

**OPENING REMARKS**

**of**

**THE HONORABLE TULSI GABBARD**

**Director of National Intelligence**

**for**

**THE HOUSE PERMANENT SELECT COMMITTEE ON INTELLIGENCE**

**WORLDWIDE THREATS HEARING (OPEN)**

**19 March 2026**

Chairman Crawford, Ranking Member Himes.

I am here today to present the 2026 Annual Threat Assessment, joined by the Directors of the CIA, DIA, FBI and NSA.

This briefing is being provided in accordance with ODNI's statutory responsibility. What I'm briefing here today does not represent my personal views or opinions. I am conveying the Intelligence Community's assessments of the threats facing U.S. citizens, our Homeland, and our interests.

In this assessment, we are following the structure of priorities laid out in the National Security Strategy, starting with threats to our Homeland, then shifting to global risks.

The defense of our Homeland is of utmost importance to the American people. Efforts by this administration over the last year to bolster Homeland defense have yielded significantly positive results.

For example, the strict enforcement of U.S. policies at the U.S. Mexico border and regionally has served as a deterrent and drastically reduced illegal immigration. Based on Customs and Border Patrol data, January 2026's monthly encounters are down 83.8% compared to January 2025. Encounters declined 79% compared to 2024.

The drivers of migration are likely to continue. Potential worsening instability in countries like Cuba and Haiti risk triggering migration surges. Smugglers who

often operate as transnational criminal organizations view chaos as an opportunity for profit and will look to continue to profit from illegal immigration flows.

Transnational criminal organizations continue to pose a daily and direct threat to the health and safety of millions of U.S. citizens primarily by producing and trafficking in illegal drugs.

Under President Trump's leadership, fentanyl overdose deaths have seen a 30 percent decrease from September 2024 to September 2025.

President Trump's aggressive efforts to more directly and actively target TCOs and reduce the inflow of fentanyl precursors has already had a significant impact which is likely to continue.

Fentanyl potency has also decreased, likely due to disruptions to the production supply chain. U.S. efforts to work with China and India to halt the flow of fentanyl precursor chemicals to North America are demonstrating improvement, but there is more work to be done as there are still tens of thousands of fentanyl-related deaths in America every year.

**Mexico-based TCOs** like the Sinaloa Cartel and Jalisco New Generation Cartel dominate the production and smuggling of fentanyl, heroin, methamphetamine and cocaine into the United States.

Colombia-based TCOs and illegal armed groups like the Revolutionary Armed Forces of Columbia (FARC) and the National Liberation Army (ELN), are responsible for producing and trafficking large volumes of cocaine to the U.S. and European markets, with some indicators of attempts to expand to the Asia-Pacific region.

Colombia remains the world's largest producer of cocaine and Columbian criminal groups have expanded their trafficking relationships with neighboring Ecuadorian and Brazilian gangs.

MS-13 is well-established in cells in the U.S. and uses violence to intimidate the Salvadoran diaspora, engaging in murder, extortion, retail drug trafficking, firearms offenses and prostitution, fueling increased violence and instability.

These and other TCOs present a very tangible and individualized risk of violent crime to everyday Americans and contribute to regional instability.

As the President increases counterdrug and countercartel pressures, they are likely to seek ways to adapt their operations, including shifting and decentralizing production locations and trafficking routes and methods.

The US continues to face a complex and evolving threat landscape with a geographically diverse set of Islamist terrorist actors seeking to propagate their ideology globally and harm Americans, even as Al-Qaeda and ISIS remain weaker than they were at their respective peaks.

The spread of Islamist ideology, in some cases led by individuals and organizations associated with the Muslim Brotherhood, poses a fundamental threat to freedom and foundational principles that underpin Western Civilization. Islamist groups and individuals use this ideology for recruiting and financial support for terrorist groups and individuals around the world, and to advance their political objectives of establishing an Islamist caliphate which governs based on Sharia. There are increasing examples of this in various European countries. President Trump's designation of certain Muslim Brotherhood chapters as Foreign Terrorist Organizations is a mechanism to secure Americans against this threat.

In response to setbacks to their capabilities of conducting large-scale complex attacks, Islamist terrorist groups have shifted toward focusing on executing information operations to spread propaganda and inspire or enable individuals located in or with access to the West.

