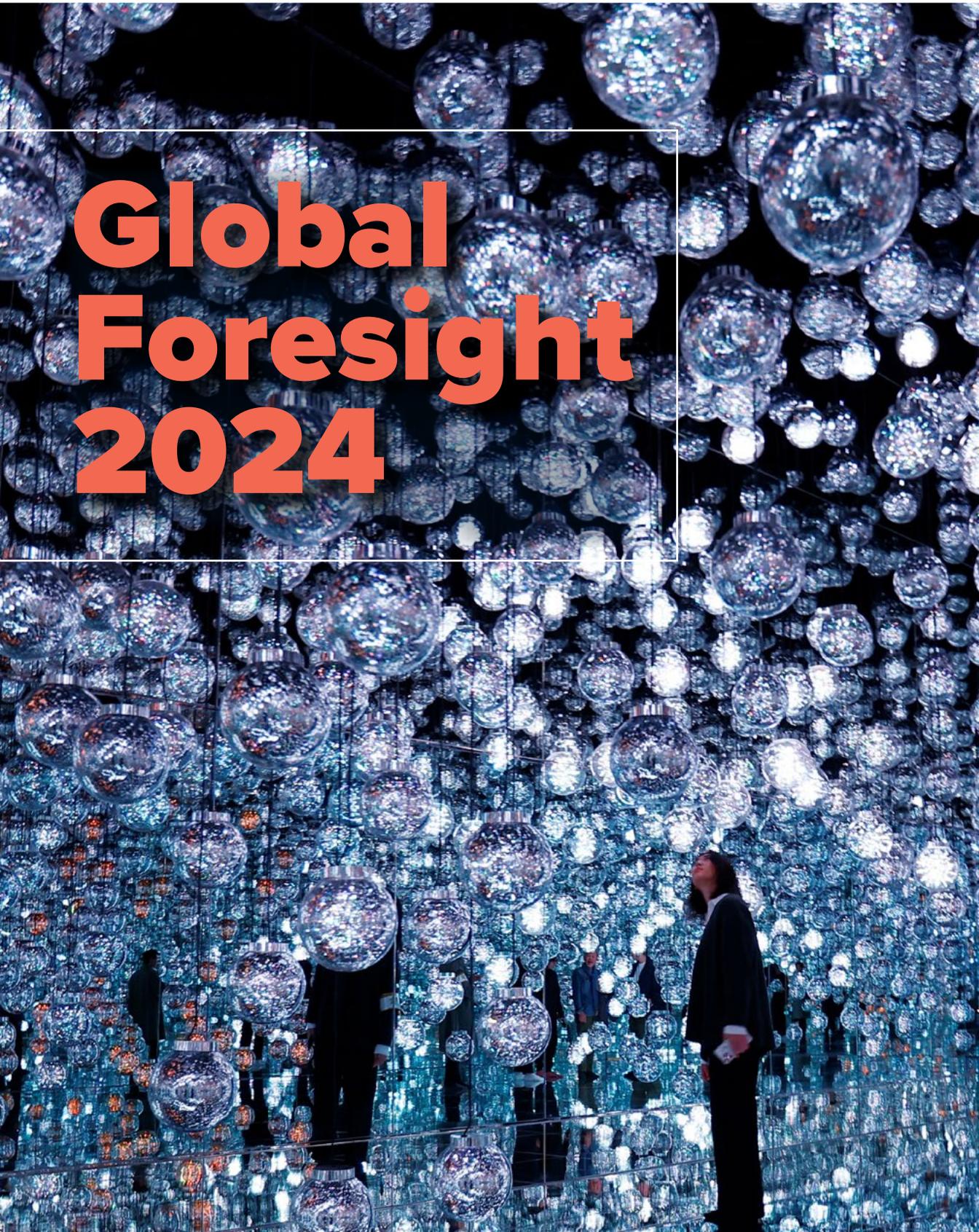


Global Foresight 2024





GLOBAL FORESIGHT 2024

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Introduction

Global Foresight 2024 is the third edition of an annual foresight series produced by the Atlantic Council's Scowcroft Center for Strategy and Security. As was the case with the previous editions, the goal is to provide the reader with a provocative take on how the world might unfold in the years to come. Our complex world requires that we emphasize the connections across diverse phenomena, an emphasis that is central to the discipline known as foresight. As such, *Global Foresight 2024* touches on a wide range of topics, including conflict and geopolitics, technology and innovation, ecology and climate change, society and politics, demography, and more.

Following an established template, *Global Foresight 2024* contains three main analytical components. The first forecasts the year ahead, asking how the world in 2024 might unfold. This list of risks and opportunities for 2024 examines the prospect of a wider war in the Middle East, a Chinese blockade of Taiwan, expansion of Africa's "coup belt", nuclear states clashing with conventional weapons, the space economy taking off, AI becoming mainstream, the hopes as well as fears for Ukraine on the battlefield, and much more. The second assesses the results from a survey of nearly 300 leading global strategists and foresight practitioners, who provide insights about the world in the year 2034. The third identifies six "snow leopards," which are under-the-radar phenomena that might have outsized impacts in the future. These six snow leopards focus on the new race to the South Pole, climate change's impacts on global supply chains, the outsized importance of the small island state of Palau, a breakthrough type of paint, the decreasing cost of desalination, and the proliferation of long-range weapon systems.

As an Atlantic Council Strategy Paper, *Global Foresight 2024* is part of a longstanding series of intellectually robust analyses of the world. We hope that the reader finds this third edition of the Global Foresight series to be an invaluable contribution to that series.

Dr. Peter Engelke

Senior Fellow for Foresight
Scowcroft Center for Strategy and Security
Atlantic Council

The top risks and opportunities for 2024

Voters around the world cast their ballots on the fate of democracy. Ukraine determines whether its struggle against Russian aggression is winnable, China deploys measures just short of war against Taiwan, and broader hostilities engulf the Middle East. Insufficient action on climate change increases the chances of rogue geoengineering. Oceans governance and space exploration leap forward. Artificial intelligence becomes ubiquitous.

These are just some of the biggest global risks and opportunities that we foresee in 2024. To create the following list, we conducted a miniature foresight exercise, assessing the most significant trends and developments that have occurred in the past, consulting Atlantic Council experts on what they're monitoring in the present, and forecasting how geopolitical, economic, technological, political, demographic, and environmental forces could interact in the future.

The scenarios below, which do not appear in a particular order (we consider all to be important, hence their inclusion on this list), are assigned a probability from "low" to "high." A "medium" probability means that we have assigned a (roughly) 50/50 chance to the scenario occurring within the next year. A scenario with a "low" probability is no less significant than the others. This just indicates that it is unlikely to materialize in 2024. But as recent years have so dramatically illustrated, low-probability scenarios can cause a high degree of global turbulence. And the odds of such a scenario happening could rise over a longer timeframe.

TOP RISKS

1 The Israel-Hamas conflict triggers a wider Middle East war



There are two central worries associated with this risk. First, that the conflict between Israel and Hamas will not be contained to Gaza and instead spread to other countries bordering Israel. Since Hamas’s October 7 terrorist attack, Israel and Iran-backed groups in Syria and Lebanon, including Hezbollah, have traded artillery fire and engaged in other military activities such as airstrikes, with tensions

recently spiking over the killing of Hamas leader Saleh al-Arouri in Beirut.¹ These dynamics risk escalation, whether intended or unintended.

Second is the concern that the United States and Iran will be drawn into a direct conflict with one another.² Iran’s well-developed regional network of armed militias and terrorist groups has already attacked US bases in Iraq and Syria and commercial vessels in the Red Sea.³ The latter development, in turn, has forced the United States and its allies to form a maritime security force to protect vital shipping lanes in the region and ultimately to carry out airstrikes in Yemen against the Houthi rebels behind the Red Sea attacks.⁴ Although neither Israel nor Iran nor the United States appears interested in a wider war in the Middle East, an accident, a miscalculation, unforeseen events, or rash and imprudent decision-making by a state or nonstate actor might prove the tipping point for a highly volatile region.⁵

Although Israel announced that it is winding down the first phase of its campaign in Gaza, there are too many unknowns and potential flashpoints to forecast a rosy scenario in 2024.⁶

1 Suleiman Al-Khalidi, “Israel hits air defence base in Syria -intel sources,” Reuters, December 28, 2023, <https://www.reuters.com/world/middle-east/israel-hits-syrian-air-defence-base-southern-syria-intel-sources-2023-12-28/>; Ian Lee and Haley Ott, “Fears of widening regional conflict grow after Hamas leader Saleh al-Arouri killed in Lebanon,” CBS News, January 3, 2024, <https://www.cbsnews.com/news/israel-lebanon-hamas-saleh-al-arouri-fears-widening-regional-conflict/>.

2 Brian Finucane, Lahib Higel, Naysan Rafati and Ali Vaez, “Understanding the Risks of U.S.-Iran Escalation amid the Gaza Conflict,” International Crisis Group, November 10, 2023, <https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/iran-united-states/understanding-risks-us-iran>.

3 Andrew England and Felicia Schwartz, “The ‘Axis of Resistance’ pushing US to ramp up Middle East defences,” The Financial Times, November 14, 2023, <https://www.ft.com/content/f4e4ffb0-48d4-450f-bc21-a55bf9a361e9>.

4 Phil Stewart and John Davison, “US launches Red Sea force as ships reroute to avoid attacks,” Reuters, December 19, 2023, <https://www.reuters.com/world/middle-east/us-launches-new-multinational-operation-safeguard-red-sea-commerce-2023-12-18/>; Matthew Mpoke Bigg, Vivek Shankar and Thomas Fuller, “Houthis, Undeterred by Strikes, Target More Ships in Red Sea,” The New York Times, January 15, 2024, <https://www.nytimes.com/2024/01/15/world/middleeast/houthis-ships-red-sea.html>.

5 Bilal Y. Saab, “The closer Israel gets to destroying Hamas, the more likely war with Hezbollah becomes,” Chatham House, November 17, 2023, <https://www.chathamhouse.org/2023/11/closer-israel-gets-destroying-hamas-more-likely-war-hezbollah-becomes>.

6 Patrick Kingsley, Adam Entous and Edward Wong, “Israel Says Its Military Is Starting to Shift to a More Targeted Gaza Campaign,” The New York Times, January 8, 2024, <https://www.nytimes.com/2024/01/08/us/politics/israel-military-gaza.html>.

2

The possibility of Ukrainian victory recedes as Western support fades



It appears unlikely that Russia has the military capability to decisively defeat Ukraine on the battlefield. Yet it is not a given that Ukraine will be able to win the war outright, as shown by its own lack of offensive progress on land (if not at sea) in 2023.

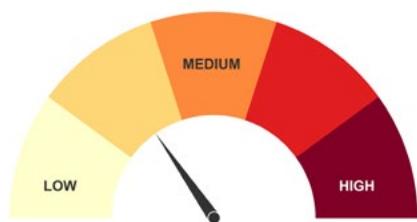
Few if any analysts believe that Ukraine will be able to emerge from this war intact (where “intact” is defined in part as repossessing the territory it held before Russia’s invasions of the country in 2022 or 2014) without sustained Western financial and military support.⁷ Although Ukraine has benefited enormously from deliveries of advanced weaponry from the West, that support has been insufficient to tip the scales in favor of Ukraine’s offensive operations. Simply put: Ukraine needs more of everything, including the basics—artillery shells, for example—to win a war involving hundreds of thousands of troops along a thousand-kilometer front.⁸

In 2024, the risk is that such assistance will not be forthcoming, owing to war fatigue and domestic factors in Europe and the United States. There have been numerous warning signs on both sides of the Atlantic.⁹ In the United States, the Biden administration is facing much stronger congressional resistance to maintaining and increasing Ukraine funding than it confronted earlier in the war. In Europe, Hungarian Prime Minister Viktor Orbán has blocked the European Union’s funding plans for Ukraine.¹⁰ The Netherlands’ incoming prime minister, Geert Wilders, and his Freedom Party advocate withdrawing Dutch military and financial support from Ukraine, though such an outcome is far from certain given Wilders’s need to form a multiparty governing coalition.¹¹

Should Western support fade, Ukraine almost certainly would be unable to win on the battlefield. In a worst-case scenario where aid from both the United States and Europe fails to arrive, Ukraine could lose its struggle with Russia outright.

7 Ivan Verstyuk, “Putin will win unless the West finally commits to Ukrainian victory,” The Atlantic Council, November 2, 2023, <https://www.atlanticcouncil.org/blogs/ukrainealert/putin-will-win-unless-the-west-finally-commits-to-ukrainian-victory/>.
 8 Abdujalil Abdurasulov, “Ukraine war: Shell shortages force us to limit firing, Ukrainian troops tell BBC,” BBC, December 14, 2023, <https://www.bbc.com/news/world-europe-67714719>.
 9 James Nixey, “Russia’s plan B is working. The West must not give up on Ukraine now,” Chatham House, November 23, 2023, <https://www.chathamhouse.org/2023/11/russias-plan-b-working-west-must-not-give-ukraine-now>.
 10 Matina Stevis-Gridneff and Steven Erlanger, “Hungary Blocks Ukraine Aid After E.U. Opens Door to Membership,” The New York Times, December 14, 2023, <https://www.nytimes.com/2023/12/14/world/europe/eu-ukraine-hungary-aid.html>.
 11 Lisa Homel, “The shocking Dutch election is done. The political maneuvering is just beginning,” The Atlantic Council, December 4, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/the-shocking-dutch-election-is-done-the-political-maneuvering-is-just-beginning/>.

3 A climate-fueled storm devastates a megacity



In October 2023, a rare storm formed in the Pacific. Over a single day, it intensified from a tropical storm to a Category 5 hurricane, coming ashore around Acapulco and ravaging the Mexican city.¹² In September, eight months' worth of rain fell on eastern Libya in just twenty-four hours, collapsing two dams and washing out large portions of coastal communities.¹³

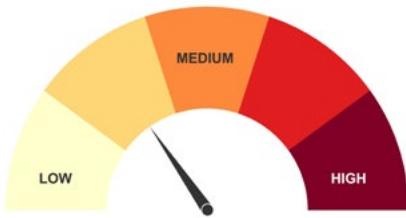
Imagine a storm of such ferocity and speed hitting an even larger city—one of five, six, or twenty million residents. Over 600 million people live in low-lying areas within sixty miles of a seacoast and two-thirds of the world's largest cities (with populations of five million or more) are located in these coastal zones.¹⁴ People around the world are increasingly moving to such megacities—some driven there because the effects of climate change have made life elsewhere untenable.

Clear data on the relationship between climate change and extreme weather events is elusive. For example, data from the US Environmental Protection Agency suggests that the frequency of hurricanes reaching the United States has largely not changed over the last century, but the data also points toward increasing activity since 1995 (coinciding with increases in sea surface temperature).¹⁵ In general, however, storm forecasters worry that higher ocean temperatures and other climate-related factors will both increase the number of hurricanes and rapidly transform weak tropical storms into severe hurricanes, as occurred in Acapulco.¹⁶

Combine this climate reality with the infrastructure challenges facing many of the world's megacities, and the stage seems to be set for an Acapulco-like disaster playing out on a larger scale, wherein a megastorm hits a megacity such as Dhaka, Manila, Ho Chi Minh City, or Rio de Janeiro.¹⁷ Whether such a disaster occurs in 2024 is hard to predict, but what is certain is that such an event will occur at some point in the coming years.

-
- 12 Elizabeth Wolfe, Aya Elamroussi, Robert Shackelford and Mary Gilber, "Hurricane Otis' Category 5 'nightmare scenario' knocks out all communications in Acapulco, Mexico," CNN, October 25, 2023, <https://www.cnn.com/2023/10/24/weather/hurricane-otis-acapulco-mexico/index.html>.
- 13 Ruby Mellen, Laris Karklis, Samuel Granados, Júlia Ledur and Dan Stillman, "See why Libya's floods were so deadly in maps and videos," The Washington Post, September 12, 2023, <https://www.washingtonpost.com/world/2023/09/12/deadly-libya-flooding-cause/>.
- 14 Nell Greenfieldboyce, "Study: 634 Million People at Risk from Rising Seas," NPR, March 28, 2007, <https://www.npr.org/templates/story/story.php?storyId=9162438>.
- 15 "Climate Change Indicators: Tropical Cyclone Activity," Environmental Protection Agency, Last updated November 1, 2023, <https://www.epa.gov/climate-indicators/climate-change-indicators-tropical-cyclone-activity>.
- 16 Elena Shao, "A 'Nightmare' for Forecasters: Here's Why Hurricanes Are Getting Stronger, Faster," The New York Times, September 26, 2022, <https://www.nytimes.com/2022/09/26/climate/hurricane-ian-rapid-intensification.html>.
- 17 Bruce Stutz, "Too Big to Flood? Megacities Face Future of Major Storm Risk," Yale Environment 360, December 17 2022, https://e360.yale.edu/features/megacities_face_increasing_risk_as_sea_levels_rise.

4

China blockades Taiwan, risking conflict with the United States

Fears of a Chinese invasion of Taiwan have been circulating in Washington and other capitals for years. Although an invasion scenario has preoccupied military planners in the Pentagon, another coercive scenario—a Chinese naval blockade of Taiwan—is as likely if not more so in 2024 and beyond.

With the world’s largest navy, coast guard, and maritime militia, China knows a blockade is more flexible and easier to execute than an invasion would be.¹⁸ A blockade is easier to walk back should Chinese leaders decide that the costs of the operation are not worth its benefits, and offers fewer public-relations headaches relative to a massive and unprovoked invasion of the island. Moreover, Beijing may calculate that a blockade carries less risk of direct conflict with the United States compared with an invasion—a calculation that might prove tragic for all sides.

Taiwan’s January 2024 elections could shape decision-making in Beijing. The outcome—in which the incumbent Democratic Progressive Party (DPP), the political party least inclined toward closer relations with China, won the presidential race—could spur Beijing to continue ramping up its intimidation tactics to convince Lai Ching-te, the Taiwanese president-elect, to refrain from further assertions of or moves toward independence from China.¹⁹

The DPP victory may combine with other factors such as China’s slowing economy to spur aggressive action by Beijing, perhaps to include a blockade. Chinese leader Xi Jinping could decide the moment has come to force Taiwan into submission—years before (some) US officials have estimated that Beijing might make such a move.²⁰ Given Beijing’s recent willingness to probe Taiwan’s defenses surrounding the island (significantly, including in the waters and airspace to the east of Taiwan), the prospect of Chinese naval vessels blockading entry into Taiwanese ports remains a lower probability yet still plausible event in 2024.²¹

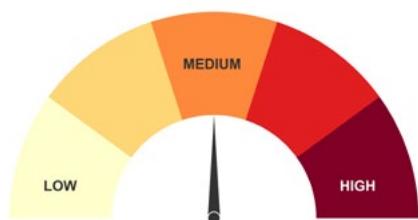
18 Marek Jestrab, “A maritime blockade of Taiwan by the People’s Republic of China: A strategy to defeat fear and coercion,” Atlantic Council, December 12, 2023, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/a-maritime-blockade-of-taiwan-by-the-peoples-republic-of-china-a-strategy-to-defeat-fear-and-coercion/>.

