

OFFICE OF THE DIRECTOR OF NATIONAL INTELLIGENCE



Global Trends: Alternative Security Futures

L E A D I N G I N T E L L I G E N C E I N T E G R A T I O N

Presented to the US Army War College Strategy Conference

by

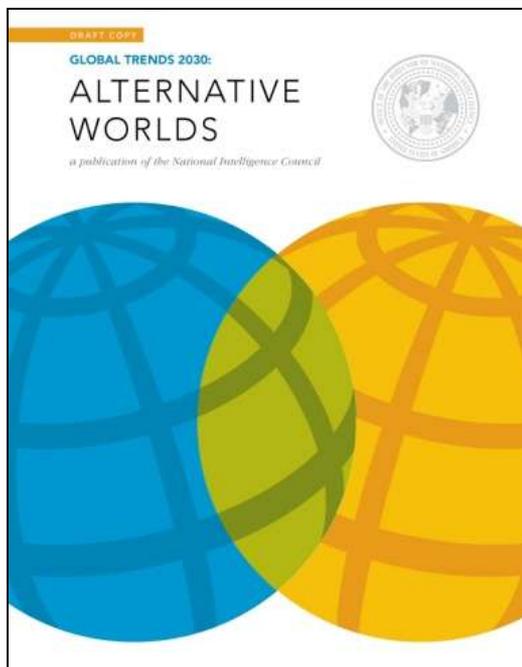
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Global Trends 2030



We do not seek to predict the future—which would be an impossible feat—but instead provide a framework for thinking about possible futures and their implications.”



Megatrends

“Certainties” About the Future



Demography



Resource
Nexus



Diffusion of
Power



Empowered
Individuals



Game-Changers

“Uncertainties” About the Future



Global Economy

Breakdown and collapse...
...or increased resilience?



Governance

Adapt to change...
...or be overwhelmed by it?



Technology

Will technology solve problems...
...or create new ones?



Regional Instability

Will instability remain regionally focused...
...or spill over and create global insecurity?



Potential for Conflict

Recent patterns continue...
...or conflict more likely?



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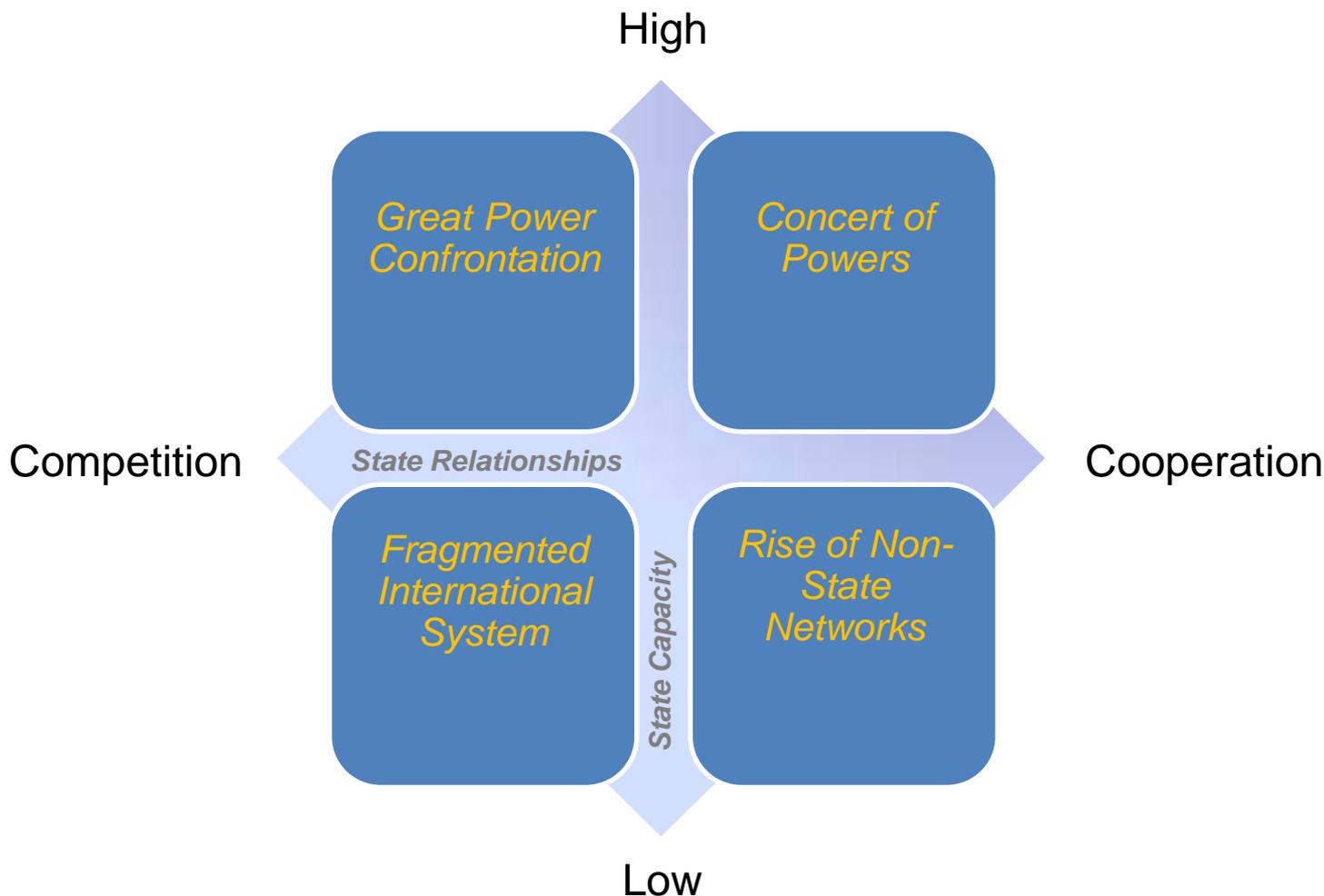
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Capacity of States in the International System