U.S. counterterrorism operations primarily in Iraq, Somalia, Yemen and Syria in 2025 removed key terrorist leaders and operatives, degrading the ability of al-Qaeda and ISIS to quickly reconstitute its leadership and launch large-scale attacks against the Homeland and U.S. interests abroad.

Strict U.S. border enforcement measures and increased deportations of individuals with suspected links to Islamist terrorists have reduced access to the Homeland and removed some potential sources of future terror attacks.

Since January, US officials have only had a handful of encounters at our borders with individuals associated with terrorist groups. This is a positive trend, however

our interagency coordinated efforts to identify, locate and remove known or suspected terrorists who are already in the U.S. continues with vigilance.

In 2025, there were at least three Islamist terrorist attacks in the US. Law enforcement disrupted at least 15 US based Islamist terrorist plotters. Roughly half of last year's disrupted plotters had some online contact with Islamist terrorists inspired by Islamist foreign terrorist organizations abroad. For example, in the recent attempt to attack a synagogue in Michigan, the shooter had familial ties to a Hizballah leader.

Al-Qaeda and ISIS pose the biggest threat to US interests overseas in parts of Africa, the Middle East and South Asia where these groups operate. They will continue to exploit political instability and ungoverned territory as they seek to rebuild their capabilities and leadership. Al-Qaeda probably has between 15,000-28,000 members worldwide, while ISIS likely has between 12,000 and 18,000 members. Africa has become a focal point for the global Sunni jihadist movement, where their largest and most violent affiliates and branches are active.

In the Middle East, AQAP in Yemen, ISIS-K in South Asia, and ISIS in Syria are among the most likely groups conducting external plotting. ISIS in Syria is likely seeking to rebuild its ranks, expand support networks and solicit funds by reengaging with and recruiting from the likely hundreds of ISIS detainees and thousands of ISIS-linked women and children who escaped or were released from prisons and displaced persons camps previously run by the Syrian Democratic Forces in northeast Syria.

Meanwhile, state actors present a risk broader in scope by seeking new capabilities in kinetic and cyber warfare.

The U.S. secure nuclear deterrent continues to ensure safety in the Homeland against strategic threats. However, the IC assesses that Russia, China, North Korea, Iran and Pakistan have been researching and developing an array of novel, advanced, or traditional missile delivery systems with nuclear and conventional payloads, that put our Homeland within range. The IC assesses that threats to the Homeland will expand collectively to more than 16,000 missiles by 2035, from the current assessed figure of more than 3,000 missiles.

The IC assesses that China and Russia are developing advanced delivery systems meant to be capable of penetrating or bypassing U.S. missile defenses. North Korea's ICBMs can already reach U.S. soil, and the IC assesses that it is committed to expanding its nuclear arsenal. Pakistan's long-range ballistic missile development potentially could include ICBMs with the range capable of striking the Homeland. The IC assesses that Iran has previously demonstrated space launch and other technology it could use to begin to develop a militarily viable ICBM before 2035, should Tehran attempt to pursue the capability. However, these assessments will be updated as the full impact of Operation Epic Fury's devastating strikes on Iran's missile production facilities, stockpiles, and launch capabilities is determined.

These nations will likely seek to understand US plans for advanced missile defense for the Homeland, probably for the purpose of shaping their own missile development programs and assessing US intentions regarding deterrence.

**Shifting to the cyber domain**, the IC assesses that China, Russia, Iran, North Korea, and non-state ransomware groups will continue to seek to compromise U.S. government and private-sector networks as well as critical infrastructure to collect intelligence, create options for future disruption, and for financial gain. The IC assesses China and Russia present the most persistent and active threats and are continuing their R&D efforts. North Korea's cyber program is sophisticated and agile. In 2025 alone, North Korea's cryptocurrency heists probably stole \$2 billion which is helping to fund the regime, including further development of its strategic weapons programs.

Financially or ideologically motivated nonstate actors are becoming bolder, with ransomware groups shifting to faster, high-volume attacks that are harder to identify and mitigate.

Innovation in the field of Artificial Intelligence will likely accelerate the threats in the cyber domain. It will increasingly shape cyber operations with both cyber operators and defenders using these tools to improve their speed and effectiveness. For example, in August 2025, cyber actors used an AI tool to conduct a data-extortion operation against international government, healthcare and public health, emergency services sectors, and religious institutions.