19 Wen-Ti Sung, Kenton Thibaut, Markus Garlauskas, Frederick Kempe, Jeremy Mark, Ryo Hinata-Yamaguchi, Elizabeth Larus, Hung Tran, “Experts react: Taiwan just elected Lai Ching-te as president despite China’s opposition. What’s next?,” The Atlantic Council, January 13, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/experts-react/experts-react-taiwan-just-elected-lai-ching-te-as-president-despite-chinas-opposition-whats-next/#kempe>.

20 Iain Marlow, “US Ignores Taiwan 2027 Conflict Deadline ‘At Our Peril,’ Ex-Pacific Commander Says,” Bloomberg News, February 7, 2023, <https://www.bloomberg.com/news/articles/2023-02-07/ex-us-pacific-commander-cites-fear-of-a-taiwan-invasion-by-2027>.

21 Christian Shepherd and Vic Chiang, “How Chinese aggression is increasing the risk of war in the Taiwan Strait,” The Washington Post, November 13, 2023, <https://www.washingtonpost.com/world/2023/11/13/china-biden-xi-meeting-apec-taiwan/>.

5 Nuclear states clash with conventional weapons, risking a nuclear escalation



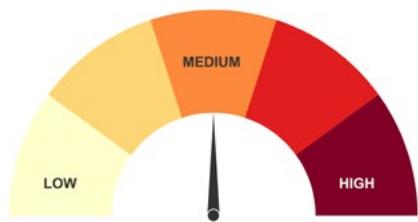
With relations among nuclear-armed countries deteriorating as they contest hot spots around the world, there is a real prospect in 2024 of two or more nuclear powers engaging in direct combat with one another using conventional weapons. The bigger concern is that such a conflict could escalate to a nuclear exchange.

The list of difficult relationships among the world's nuclear powers is long. These include China and the United States, China and India, Pakistan and India, North Korea and the United States, and Russia and NATO (the Alliance counts the nuclear-armed United States, United Kingdom, and France as members). In the background lurks the hostile relationship between Israel, which has never confirmed nor denied that it possesses nuclear weapons, and Iran, which is reportedly now capable of producing enough fissile material for several nuclear weapons.²²

Few of these relationships are on an upward trajectory diplomatically; most are in stasis or deteriorating. Hot spots include Ukraine and the easternmost states of NATO and the European Union; Taiwan, the Senkaku Islands, the Paracel and Spratly Islands, and other waters and islands in the western Pacific; the Korean peninsula's demilitarized zone; much of the Middle East given the current conflict in Gaza; and the contested borders between Pakistan, India, and China.

A direct military conflict between two or more nuclear-armed powers does not mean an automatic escalation to an exchange of nuclear weapons. Indeed, in recent years, China and India on the one hand and Pakistan and India on the other have engaged in clashes involving small numbers of troops along their disputed borders that were contained well before any apparent serious consideration of resorting to such weapons.²³ Yet the lack of nuclear escalation in these past conflicts does not mean that the risk is nil in the future.

6 A lack of progress on climate change leads countries—or wealthy citizens—to take matters into their own hands



While the final agreement from the recently concluded United Nations (UN) climate change summit known as COP28 included a commitment to “transition away” from fossil fuels, it also fell short—just like other COPs before it—of tying countries to binding collective action on reducing greenhouse gas emissions.²⁴

22 “Israel,” Nuclear Threat Initiative, Last updated November 15, 2023, <https://www.nti.org/countries/israel/>; Francois Murphy, “Iran’s nuclear enrichment advances as it stonewalls UN, IAEA reports show,” Reuters, November 15, 2023, <https://www.reuters.com/world/middle-east/irans-nuclear-enrichment-advances-it-stonewalls-un-iaea-reports-show-2023-11-15/>.

23 Jessie Yeung, “Indian and Chinese troops fight with sticks and bricks in video,” CNN, December 15, 2022, <https://www.cnn.com/2022/12/14/asia/india-china-border-tensions-video-intl-hnk/index.html>; “Indian and Pakistani soldiers trade fire in disputed Kashmir, killing 1 Indian soldier,” Associated Press, November 9, 2023, <https://apnews.com/article/kashmir-india-pakistan-border-firing-d2a0841b9ddd32044478834aade8ee08>.

24 Brad Plumer and Max Bearak, “In a First, Nations at Climate Summit Agree to Move Away From Fossil Fuels,” The New York Times, December 13, 2022, <https://www.nytimes.com/2023/12/13/climate/cop28-climate-agreement.html>.

The dawning recognition that emissions goals aren't being met is fueling a controversial view that geoengineering—the notion that humans can predictably alter the planet's climatological system through deliberate and controlled intervention—is the only realistic, workable solution to keeping surface temperatures within tolerable bounds.²⁵ In 2024, we could see a dramatic increase in proposed geoengineering solutions and prototype projects. Expect to hear more about interventions of every type—from carbon sequestration-focused approaches such as sinking algae down to the benthic seabed and “mineralizing” atmospheric carbon into rock, to solar radiation management techniques focused on spraying sulfur-dioxide particles in the high atmosphere or deploying space-based sunshades. Although these interventions are scientifically and technologically diverse, all share the goal of slowing, halting, or reversing climate impacts.

While geoengineering is an important and active arena of scientific inquiry, the worry is that someone will proceed with a dramatic intervention that is unilateral, transboundary, and premature.²⁶ Given the many scientific unknowns and lack of global governance structures relating to geoengineering, some types of interventions could amount to irresponsible gambles with the ecological health of the planet—by, for example, risking damage to the ozone layer or altering weather patterns. Rogue geoengineering is an unnerving wild card that might start coming into play in 2024 and beyond, perhaps in the form of interventions initiated by a single state or nonstate actor (such as a super-wealthy entrepreneur) acting on their own and ahead of scientific and political consensus on whether the rewards of such actions outweigh the risks.²⁷

7

Africa's “coup belt” expands, disrupting social and economic progress



Since 2020, there have been eight successful coups in countries across Africa's Sahel region and West Africa, forming what is now labeled a “coup belt” stretching from the Atlantic Ocean to the Red Sea.²⁸ In 2024, the odds are high that additional coups will beset the region, within both countries that already have experienced coups (Mali and Burkina Faso, for example, have endured back-to-back coups in short succession) and countries that have not yet experienced them.²⁹ The coup belt could also expand outward. In August, for instance, Africa's most recent coup occurred in Gabon, well south of the Sahel in west-central Africa.³⁰

25 “What Is Geoengineering?,” Oxford Geoengineering Programme, 2018, <https://www.geoengineering.ox.ac.uk/www.geoengineering.ox.ac.uk/what-is-geoengineering/what-is-geoengineering/>.

26 Mahmoud Abouelnaga and Raul Brens Jr, “Carbon removal is a once-in-a-generation opportunity to reduce the risks of overshooting global warming targets,” The Atlantic Council, September 20, 2023, <https://atlanticcouncil.org/blogs/new-atlanticist/carbon-removal-reduce-the-risks-of-climate-overshoot/>.

27 India Bourke, “To avert climate disaster, what if one rogue nation dimmed the Sun?,” BBC, October 10, 2023, <https://www.bbc.com/future/article/20231010-sun-solar-geoengineering-ministry-for-the-future-kim-stanley-robinson>.

28 Morgan Winsor, “Africa at a crossroads as more democracies fall to military coups, experts say,” ABC News, October 1, 2023, <https://abcnews.go.com/International/africa-military-coups-democracy/story?id=103272601>; Declan Walsh, “Coast to Coast, a Corridor of Coups Brings Turmoil in Africa,” The New York Times, July 29, 2023, <https://www.nytimes.com/2023/07/29/world/africa/africa-coups-niger.html>.

29 “Africa: the 7 military coups over the last three years,” Africanews, August 30, 2023, <https://www.africanews.com/2023/08/30/africa-the-7-military-coups-over-the-last-three-years/>.

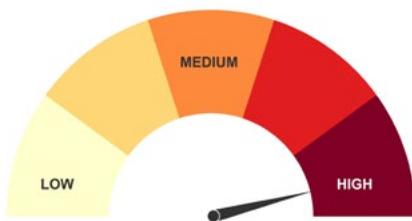
30 Archibald S. Henry and Elizabeth Murray, “What to Know About Gabon's Coup,” the United States Institute of Peace, August 31, 2023, <https://www.usip.org/publications/2023/08/what-know-about-gabons-coup>.

There are complex underlying reasons why these countries are experiencing coups in such close succession. Although each nation in the coup belt has its own unique challenges, governments across these regions generally have not provided their citizens with core public goods including security, prosperity, and competent services.³¹ They have failed to confront growing insurgencies and associated violence, contain corruption (enabling wealth to flow to a small elite), or run clean elections to legitimize government authority.

Public-opinion polling shows that such sources of instability are undermining support for elected governments while increasing the desire for the apparent stability—quite often illusory—that military rule might bring.³² An expansion of the coup belt would present an obstacle to the ongoing economic and social transformation that Africa’s youthful, entrepreneurial, and growing population is driving.

8

China increases its influence in Latin America and the Caribbean at the expense of the United States



Strategic competition with China has quietly reached the United States’ neighborhood. Over the past two decades, China has become the largest trading partner of many countries in Latin America and the Caribbean.³³ By taking numerous steps to enhance its position, China has quickly established itself as the region’s second-biggest trading partner overall, after the United States, and South America’s largest.³⁴ In May 2023, for example, China signed a free-trade agreement with Ecuador, its fourth in the region following agreements with Peru, Chile, and Costa Rica. And Chinese entities have invested nearly \$150 billion in the region since 2005 to support energy, transportation, infrastructure, and other public-goods projects.³⁵

China’s growing economic clout in Latin America and the Caribbean is paralleled by its diplomatic successes. Since 2017, for instance, five countries in the region have established formal ties with China and ended their relations with Taiwan.³⁶ In October 2023, China also upgraded its diplomatic ties with Colombia, one of the United States’ oldest allies in the region, to a “strategic partnership.”³⁷

China’s growing economic clout in Latin America and the Caribbean is paralleled by its diplomatic successes. Since 2017, for instance, five countries in the region have established formal ties with China and ended their relations with Taiwan.³⁶ In October 2023, China also upgraded its diplomatic ties with Colombia, one of the United States’ oldest allies in the region, to a “strategic partnership.”³⁷

The US government is attempting to develop an effective response given its longstanding interests in the region. Yet the obstacles are numerous. The United States has multiple trade agreements with countries there, but in Washington there is little interest in expanding trade agreements to more Latin

31 Igor Ngima, “A Surge of Military Coups in Africa Threatens Human Rights and the Rule of Law,” Freedom House, October 12, 2023, <https://freedomhouse.org/article/surge-military-coups-africa-threatens-human-rights-and-rule-law>.

32 “Africa’s coups are part of a far bigger crisis,” The Economist, October 3, 2023, <https://www.economist.com/international/2023/10/03/africas-coups-are-part-of-a-far-bigger-crisis>.

33 Ricardo Barrios and Karla I. Rios, “China’s Engagement with Latin America and the Caribbean,” Congressional Research Service, June 23, 2022, <https://crsreports.congress.gov/product/pdf/IF/IF10982>.

34 Diana Roy, “China’s Growing Influence in Latin America,” Council on Foreign Relations, June 15, 2023, <https://www.cfr.org/backgrounder/china-influence-latin-america-argentina-brazil-venezuela-security-energy-bri>.

35 Barrios and Rios, “China’s Engagement.”

36 Nicolás Devia-Valbuena and Alberto Mejía, “How Should the U.S. Respond to China’s Influence in Latin America?,” the United States Institute of Peace, August 28, 2023, <https://www.usip.org/publications/2023/08/how-should-us-respond-chinas-influence-latin-america>.

37 Liz Lee and Ryan Woo, “China upgrades diplomatic ties with close US ally Colombia,” Reuters, October 25, 2023, <https://www.reuters.com/world/china-upgrades-diplomatic-ties-with-close-us-ally-colombia-2023-10-25/>.

American and Caribbean countries.³⁸ And although the Biden administration has launched a regional economic development initiative known as the Americas Partnership for Economic Prosperity, thus far it has struggled to marshal the resources that many believe are necessary to fully counter the scale of China's activities (the extent of the trade relationship between the United States and Mexico being an important exception).³⁹ For the United States and even for Europe—likewise mired in ineffective economic diplomacy in the region—the risk is that Latin American and Caribbean countries will hew ever more closely to China in the coming years.⁴⁰

TOP OPPORTUNITIES

1 Key elections reinvigorate the world's democracies



This will be a critical year for democracy. The world's largest democracies, India and the United States, will hold general elections. So too will South Africa, Mexico, Indonesia, and a host of smaller countries, while the European Union will hold parliamentary elections. In total, according to the *Economist*, countries with more than four billion people will host local, regional, or national elections in 2024.⁴¹

Over the past decade at least, democracies have been struggling against difficult headwinds. Economic frustrations, online disinformation, assorted grievances against established political elites, and social, cultural, and political polarization all have transformed the global democratic landscape for the worse. In 2024, it is reasonable to expect that voters in some countries will choose parties and candidates that flirt with authoritarian rather than democratic governance, as voters have done over the preceding years. Should voters choose illiberal paths in the majority of democracies holding elections this year, there is considerable risk of serious and lasting damage to the democratic project around the world.

However, we put this item on the opportunity side of the ledger because we remain optimistic about people's faith in that democratic project. And with some reason: Global public-opinion surveys consistently show broad support for democracy, although there also is widespread frustration with how it functions in practice. Voters across the world have an opportunity in 2024 to reaffirm their commitment to democratic governance by choosing parties and candidates that support democratic ideals and principles and, in so doing, reject illiberalism.

38 Michael Stott, "US reluctance on trade deals sends Latin America towards China," *The Financial Times*, May 24, 2023, <https://www.ft.com/content/19ff62c3-5c75-4ba7-8f73-75a7a902aa90>.

39 Fernanda Magnotta, "Did Biden's Latin America Summit Offer Too Little, Too Late?," *Americas Quarterly*, November 13, 2023, <https://americasquarterly.org/article/is-bidens-latin-america-summit-offering-too-little-too-late/>.

40 Mauricio Savarese and Daniel Politi, "Hopes for a Mercosur-EU trade deal fade yet again as leaders meet in Brazil," *the Associated Press*, December 7, 2023, <https://apnews.com/article/mercosur-european-union-eu-trade-negotiations-deal-brazil-1ed964ed052345e78555df3b863251f7>.

41 "2024 is the biggest election year in history," *The Economist*, November 13, 2023, <https://www.economist.com/interactive/the-world-ahead/2023/11/13/2024-is-the-biggest-election-year-in-history>.

2 AI goes mainstream—and spreads everywhere



Since bursting onto the public scene in 2022, generative artificial intelligence (AI) and technologies involving large language models have advanced with breathtaking speed, with implications equally fascinating and terrifying. But relative to what will unfold in 2024, what we saw in 2023 barely qualifies as a warmup. Trying to predict anything in such a fast-moving area is a mug's game, but there are a few elements we can count on:

The global generative AI market will grow robustly in the year ahead and into the early 2030s. Goldman Sachs analysts have estimated that the diffusion of AI technologies will increase global gross domestic product (GDP) by 7 percent over the next decade.⁴²

2024 will be the year when AI goes mainstream, and not just on our screens. AI systems are being embedded in the devices that define our everyday life.⁴³ The result will be the arrival of the first “smartifacts”—devices with rudimentary intelligence having a greater ability to directly sense and interact with the physical world than they do now. This will begin with familiar objects—vehicles, appliances, personal electronics—but will also yield entirely new classes of devices, including dramatically more capable robots.

Meanwhile, AI will also yield more prosaic surprises. Chatbots will become ubiquitous on our communications devices, displacing traditional search. Such surprises will include downsides as well. AI will play a major disruptive role in influencing public opinion and this year's many elections around the world. Indeed, the disruptions have already begun; in September 2023, for instance, Microsoft researchers unearthed a network of Chinese-controlled social media accounts using AI to influence US voters.⁴⁴

3 Ukraine achieves a battlefield breakthrough against Russia



Ukraine's lack of significant progress during its 2023 counteroffensive surprised those who expected quick work against a Russian military that appears incompetent at best. Instead, Russian defenses have proven resilient, reducing Ukraine's land offensive to a slow crawl. The war now appears to be settling into one of attrition that favors Russia given its larger economy and reserves of manpower, plus

the expected impatience of Western publics for long wars (see the related risk above). In a November

42 Joseph Briggs and Devesh Kodnani, “Generative AI could raise global GDP by 7%,” Goldman Sachs, April 5, 2023, <https://www.goldmansachs.com/intelligence/pages/generative-ai-could-raise-global-gdp-by-7-percent.html>.

43 Sani Theo, “Ten AI Trends Revolutionising Consumer Electronics,” *Electronisforu.com*, October 24, 2023, <https://www.electronisforu.com/technology-trends/tech-focus/ten-ai-trends-revolutionising-consumer-electronics>.

44 Sam Sabin, “China has started using AI in influence operations, Microsoft says,” *Axios*, September 8, 2023, <https://www.axios.com/2023/09/08/china-ai-disinformation-microsoft>.

interview, Ukraine’s commander in chief, Valery Zaluzhny, lamented, “There will most likely be no deep and beautiful breakthrough”—at least, he implied, in the near term.⁴⁵

However, in 2024 there remains some hope of a breakthrough on the battlefield in Ukraine’s favor, assuming two factors align for Ukraine:

The right mix of Western weapons and ammunition arrives at scale and on time. Although Western countries have been delivering these resources, the types and quantity thus far have fallen short of what has been needed to realize an offensive breakthrough.

Ukraine’s military leadership finds innovative solutions for a twenty-first-century battlefield that so far has favored the defense—an insight that Zaluzhny has readily admitted, while asserting that novel combinations of weapons, tactics, and information will provide the breakthrough.⁴⁶

For such a scenario to materialize, the bad performance of Russian forces—a result of factors such as poor training, low morale, and inadequate supply—also would need to hold.

Should Ukraine’s military situation become more favorable in these ways in 2024, there is a chance that Ukrainian forces will achieve a breakthrough and, with it, the prospect of ending the war on Kyiv’s terms.

4 The space economy takes off



One of the fastest-growing economies on the planet isn’t on the planet—it is in space. According to the nonprofit Space Foundation, the global space economy grew 8 percent in 2022 to more than five hundred billion dollars and is on track to grow to nearly eight hundred billion dollars over the next half-decade.⁴⁷ Commercial space efforts account for nearly 80 percent of activity in the sector, but military spending has also increased and is likely to continue to grow.

