially for close allies. For example, some Buy America provisions, which require companies to use goods made in the United States, have been inefficient, stifled innovation, and driven up costs.[56] U.S. laws prohibit ships that are homeported in the United States or Guam from being overhauled, repaired, or maintained in a foreign shipyard, except to undergo mid-deployment voyage repairs or to fix battle damage. The Navy cannot make significant use of high-quality shipyards in allied nations, such as Japan and South Korea, despite maintenance backlogs in U.S. shipyards.[57]

Expanding reciprocal defense procurement agreements with allies could also be helpful. Such provisions as the Merchant Marine Act of 1920 (better known as the Jones Act) have made it difficult for the United States to effectively collaborate in such areas as shipbuilding with Japan, South Korea, or other allies that have sufficient capacity.[58] The act is archaic and counterproductive in a world where defense collaboration is increasingly important with U.S. allies.

A DEFENSE BUDGET FOR A WARTIME ENVIRONMENT

The United States will likely need to spend more on defense to remain competitive; deter China, Russia, Iran, North Korea, and other adversaries; and win wars if it has to fight. As University of Chicago professor Hans Morgenthau wrote:

> Since victory in modern war depends upon the number and quality of highways, railroads, trucks, ships, airplanes, tanks, and equipment and weapons of all kinds . . . the competition among nations for power transforms itself largely into competition for the production of bigger, better, and more implements of war. The quality and productive capacity of the industrial plant, the know-how of the working man, the skill of the engineer, the inventive genius of the scientist, the managerial organization—all these are factors upon which the industrial capacity of a nation and, hence, its power depend.[59]

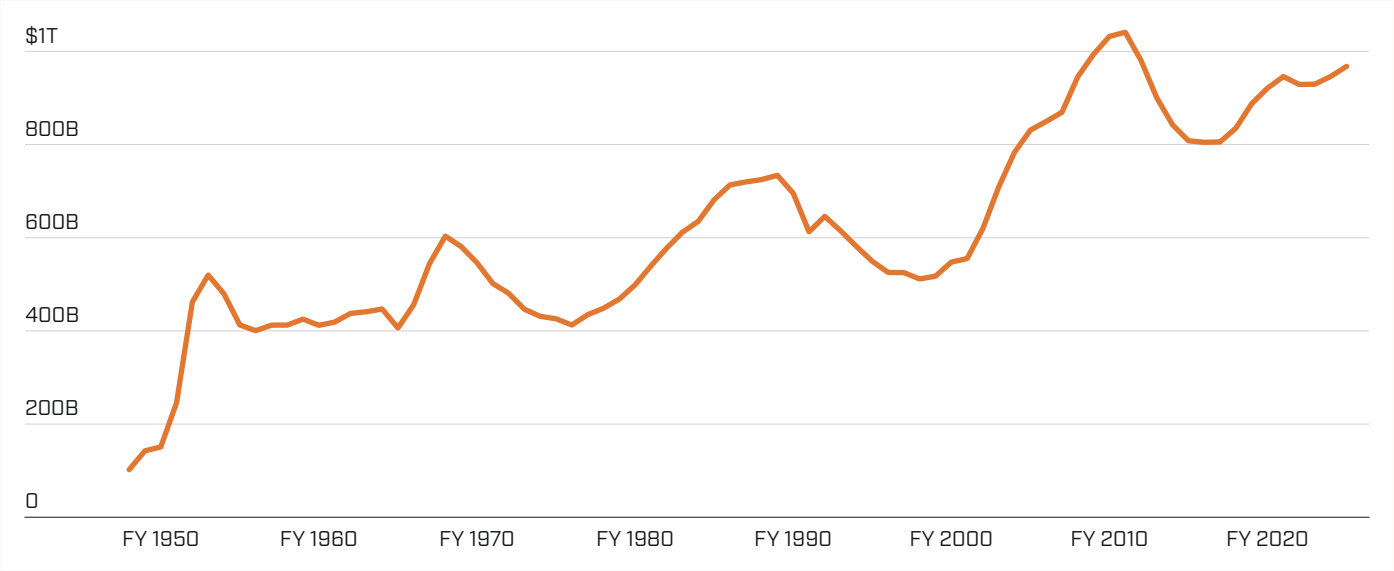


FIGURE 6.5 U.S. National Defense Outlays in FY 2027 Dollars, FY 1949–FY 2025

SOURCE "Table 3.1—Outlays by Superfunction and Function: 1940–2031," The White House, https://www.whitehouse.gov/omb/information-resources/budget/historical-tables/ and CSIS.

