



## A Vision of the Future: The U.S. Intelligence Report “Global Trends 2040”

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In April 2021, the U.S. intelligence community published the extensive report “Global Trends 2040: A More Contested World”. It analyses the main demographic, political, and strategic trends that will likely shape the world for the next two decades. The report will be intensively used by the Biden administration in the preparation of the new U.S. National Security Strategy and National Defense Strategy, as well as in new military doctrines. The “Global Trends” document reflects the main tendencies in American strategic thinking, such as the growing “Sinocentrism” and traditional U.S. attachment to transatlantic relations.

The report is the conclusion of a four-year cyclic process and is used by the U.S. administration for its analysis needs and strategic planning. The newest, seventh edition of “Global Trends” is prepared by the National Intelligence Council (composed of analysts from 16 intelligence agencies). The report is a unique project, considering how many U.S. intelligence research units are involved in it and the scale of consultations with the non-governmental sector and selected allied countries. It also is in line with the work already initiated by the White House on the National Security Strategy and should analytically help in the formulation of new administration foreign policy, [already signalled in the Interim National Security Strategic Guidance \(INSSG\)](#).

**Global Trends.** The first part of report is an analysis of the key driving factors in demography, the natural environment, economy, and technology of a long-term nature that might shape the international order by 2040. Among the most important is the visible and expected slowing of population growth and ageing of OECD countries and China. The majority of nation states might be unable to sustain satisfactory access of its citizens to education, healthcare, and welfare. Between now and 2040, migration pressure from Africa on Europe will continue. Climate change also will continue, multiplying social problems and instability among many states. In the economy, a further

growth of public debt, instability of financial markets and services, and strengthening of global corporations are expected. New technologies in general will result in positive changes in people’s lives, however these also will be domains for the intensified rivalry among great powers. Many states will also become more willing to take riskier steps in their foreign and security policies.

The report indicates three levels of a changing dynamic in the international order. At the level of societies there will be sharp divisions based on individual and group identities, resulting in increased ideological or religious radicalism. Negative aspects of demographic trends, climate change and economic instability will deepen internal tensions at the state level, with growing gaps between citizens’ expectations and the real capabilities of their governments. These may result in internal tensions and regime changes, even among currently stable states. At the international level, no single great power will be in a dominant position. The main rivals will continue to be the U.S. and China, which through 2040 will seek to a build coalition of states that share their norms, rules, and institutions. According to the report’s authors, Europe will overcome its current problems and continue the EU’s economic and political integration; however, alternative military cooperation projects to NATO will fail.

**Trends in Military Conflicts and Technologies.** The report analyses military technologies and likely changes in the nature of military conflicts. It assumes a growing risk of conflicts between states because of technological progress and weakened escalation control during rapidly evolving crises. The main factors of change on battlefields are assumed to be offensive capabilities in cyberspace, military applications of artificial intelligence, and the development of hypersonic and anti-satellite weapons. These systems might also be more accessible to smaller states and non-state actors. States will continue to use means and forces in the “grey zone”—below the threshold of open war—mainly by use of different proxy forces. These conditions will also limit the application of traditional deterrence strategies and will result in more willing use of surprise first strikes by great powers. The report also warns about the future risk of nuclear escalation during crises with China and Russia. It is pessimistic regarding the chances for negotiation of new arms-control regimes limiting new technologies. The U.S. intelligence also expects further military rivalry in space, especially with China, America’s most significant competitor in this domain.

**Scenarios for the Global Order.** The report presents five scenarios for the development of the international order by 2040. It stresses that these are only example combinations based on the indicated trends and changes and not forecasts with assumed probability or risk-assessments for the U.S.

The first scenario presented is a “Renaissance of Democracies” under the leadership of the U.S. and its allies. This scenario may result in broadening the number of democratic states and increasing human life quality on a global scale, but without deeper changes in China and Russia. The second is “A World Adrift”, marked by weakening OECD economies, a chaotic global system, and weak international organisations. Despite growing influence, China would be unwilling to cooperate closely on solving global issues. The third scenario, “Competitive Coexistence”, assumes that both the U.S. and China will be driven mainly by economic interests, with some limited cooperation on specific global issues. The fourth, “Separate Silos”, sees the creation of separate politico-economic blocs around the U.S., the EU, China, Russia, and some regional powers. Each of these will have different potential and due to their rivalry, international commerce might become more complicated and the position of non-bloc states worse. The fifth scenario, “Tragedy and Mobilisation”, projects very close global cooperation among states in managing climate change.

**Implications of the Report for U.S. Allies.** The report’s conclusions about global trends to 2040 will be used in

threat assessments by the White House and Pentagon in the next editions of strategic documents, including the National Security Strategy, expected later this year. These about the nature of the long-term rivalry between the U.S. and China or on megatrends will be introduced into the assumptions in the new American military doctrines and operational concepts. “Sinocentrism” in parts of the intelligence report is a reflection of the broader and ingrained American thinking of the primacy of the threats from China, with some relativisation of these to Russia, even if the motives of both powers are perceived negatively. The report dedicates just a little room to purely European issues, assuming further progress in EU integration and the importance of cooperation between Europe and the U.S. for American strategic interests. These kinds of conclusions might be used by the Biden administration in assurances of its attachment to the transatlantic partnership with Europe, as well as in the constant search for selective U.S. cooperation or dialogue with China and Russia.

It should be assumed that the grand strategy of the U.S. will focus on countering challenges and threats from China and the negative aspects of global megatrends, and aimed at cooperation on these issues with American allies. On the one hand, this will mean that the U.S. might be ready to make some concessions to Russia but, on the other hand, the U.S. is fully committed to a very close partnership with the EU and major European states on global and regional issues. The main implication of the “Global Trends” report is that Poland and other European allies need to broaden the agenda of their bilateral relations with the U.S. In addition to efforts to achieve the widest possible support for U.S. policy towards China, the Biden administration will expect its allies to engage in efforts on solving issues related to technological, economic, climate, and demographic trends or subsequent pandemics.

Further impact of the “Global Trends” report also might be articulated in the U.S. approach to the final version of the NATO Strategic Concept, which may confirm a joint allied recognition of the parallel nature of the threats from Russia and China. This concept might also reflect a dual-track approach of the U.S. to its rivals, where defence and deterrence do not exclude readiness for dialogue. The U.S. intelligence report’s observations about the future of armed conflict and military capabilities also likely will be used in the work of the NATO Allied Command on Transformation in the updated “Future Operational Capabilities” report, which should be finalised by the allies in 2023.