The hottest space real estate in 2024 will be low Earth orbit (LEO), where more sensor and communications systems will be deployed. In the coming year incumbents such as SpaceX and Blue Origin will expand the pace of their launch operations with new platforms such as Blue Origin’s reusable New Glenn launch vehicle, under contract with NASA to send two probes to Mars in 2024, and Rocket Lab’s two-stage Electron rocket, which has delivered dozens of payloads to LEO.⁴⁸

45 “Ukraine’s commander-in-chief on the breakthrough he needs to beat Russia,” *The Economist*, November 1, 2023, <https://www.economist.com/europe/2023/11/01/ukraines-commander-in-chief-on-the-breakthrough-he-needs-to-beat-russia>.

46 “Ukraine’s commander-in-chief on the breakthrough he needs to beat Russia,” *The Economist*.

47 Space Foundation Editorial Team, “Space Foundation Releases The Space Report 2023 Q2, Showing Annual Growth Of Global Space Economy To \$546b,” *The Space Foundation*, July 25, 2023 <https://www.spacefoundation.org/2023/07/25/the-space-report-2023-q2/>.

48 “New Glenn,” Blue Origin, last accessed January 26, 2024, <https://www.blueorigin.com/new-glenn/>; “Electron,” Rocket Lab, last accessed January 26, 2024, <https://www.rocketlabusa.com/launch/electron/>.

Meanwhile, SpaceX has announced a goal of launching a rocket nearly every two days in 2024, which would roughly double its number of launches in 2023.⁴⁹

The incumbents are being chased by an ever-growing number of companies seeking their unique niches in the space economy. Look for the expansion of space-based telecommunications offerings beyond Starlink to encompass direct smartphone calling via satellite. The first space hotel is not projected to enter orbit until 2030 at the earliest, but even space tourism will grow modestly as Blue Origin, SpaceX, and Virgin Galactic expand their space-flight operations for tourists.⁵⁰ And Axiom Space, a well-funded start-up with a goal to construct the world's first commercial space station, has been sending commercial missions to the International Space Station.⁵¹

Activities such as space tourism might seem frivolous, but they help fund and build out the space infrastructure needed to meet global challenges such as communications access for remote and underserved communities and environmental sensing for monitoring, predicting, and mitigating the effects of climate change. The growth of the industry matters because space-based activities are central to managing terrestrial issues and opportunities.

5 Africa gains agenda-setting power in major global forums



In September 2023, at the annual summit of the Group of Twenty (G20), Indian Prime Minister Narendra Modi announced that the African Union (AU) would be joining the G20 as a full member.⁵² Prior to this move, South Africa was the only African representative in the G20, despite representing just 4 percent of the continent's population.

The G20 expansion presages Africa's fuller inclusion in multilateral decision-making at the highest levels. A figurative dam has broken. For many years, Africa largely has been sidelined within global governance institutions such as the G20.⁵³ AU membership in the G20 should make Africa's economic, environmental, and security agenda of greater concern to the global community, and also help build trust between African nations and other countries within the G20 and elsewhere.⁵⁴

The big questions for 2024 and beyond are whether Africa's agenda will be taken as seriously within the G20 as its inclusion in the bloc promises—and whether the AU's entrance into the G20 increases Africa's influence in other global forums such as the international financial institutions.

49 Mike Wall, "SpaceX aims to launch 144 missions next year," Space.com, October 18, 2023, <https://www.space.com/spacex-launch-144-missions-2024>.

50 Stefanie Waldek, "You Might Be Able to Vacation in This Space Hotel by 2030," Travel and Leisure, November 12, 2022, <https://www.travelandleisure.com/trip-ideas/space-astronomy/voyager-station-first-space-hotel-open-2027>.

51 "Axiom Mission 3," Axiom Space, January 18, 2024, <https://www.axiomspace.com/>.

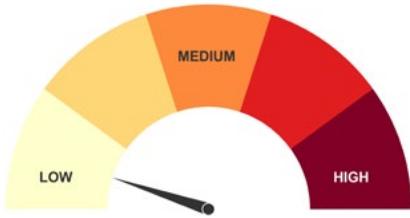
52 "G20 welcomes African Union as member in push to give a greater voice to developing nations," Le Monde, September 9, 2023, https://www.lemonde.fr/en/international/article/2023/09/09/g20-welcomes-african-union-as-member-in-push-to-give-a-greater-voice-to-developing-nations_6130684_4.html.

53 Ruth Namatovu, "Africa's Bargaining Chip to the G20," The Wilson Center, October 19, 2023, <https://www.wilsoncenter.org/blog-post/africas-bargaining-chip-g20>.

54 Chido Munyati, "The African Union has been made a permanent member of the G20 – what does it mean for the continent?," World Economic Forum, September 13, 2023, <https://www.weforum.org/agenda/2023/09/african-union-g20-world-leaders/>.

6

The UN Security Council is reformed, shoring up its diminished legitimacy



Reforming the United Nations Security Council (UNSC), the most important body within the UN owing to its responsibilities for responding to war and upholding peace, has proven to be one of international diplomacy’s most intractable challenges. But the task has taken on greater urgency since Russia’s full-scale invasion of Ukraine in 2022 and Moscow’s subsequent blocking of all resolutions

about the war.⁵⁵ One fear is that the Security Council’s evident paralysis—in part the result of its inability to modify its membership and voting procedures—has rendered it illegitimate. The hope is that a reformed UNSC could regain much of its diminished legitimacy by acting more credibly and decisively on future matters of war and peace.

While reform proposals span procedural and membership changes, the core reform question is whether to expand the “P5,” the five permanent members of the Security Council that hold a veto: the United States, Russia, China, the United Kingdom, and France.⁵⁶ P5 countries represent less than half of global GDP and one quarter of the world’s population. Major countries and entire regions, including Africa, Latin America, South Asia, and the Middle East, are excluded from permanent membership.

Despite the Biden administration’s support for new permanent members, and a significant global outcry over the lack of reform, we assess the odds of reforming UNSC permanent membership to be low in the short to medium term.⁵⁷ There simply are too many conflicting interests within and outside the P5 to rate the prospects much higher. Nonetheless, addressing these problems remains an opportunity to act on a symbolically and substantively critical part of the global agenda, and a chorus of reform-minded voices is currently backing such moves.⁵⁸

55 Shelby Magid and Yulia Shalomov, “Russia’s veto makes a mockery of the United Nations Security Council,” The Atlantic Council, March 15, 2022, <https://www.atlanticcouncil.org/blogs/ukrainealert/russias-veto-makes-a-mockery-of-the-united-nations-security-council/>; “Security Council Fails to Adopt Resolution Condemning Moscow’s Referenda in Ukraine’s Occupied Territories, as Permanent Member Employs Veto,” Reliefweb, October 1, 2022, <https://reliefweb.int/report/ukraine/security-council-fails-adopt-resolution-condemning-moscows-referenda-ukraines-occupied-territories-permanent-member-employs-veto>.

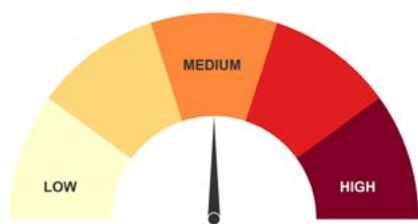
56 Anjali Dayal and Caroline Dunton, “The U.N. Security Council Was Designed for Deadlock — Can it Change?,” The United States Institute of Peace, March 1, 2023, <https://www.usip.org/publications/2023/03/un-security-council-was-designed-deadlock-can-it-change>.

57 Missy Ryan, “U.S. seeks to expand developing world’s influence at United Nations,” The Washington Post, June 12, 2023, <https://www.washingtonpost.com/national-security/2023/06/12/biden-un-security-council-reform/>.

58 Rajeev Agarwal, “After the G20, Can India Make Progress on UN Security Council Reform?,” The Diplomat, September 25, 2023, <https://thediplomat.com/2023/09/after-the-g20-can-india-make-progress-on-un-security-council-reform/>.

7

The High Seas Treaty is ratified, advancing collective management of the world's oceans



The world's five oceans, which together cover 71 percent of Earth's surface, have come under threat from a range of human activities, including overfishing, plastics pollution, and climate change. Decades after the UN Convention on the Law of the Sea (UNCLOS) came into force, many of its most ambitious provisions remain in limbo. The recently adopted Biodiversity Beyond National Jurisdiction Treaty

(commonly referred to as the High Seas Treaty), however, might just become a breakout exception in 2024 if sixty countries ratify it, allowing it to enter into force.⁵⁹

The High Seas Treaty provides a framework for managing oceanic ecosystems. Among other measures, it builds capacity around marine technology, creates new marine-area management tools, establishes processes for environmental-impact assessments, and provides technical support to developing countries, all in the service of effective global stewardship of oceanic resources.⁶⁰

The treaty will go a long way toward preserving oceanic fisheries, but that's not all. The Earth's oceans account for half of the planet's oxygen, absorb one-quarter of carbon-dioxide emissions, and act as a sink for 90 percent of the excess heat generated by anthropogenic emissions.⁶¹ By managing the ocean's biodiversity, the High Seas Treaty also will help preserve the oceans' capacity to assist in managing the effects of anthropogenic climate change.

Another area to watch: the exploitation of deep-seabed resources contemplated under UNCLOS's Part XI, driven by advances in extraction technologies. Although the High Seas Treaty does not have jurisdiction over deep-sea mining, ratification of the treaty might convince countries that if they can act in concert to manage the living resources of the sea, then they can also agree to do the same for the resources on the seabed.⁶²

59 "High Seas Treaty Ratification Tracker," High Seas Alliance, last accessed January 26, 2024, <https://highseasalliance.org/treaty-ratification/>.

60 "High Seas Treaty: a global deal decades in the making," Economist Impact Unit, March 9, 2023, <https://impact.economist.com/ocean/biodiversity-ecosystems-and-resources/high-seas-treaty-a-global-deal-decades-in-the-making>.

61 Todd Woody, "The sea is running out of fish, despite nations' pledges to stop it," National Geographic, October 8, 2019, <https://www.nationalgeographic.com/science/article/sea-running-out-of-fish-despite-nations-pledges-to-stop>; "The ocean – the world's greatest ally against climate change," The United Nations, last accessed January 26, 2024, <https://www.un.org/en/climatechange/science/climate-issues/ocean>.

62 "Treaty To Protect High Seas Too Late To Stop Mining," CodeBlue, July 3, 2023, <https://codeblue.galencentre.org/2023/07/03/treaty-to-protect-high-seas-too-late-to-stop-mining/>.

8 Supply chains for critical minerals begin to be reoriented



A decarbonized global economy requires a consistent supply of critical minerals, including lithium, cobalt, copper, nickel, and rare-earth elements. Like the fossil fuels that have powered the modern industrial economy, critical minerals are unevenly distributed in the earth’s crust. Frequently, there is a geographic divide between where they are mined and processed versus where they are consumed as components

in batteries, wind turbines, and other technologies. Source countries often are in the Global South, especially Latin America and Africa, and in China, which also has managed to capture much of the world’s output through contracting or outright purchase of mines and other facilities.⁶³ But as with oil and natural gas, critical minerals are consumed everywhere in the world, disproportionately in the wealthiest countries that boast the largest consumer markets and fastest energy transitions.

There is enormous interest within both producer and consumer countries in reorienting the global supply chains of such minerals. The United States and its allies and partners in East Asia and Europe want to move supply chains away from China, while producer nations want to add processing and manufacturing value to their operations so that they aren’t only exporters of raw materials.⁶⁴ A reset of global supply chains would require consumer countries such as the United States to envision new models of working with producer countries, and begin crafting equitable and mutually beneficial partnerships with them.⁶⁵ Such partnerships could result in consumer countries securing their supply chains while producer countries build capabilities for processing and manufacturing critical minerals based on sound environmental, social, and governance principles. Doing so would benefit producer economies (and their local communities) beyond the gains provided by simple export of unprocessed raw materials.

Keep an eye on whether policymakers in producer and consumer countries seize such an opening starting in 2024 and begin the hard—but ultimately worthwhile—work of reorienting global supply chains for critical minerals around new models.



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63 Mark Burton, “Why the Fight for ‘Critical Minerals’ Is Heating Up,” Bloomberg News, November 20, 2023, <https://www.bloomberg.com/news/articles/2023-11-20/critical-minerals-china-s-dominance-as-supplier-is-a-problem-for-the-west>; Christina Lu, “Beijing Tightens Its Grip on the Critical Minerals Sector,” Foreign Policy, November 7, 2023, <https://foreignpolicy.com/2023/11/07/china-critical-mineral-rare-earth-supply-chain-electric-vehicle/>.

64 Zainab Usman and Alexander Csandi, “How Can African Countries Participate in U.S. Clean Energy Supply Chains?,” Carnegie Endowment for International Peace, October 2, 2023, <https://carnegieendowment.org/2023/10/02/how-can-african-countries-participate-in-u.s.-clean-energy-supply-chains-pub-90673>.

65 Reed Blakemore and Paddy Ryan, “One year after the IRA, the hard work to build resilient mineral supply chains is only beginning,” The Atlantic Council, August 16, 2023, <https://www.atlanticcouncil.org/blogs/energysource/one-year-after-the-ira-the-hard-work-to-build-resilient-mineral-supply-chains-is-only-beginning/>.



Welcome to 2034

What the world could look like in ten years, according to nearly 300 experts

Picture a world with competing power centers, an unstable Russia stumbling into its post-Putin era, a nuclear-armed Iran emerging in the midst of an unruly nuclear age, and a United Nations incapable of carrying out its core functions—including convening the world’s countries to tackle problems, such as climate change, that no one state can solve and that pose a grave threat to global security and prosperity.

That’s just a glimpse into the future that leading global strategists and foresight practitioners forecast when the Atlantic Council’s Scowcroft Center for Strategy and Security surveyed them in November on how they expect the world to change over the next ten years.

If this sketch leaves you gloomy, you’re in good company: Sixty percent of the experts who participated in our annual Global Foresight survey think the world will be worse off a decade hence. But despite the pessimism about the overall direction of global affairs that many expressed, their responses also turned up cause for hope when we asked more specific questions regarding geopolitics, the environment, disruptive technology, the global economy, and other domains.

The 288 respondents were mostly citizens of the United States (60 percent of those polled), with 17 percent from Europe and 11 percent from Latin America and the Caribbean. In total, respondents’ nationalities were spread across forty-eight countries.

Respondents also work in a variety of fields, including the private sector (27 percent), nonprofits (18 percent), academic or educational institutions (16 percent), government (16 percent), independent consulting (14 percent), and multilateral institutions (4 percent). They are dispersed across age ranges as well, with 10 percent between eighteen and thirty-five, 23 percent between thirty-six and fifty, 37 percent between fifty-one and sixty-five, and the remaining 29 percent aged sixty-six or older.

So what do these seasoned forecasters of the global future expect over the coming decade? Below are the survey’s ten biggest findings.

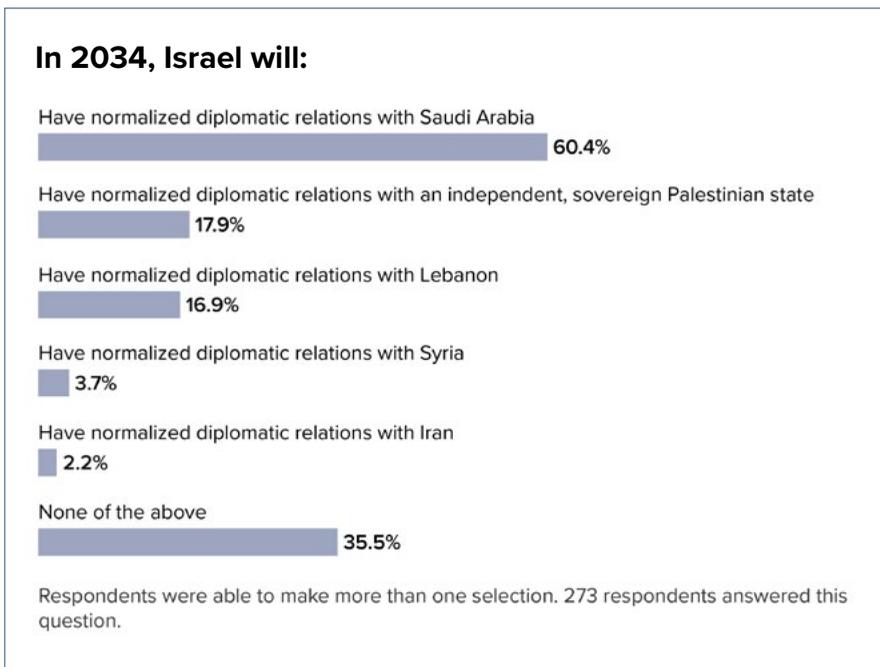
1. THE OUTLOOK FOR NORMAL RELATIONS BETWEEN ISRAEL AND SAUDI ARABIA REMAINS POSITIVE DESPITE THE ISRAEL-HAMAS WAR—AND A PALESTINIAN STATE MAY BE MORE LIKELY THAN IT SEEMS

Could the current convulsions in the Middle East portend major transformations in the decade ahead? A remarkably high percentage of respondents think so, given that the survey was fielded after the October 7 Hamas terrorist attacks against Israel and in the throes of the ensuing war in Gaza.

The outbreak of hostilities seemed to deal a big blow to progress that Saudi and Israeli leaders had been making toward a historic agreement to normalize relations between their countries.⁶⁶ Some experts, in fact, have argued that one of the main goals of the October 7 attacks was to derail the deal.⁶⁷

Nevertheless, a clear majority of respondents—around 60 percent—expect Israel to have normalized diplomatic relations with Saudi Arabia by 2034, suggesting that the underlying conditions that had been drawing the two countries together prior to war engulfing the region could outlast the fighting and remain salient.⁶⁸

Perhaps even more surprising, nearly one in five respondents believes that by 2034 Israel will have normalized diplomatic relations with an independent, sovereign Palestinian state. While this was a minority view, it indicates an alternative reading of the devastation of the last few months: that in the long run the violence that makes peace seem such a remote possibility could ultimately reinvigorate



66 “‘Basic Framework’ in place for Israel-Saudi normalization, US says,” The Times of Israel, September 30, 2023, <https://www.timesofisrael.com/basic-framework-in-place-for-israel-saudi-normalization-us-says/>.

67 Alan Pino, “What was Hamas thinking? And what is it thinking now?,” The Atlantic Council, October 16, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/what-was-hamas-thinking-and-what-is-it-thinking-now/>.

68 Daniel E. Mouton, “The post-October 7 US strategy in the Middle East is coming into focus,” The Atlantic Council, November 21, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/the-post-october-7-us-strategy-in-the-middle-east-is-coming-into-focus/>.

calls for a two-state solution to the Israeli-Palestinian conflict. A slightly smaller percentage of respondents also anticipate normalized relations between Israel and Lebanon a decade from now.