In the Arctic, the IC assesses that Russia, and to a lesser extent China, aim to strengthen their presence in the region through increased maritime trade, natural resource extraction, and military activity. Russia, which has the longest coastline in the Arctic, has long sought recognition of its 'Polar Great Power' status and is deploying more military forces and building new permanent infrastructure. China, though not an Arctic country, is engaged in more limited efforts in the region to advance its strategic and economic interests.

On the technology front, Artificial Intelligence capabilities are rapidly advancing and changing the threat landscape. As this is a defining technology that enables computers and machines to simulate human learning comprehension, problem solving, creativity, and autonomy, it will be critical to ensure that humans remain in control of how AI is used and of the machines that may threaten to autonomously violate the interests of the American people across all domains.

The IC assesses that China is the most capable competitor in this field and aims to displace the U.S. as the global AI leader by 2030. AI adoption at scale across the spectrum of usage poses serious risks. AI has the potential to aid in weapons and systems design and has been used in recent conflicts to influence targeting and streamline decision-making, underscoring the risk and likely threats that could manifest on the battlefield.

Early developers in quantum computers will give countries an extraordinary technological advantage over others to quickly process national security information and break current encryption methodology used to protect sensitive finance, health care and government information.

The global security landscape is volatile and complex, with armed conflict growing more common and posing potential threats against US interests. Strategic competition and regional and smaller powers becoming more willing to use force to pursue their interests heightens the risk of conflict. The space domain is becoming increasingly contested, with China and Russia developing counterspace capabilities to challenge US space efforts. The threat of nuclear proliferation and advancing chemical and biological warfare capabilities continues to grow.

I'll turn now to our neighborhood, the Western Hemisphere where flagging economies, high crime rates, pervasive organized crime, migration flows, corruption and narcotics trafficking present a spectrum of risks to US interests, and where strategic competitors seek greater influence in the region. The IC assesses Latin America and the Caribbean almost certainly will see hotspots of volatility in the coming year, with the potential to undermine or distract some countries from improving economies and living conditions and tackling illicit drug flows and cartels.

Since Maduro's arrest, we have seen a shift in Venezuela's leadership toward cooperating with the US to open its economy, develop the country's oil and gas extraction capability, and release political prisoners. The US Embassy raised the American flag last week for the first time in seven years.

The US Mexico Canada agreement review in 2026 will likely increase uncertainty in many Latin American countries, especially those that rely on Mexico as an export destination for intermediate goods for manufacture and onward export to the U.S.

China, Russia and Iran are seeking to sustain economic, political and military engagement with Latin America. China's demand for raw materials is likely to drive continued economic outreach, while Russia likely wants to expand its current security and diplomatic ties with Cuba and Nicaragua.

The IC assesses that China aims to elevate its own political, economic, military and technological power to increase its own regional positioning, global influence, and to fend off threats to their interests. While there are challenging areas where interests diverge, President Trump's diplomatic engagements with President Xi have enabled progress on areas where there are mutual interests and outcomes.

The IC assesses that China continues to rapidly modernize its military forces across all domains in pursuit of its goal to achieve "world-class" status by mid-century. This includes building a force with the aim of being capable of deterring U.S. and allied forces in the region, and to achieve their stated objective of developing the ability to seize Taiwan by force, if necessary. However, the IC assesses that China likely prefers to set the conditions for an eventual peaceful reunification with Taiwan, short of conflict.

An increasingly confident North Korean regime remains a source of concern regionally and globally. Its WMD, conventional military capabilities, illicit cyber activities and demonstrated willingness to use asymmetric capabilities poses a threat to the US and its allies, particularly South Korea and Japan.

North Korea's partnership with Russia is growing and in 2025, Kim took steps to improve ties with China, still North Korea's most important trading partner and economic benefactor, after the relationship had cooled due to Beijing's earlier opposition to Pyongyang's nuclear and missile tests.

The IC assesses that North Korea's support for Russia in the war against Ukraine has increased North Korean capabilities as their forces have gained combat experience in 21<sup>st</sup> century warfare along with equipment. In 2024, North Korea deployed more than 11,000 troops to Russia to support combat operations in Kursk.