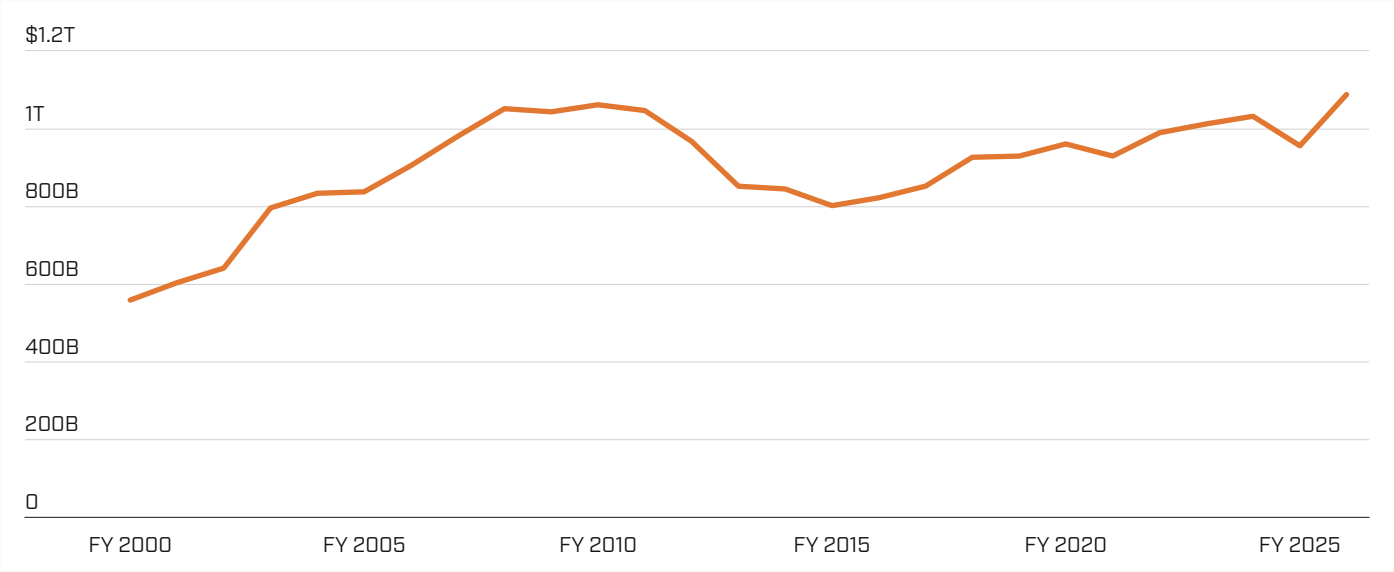
Since the end of World War II, U.S. defense spending levels have grown when adjusted for inflation (Figure 6.5), with outlays over six times higher in FY 2025 than in FY 1950. Periods of concerted growth in defense spending have been driven by major wars involving the United States as well as by the Reagan administration and its military buildup. Post-World War II outlays peaked during the height of the wars in Afghanistan and Iraq before falling in the drawdown of operations.

Spending rebounded from the postwar low and has generally increased over time. Measured in terms

FIGURE 6.6 U.S. Defense Discretionary Budget Authority in FY 2027 Dollars, FY 2000–FY 2026

NOTE Defense reconciliation funds included in FY 2025 and FY 2026 according to DOD funding allocation plan and Department of Energy budget documents.

SOURCE "Budget Authority XLSX," Public Budget Database, The White House, https://www.whitehouse.gov/omb/information-resources/budget/supplemental-materials/ and CSIS.



budget authority Congress provides annually, defense spending in FY 2026 has exceeded the previous peak at the height of the wars in the Middle East (Figure 6.6). This peak was driven by congressional provision of approximately $157 billion for defense in its reconciliation bill passed in July 2025, which aimed to provide a one-time supplemental investment in defense capabilities. The Pentagon plans to spend the vast majority of those funds in FY 2026.

Measured as a percentage of GDP, however, U.S. defense spending is historically low. During the Cold War, the U.S. defense budget peaked at nearly 14 percent of GDP during the Eisenhower administration, declining to 9 percent during the Kennedy and Johnson administrations, 8 percent during the Nixon administration, and 6 percent during the Reagan administration. FY 2026 funding levels for national defense (Figure 6.7) are estimated to stand at approximately 3 percent of GDP.[60]