Even if all this were to occur, however, don't expect peace to break out all over the region. Few experts believe that Israel will have normalized relations with Syria (4 percent) or Iran (2 percent) by 2034.

2. THERE ARE GROWING DOUBTS ABOUT CHINA SEEKING TO FORCIBLY SEIZE TAIWAN

Those surveyed are more convinced of ongoing political stability in China than in other world powers. For example, 86 percent believe that the Chinese Communist Party will still be in power by 2034, while only 3 percent expect the opposite. Only one respondent thinks that the country will become a failed state over the coming decade, a figure that rounds down to 0 percent of the total. For the United States, that figure is 5 percent. For Russia, it's 11 percent.

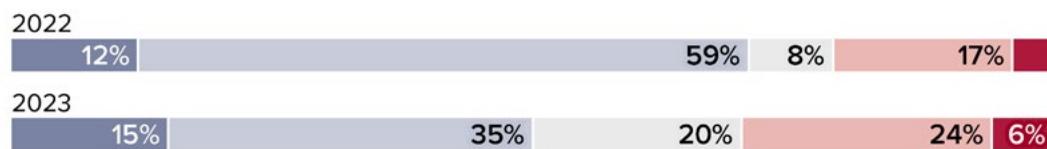
This expert consensus cuts against speculation among some observers that recent developments such as the country's economic struggles and the protests that brought Xi Jinping's "zero COVID" policy to an abrupt end could threaten the regime.⁶⁹

Yet the survey results also cast doubt on another narrative about China—more prominent earlier this century—as the unstoppable future global hegemon. Perceptions of Beijing could be starting to shift.

On one of the most pressing issues on the horizon—whether China will attempt to retake Taiwan by force in the coming years—respondents expressed some notable skepticism. While half expect this

Within the next ten years, China will attempt to retake Taiwan by force.

■ Strongly agree
 ■ Somewhat agree
 ■ Don't know
 ■ Somewhat disagree
 ■ Strongly disagree



282 respondents answered this question

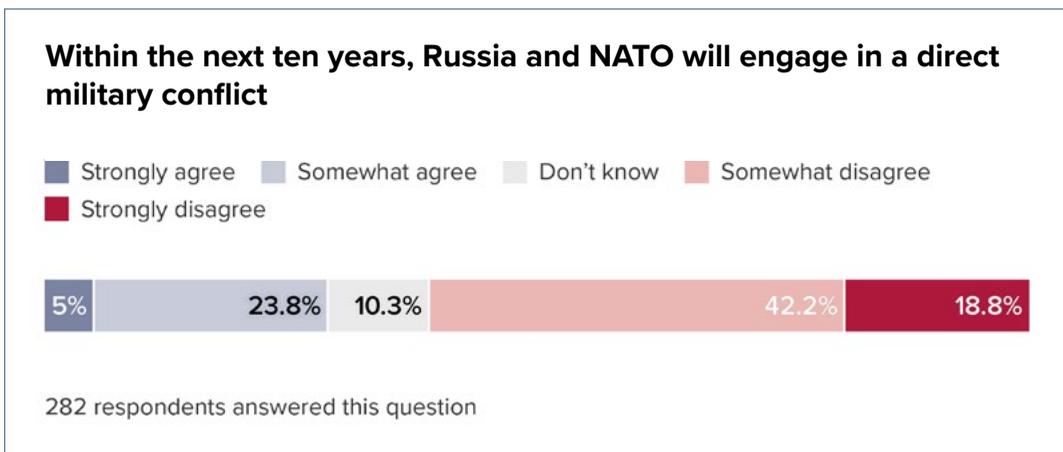
69 The Rhodium Group's China Team and the Atlantic Council's Geoeconomics Center, "Running out of road: China Pathfinder 2023 annual scorecard," The Atlantic Council, October 4, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/report/running-out-of-road-china-pathfinder-2023-annual-scorecard/>; Jeremy Mark and Michael Schuman, "China's Faltering 'zero COVID' policy: Politics in command, economy in reverse," The Atlantic Council, May 11, 2022, <https://www.atlanticcouncil.org/in-depth-research-reports/report/chinas-faltering-zero-covid-policy-politics-in-command-economy-in-reverse/>.

to occur within the next ten years, the proportion who foresee such a military operation has gone down substantially from 70 percent of respondents when we asked this same question in last year's survey.⁷⁰ Also significant: One of the big changes from 2022 to 2023 is an increase in the percentage of experts who state that they “don't know” whether China will try reunification by force.

3. BRACE FOR UPHEAVAL IN RUSSIA, INCLUDING A POSSIBLE RUSSIA-NATO CONFLICT

Mark your calendars: Sometime in the next decade, according to many respondents, a new leader will likely assume control of Russia—under unknown circumstances and amid potential turmoil. In December Vladimir Putin, who has dominated Russian politics since 1999, announced plans to do what he has twice altered Russia's constitution to make possible: seek more time in power. He is widely expected to win the country's March presidential election, but the experts we surveyed do not expect his rule to last the decade: 71 percent say that he will not still be president of Russia by 2034, and a further 22 percent are not sure.

Will age end Putin's rule—he will be eighty-two in 2034—or will political events intervene? A large number of survey respondents expect substantial turmoil in Russia over the next decade. In a similar result to one of the biggest findings from last year's survey, 35 percent of respondents believe that Russia will break up internally in the coming ten years because of developments such as revolution, civil war, or political disintegration.⁷¹ For those who think that Putin will no longer be president in 2034, this figure rises to 40 percent. Even among those who think Putin will still rule Russia in 2034, nearly one quarter nevertheless expect the country to break up. Around 11 percent of respondents cited Russia as the country that is not currently a failed state but is most likely to become one within the next ten years—lower than in last year's survey and a small minority, but still the highest percentage that any country received.⁷²



70 Mary Kate Aylward, Peter Engelke, Uri Friedman, and Paul Kielstra, “Welcome to 2023: What the world could look like in ten years, according to more than 160 experts,” The Atlantic Council, January 9, 2023, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/welcome-to-2033/#top>.

71 Aylward, et al., “Welcome to 2023.”

72 Aylward, et al., “Welcome to 2023.”

Only 6 percent of respondents believe Putin will be able to achieve his war aim of turning Ukraine into a Russian client state within the next decade. But how any failures in Ukraine affect his political longevity remains to be seen. Even the June march on Moscow by Wagner Group commander Yevgeniy Prigozhin ultimately has not seemed to endanger Putin's grip on power, given the swift suppression of the mutiny and Prigozhin's death two months later in a plane crash.

Those who expect Russia to break up are more likely to foresee Moscow engaging in worrisome activity: Thirty-eight percent believe that the country and NATO will fight a war in the next ten years, compared with 25 percent of other respondents, and 20 percent think that Russia will use a nuclear weapon in the decade ahead, compared with 11 percent of other experts.

Overall, in another significant finding, nearly one in three respondents (29 percent) at least somewhat agree that Russia and NATO will engage in a direct military conflict over this timeframe—a slightly higher percentage than in last year's survey.⁷³

4. THE UNITED STATES' MILITARY DOMINANCE WILL ENDURE AND THE PROSPECTS FOR OTHER ELEMENTS OF ITS POWER ARE LOOKING UP, WITH DIPLOMATIC CLOUT AN EXCEPTION

By 2034, according to a large majority (73 percent) of respondents, the world will be multipolar, with multiple centers of power, in contrast to the unipolar moment that followed the collapse of the Soviet Union, leaving the United States as the last superpower standing.

But at the same time, most also expect the United States to retain a preponderance of power across several key dimensions. Eighty-one percent of respondents foresee the United States remaining the world's dominant military power in 2034. A similarly large majority (79 percent) anticipate that US security alliances and partnerships in Europe, Asia, and the Middle East, forged over the course of the Cold War and unipolar moment, will endure—a notable expectation given that these alliances and partnerships could be a major subject of debate during the 2024 US presidential election. Notably, a smaller majority—63 percent—believe the United States will be the dominant source of technological innovation by 2034, and just over half (52 percent) say it will be the dominant economic power.

This level of confidence in the longevity of US power is, in fact, greater than the level respondents expressed when we conducted our last survey at the end of 2022.⁷⁴ The exception is in the diplomatic realm, where once again only one third of respondents expected the United States to be the world's dominant diplomatic power in ten years.

Even experts who expect the United States' global military dominance to endure don't think that will be enough to sustain a sole superpower status. Those who envision the United States as the dominant military power of 2034 are just as likely to anticipate that the world will be multipolar in that year (73 percent) as those who do not believe US military dominance will last the decade (72 percent). And while those who foresee future US military dominance are more likely to also expect the United States to maintain its European, Asian, and Middle Eastern security alliances and partnerships, it's important to keep in mind that sustaining those alliances and partnerships also requires the kind of US diplomatic clout that respondents are less sanguine about going forward.

⁷³ Aylward, et al., "Welcome to 2023."

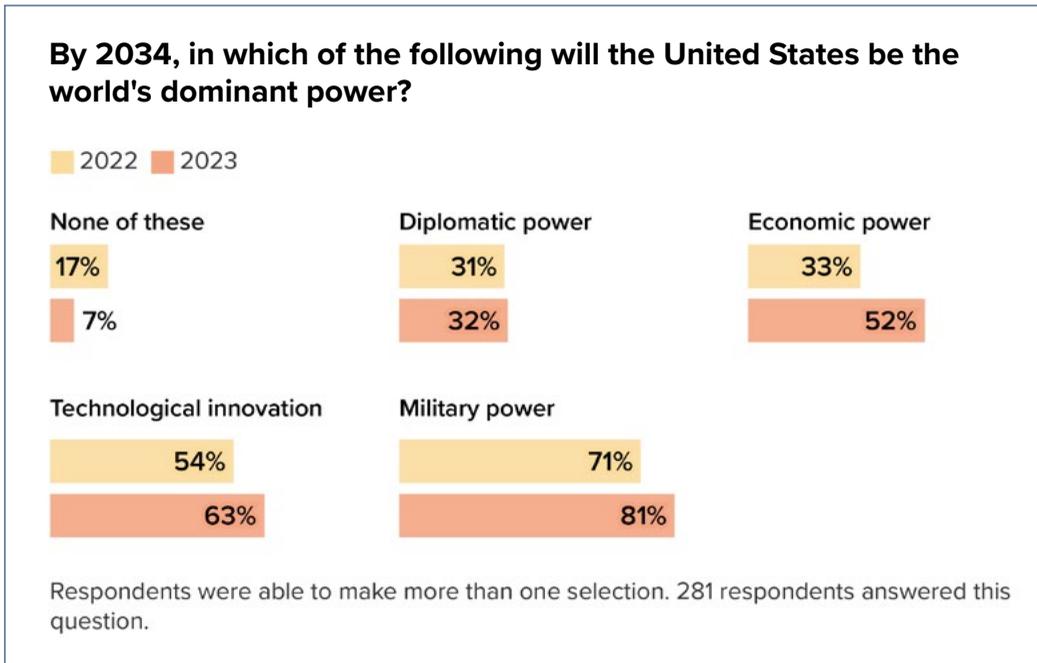
⁷⁴ Aylward, et al., "Welcome to 2023."

With these dynamics at play in the coming decade, will Europe turn all the talk about “strategic autonomy” into action by taking more responsibility for its own security?⁷⁵ Only 31 percent of respondents believe that the continent will have achieved “strategic autonomy” by 2034. Even Europeans themselves are largely split: Forty percent think they will have such autonomy but 36 percent disagree. Among non-European respondents, half don’t see it happening while only 29 percent do.

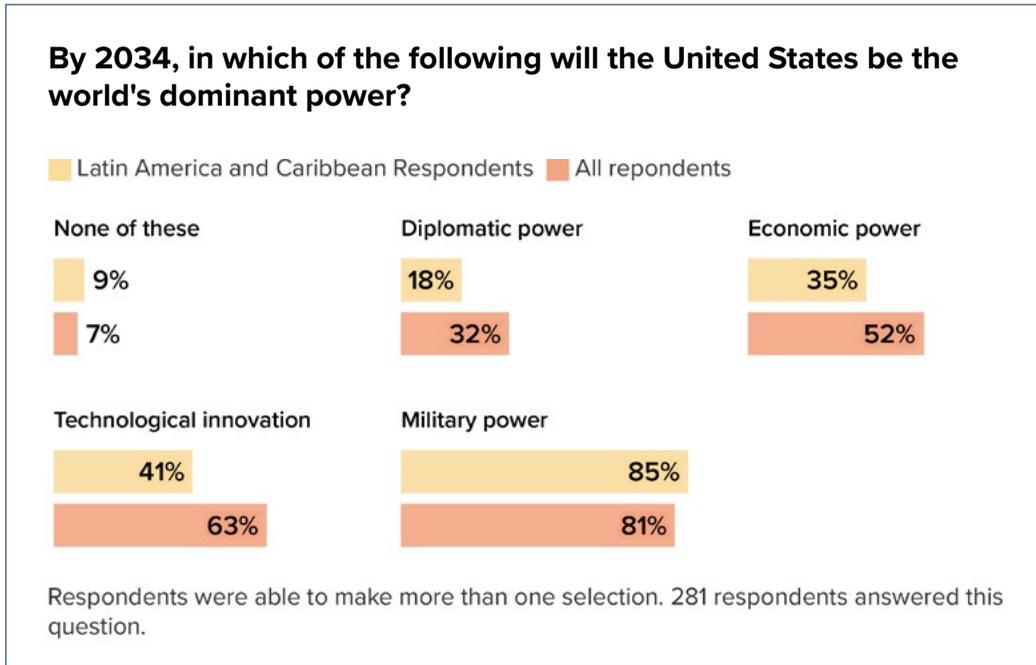
The overall survey data also reflects mostly US perspectives. Sorting respondents by country of citizenship reveals more diverse views on the nature and longevity of US power. For example, while respondents from Latin America and the Caribbean are slightly more likely than respondents overall to expect US military dominance to remain in 2034, they are far less likely than other survey takers to say the same about US power in other domains.

A startling 30 percent of Latin American respondents also predict that the United States will break up internally in the coming decade for reasons such as revolution, civil war, or political disintegration (compared with 9 percent among other respondents).

That speaks to a broader potential vulnerability for the United States over the coming decade that doesn’t fit neatly into a single category of power: its domestic political divisions and challenges. Nearly 12 percent of respondents overall expect the United States to break up by 2034—a much lower percentage than those who thought the same about Russia, as noted above, but a higher percentage than those who said the same about other powers such as China (7 percent) and India (6 percent). Around 5 percent of respondents identified the United States as the country that is not



75 Olivier-Rémy Bel, “What European strategic autonomy requires: smarter talk, more action,” The Atlantic Council, January 7, 2021, <https://www.atlanticcouncil.org/blogs/new-atlanticist/what-european-strategic-autonomy-requires-smarter-talk-more-action/>.



currently a failed state but is most likely to become one within the next ten years—fewer than those who pointed to Russia (11 percent) and Pakistan (8 percent), but roughly on par with the percentage of respondents who cited Afghanistan, Argentina, and Lebanon. Only small minorities are expressing these views, but they are nevertheless worth heeding.

5. RESPONDENTS HAVE LOW CONFIDENCE IN THE UNITED NATIONS

While many respondents expect the world in ten years to be multipolar, they also foresee challenges with the international organizations that could mediate among competing centers of power. The multilateral institutions established after World War II—the United Nations (UN), the World Bank, and the International Monetary Fund (IMF), among others—were designed in part as places for rival powers to hash out their differences without resort to military force. The experts we surveyed, however, don't expect these institutions to be fully capable of playing this role over the coming decade.

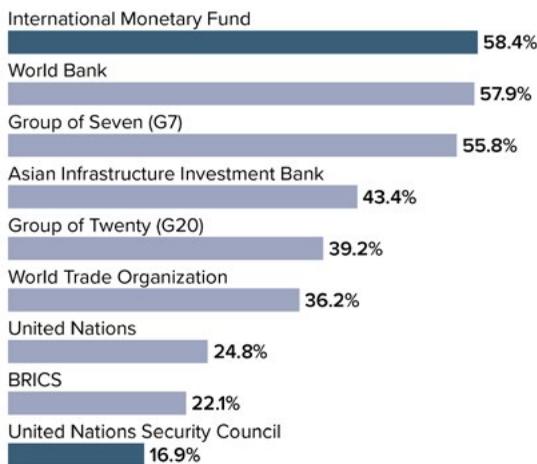
The most striking lack of confidence is in the United Nations. A mere 2 percent of respondents say that by 2034 the organization as a whole will be entirely capable of solving the challenges core to its mission, with a further 23 percent stating that it will be somewhat capable of doing so. As for the UN Security Council, nobody—literally zero respondents—believes that it will be entirely capable, and just 17 percent expect it will be somewhat so. This contrasts with 68 percent who think that the Security Council will display varying degrees of incapacity.

This lack of confidence holds across survey demographics. What seems to set apart those with at least some confidence in the Security Council is a conviction that it will reform itself: Seventy-six percent of those who think that the Security Council will be somewhat capable of executing on its mission in 2034 also believe that at least one new permanent member will be added to the body within the next ten years (the most likely candidates: India, Germany, and Japan). Among those who

say the Security Council will be incapable of carrying out its functions, only 53 percent think at least one new permanent seat will be added.

The United Nations is just the clearest example of muted faith in multilateral institutions. Very few respondents expect any of the major international bodies we asked about to be entirely capable of doing their jobs. Nevertheless, over half of the experts we surveyed believe that the IMF, World Bank, and Group of Seven (G7) will be at least somewhat capable of doing so. Even this confidence, though, may reflect the largely Western perspective of our survey pool rather than a wider global consensus. Only 36 percent of respondents from Latin America think that by 2034 the IMF will be at least somewhat capable of addressing challenges central to its mission, and just 35 percent say the same of the G7.

Which institutions do respondents have most confidence in?



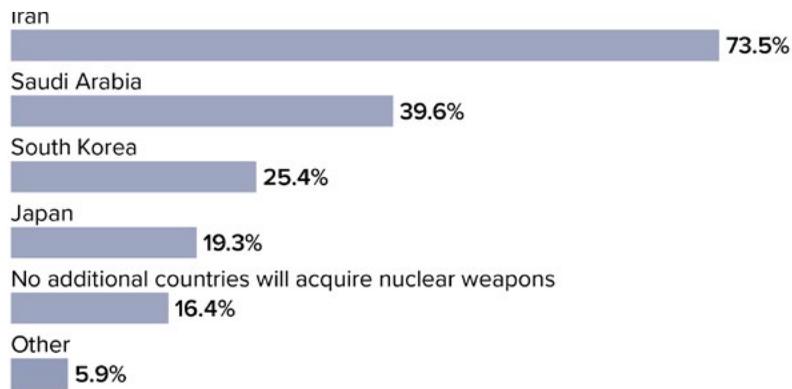
Percentage of respondents who expect the organizations to be "entirely capable" or "somewhat capable" of solving challenges core to their mission by 2034. 272 respondents answered this question.