Character of International Relations



Alternative Global Security Futures





Concert of Powers

Growing numbers of powerful states strengthens the international community's ability to deal with security challenges

Drivers:

- Major powers view their economic well-being as tied to a stable security environment and energy market
- High level of state capacity, common interests promote international cooperation
- Rising middle class expectations for political and economic reform prioritizes domestic spending over defense



Security Implications:

- Focus on economic growth and soft power
- New coalition of states emerge to address global challenges and share security burden such as humanitarian operations and peacekeeping
- Reduce defense spending risks introducing vulnerabilities if unexpected contingencies arise



Fragmented International System

Diffusion of global power and competing regional spheres of influence impede efforts to address security challenges

Drivers:

- Lagging global economic growth, burden fatigue in the West, and lack of international consensus makes managing global challenges more difficult
- Efforts to stem weapons and nuclear proliferation, sectarian violence, and terrorism are hindered by limited international cooperation
- Resources scarcities and youth bulges contribute to humanitarian crises that overwhelm the international community's capacity to respond

Security Implications:

- Threat of increased instability especially in Africa, the Greater Middle East, and parts of Asia
- Challenges posed by weak states with WMD arsenals; regional competition between missile offense and missile defense capabilities; state support to nonstate proxies
- Risk of regional conflicts escalating to have broader security consequences



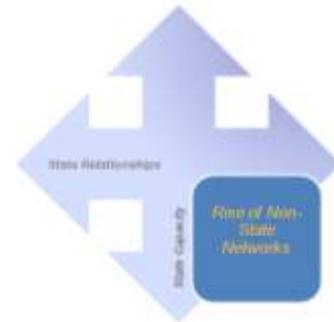


Rise of Non-State Networks

Dispersion of power and authority away from nation-states raises the influence of subnational and transnational entities

Drivers:

- Power vacuums created by weak state governance results in nonstate actors and networks having greater sway in creating and addressing security problems
- Information and other technologies empower individuals, groups, and ad-hoc coalitions
- Nonstate networks seek to resolve and exploit turmoil generated by resource scarcities, poor governance, ethnic and religious rivalries and forced displacement of populations.



Security Implications:

- Ad-hoc coalitions of state and nonstate actors respond to global security challenges
- Transnational terrorism and criminal networks, intrastate conflict, and irregular warfare dominate security agenda
- Individual access to lethal and disruptive capabilities such as bioweapons, cyber, and precision weapons

Globalization
A Culture



Great Power Competition

Increasing competition between developing and developed powers for resources, markets, and influence



Drivers:

- Growing energy demands and population increases lead to resource competition
- Nationalist sentiments rise as states perceive themselves in a zero-sum competition for resources, markets, and influence
- Lack of confidence in global institutions to resolve problems
- Major powers used growing economies to fuel military build ups

Security Implications:

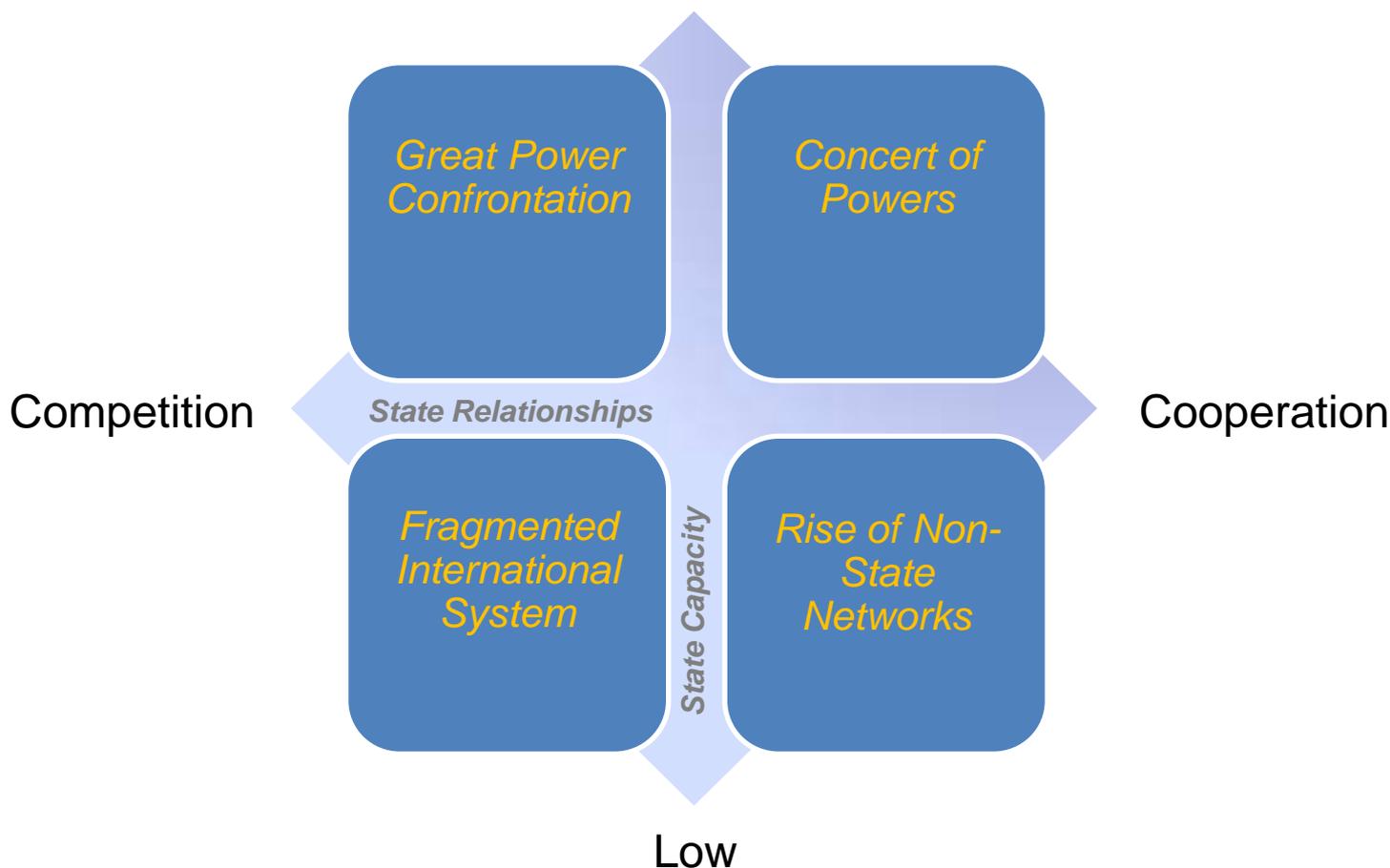
- Cold War “redux”
- High potential for interstate confrontation, premium on alliance relationships
- Threats posed by advanced weapons (e.g. long-range precision strike) and nonmilitary forms of warfare (information, resource, economic)
- Freedom of action constrained, cost of military intervention increased



Alternative Global Security Futures

Implications

High





Four Trends Increasing the Risk of Future Conflict

As identified in Global Trends 2030

- Diffusion of power in the international system
- Increasing competition for resources
- Spread of disruptive technologies
- Growing potential for local or regional instability to rapidly escalate with global consequences