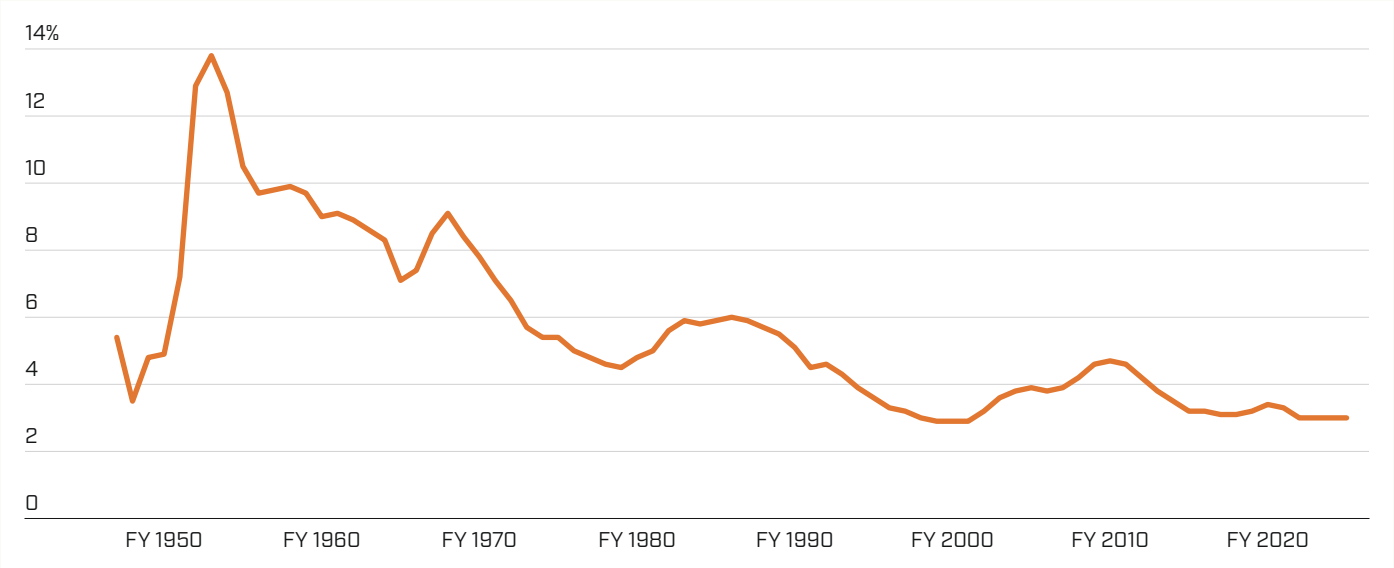
Nevertheless, building a military force able to deter and, if necessary, fight two major wars—even with assistance from allies—will likely require a larger defense budget of at least 4 percent of GDP. Increased funding should be focused on procurement, particularly weapons systems helpful for Air-Sea Battle in the Indo-Pacific against China and Air-Land Battle in Europe against Russia.

Figure 6.8 shows trends in U.S. defense spending by title of the budget. Previously, the top recipient of funding fluctuated over time between operation and maintenance, military personnel, and procurement. However, since the drawdown from the Cold War, operation and maintenance as well as military personnel have generally received the most funding, stemming from increasing operating costs for U.S. units and systems and increases in personnel costs from higher pay raises, healthcare, and housing costs.[61] The portion of the Pentagon budget dedicated to procurement has decreased as a percentage of the total budget from 29 percent during the peak of the Reagan buildup in the 1980s to under 15 percent during the Cold War drawdown and standing at 20 percent in 2023, when adjusted for inflation.[62]

Defense spending levels must consequently address the reality of higher costs to operate and sustain U.S. forces while simultaneously investing in developing and fielding new capabilities. In addition to buying new weapons, aircraft, ships, and other hardware, increased funding in acquisition, to include research, development, test, and evaluation (RDT&E) and procurement funding, can provide an increased demand signal to industry to expand capacity and production lines. An infusion of procurement funds would be helpful for the supply chain, including such crucial components as rocket boosters, energetics, engines, and munitions. It would also be useful to increase in-

FIGURE 6.7 U.S. Defense Outlays as a Percentage of GDP, FY 1947–FY 2026

SOURCE "Historical Tables," The White House, https://www.whitehouse.gov/omb/information-resources/budget/historical-tables/.



