



GLOBAL TRENDS:

Paradox of Progress

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The Global Trends Project



- Global participation
- Published quadrennially to inform an incoming or returning Administration
- Provides a framework for thinking about possible futures and their implications
- Unclassified – available online:
<https://www.dni.gov/index.php/global-trends-home>

Recent and future trends are converging...

To proliferate actors, issues,
and information...



... To make governing
and cooperation harder...



... Putting a premium on policy
choices and resilience.



Leaving International Order in the Balance

Why Will Governing and Cooperation Get Harder?

<i>Key trends are:</i>	
Increasing the number, complexity, and speed of issues	Increasing the number of states that can exert geopolitical influence
Empowering individuals and small groups to act like states, altering once established patterns of both governance and conflict	Changing the information environment to produce countless perceived realities, undermining cooperation and democracy

Producing a transformed, volatile strategic context



In such a world, **power is not what it used to be**



Forging new patterns of **cooperation becomes essential but more difficult**



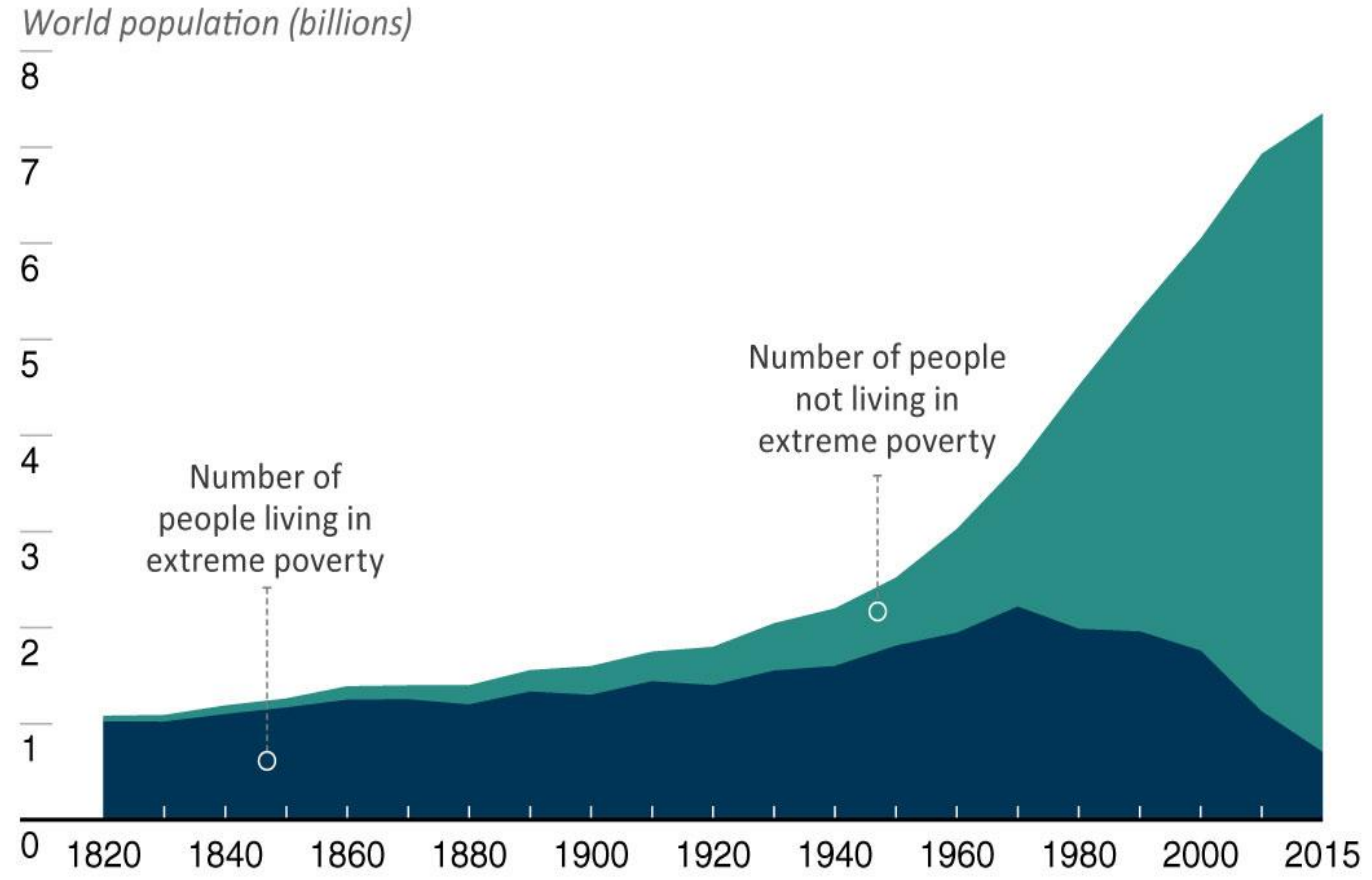
Leadership and the coordination of individual, group, and state choices **more important than ever**