6. THE NEXT NUCLEAR AGE WILL BE AN UNGOVERNED ONE—WITH MORE WEAPONS, FEWER GUARDRAILS, AND THE RESURGENT THREAT OF NUCLEAR TERRORISM

We appear to be entering a third nuclear age following those that occurred during the Cold War and post-Cold War periods.⁷⁶ And a lack of international governance is likely to be one of the new nuclear age's defining features, as geopolitical competition intensifies, and nuclear arms-control treaties unravel. What happens when the guardrails for limiting the buildup, spread, and use of nuclear weapons are removed?

⁷⁶ Uri Friedman, "A Third Nuclear Age," *The Atlantic*, August 2, 2022, <https://www.theatlantic.com/ideas/archive/2022/08/north-korea-kim-jong-un-third-nuclear-weapon-age/670993/>.

Which of the following countries will have nuclear weapons within the next ten years?

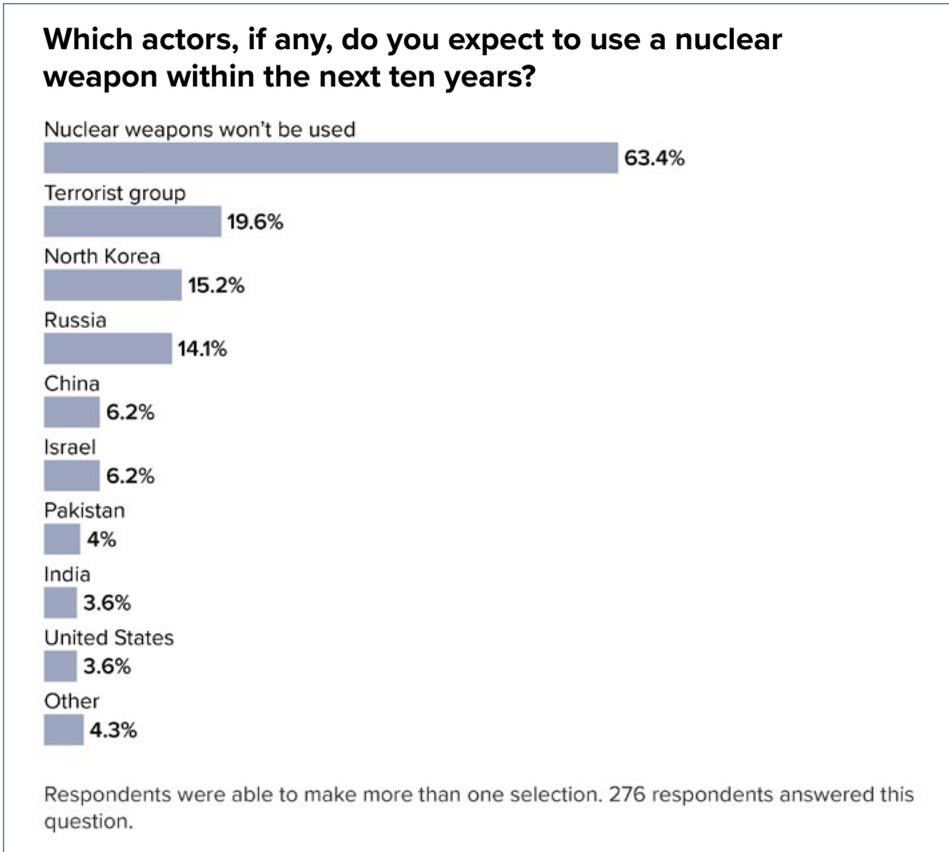


Respondents were able to make more than one selection. 275 respondents answered this question.

A huge majority of respondents foresees proliferation: Eighty-four percent say that at least one currently non-nuclear state will obtain these weapons by 2034. The most likely country, cited by 73 percent of experts, is Iran, but considerable numbers also expect Saudi Arabia (40 percent), South Korea (25 percent), and Japan (19 percent) to join the nuclear club. These numbers are similar to the results from last year's survey, but one difference is worrying.⁷⁷ In the survey conducted at the end of 2022, on average respondents thought that 1.4 new actors would have nuclear weapons within a decade. This has now risen to 1.7. Though this may seem like a small increase, it suggests that compared with 2022, experts now believe nuclear weapons will spread more quickly—about 21 percent more quickly, in fact.

When asked about which actors they expect to actually use a nuclear weapon within the next ten years, 20 percent of our experts said a terrorist group—up from just 3 percent last year. In this year's survey we included terrorist groups explicitly among our multiple-choice options whereas in last year's we included a more general "other state or a non-state actor" option, which may account for some of the year-over-year difference. But the fact that one in five respondents is forecasting such an alarming scenario is still noteworthy and concerning. Around 14 percent of respondents expect Russia to use a nuclear weapon by 2024, while roughly 15 percent forecast that North Korea will do so. But on a more positive note: More than 60 percent of respondents believe nuclear weapons won't be used over the coming decade.

77 Aylward, et al., "Welcome to 2023."



Even if international institutions were capable of restraining nuclear proliferation, our respondents see little demand for them to do so. Only 3 percent think that the greatest expansion of global cooperation over the next ten years will occur in the realm of nuclear nonproliferation.

7. NEITHER RUSSIA NOR UKRAINE IS LIKELY TO ACHIEVE ALL ITS WAR AIMS, BUT MANY SEE A FUTURE FOR UKRAINE IN THE EUROPEAN UNION AND NATO

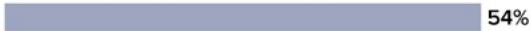
Among Ukraine’s primary objectives in its war with Russia is to retake the territory in the eastern part of the country and the Crimean peninsula that Russia seized during its first incursion into the country in 2014 and second invasion in 2022. While only 12 percent of survey respondents expect Ukraine to regain control of its pre-2014 territory by 2034, just under half (48 percent) anticipate that it will reassert authority over the Ukrainian territory it held prior to Russia’s full-scale invasion in 2022.

As for Putin’s effort to subjugate Ukraine, the long-term outlook for Moscow doesn’t look good: A mere 6 percent of respondents think that Ukraine will end up dependent on Russia or otherwise in its orbit by 2034.

Ukraine’s goals also include joining NATO and the European Union as a means of integrating with the West and ensuring its future security. A slight majority of respondents (54 percent) expect to see Ukraine in the European Union in the next ten years—a process, in fact, that Kyiv and Brussels have already

In 2034, Ukraine will be:

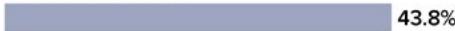
A member of the European Union



An independent, sovereign state in control of the territory it held before Russia's 2022 full-scale invasion of the country



A member of NATO



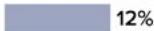
An independent, sovereign state in control of the territory it held before Russia's 2014 invasion of the country



Within Russia's orbit and dependent upon it



None of the above



Respondents were able to make more than one selection. 276 respondents answered this question.

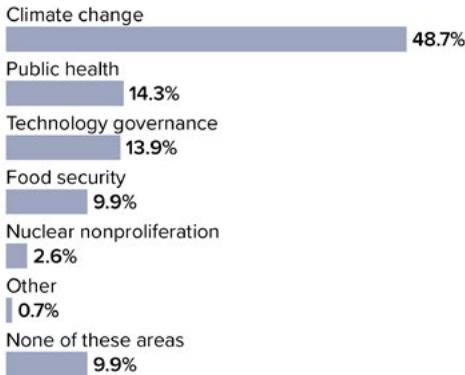
set in motion (though plenty of hurdles remain).⁷⁸ Forty-four percent also anticipate that Ukraine will have joined NATO during this period, with this prospect likely to be debated at the Alliance's upcoming summit in Washington, DC this summer. These expectations overlap with views about Ukraine's future independence and territory in perhaps predictable ways. For example, among respondents who believe that Ukraine will be a sovereign, independent state a decade from now, 64 percent say that Ukraine will also be an EU member by that time, compared with 40 percent for other respondents

8. CLIMATE CHANGE IS THE GREATEST THREAT TO GLOBAL PROSPERITY—AND A DECLINE IN EMISSIONS COULD STILL BE FAR OFF

The single biggest threat to global prosperity over the coming decade is climate change, according to a plurality of respondents, with 37 percent selecting it as their main concern—significantly ahead of war between major powers (25 percent), the second-most-cited option. Climate change is also by far the most frequently cited field in which respondents expect the greatest expansion of global cooperation over the next ten years (49 percent), well ahead of technology governance and public health as the next-most-identified areas at roughly 14 percent each. Notably, when we asked this question in 2022 a significantly higher 25 percent of respondents picked public health. As the

78 Laurence Norman and Daniel Michaels, "EU Will Start Membership Talks with Ukraine, but Bloc Fails to Agree on Aid," *The Wall Street Journal*, December 14, 2023, <https://www.wsj.com/world/europe/snubbed-by-the-u-s-on-aid-ukraine-turns-to-bickering-europe-ce133b53>.

In which of the following fields do you expect the greatest expansion of global cooperation over the next ten years?

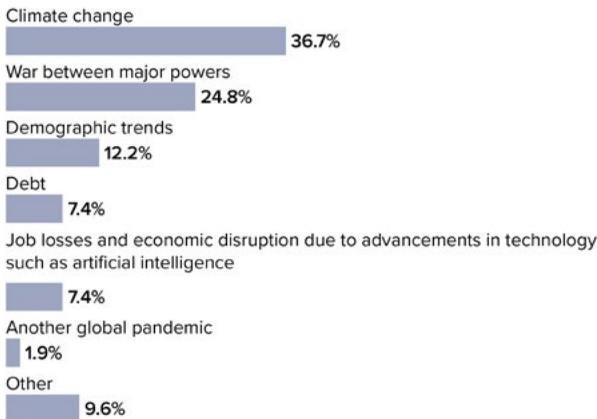


Respondents could only make one selection. 273 respondents answered this question.

COVID-19 pandemic recedes, the priority placed on this domain may be lessening even though the risk of more pandemics, which climate change may exacerbate, hasn't diminished.⁷⁹

Views on risk and response are connected. Those who see climate change as a more serious threat expect more growth in international collaboration to counteract it, with 63 percent of them identifying the issue as the one that will generate the greatest increase in global cooperation; the

What is the single biggest threat to global prosperity over the next ten years?



270 respondents answered this question

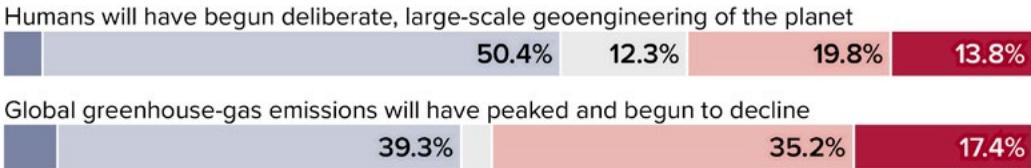
79 Oluwayemisi Ajumobi, "A warming world could unleash dangerous new pathogens. Metagenomics early warning tools are vital for pandemic prevention," The Atlantic Council, October 30, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/a-warming-world-could-unleash-dangerous-new-pathogens-metagenomics-early-warning-tools-are-vital-for-pandemic-prevention/>.

inverse is also true. In one interesting wrinkle in the data, respondents who work in the private sector, which will have to create or commercialize the technology needed to mitigate climate change, seem less concerned about the potential impact of climate change on global prosperity: Only 23 percent identify it as the top risk, relative to 32 percent who point to a major-power war.

The relative optimism about countries’ ability to work together to address climate change is tempered by relative pessimism about how much that cooperation will achieve in terms of reducing greenhouse gas emissions. Fifty-three percent of respondents do not believe that global greenhouse gas emissions will have peaked and begun to decline by 2034, compared with 44 percent who think they will. The Intergovernmental Panel on Climate Change says global greenhouse gas emissions need to peak before 2025 to limit global warming to 1.5 degrees Celsius above preindustrial levels.⁸⁰ The later emissions peak, the more sharply they will need to fall if countries want to meet targets set in the 2015 Paris Agreement to limit warming to 2 degrees Celsius. Perhaps in recognition of these considerations, more than half of respondents think that by 2034 humans will have begun deliberate, large-scale geoengineering of the planet to reduce the impacts of climate change or achieve other goals.

Do you agree or disagree with the following statements about the most likely conditions by 2034?

Strongly agree Somewhat agree Don't know Somewhat disagree Strongly disagree



Full statement in the survey on large-scale geoengineering read: Humans will have begun deliberate, large-scale geoengineering of the planet (such as seeding the atmosphere with aerosols) to reduce the impacts of climate change or achieve other goals. 270 respondents answered this question

80 “The evidence is clear: the time for action is now. We can halve emissions by 2030,” The Intergovernmental Panel on Climate Change, April 4, 2024, <https://www.ipcc.ch/2022/04/04/ipcc-ar6-wgiii-pressrelease/>.

9. AS SOCIAL MEDIA CONTINUES ITS DESCENT INTO TOXICITY, THE AI AGE IS DAWNING (WITH THOSE UNDER FIFTY MARKEDLY MORE CONCERNED)

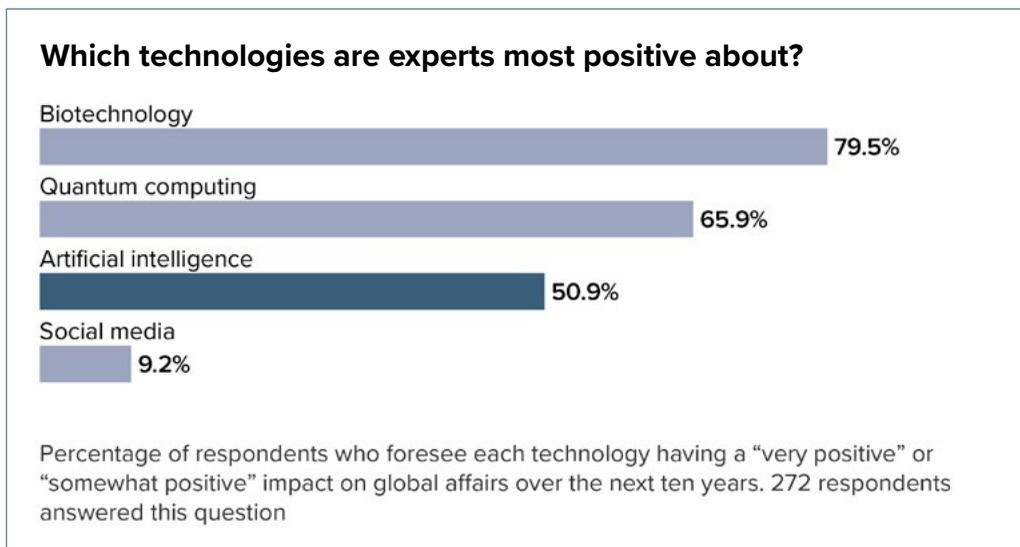
Here's the big picture on our findings regarding technology: Respondents overall have a very negative view of social media and a somewhat positive view of artificial intelligence (AI). But zoom in and the picture gets more complicated.

The wariness of social media that experts expressed in last year's survey is as widespread as ever: This year eight in ten respondents (81 percent) say that social media will, on balance, have a negative impact on global affairs over the coming ten years.⁸¹

As for AI, despite a year of high-profile speculation about today's helpful chatbot becoming tomorrow's superintelligent force beyond human control, respondents feel reasonably good. Fifty-one percent believe that AI will have a somewhat or very positive effect on global affairs in the next decade, relative to 38 percent who say the opposite.

Behind these numbers, however, are notable disagreements on AI within demographic groups. Men, for example, are more likely to envision AI having a positive impact (53 percent positive versus 36 percent negative), with women evenly split (44 percent for both positive and negative). Those who work in the private sector are much more positive about AI; all other respondents from employment groups with sufficient replies to analyze are negative or roughly evenly split.

More striking is the division between age groups, with the watershed at around fifty years old. Fifty-six percent of those over fifty forecast AI having good effects and 33 percent bad ones. The figures are almost exactly the reverse among those under fifty: Thirty-nine percent of younger respondents expect AI to have good effects over the next decade, while 52 percent expect bad effects.



81 Aylward, et al., "Welcome to 2023."

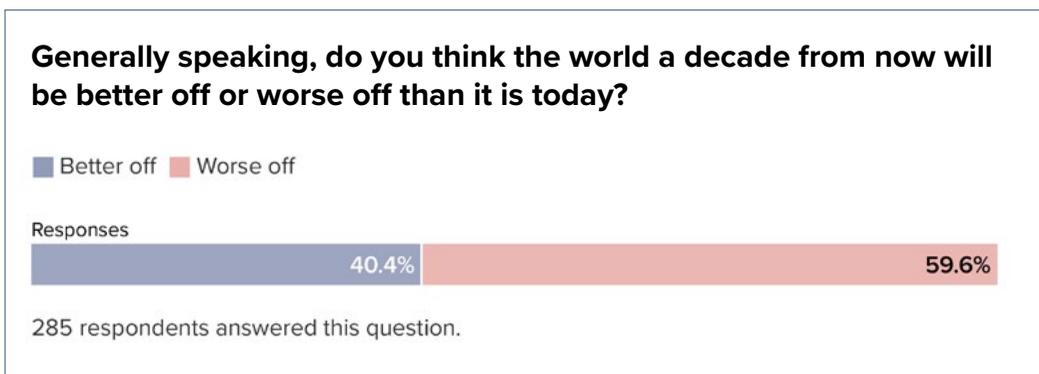
Twenty-four percent of respondents under fifty also say that technology governance will be the area that experiences the greatest expansion of global cooperation over the next decade, underscoring the greater degree of concern among younger generations. Among older respondents, this figure drops to just 9 percent.

Why might this gap in perceptions between age groups exist? It's not clear from the data, but it's possible that digital natives are more able to see the dangers of new technology. Or perhaps since younger people tend to be at lower levels of seniority in the workplace, they may be more worried about automation jeopardizing their own employment opportunities.

10. EXPERTS ARE DECIDEDLY PESSIMISTIC ABOUT THE DECADE AHEAD—NO MATTER THEIR AGE, GENDER, OR COUNTRY OF CITIZENSHIP

This year, for the first time, we posed a question that we hope to now ask on an annual basis as a means of tracking sentiment on the global outlook: “Generally speaking, do you think the world a decade from now will be better off or worse off than it is today?” Our baseline results reveal a pool of expert respondents who are more concerned than hopeful: Sixty percent say the world will be worse off while 40 percent expect it to be better off. This ratio is surprisingly widespread, with no statistically significant difference discernible when sorting the sample by gender, age, country of citizenship, or field of employment.

It's a sobering assessment—and an indicator we'll plan to monitor year after year to better understand which way the world is tending.