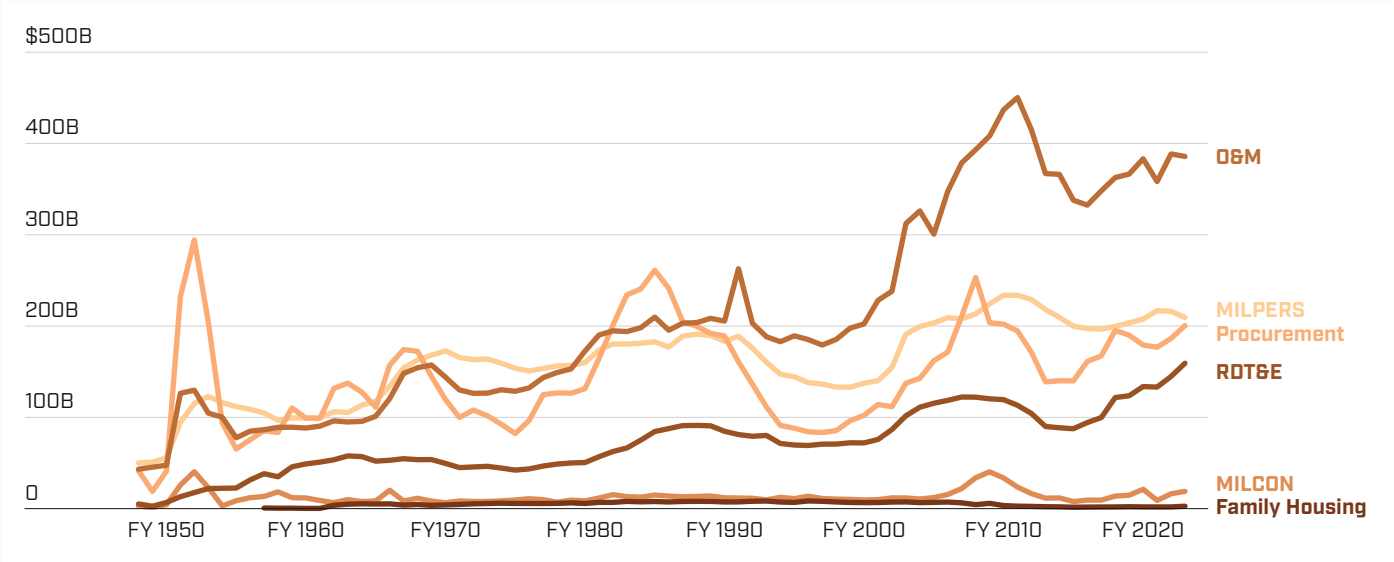


FIGURE 6.8 U.S. Defense Budget Authority by Title in FY 2027 Dollars, FY 1948–FY 2023

NOTE Does not show revolving and management funds or trust, receipt, and other funds.

SOURCE Office of the Under Secretary of Defense, *National Defense Budget Estimates for FY 2025* (Washington, DC: U.S. Department of Defense, April 2024), https://comptroller.war.gov/Portals/45/Documents/defbudget/FY2025/fy25_Green_Book.pdf and CSIS.

vestments in the workforce and defense infrastructure, such as factories and shipyards, which can be difficult and risky for industry.

Defense leaders should judiciously budget to find the appropriate high-low mix of capabilities necessary for Air-Sea and Air-Land Battle, as well as balance their investments in legacy platforms for near-term risks and new capabilities for future threats. Given concerns over the size of the federal deficit and debt, any increase in defense spending will require examining the pros and cons of reforms to entitlement programs, increased taxes, and other options.[63]