Key Trends: Past Progress, Tomorrow's Paradox Demographics, Poverty, Environment & Health

Paradox: Life has improved dramatically in many ways, for more people, in more places... And yet the world feels more insecure than ever. For example:

- Historic reduction in poverty
 - More people in cities
 - Changing diets
- Combined with climate change, environment and health issues pose imminent and longer term threats
 - More extreme weather, water and soil stress, food insecurity
 - Sea-level rise, ocean acidification, glacial melt, and pollution will change living patterns.
 - Local to geopolitical tensions over climate will grow.



Source: OurWorldinData.org Max Roser based on World Bank and Bourguignon and Morrisson.

Key Trends: Past Progress, Tomorrow's Paradox

Political Economy and Geopolitics

- Shifting global economy. Advanced economies facing shrinking workforces, diminishing productivity gains and lagged effects of financial crisis. Chinese debt and state investment jeopardize shift to a consumer-driven economy.
- A near future of slowing rates of economic growth threaten fiscal balance and further poverty reduction.
- Inequality and wealth concentrations—combined with corruption, elite failures, and eroding trust in authorities—driving a wave of political change.



Source: Branko Milanovic.



Key Trends: Past Progress, Tomorrow's Paradox Technology



- Converging technologies will accelerate progress, interdependencies, and discontinuities
 - Automation and AI to change industries faster than economies can adjust, potentially displacing workers and limiting the usual route for poor countries to develop.
 - Biotechnologies such as genome editing will revolutionize medicine and other fields, while sharpening moral differences.
 - Unconventional energy revolution increasing availability of new sources of oil and natural gas while tech advances break the link between economic growth and energy utilization.
 - Emerging tech will require careful parsing to appreciate effects on humans, societies, states, and the planet.

Key Trends: Past Progress, Tomorrow's Paradox Ideas and Identities

- Growing global connectivity amid economic uncertainty and insecurity will increase rather than reduce tensions over ideas and identities.
 - Increasingly segregated information and media environment will harden identities—through algorithms for custom search, personal social media, and deliberate shaping efforts by governments, organizations, and thought leaders.
 - Populism will increase on the left and the right, threatening liberalism. Some leaders will turn to nationalism to shore up control.
 - Religious influence will be increasingly consequential and more authoritative than many governments.
 - Nearly all countries will see economic forces boost women's status and leadership roles but backlash also will occur.



Key Trends: Past Progress, Tomorrow's Paradox

Conflict will be diffuse, diverse, and disruptive—distinctions between peacetime and wartime will continue to blur

- **Diffuse:** State, nonstate, and substate entities have greater accessibility to means of warfare.
- **Diverse:** Means of warfare will vary across a wider spectrum—from nonmilitary capabilities to advanced conventional weapons and WMD.
 - Increasing stand-off and remote attacks.
 - New concerns about nuclear and other WMD
- **Disruptive:** Greater emphasis by states and terror groups on disrupting critical infrastructure, societal cohesion and government functions, rather than defeating enemy forces on the battlefield through traditional military means.



Implications for Deterrence and Managing Escalation

Near-term Outlook: Rising Tensions, International Order in the Balance

WITHIN COUNTRIES

Identity Politics Intensify as Governance Falls Short



BETWEEN COUNTRIES

Domestic Developments, Opportunism Drive Geopolitics



TERRORISM

Expanding Threat as Ability To Impose Harm Diversifies



Plus risks of environmental, global health, & technological discontinuities

Longer-term Scenarios

Three key uncertainties to shape more distant futures

ISLANDS



Will global economic integration persist, especially if restructuring of the global economy leads to long periods of low or slow growth?

ORBITS



What is the future of international order in a context of increasing geopolitical competition and stability concerns at home?

COMMUNITIES






How might growing public expectations but diminishing national governance capacity create openings for new providers and forms of political order?



Opportunities

More positive futures rest with political, business and personal choices that promote resilience.

Investments for managing surprise and discontinuity

-  **Infrastructure**
-  **Knowledge**
-  **Relationships**

The most resilient societies will unleash and embrace the full potential of all individuals—whether women and minorities or those battered by recent economic and technological trends.





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