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Six 'snow leopards' to look out for in 2024

The snow leopards that stalk the rocky mountains of Central Asia are so elusive and well-camouflaged that they've earned the nickname "ghost of the mountains." They're out there, but exceedingly hard to spot.

These solitary big cats are a useful analogy for the global phenomena that can seem to come out of nowhere and take even the most seasoned observer by surprise. In some cases, that's because a high-profile threat has eclipsed others; we rightly worry about the proliferation of nuclear weapons, for instance, but missile proliferation receives relatively less attention. Some things are so woven into our daily lives that they become invisible, as in the case of the global shipping lanes that make it possible for us to tap "buy now" today and find a package on our doorstep tomorrow. Trends that gather momentum slowly but steadily, undetected developments, known but underappreciated risks—all of these "snow leopards" have the power to reshape the world.

This makes snow leopard-spotting an essential complement to any attempt to peer into the future. So our next-generation foresight team at the Scowcroft Center for Strategy and Security compared notes and identified six under-the-radar phenomena to watch. These are not predictions (for those, check out our list of top risks and opportunities for 2024, and our expert survey forecasting the decade ahead). What follows are trends and developments already underway whose disruptive potential, for good or for ill, we are overlooking.

In the year to come, here are six snow leopards we're keeping an eye on.

The new race to the South Pole



With a key provision of Antarctica’s governing treaty set to come up for debate in 2048, many countries are eyeing the vast fisheries and hydrocarbons there.⁸² Most forms of military and economic activities on the world’s only uninhabited continent are banned under the 1961 Antarctic Treaty, which lays out a vision of peaceful scientific inquiry and cooperation and which fifty-six countries have now signed. But with Antarctica home to an estimated 500 billion tons of oil and 300 billion to 500 billion tons of natural gas, and with 135 billion tons of oil in the Southern Ocean region, the stage is set for the continent to become yet one more arena of geopolitical competition.

The Protocol on Environmental Protection to the Antarctic Treaty, signed in 1998, stipulates that during its first fifty years it can only be modified by the unanimous agreement of all parties to the treaty.⁸³ In its current form, the protocol restricts any activities related to Antarctica’s natural resources except for those involving scientific research. But starting in 2048 any party can call for a review of the protocol, initiating a process that, while lengthy and complex, could result in a modified protocol that creates more of an opening for natural-resource exploration in Antarctica.

Notably, neither China nor the United States recognizes existing territorial claims to Antarctica made by other powers, with both reserving the right to participate in “any future uses of the region,” as the US government phrases it.⁸⁴ China sees both polar regions as strategically valuable and ungoverned spaces, and has been increasing its physical footprint in Antarctica for years—having just broken ground on its fifth research station. China is planning to construct powerful antennas at its Antarctic

82 John Garrick, “The Antarctic Treaty System is on thin ice – and it’s not all about climate change,” The Australian Strategic Policy Institute, November 12, 2021, <https://www.aspistrategist.org.au/the-antarctic-treaty-system-is-on-thin-ice-and-its-not-all-about-climate-change/>.

83 “The Protocol on Environmental Protection to the Antarctic Treaty,” Secretariat of the Antarctic Treaty, last accessed January 29, 2024, <https://www.ats.aq/e/protocol.html>.

84 “U.S. Policy for Antarctica,” U.S. National Science Foundation, last accessed January 29, 2024, <https://www.nsf.gov/geo/opp/antarct/uspolicy.jsp>.

bases that could serve two purposes: furthering legitimate scientific research, but also allowing China to gather intelligence across the Indo-Pacific region.⁸⁵

Given Antarctica’s increasing geopolitical and economic importance—from fresh water, iron, and copper resources to strategic transportation routes—it is unlikely that the protections of the original Antarctic Treaty will be renewed in their current form.⁸⁶ In the meantime, expect countries to ramp up their jockeying for position in the region, in the process undermining one of the few successful expressions of cooperative global governance.



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The climate-induced shocks to global shipping lanes

Climate change is now threatening the shipping lanes that underpin global commerce. While major supply-chain disruptions have made headlines in recent years—resulting from the COVID-19 pandemic beginning in 2020, the Suez Canal blockage in 2021, Russia’s invasion of Ukraine in 2022, and Houthi attacks on shipping vessels in the Red Sea in 2023, climate impacts are

85 Matthew P. Funaiolo, Brian Hart, Joseph S. Bermudez Jr., and Aidan Powers-Riggs, “Frozen Frontiers: China’s Great Power Ambitions in the Polar Regions,” The Center for Strategic and International Studies, April 18, 2023, <https://features.csis.org/hiddenreach/china-polar-research-facility/>.

86 María Ana Leal, “Antarctica: geopolitical and economic importance,” CEEP, May 25, 2023, <https://ceeep.mil.pe/2023/05/25/antarctica-geopolitical-and-economic-importance/?lang=en>.

poised to dominate such disturbances in the coming years.⁸⁷ The disruption to the way water moves between the Earth and the atmosphere—the patterns of rain, evaporation, condensation, and runoff that affect how much water flows through the world’s waterways—appears to be here to stay.

Global supply chains depend on these waterways. China’s “golden shipping route,” the Yangtze River, carries as much as 2.93 billion tons of cargo annually, including advanced manufacturing products.⁸⁸ But a severe summer drought in 2022 left the river at half its usual width, stopping shipping through the middle and lower sections of the river.⁸⁹ Likewise, the water levels of the Mississippi River, which sends \$130 billion in goods each year through the Port of New Orleans alone, dwindled during a major drought in late 2022 that led to \$20 billion in economic losses.⁹⁰ In both 2022 and 2023, the Rhine River, perhaps Europe’s most important inland waterway, was so low owing to drought that some ships were only carrying half their usual amount of goods.⁹¹ The capacity of the Panama Canal, which transports 40 percent of US container traffic, 5 percent of global trade, and \$270 billion in goods, took a hit, too.⁹² A 2023 drought—the region’s worst since 1950—reduced the number of ships transiting the canal each day, as well as the amount of goods each could carry, suggesting a difficult future for one of the world’s most important nodes of trade.⁹³

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- 87 Susan Helper and Evan Soltas, “Why the Pandemic Has Disrupted Supply Chains,” The White House, June 17, 2021, <https://www.whitehouse.gov/cea/written-materials/2021/06/17/why-the-pandemic-has-disrupted-supply-chains/>; Jessica Jaganathan, “Suez Canal blockage adds strain to global supply chains,” Reuters, March 26, 2021, <https://www.reuters.com/article/egypt-suezcanal-supplychains-int/suez-canal-blockage-adds-strain-to-global-supply-chains-idUSKBN2B13B/>; Eric Hamilton, “The global supply chain consequences of the Russia-Ukraine war,” University of Florida, February 21, 2023, <https://news.ufl.edu/2023/02/russia-ukraine-global-supply-chain/>; Ellen Wald, “What’s behind the attacks on ships in the Red Sea,” The Atlantic Council, December 20, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/whats-behind-the-attacks-on-ships-in-the-red-sea/>.
- 88 “Annual cargo transport on Yangtze River sets record,” Hellenic Shipping News, February 1, 2020, <https://www.hellenicshippingnews.com/annual-cargo-transport-on-yangtze-river-sets-record/>; “China’s Yangtze River Also Reports Falling Water Threatening Shipping,” The Maritime Executive, August 16, 2022, <https://maritime-executive.com/article/china-s-yangtze-river-also-reports-falling-water-threatening-shipping>.
- 89 Helen Davidson, “China drought causes Yangtze to dry up, sparking shortage of hydropower,” The Guardian, August 22, 2022, <https://www.theguardian.com/world/2022/aug/22/china-drought-causes-yangtze-river-to-dry-up-sparking-shortage-of-hydropower>.
- 90 Katie Jennings, “How The Gatekeepers Of 500 Million Tons of Cargo Power Through the Pandemic,” Forbes, September 30, 2020, <https://www.forbes.com/sites/katiejennings/2020/09/30/how-the-gatekeepers-of-500-million-tons-of-cargo-power-through-the-pandemic/?sh=1eb07789400>; Shannon Najmabadi, “Mississippi River Careens From Floods to Low Water, Threatening Barge Traffic,” The Wall Street Journal, August 5, 2023, <https://www.wsj.com/articles/mississippi-river-careens-from-floods-to-low-water-threatening-barge-traffic-a6d5758d>.
- 91 Philip Oltermann, “Rhine water levels fall to new low as Germany’s drought hits shipping,” The Guardian, August 12, 2022, <https://www.theguardian.com/world/2022/aug/12/germany-drought-rhine-water-levels-new-low>; Lucy Handley, “Drought threatens major European river trade route with ripples across the continent,” CNBC, August 4, 2023, <https://www.cnbc.com/2023/08/04/drought-threatens-major-european-river-trade-route-with-ripples-across-the-continent.html>; “Low water hampers Rhine river shipping in Germany,” Reuters, October 5, 2023, <https://www.reuters.com/business/autos-transportation/low-water-hampers-rhine-river-shipping-germany-2023-10-05>.
- 92 Lori Ann LaRoco, “U.S. trade dominates Panama Canal traffic. New restrictions due to ‘severe’ drought are threatening the future of the shipping route,” CNBC, June 25, 2023, <https://www.cnbc.com/2023/06/24/us-trade-dominates-panama-canal-traffic-a-drought-is-threatening-it.html>; Marianna Parraga and Elida Moreno, “Panama Canal to further reduce daily transits if drought continues,” Reuters, September 12, 2023, <https://www.reuters.com/world/americas/panama-canal-further-reduce-daily-transits-if-drought-continues-2023-09-12/>.
- 93 Wailin Wong and Paddy Hirsch, “A traffic jam in the drought-stricken Panama Canal may affect global supply chains,” NPR, September 8, 2023, <https://www.npr.org/2023/09/08/1198525649/a-traffic-jam-in-the-drought-stricken-panama-canal-may-affect-global-supply-chai>; Peter Eavis, “Drought Saps the Panama Canal, Disrupting Global Trade,” The New York Times, November 1, 2023, <https://www.nytimes.com/2023/11/01/business/economy/panama-canal-drought-shipping.html>.

With climate change expected to make extreme weather more frequent, a big rethink of how goods move around the globe is necessary. Adaptation strategies, including refitting ships for shallower water or dredging and reengineering rivers, are costly and fail to solve the larger problem.⁹⁴ A future with reliable transportation of goods will require rebuilding the global shipping map, from its hubs to its methods of transport, along with new technologies to navigate the world's rapidly changing waterways.



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Before she joined the Atlantic Council, Sherry worked as an intern for the Wisconsin State Legislature and as a research assistant for a PhD candidate on projects focused on forced labor, migration, and female participation in governance in post-Soviet Central Asia. She graduated with a bachelor's degree in political science and a certificate in history from the University of Wisconsin.



Purdue University/John Underwood

Cans of paint may prove to be an important solution in addressing the climate crisis—a very specific white paint, to be exact. A professor at Purdue University, Xiulin Ruan, and his team have developed a highly specialized white paint that can reflect 98 percent of the sun's rays away from the Earth. It's a record that goes well beyond what the best existing white paints can do. Coating structures with this paint lowers their surface heat, keeps them cool without requiring energy or generating waste heat, and reduces air-conditioning needs by up to 40 percent.⁹⁵ Purdue's paint stands out as a leading offering, but cool coatings, even those not as advanced as the one developed at Purdue, provide a number of benefits.

94 Petra Sorge, Wilfried Eckl-Dorna, and Carolyn Look, "Europe's Most Important Trade Route Is at Risk Due to Climate Change," Bloomberg News, July 31, 2023, <https://www.bloomberg.com/news/features/2023-07-31/low-rhine-river-levels-puts-europe-s-most-important-trade-route-at-risk?sref=a9fBmPFG>; Najmabadi, "Mississippi River Careens."; Eavis, "Drought Saps the Panama Canal."

95 Cara Buckley, "To Help Cool a Hot Planet, the Whitest of White Coats," The New York Times, July 12, 2023, <https://www.nytimes.com/2023/07/12/climate/white-paint-climate-cooling.html>.

Imagine painting 1 percent or 2 percent of the entire planet in this heat-reflective white. According to one calculation, this could entirely offset the additional warming associated with ongoing carbon emissions.⁹⁶ Though applying paint to structures at that scale would probably be impractical and costly, applying it to cars, roofs, and roads worldwide would create islands of coolness in a warming world.⁹⁷

The world's growing number of city dwellers would also benefit. Buildings, roads and other infrastructure absorb and trap much more heat than greener natural landscapes. The retention and release of this heat, among other factors, can cause an urban heat-island effect, with daytime temperatures up to 7 degrees Fahrenheit higher in cities than in rural areas.⁹⁸ Already, 56 percent of the global population resides in cities, and seven in ten people will live in cities by 2050.⁹⁹ As temperatures around the world increase, some of these cities are becoming increasingly unlivable. Painting even a small part of the planet could keep cities cooler and healthier.



IMRAN BAYOUMI, Associate Director, Scowcroft Strategy Initiative, Scowcroft Center for Strategy and Security.

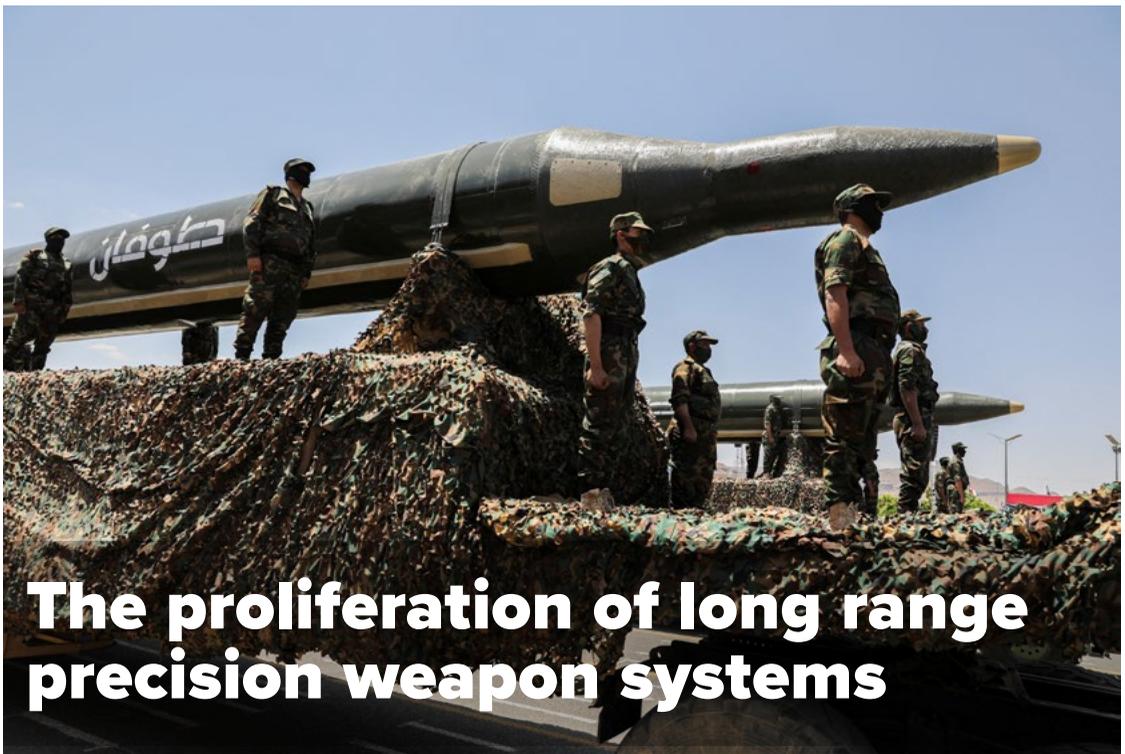
Bayoumi graduated with his master's degree in global affairs from the Munk School at the University of Toronto where he held a Joseph-Armand Bombardier Canada Graduate Scholarship. He also holds a BA from Queen's University in political studies.

96 Buckley, "To Help Cool a Hot Planet."

97 Eric Levitz, "Can Extremely Reflective White Paint Save the Planet?," New York Magazine, July 15, 2023, <https://nymag.com/intelligencer/2023/07/can-extremely-reflective-white-paint-save-the-planet.html>; Francisco Estrada, W. J. Wouter Botzen and Richard S. J. Tol, "A global economic assessment of city policies to reduce climate change impacts," Nature Climate Change, May 29, 2017, <https://doi.org/10.1038/nclimate3301>.

98 "Heat Island Effect," U.S. Environmental Protection Agency, January 29, 2024, <https://www.epa.gov/heatislands>.

99 "Urban Development," The World Bank, last accessed January 29, 2024, <https://www.worldbank.org/en/topic/urbandevelopment/overview>.



The proliferation of long range precision weapon systems

Take a global landscape of rising multipolar tensions and partnerships, add widely available dual-use technologies like unmanned aerial vehicles (UAVs), and voilà: A new era of proliferation is increasing the challenge to arms control and the potential for conflicts around the world to escalate.

At the end of the twentieth century, only a handful of powers had long-range precision-strike technology—primarily in the form of cruise and ballistic missiles.¹⁰⁰ The technology was closely guarded, with international agreements and norms limiting the spread of such missile systems. Today, the number of countries acquiring and deploying long-range precision-strike systems is rising steadily—twenty-four states currently operate cruise missiles with a range greater than 300 kilometers, relative to just three in 1991—and similar technologies are now being deployed by nonstate actors as well.¹⁰¹

More and more, agreements to restrict the proliferation of these systems have been eliminated or ignored. In 2019, the United States withdrew from the Intermediate-Range Nuclear Forces Treaty after years of allegations that Russia had violated its terms.¹⁰² Another crumbling component of the arms-control architecture is the Missile Technology Control Regime, a 1987 voluntary agreement among nations to not sell or transfer technology for long-range missiles to other parties.¹⁰³ But exports of restricted missile technology by the United Kingdom, France, Russia, India, China, Israel, and the

100 Michael C. Horowitz and Joshua A. Schwartz, “To Compete or Retreat? The Global Diffusion of Precision Strike,” SSRN, December 20, 2020, https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3752391.

101 The Military Balance 2022, IISS, February 2022, <https://www.iiss.org/publications/the-military-balance/the-military-balance-2022>.

102 “The Intermediate-Range Nuclear Forces (INF) Treaty at a Glance,” Arms Control Association, last accessed January 29, 2024, <https://www.armscontrol.org/factsheets/INFtreaty>.

103 Kolja Brockmann, “The Missile Technology Control Regime at a crossroads,” Stockholm International Peace Research Institute, October 1, 2021, <https://www.sipri.org/commentary/topical-background/2021/missile-technology-control-regime-crossroads>.