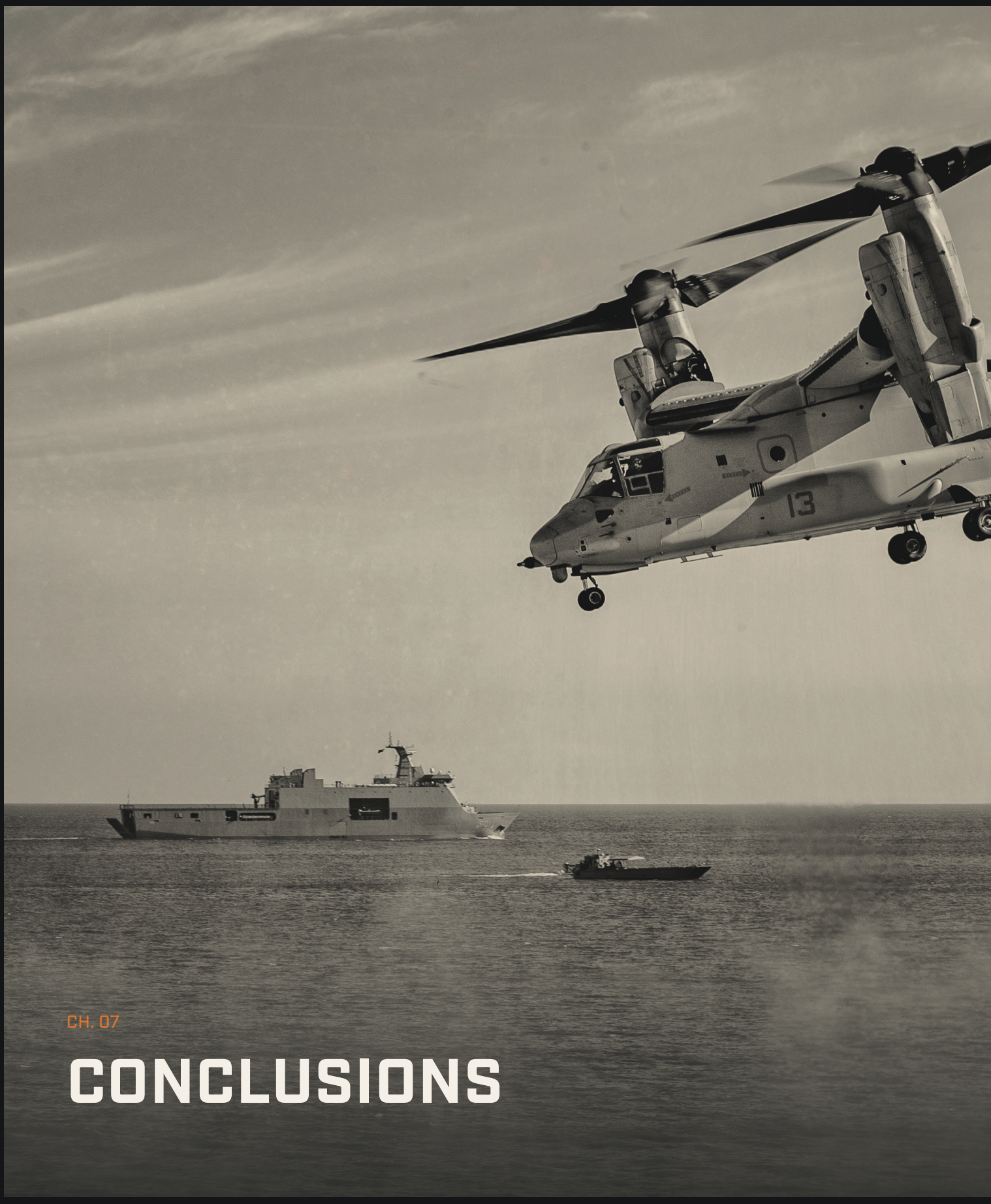
CONCLUSION

The defense industrial bases of axis countries—especially China and Russia—are on a wartime footing. But the U.S. industrial base is still unprepared for a protracted conflict and faces significant challenges. The United States lacks a clear operational concept to guide industrial production for defeating and deterring axis countries, including China. The United States also faces challenges in such areas as mass production, strategic stockpiles, supply chains, the defense workforce, and industrial cooperation with allies and partners.

Urgent change is needed. The United States needs to refine joint operational concepts for China and Russia—especially through the development of Air-Sea Battle and Air-Land Battle, respectively—and focus its industrial base on several key capabilities, such as a high-low mix of undersea capabilities, air capabilities, long-range precision strike capabilities, and air defense. For example, in the critical opening phases of a conflict over Taiwan, traditional forces, based and operating in traditional ways, will not be sufficiently effective. Hence, there is a need for small-footprint mobile systems that are cheaper, can be produced in much larger numbers, and are pre-positioned in or near the battlespace. Thankfully, there is hope. The United States has a rich tradition of industrial production and an enormously innovative commercial sector.

SECTION III

FLEXIBLE ENGAGEMENT



CH. 07

CONCLUSIONS

A U.S. Marine OV-22 Osprey aircraft takes off as U.S. and Philippine marines take part in a joint amphibious assault exercise as part of the annual 'Balikatan' (shoulder-to-shoulder) U.S.-Philippines war exercises, off the waters of South China Sea.

SOURCE Ezra Acayan/Getty Images

This report outlines a U.S. defense strategy of "flexible engagement" developed around a two-war planning construct with allies and a rapid shift to a wartime industrial footing to counter a growing authoritarian axis led by China and Russia. It rejects a military focus on the Western Hemisphere and other regions in favor of prioritizing the Indo-Pacific first and Europe second, as well as preparing to deter and, if necessary, defeat two major powers simultaneously with significant allied and partner involvement. China represents the most significant great power threat to the United States, followed by Russia. To implement flexible engagement, the United States needs to develop a new offset strategy of Air-Sea Battle in the Indo-Pacific and Air-Land Battle in Europe that blends advanced and lower-cost unmanned systems with long-range precision strike and nuclear modernization. It also must adopt a new posture prioritizing dispersed and survivable U.S. forces, urgently reform its defense industrial base to operate with greater speed and production capacity, and raise defense spending to focus on procurement.

The United States is not adequately prepared for the evolving international environment, particularly with an emboldened axis of authoritarian countries including China, Russia, Iran, and North Korea. Without rapid changes, the United States risks losing deterrence—especially in the Indo-Pacific—and may fail to deter or win a multi-theater war. Of particular concern is losing the ability to deter Chinese aggression within the first and second island chains. The U.S. defense industrial base and broader ecosystem are unprepared for a protracted conflict, especially one that

occurs in more than one theater. There is little urgency to maximize production; contracting and acquisitions systems reflect a peacetime mindset, while there are workforce, supply chain, and other challenges in serious need of reform.