Pyongyang continues to develop and expand its strategic weapons programs, including missiles that can evade US and regional missile defenses, and is continuing to work to increase its nuclear warhead stockpile. It maintains biological and chemical weapons capabilities which could be used during a conflict or in an unconventional or clandestine attack.

Russia retains the capability to selectively challenge U.S. interests globally by military and non-military means. The IC assesses that the most dangerous threat posed by Russia to the US is an escalatory spiral in an ongoing conflict such as Ukraine or a new conflict that led to direct hostilities including the deployment of nuclear weapons.

The IC assesses that Putin continues to invest in Russia's defense industrial base as well as novel capabilities that may pose a greater threat to the US homeland and forces abroad than conventional weapons. Russia has advanced systems, hypersonic missiles and undersea capabilities designed to negate U.S. military advantage. Moscow also relies on other tools to exert pressure using grayzone tactics to further its goals and compete below the level of armed conflict.

Russia is also building extensive counterspace capabilities to contest US space dominance. Its development of a nuclear counterspace weapon poses the greatest single threat to the world's space architecture.

During the past year, the IC assesses that Russia has maintained the upper hand in its war against Ukraine. US-led negotiations between Moscow and Kyiv are ongoing. Until such an agreement is met, Moscow is likely to continue fighting a slow war of attrition until they view their objectives have been achieved.

In the Middle East, conflict and instability will shape security, political and economic dynamics in a variety of ways. The IC assesses that Operation Epic Fury is advancing fundamental change in the region that began with Hamas's attack on Israel on October 7, 2023, and continued with the 12-Day War last year, resulting in weakening Iran and its proxies.

The IC assesses the regime in Iran appears to be intact but largely degraded due to attacks by Israel and the US on its leadership and military capabilities. Its conventional military power projection capabilities have largely been destroyed, leaving limited options. Iran's strategic position has been significantly degraded. The US led maximum pressure campaign and snapback of European sanctions added additional pressure to an already bleak Iranian economy, resulting in mass protests earlier this year that Tehran suppressed by killing thousands of protesters. Even if the regime remains intact, internal tensions are likely to increase as Iran's economy worsens.

Even so, Iran and its proxies continue to attack US and allied interests in the Middle East. If a hostile regime survives, it will likely seek to begin a yearslong effort to rebuild its military, missiles and UAV forces. Prior to Operation Epic Fury, the IC assesses Iran was trying to recover from the severe damage to its nuclear infrastructure sustained during the 12 Day War. Iran maintained the intention to rebuild its infrastructure and nuclear enrichment capability and continued to refuse to comply with its nuclear obligations with the IAEA, refusing them access to key facilities.

The IC assesses that China, Russia and North Korea see the United States as a strategic competitor and potential adversary. Iran has long viewed the U.S. as an adversary and is engaged in active conflict with the U.S. as of this writing.

These four countries are likely to continue their selective cooperation with each other, which could bolster their individual capabilities and threats to U.S. interests more broadly. However, currently, these relationships are primarily bilateral on

selective issues, and depend on broader circumstances, divergent sovereign interests, and in some cases, concerns over directly confronting the U.S. These factors are likely to constrain their relationships.

Finally, conflicts on the continent of Africa are likely to persist through 2026 due to poor governance, economic demands and external support. Tensions continue between Ethiopia and Eritrea which could rapidly accelerate to conflict.

Contentious national elections in Somalia could distract the Federal government away from counterterrorism actions against Al-Shabaab, which continues to conduct terror attacks, while providing funding and propaganda support to other elements of AQ in Yemen. The civil war in Sudan continues, even as external negotiations occur. ISIS in West Africa and the Sahel have increased the intensity of their attacks against local security forces, expanding their areas of operation, moving closer to cities with a US presence.

African governments will use their wealth in critical minerals to seek partnerships that deliver them meaningful benefit. Concurrent conflicts and crises across the continent will continue to put US citizens at risk and cause further instability. Infectious diseases endemic to Africa continue to crop up in new regions and threaten to spill over.

In closing, as leaders of the Intelligence Community, we remain committed to providing the President, Congress, policymakers and operators with timely, unbiased, relevant intelligence to ensure the safety, security and freedom of the American people.

Thank you.