United States have diminished the normative power of the agreement.¹⁰⁴ What's more, the Missile Technology Control Regime and other agreements have failed to control the spread of long-range armed UAVs. In 2020, for example, the United States changed its interpretation of the agreement's rules so that it could more easily export armed drones—in reaction to the widespread sale of similar systems by China, Turkey, and Israel.¹⁰⁵

The proliferation of long-range precision-strike technology to nonstate actors has further confounded arms-control efforts. Iran has exported ballistic missiles, cruise-missile technology, and armed UAVs to Hezbollah in Lebanon and the Houthis in Yemen.¹⁰⁶ Both groups have used these weapons in attacks in the region. Just in the past several months, the Houthis have attempted several missile attacks on Israel and targeted international shipping.¹⁰⁷

The upshot of all these trends? We may be headed for a world where most states and many nonstate actors will be able to attack targets deep within their neighbors' territory, or even far beyond their borders, within hours. Civilian populations will become more vulnerable during war, as Russia's attacks on Ukrainian cities show. The likelihood of local conflicts escalating across their region may increase along with the range of the weapons deployed—and more countries may need to develop plans and capabilities for air and missile defense.



JACOB MEZEY, Program Assistant, Forward Defense Initiative.

Jake Mezey is a program assistant in the Forward Defense practice of the Atlantic Council's Scowcroft Center for Strategy and Security. He contributes to the program's research on nuclear security, space security, defense innovation and modernization, and grey zone conflict. Previously, Mezey interned with the International Institute for Strategic Studies and contributed to its Missile Dialogue Initiative. Mezey graduated with distinction from Yale University where his senior thesis focused on the role of the Russian military in Transnistria.

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- 104 Jeffrey Lewis, "Storm Shadow, Saudi, & The MTCR," Arms Control Wonk, May 31, 2011, <https://www.armscontrolwonk.com/archive/204051/saudi-arabia-storm-shadow-the-mtcr/>; "Russia Ready to Export Iskander missile complexes to Saudi Arabia," TASS, July 3, 2015, <https://tass.com/russia/805823>; "India-Russia joint venture hopes for \$5 bln in supersonic missile exports by 2025," Reuters, October 18, 2022, <https://www.reuters.com/business/aerospace-defense/india-russia-joint-venture-hopes-5-blb-supersonic-missile-exports-by-2025-2022-10-18/>; Zaheena Rasheed, "How China became the world's leading exporter of combat drones," Al Jazeera, January 24, 2023, <https://www.aljazeera.com/news/2023/1/24/how-china-became-the-worlds-leading-exporter-of-combat-drones>; "LORA," Missile Threat, August 2, 2021, <https://missilethreat.csis.org/missile/lora/>; Joe Gould, "Demand exploding for Tomahawk missiles as US backs latest foreign sale," Defense News, March 15, 2023, <https://www.defensenews.com/pentagon/2023/03/16/demand-exploding-for-tomahawk-missiles-as-us-backs-latest-foreign-sale/>.
- 105 Daryl G. Kimball, "U.S. Reinterprets MTCR Rules," Arms Control Association, September 2020, <https://www.armscontrol.org/act/2020-09/news/us-reinterprets-mtcr-rules>.
- 106 "Open-source analysis of Iran's missile and UAV capabilities and proliferation," IISS, April 20, 2021, <https://www.iiss.org/research-paper/2021/04/iran-missiles-uavs-proliferation>; "Lebanon's Hezbollah: What weapons does it have?," Reuters, October 30, 2023, <https://www.reuters.com/world/middle-east/lebanons-hezbollah-what-weapons-does-it-have-2023-10-30/>; "Yemen's Houthis say they launched ballistic missiles at Israel," Reuters, December 6, 2023, <https://www.reuters.com/world/uk-maritime-agency-received-reports-suspected-drone-incident-southern-red-sea-2023-12-06/>.
- 107 Frank Gardner, "How missiles from Yemen could escalate Israel-Gaza war," BBC, December 6, 2023, <https://www.bbc.com/news/world-middle-east-67635670>.



If a US-China conflict ever breaks out, expect to hear a lot more about Palau. As the potential for a military clash in the Western Pacific grows, so does the strategic significance of this tiny island nation between the Philippines and Guam. Palau's importance stems from its key geographic location and its political alignment: It is one of just four states in the Pacific that maintains formal diplomatic relations with Taiwan, and it provides exclusive military operating and basing rights to the United States.

Geographically, Palau is at the center of the “second island chain,” farther from China’s coastline than the chain of islands that includes Taiwan and part of the Philippines. Since China’s anti-access military capabilities—particularly land-based missiles—pose such a threat to military operations within the first island chain, the prevailing wisdom among defense experts is that the second island chain would be a more defensible platform for US forces in the event of a conflict with China. Palau—considered the anchor of the second island chain—could be a key location for rearming and repairing US military ships and aircraft as well as an important basing location for resupply, surveillance, communications, and other supporting activities.¹⁰⁸

Politically, Palau has long had a special relationship with the United States, with commitments on both sides that extend beyond those of the typical alliance. The 1994 US-Palau Compact of Free Association gives the United States exclusive military operating rights in Palau, including the right to establish defense sites.¹⁰⁹ In return, the United States is committed to defend Palau and provide it economic assistance, among other forms of support. Under a May 2023 update to the original compact, Palau stands to receive \$890 million from the United States over twenty years.¹¹⁰

108 “Integrated Country Strategy, Palau,” U.S. Department of State, April 3, 2022, https://www.state.gov/wp-content/uploads/2022/07/ICS_EAP_Palau_Public.pdf.

109 US-Palau Compact of Free Association, <https://www.govinfo.gov/content/pkg/STATUTE-100/pdf/STATUTE-100-Pg3672.pdf>.

110 “Secretary Blinken Witnesses the Signing of the U.S.-Palau 2023 Agreement Following the Compact of Free Association Section 432 Review,” U.S. Department of State, May 22, 2023, <https://www.state.gov/secretary-blinken-witnesses-the-signing-of-the-u-s-palau-2023-agreement-following-the-compact-of-free-association-section-432-review/>.

Washington's focus on Palau has increased in recent years. The US Department of Defense awarded a \$120 million contract at the end of 2022 to install a radar system in Palau by 2026, expected to improve the United States' ability to track air and maritime threats from China and North Korea in the Western Pacific.¹¹¹ More recently, in December 2023, Palau was one of the sites of the latest rounds of the Pacific Partnership military-exercise series.¹¹² Expect to see more defense and infrastructure investments by the United States in Palau, as well as more military exercises in the area, which will only add to Palau's importance.

Palau may not be the focus of a potential US-China military confrontation, but it could be the critical location just behind the scenes.



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Emma received her master's degree in global affairs as a Schwarzman Scholar at Tsinghua University in Beijing. Her time in China lends a unique perspective to her work. She also holds a Bachelor of Arts in International Studies and Russian Studies from Macalester College.

111 Emma Helfrich and Tyler Rogoway, "U.S. Building Advanced Over-The-Horizon Radar On Palau," The War Zone, December 30, 2022, <https://www.thedrive.com/the-war-zone/u-s-building-advanced-over-the-horizon-radar-on-palau>; Sunny Peter, "Pacific Command's Palau Radar System To Keep North Korea, China Under Watch," International Business Times, January 10, 2023, <https://www.ibtimes.com/pacific-commands-palau-radar-system-keep-north-korea-china-under-watch-3655286>.

112 Cheryl Collins, "USNS Mercy Arrives in the Republic of Palau for Pacific Partnership 24-1," U.S. Navy, December 21, 2023, <https://www.navy.mil/Press-Office/News-Stories/Article/3623803/usns-mercy-arrives-in-the-republic-of-palau-for-pacific-partnership-24-1/>.



The declining cost of turning salt water into fresh drinking water

Climate change and the rising demand for fresh water strain global water supplies and spark conflicts.¹¹³ Water stress affects billions of people in rich and poor countries alike, but the problem is most acute in poor regions that are arid and drought-prone.¹¹⁴ The number of droughts worldwide has risen 29 percent since 2000.¹¹⁵ The good news: Cheaper and less energy-intensive approaches to desalination—the process of turning seawater into fresh water for human consumption and use—are on the horizon and may provide the means to better quench demand.

For decades, desalination has increased the availability of fresh water in coastal regions with direct access to the sea. Yet the dominant process for converting salt water to fresh—reverse osmosis—is costly, uses a significant amount of energy (often from fossil fuels), and produces a lot of waste (known as brine) as a byproduct. As a result, reverse osmosis can only solve part of the fresh-water problem, mainly for low-volume and high-value applications such as drinking water, and almost exclusively in high- and middle-income countries.¹¹⁶

But recent research breakthroughs could turn the tide. Researchers at MIT and in China have developed a briefcase-sized, solar-powered device that “could produce drinking water at a rate and price that is cheaper than tap water,” according to MIT’s description of the effort.¹¹⁷ Many other researchers are exploring forward osmosis, an alternative to reverse osmosis that can be applied at scale in large desalination plants.¹¹⁸ Forward osmosis uses natural osmosis, with an already present osmotic pressure drawing water through a membrane that separates the water from solids,

113 Peter H. Gleick, “Pacific Institute Water Conflict Chronology Updated,” The Pacific Institute, March 17, 2022, <https://pacinst.org/water-conflicts-continue-to-worsen-worldwide/>.

114 Martine Valo, “The global water crisis is already affecting 4 billion people,” *Le Monde*, August 16, 2023, https://www.lemonde.fr/en/environment/article/2023/08/16/the-global-water-crisis-is-already-affecting-4-billion-people_6095060_114.html.

115 “World ‘at a crossroads’ in drought management, up 29% in a generation and worsening, says UN,” United Nations, May 11, 2022, <https://www.unccd.int/news-stories/press-releases/world-crossroads-drought-management-29-generation-and-worsening-says-un>.

116 Henry Fountain, “The World Can Make More Water From the Sea, but at What Cost?,” *The New York Times*, October 22, 2019, <https://nytimes.com/2019/10/22/climate/desalination-water-climate-change.html>.

117 Jennifer Chu, “Desalination system could produce freshwater that is cheaper than tap water,” MIT News, September 27, 2023, <https://news.mit.edu/2023/desalination-system-could-produce-freshwater-cheaper-0927>.

118 “‘Green Desalination’ Showcased at Innovate New Mexico Conference,” *New Mexico Tech*, March 13, 2023, <https://www.nmt.edu/news/2023/green-desalination.php>.

and requires far less energy than reverse osmosis.¹¹⁹ In 2023, for example, a researcher at New Mexico Tech announced a forward-osmosis breakthrough that reduces energy consumption and pollution production.¹²⁰

Perfecting forward-osmosis processes for wider use should cut the cost of desalination dramatically, in turn allowing lower-income countries to create desalination facilities. With the right investment and scaling, it is possible that more of the world will have access to affordable, life-sustaining fresh water in the years to come.



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Bayoumi graduated with his master's degree in global affairs from the Munk School at the University of Toronto where he held a Joseph-Armand Bombardier Canada Graduate Scholarship. He also holds a BA from Queen's University in political studies.

119 "Forward Osmosis," ScienceDirect, last accessed January 29, 2024, <https://www.sciencedirect.com/topics/engineering/forward-osmosis>.

120 Chirs McKee, "New Mexico Tech touts breakthrough water filtration invention," KRQE News, April 4, 2023, <https://www.krqe.com/news/new-mexico/new-mexico-tech-touts-breakthrough-water-filtration-invention/>.

Appendix – The Global Foresight 2024 Survey: full results

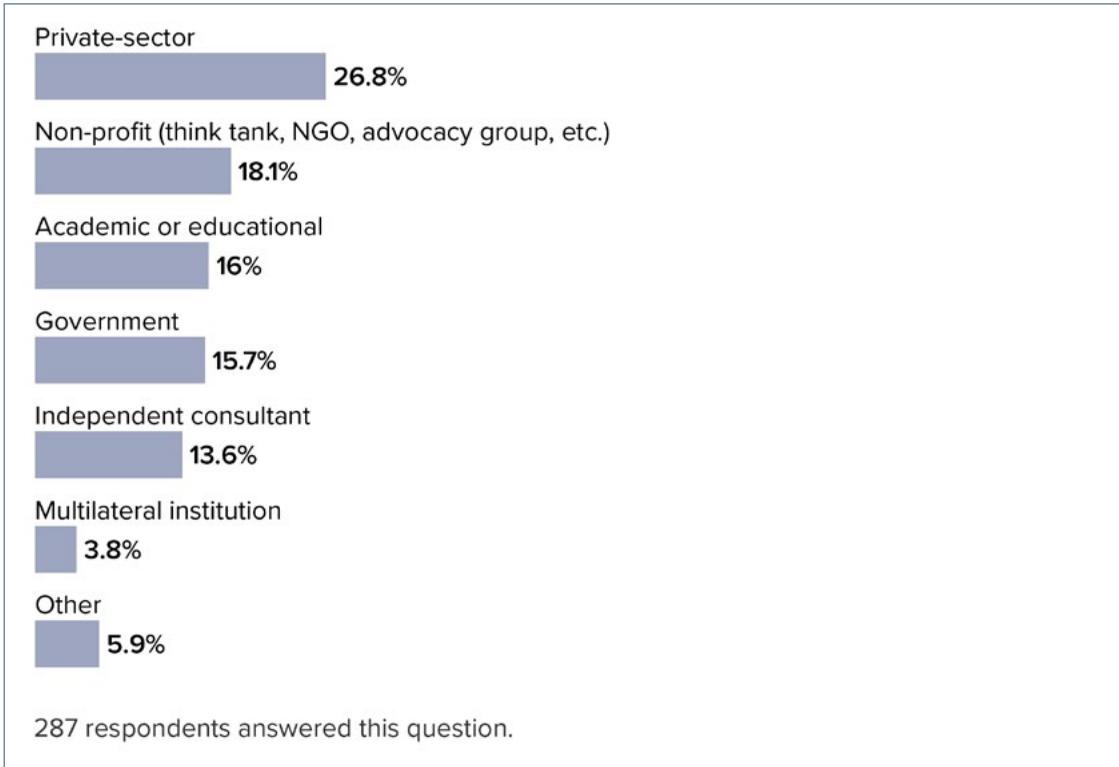
Demographic data

What is your country of citizenship?

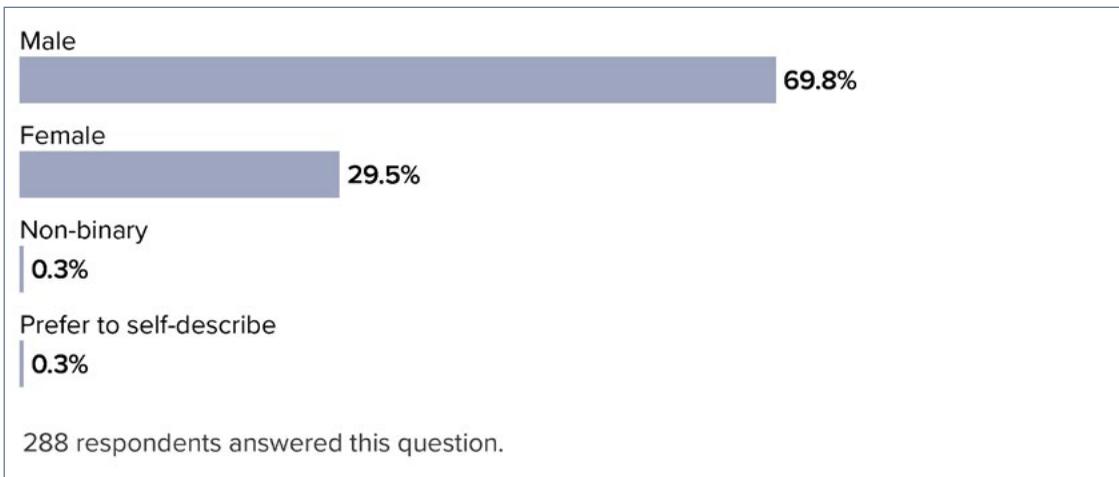
Country	Number	Country	Number	Country	Number
United States	172	Bosnia Herzegovina	2	Kenya	1
Brazil	9	Ireland	2	Lithuania	1
Canada	8	Malaysia	2	Macedonia	1
Germany	7	New Zealand	2	Nicaragua	1
Spain	7	Poland	2	Norway	1
United Kingdom	7	Singapore	2	Paraguay	1
Australia	5	Sweden	2	Portugal	1
Guatemala	5	Bahrain	1	Russia	1
Argentina	4	Barbados	1	Serbia	1
Netherlands	4	Belgium	1	South Africa	1
Switzerland	4	Bulgaria	1	Thailand	1
Venezuela	4	Chile	1	Trinidad & Tobago	1
Colombia	3	China	1	Turkey	1
France	3	Egypt	1	Ukraine	1
Italy	3	India	1	Uruguay	1
Mexico	3	Iran	1	Vietnam	1
				Other	12

Note: 287 respondents answered this question

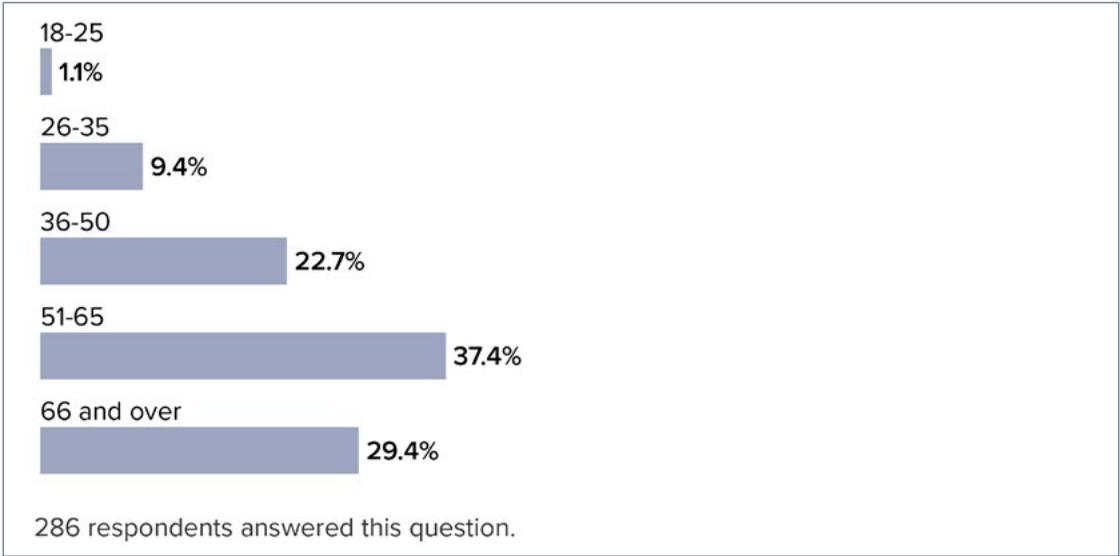
For which type of organization do you work?



What is your gender identity?