To complicate matters, there is some support from a growing minority on both sides of the U.S. political aisle for a U.S. defense strategy that turns inward and focuses primarily on domestic matters, is deeply skeptical of alliances, and supports U.S. troop withdrawals from overseas bases. This is not new in U.S. history. Before World War II, for example, there was strong support for a strategy of nonintervention from a diverse group of progressives, conservatives, business owners, and others across the globe. Today, there is also a strong argument from some quarters that the U.S. military needs to be increasingly engaged in the Western Hemisphere to deal with drugs, illegal immigration, and dictators. As this report argues, however, a U.S. policy of restraint and a focus on the Western Hemisphere would seriously undermine U.S. national security and the nation's ability to protect the homeland, promote U.S. economic security, and defend U.S. democratic values, particularly from China.

The rest of this chapter is divided into three sections that are integral to a strategy of flexible engagement. The first provides an overview of the growing threat from axis countries, particularly China and Russia. The second summarizes the main findings about U.S. interests and objectives, force planning, force structure, and the industrial base. The third concludes with a warning about the need to act urgently to build an adequate force structure and industrial base.

THE GROWING THREAT FROM AXIS COUNTRIES

The United States—including the U.S. military—needs to remain engaged in global affairs to protect vital U.S. national security interests. Moving forward, several major developments should drive U.S. national security and defense strategy.

First, China is closing the gap with the United States in military capabilities because of an aggressive modernization effort. The PLA possesses significant air and naval combat power and long-range conventional precision strike to place U.S. bases, surface forces, air forces, ground forces, space-based assets, and logistics networks in the western Pacific under serious risk. In Europe, the NATO-Russia military balance is in an uncertain transition. Despite serious challenges in Ukraine, Russia is reconstituting its military forces and defense industry with support from China and other countries. NATO retains qualitative advantages, particularly in air and maritime capabilities, but Russia still fields substantial land, naval, and nuclear forces and shows a high tolerance for casualties and economic disruption. In addition, Russian leaders will likely have long memories after their staggering losses in Ukraine—including over 1.2 million casualties between February 2022 and December 2025 alone—in part because of European and U.S. assistance to Ukraine.

Second, axis cooperation presents a serious challenge and raises the threat of multi-theater war. China, Russia, Iran, and North Korea are likely to increase bilateral relations over the next three to five years, led by Beijing and Moscow. China is by far the strongest power among the axis countries, with 85 percent of the combined population, 88 percent of the combined GDP, and 66 percent of the combined military spending.[1] As this assessment concludes, axis countries are likely to increase military and dual-use exports and imports; expand the scale and scope of bilateral and, potentially, multilateral exercises and training; construct joint military bases; integrate defense industrial cooperation; deepen bilateral treaties or pacts that commit the signatories to greater military cooperation and, potentially, mutual defense in case of attack; and deploy soldiers to fight in the wars of other axis countries.

Deepening relations between axis countries—particularly China and Russia—have significant implications for U.S. and allied defense planners. The Indo-Pacific, followed by Europe, should be the most important defense priority for the United States. Other regions of the world, including the Middle East, Latin America, Africa, and the Arctic, are not as high priority, though China, Russia, and other axis countries should be countered in those regions. Moreover, the United States must counter terrorists, criminals, and other actors across the globe that threaten its core interests.

FLEXIBLE ENGAGEMENT

Strategy is the alignment of ends and means. Along these lines, a U.S. defense strategy of flexible engagement should include several components.

U.S. Interests and Objectives

There are several core U.S. interests: protect the U.S. homeland and the security of U.S. citizens, promote and expand U.S. economic security by maintaining free trade and freedom of navigation, realize and defend U.S. democratic values, and defend and support vital U.S. allies and partners. Based on these interests and the evolving threat environment, the United States has several defense objectives: deter and defeat attacks on the U.S. homeland, civilians, and military personnel; assure and assist allies and partners in deterring and defeating attacks; deter and counter irregular and gray zone activities and compete effectively below the threshold of conventional conflict; prevent state and nonstate actors from acquiring, proliferating, or using weapons of mass destruction; and maintain free trade and freedom of navigation.

Two-War Construct

Based on these ends, the Pentagon should develop a force planning construct that involves deterring and, if necessary, defeating two major powers at the same time. This construct would design U.S. forces to simultaneously defeat two major powers in multiple theaters—such as defeating China in an Indo-Pacific conflict while simultaneously defeating Russia in Eastern Europe. Allies need to play a critical role in both theaters given deficiencies in U.S. force structure. The risk of becoming involved in simultaneous conflicts across two theaters has increased given the growing ties between U.S. competitors. Therefore, defense leaders must increase military capabilities to mitigate the threat to U.S. interests.

Force Structure

The U.S. military should expand its current force structure and modernize key capabilities to deter and, if necessary, defeat two major powers simultaneously. It should procure additional advanced strike platforms, bolster munitions stockpiles, modernize the nuclear triad, and expand its key enablers and lines of communication that may be held at risk by axis countries. Units and capabilities from all military services will continue to be needed across specific combatant commands, including the Indo-Pacific and Europe.