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BACK UP SLIDES



Uncertainty

- "this is the most uncertain (time) I've ever seen the international security environment."
 - General Ray Odierno, Army Chief of Staff





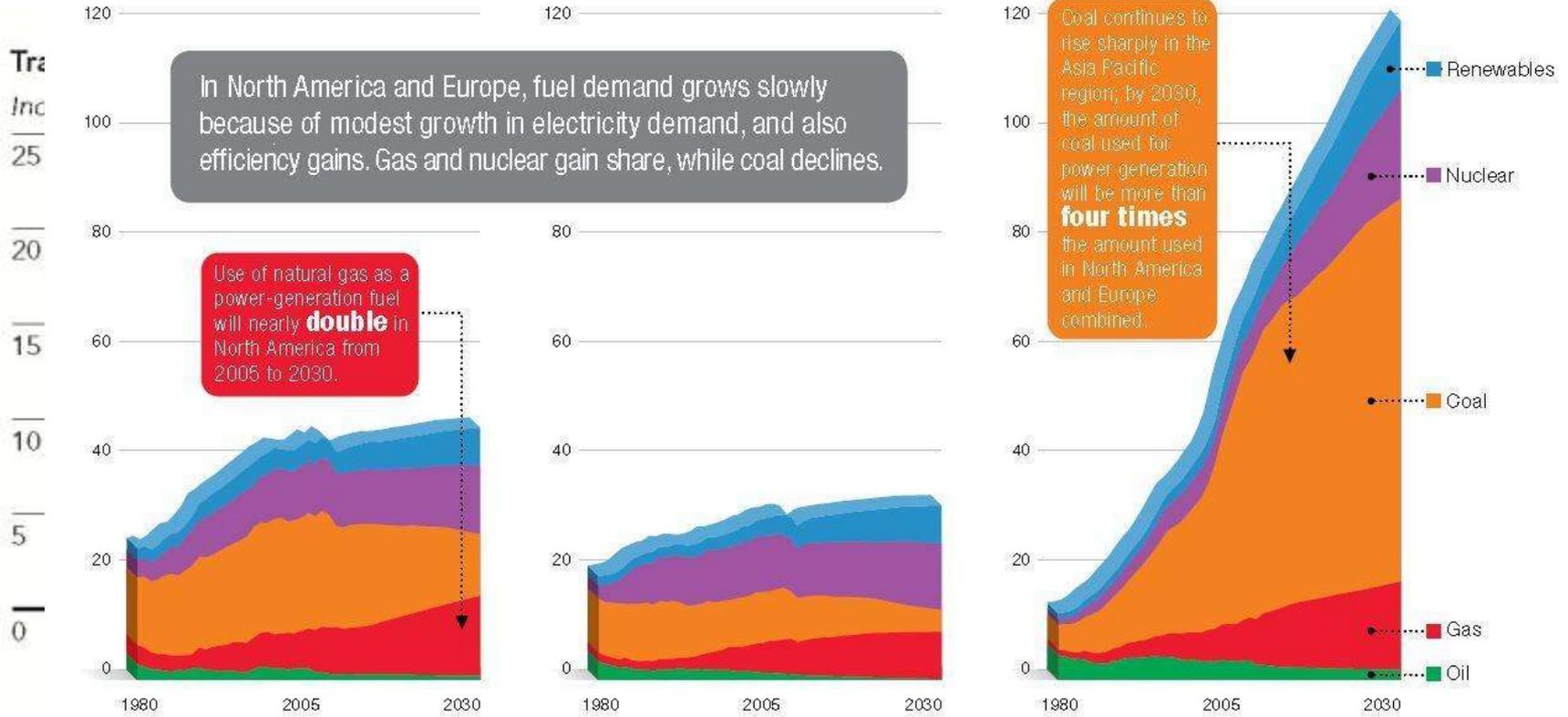
Megatrends

Power generation by fuel

Quadrillion BTUs
North America

Europe

Asia Pacific



In North America and Europe, fuel demand grows slowly because of modest growth in electricity demand, and also efficiency gains. Gas and nuclear gain share, while coal declines.

Use of natural gas as a power-generation fuel will nearly **double** in North America from 2005 to 2030.

Coal continues to rise sharply in the Asia Pacific region; by 2030, the amount of coal used for power generation will be more than **four times** the amount used in North America and Europe combined.

each other.

SOURCE: McKinsey Global Institute analysis using data from Angus Maddison; University of Groningen