Under flexible engagement, the Army and Air Force should take on primary responsibility for securing Europe with a 4+2 model that hinges on four brigade combat teams. The Air Force also has a major role to play in providing strike, air defense capabilities, and ISR, as well as overseeing the custody, maintenance, and security of U.S. nuclear weapons in Europe. In the Indo-Pacific, the Navy, Air Force, and Marine Corps should serve as the primary providers of forces for the region. U.S. allies and partners will need to play a critical role in supplementing U.S. forces and mitigating that risk, including NATO forces in Europe and Japan, Australia, South Korea, the Philippines, and other countries in the Indo-Pacific.

Posture

U.S. forces will need to be better postured to credibly deter aggression by China and Russia. Joint force commanders need to bring decisive combat power to bear against the aggressor within days of a decision to intervene, not weeks or months. Doing this effectively requires pre-positioning more combat power and sustainment assets forward but doing so in ways that do not expose them to enemy strikes.

Air-Sea and Air-Land Battle

The United States needs to refine operational concepts against China and Russia. Based on the concept of Hellscape, the Indo-Pacific region needs a modern version of Air-Sea Battle, and Europe likely needs a new version of Air-Land Battle. The goal of these concepts should be to move with speed to prevent a territorial fait accompli by pre-positioning platforms, stockpiling munitions and other matériel, and rapidly striking at the center of gravity of the invasion force. Doing these effectively requires identifying high-value targets, rapidly moving information from sensor platforms to shooters, and precisely hitting and destroying targets to deny adversaries from conducting a successful offensive.

Several capabilities are particularly important for these concepts: a high-low mix of undersea capabilities, including submarines and UUVs; a high-low mix of air capabilities, including cheap UASs and fifth- and

sixth-generation fighters and bombers; long-range precision strike systems, especially cheaper systems that can be used en masse; air defense and systems to counter unmanned vehicles; and other capabilities such as advances in AI, quantum, space, and cyber. It will be particularly important to produce capabilities for precise mass, which include new and different weapons that are simpler, faster, cheaper to produce, and more accurate.

Industrial Base for Protracted War

To support a joint U.S. force capable of working with allies to fight and win two wars occurring in multiple theaters at the same time, the United States also must make broad and urgent changes to its industrial base. Wartime periods require a different type of industrial base and a different approach than during peacetime. Wartime generally means a period when there is active combat, such as during World War II or the Korean War; conflict is likely imminent, such as during the late 1930s and early 1940s when Germany rearmed and then invaded European countries; or there is a serious risk of war if deterrence fails, such as during the 1970s and 1980s when the Soviet Union achieved nuclear parity with the United States and had a significant conventional advantage in Europe. In a wartime environment, there is much more at stake—including survival—than in peacetime.

Countries in a wartime environment need to operate with urgency, spend money to maximize defense production, minimize excessive regulations, provide incentives to industry for innovation, and streamline their defense acquisition and contracting systems. To paraphrase British naval historian Andrew Gordon, policymakers and the private sector in wartime need to act more like *ratcatchers* (those who are committed to minimizing unnecessary regulations and maximizing production to effectively win wars) and less like *regulators* (those who are prone to bureaucracy and process).[2]

Building a defense industrial base for a wartime environment is neither cheap nor quick, and it will likely require a larger defense budget of at least 4 percent of GDP. The defense industrial bases of axis countries—especially China and Russia—are on a wartime footing and building significant capabilities to deter and fight a major war. But the U.S. defense industrial base and broader ecosystem are unprepared for a protracted conflict, particularly one that occurs in more than one theater. There is limited urgency to maximize production; contracting and acquisitions systems reflect a peacetime mindset, while there are workforce, supply chain, and other challenges in serious need of reform.

PEACE THROUGH STRENGTH

A strong military is important in a dangerous world with authoritarian regimes such as China and Russia, which are rearming. President George Washington was unambiguous in his 1793 State of the Union address:

> There is a rank due to the United States among nations which will be withheld, if not absolutely lost, by the reputation of weakness. If we desire to avoid insult, we must be able to repel it; if we desire to secure peace, one of the most powerful instruments of our rising prosperity, it must be known that we are at all times ready for war.[3]

Roughly 170 years later, President Kennedy warned that "the expenditure of billions of dollars every year on weapons acquired for the purpose of making sure we never need to use them is essential to keeping the peace."[4] Two decades after that, President Reagan explained, "We know only too well that war comes not when the forces of freedom are strong, but when they are weak. It is then that tyrants are tempted."[5]

Some of the changes advocated in this report as part of flexible engagement—including developing the force structure necessary to fight on two fronts and establishing a defense industrial base to support the military—will take years. Time is exactly why it is urgent to move quickly. As Churchill remarked in March 1938 while Germany was rearming,

> Look back upon the last five years—since, that is to say, Germany began to rearm in earnest and openly to seek revenge. . . . Now is the time at last to rouse the nation. Perhaps it is the last time it can be roused with a chance of preventing war, or with a chance of coming through to victory should our efforts to prevent war fail.[6]

Unfortunately, Britain's political parties largely ignored Churchill, and Britain, France, and other allied countries failed to deter Nazi Germany. The United States must not make that mistake today. The clock is ticking.

ABOUT THE AUTHORS

Seth G. Jones is president of the Defense and Security Department and Harold Brown Chair at the Center for Strategic and International Studies (CSIS). Prior to CSIS, Dr. Jones was director of the International Security and Defense Policy Center at the RAND Corporation. Before that, he served in several positions in the Office of the Secretary of Defense and U.S. Special Operations Command. He served as representative for the commander, U.S. Special Operations Command, to the assistant secretary of defense for special operations. He was also a plans officer and adviser to the commanding general, U.S. Special Operations Forces, in Afghanistan (Combined Forces Special Operations Component Command–Afghanistan). Dr. Jones served on a congressionally mandated panel that reviewed the FBI's implementation of counterterrorism recommendations contained in the 9/11 Commission Report. He is author of *The American Edge: The Military Tech Nexus and the Sources of Great Power Dominance* (Oxford, 2025), *Three Dangerous Men: Russia, China, Iran, and the Rise of Irregular Warfare* (W. W. Norton, 2021), *A Covert Action: Reagan, the CIA, and the Cold War Struggle in Poland* (W. W. Norton, 2018), *Waging Insurgent Warfare: Lessons from the Vietcong to the Islamic State* (Oxford University Press, 2016), *Hunting in the Shadows: The Pursuit of al Qa'ida since 9/11* (W. W. Norton, 2012), and *In the Graveyard of Empires: America's War in Afghanistan* (W. W. Norton, 2009). Dr. Jones has published articles in a range of journals, including Foreign Affairs, Foreign Policy, and International Security, and news outlets like *The New York Times*, *The Washington Post*, and *The Wall Street Journal*. He is a graduate of Bowdoin College and received his MA and PhD from the University of Chicago.

Seamus P. Daniels is a fellow for Defense Budget Analysis in the Defense and Security Department at CSIS, where he researches issues related to U.S. and global defense funding, force structure, and military readiness. He has authored publications on trends in the overall U.S. defense budget, the legislative process surrounding defense appropriations, defense strategy and force structure, and NATO burden sharing. Prior to joining CSIS, Mr. Daniels worked for Government Executive Media Group. He holds an MA in international relations from Johns Hopkins University School of Advanced International Studies and an AB from Princeton University's School of Public and International Affairs with minors in Near Eastern studies and Arabic language and culture.

Riley McCabe is an associate fellow with the Warfare, Irregular Threats, and Terrorism Program at CSIS. His research focuses on military operations, irregular warfare, and terrorism and political violence. His writing has appeared in *The Washington Post*, *The Atlantic*, *Foreign Affairs*, *Foreign Policy*, and elsewhere. He was previously an editor at the Irregular Warfare Initiative. Riley is a public service fellow pursuing an MA in international relations at the Johns Hopkins University School of Advanced International Studies and holds a BA from Occidental College.

Daniel Byman is the director of the Warfare, Irregular Threats, and Terrorism Program at CSIS. He is also a professor at Georgetown University School of Foreign Service and the foreign policy editor for Lawfare. He has served as a senior adviser to the Department of State on the International Security Advisory Board and held positions at the Brookings Institution, the RAND Corporation, the U.S. intelligence community, the 9/11 Commission, and the Joint 9/11 Inquiry Staff of the House and Senate Intelligence Committees. Dr. Byman is a leading researcher and has written widely on a range of

topics related to terrorism, insurgency, intelligence, social media, artificial intelligence, and the Middle East. He is the author of nine books, including *Spreading Hate: The Global Rise of White Supremacist Terrorism* (Oxford, 2022); *Road Warriors: Foreign Fighters in the Armies of Jihad* (Oxford, 2019); *Al Qaeda, the Islamic State, and the Global Jihadist Movement: What Everyone Needs to Know* (Oxford, 2015); and *A High Price: The Triumphs and Failures of Israeli Counterterrorism* (Oxford, 2011). He is the author or coauthor of almost 200 academic and policy articles, monographs, and book chapters, as well as numerous opinion pieces in *The New York Times*, *The Wall Street Journal*, *The Washington Post*, and other leading journals. Dr. Byman is a graduate of Amherst College and received his PhD in political science from the Massachusetts Institute of Technology.

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Chapter 3: Evolution of the Axis

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Chapter 5: Force Structure, Posture, and Global Force Management

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Chapter 7: Conclusions

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