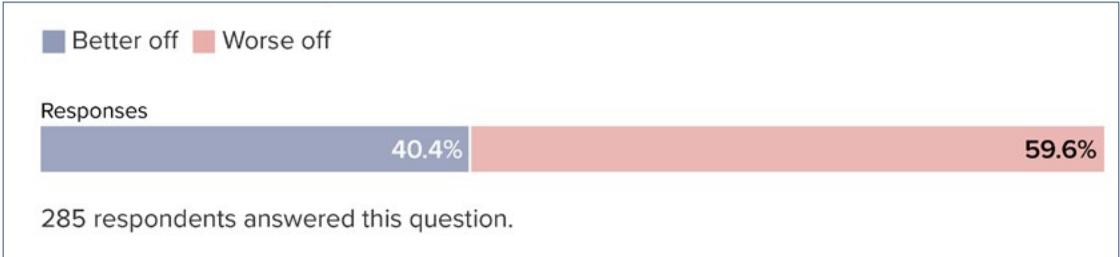


How old are you?

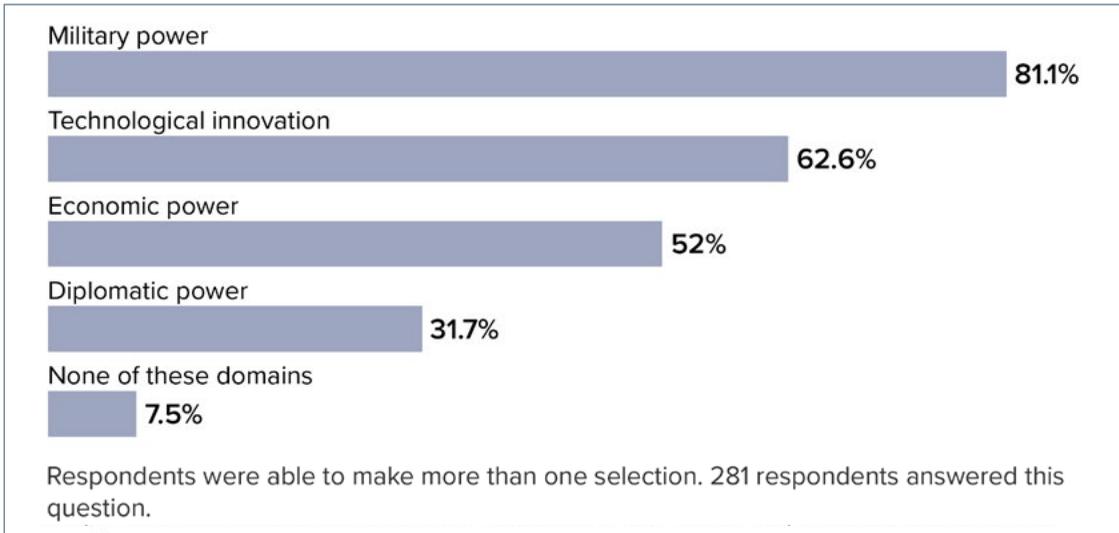


Survey questions

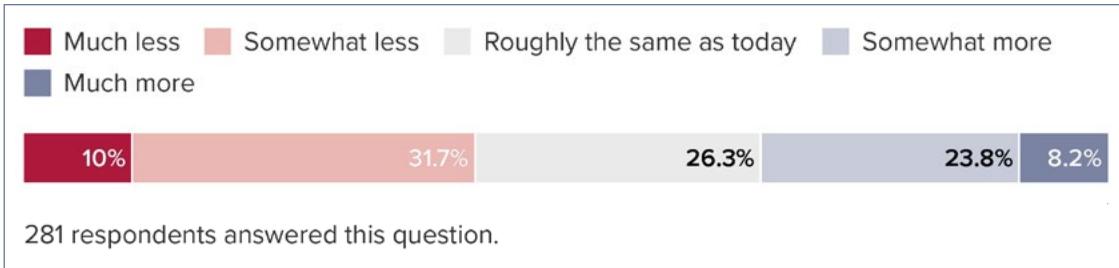
Generally speaking, do you think the world a decade from now will be better off or worse off than it is today?



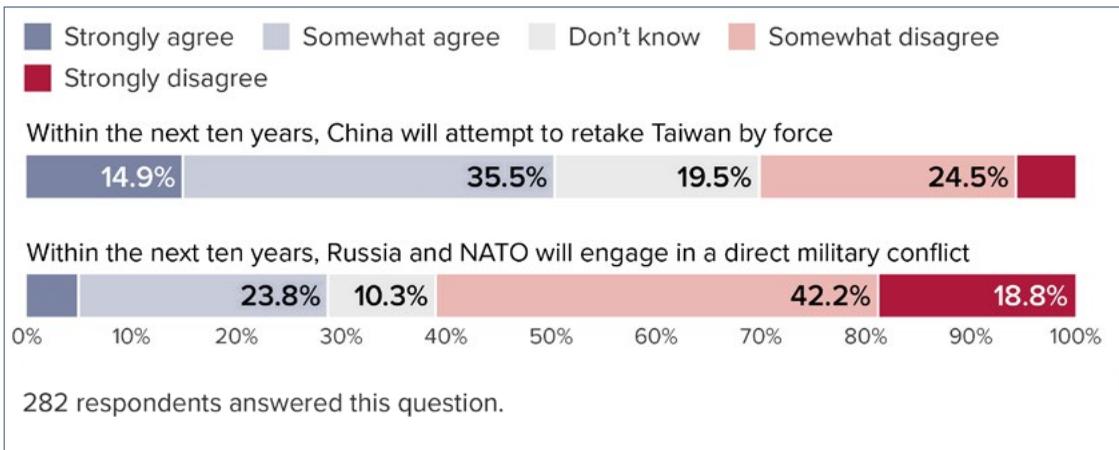
By 2034, in which of the following will the United States be the world's dominant power?



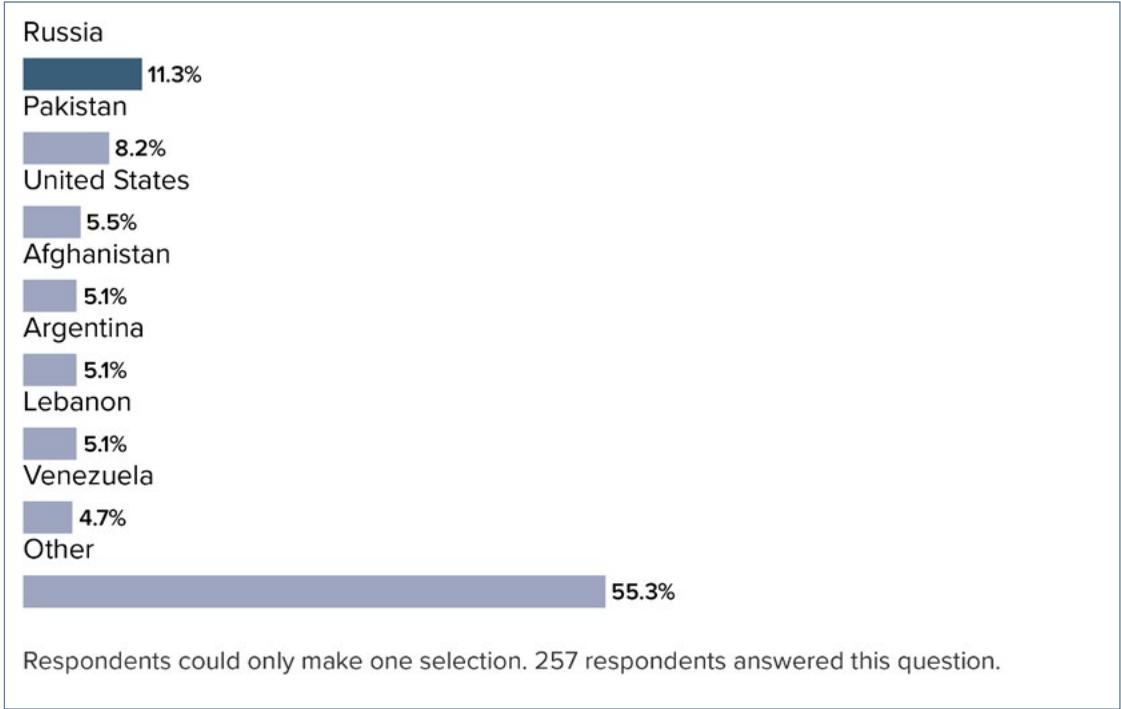
In 2034, will the economies of the United States and China be more or less interdependent than they are today?



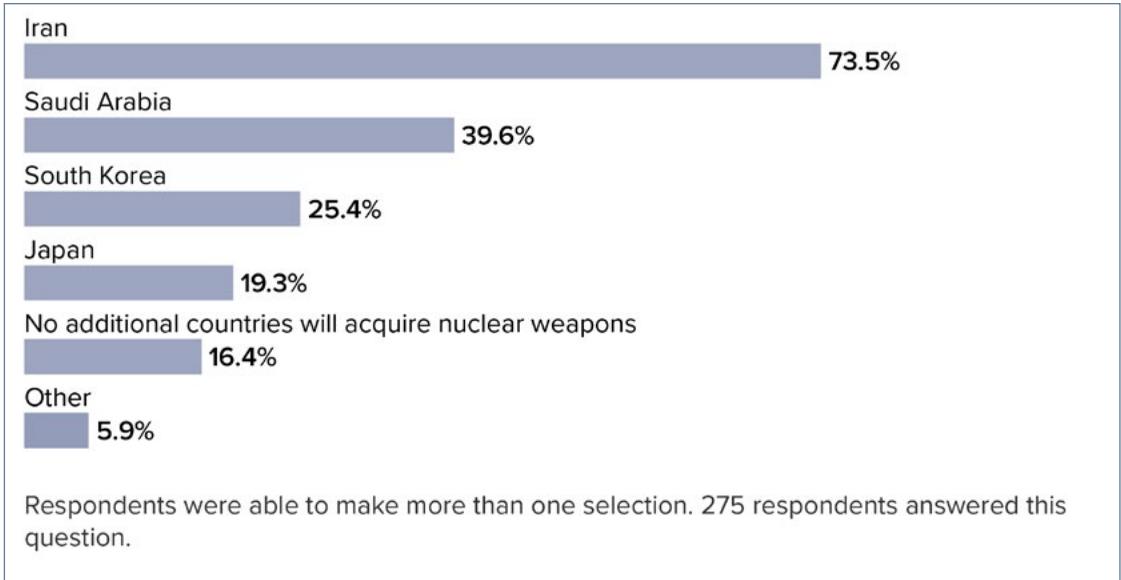
Do you agree with the following statements?



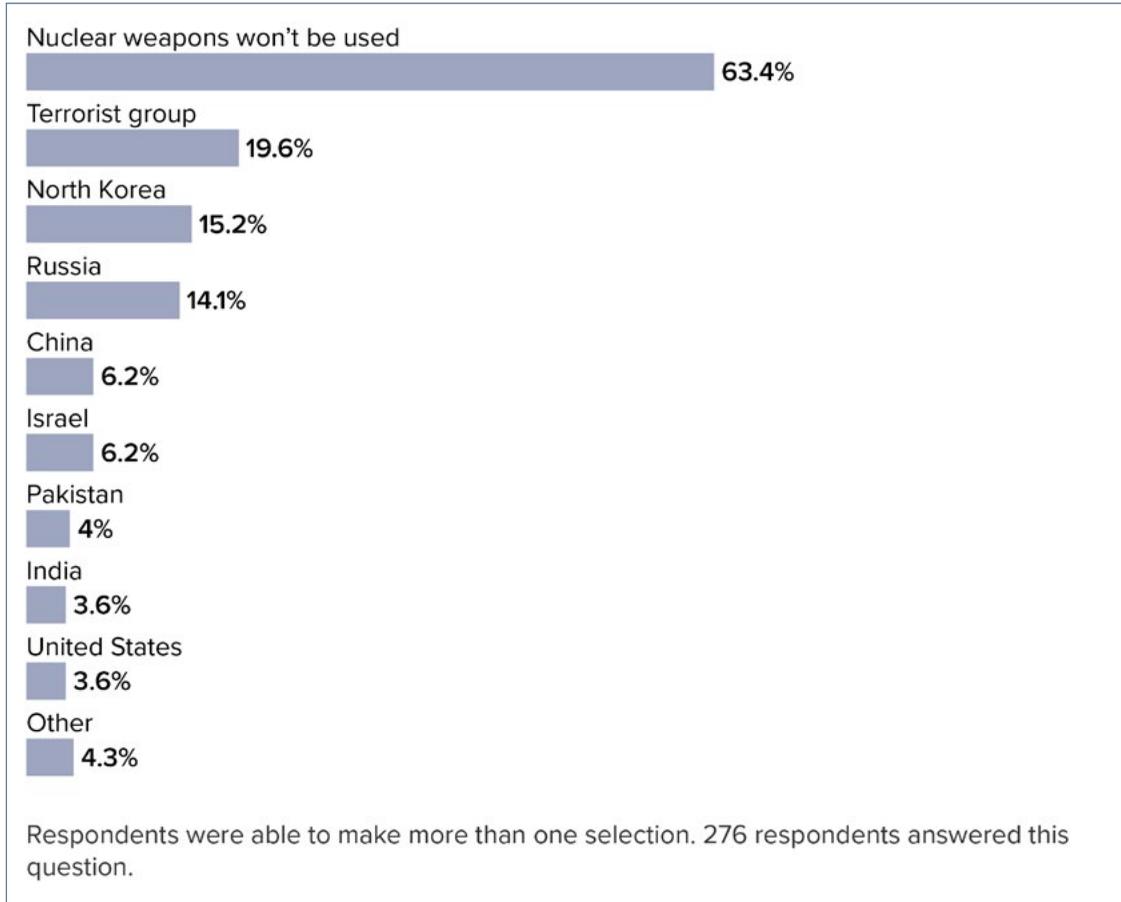
Which country that is not currently a failed state is most likely to become a failed state within the next ten years?



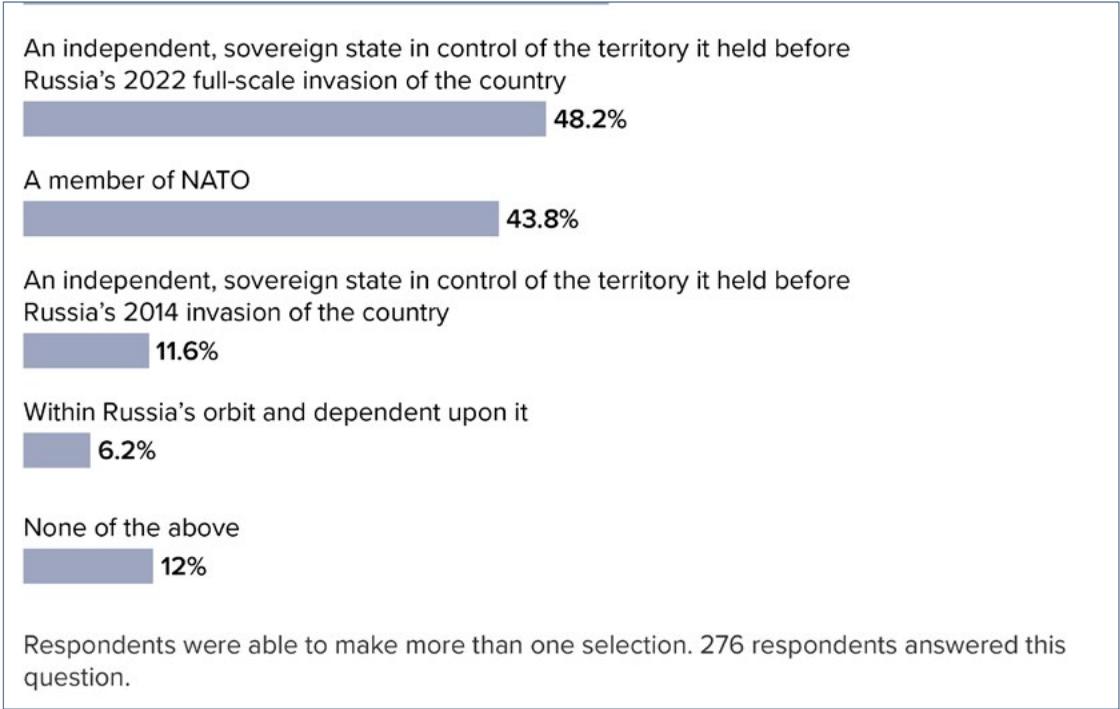
Which of the following countries will have nuclear weapons within the next ten years?



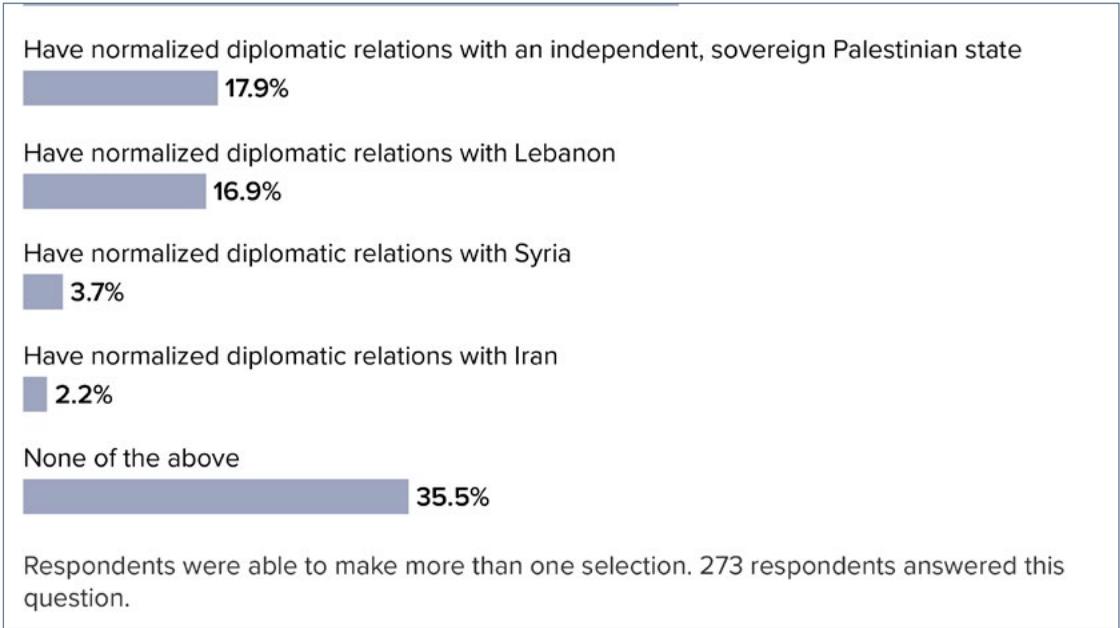
Which actors, if any, do you expect to use a nuclear weapon within the next ten years?



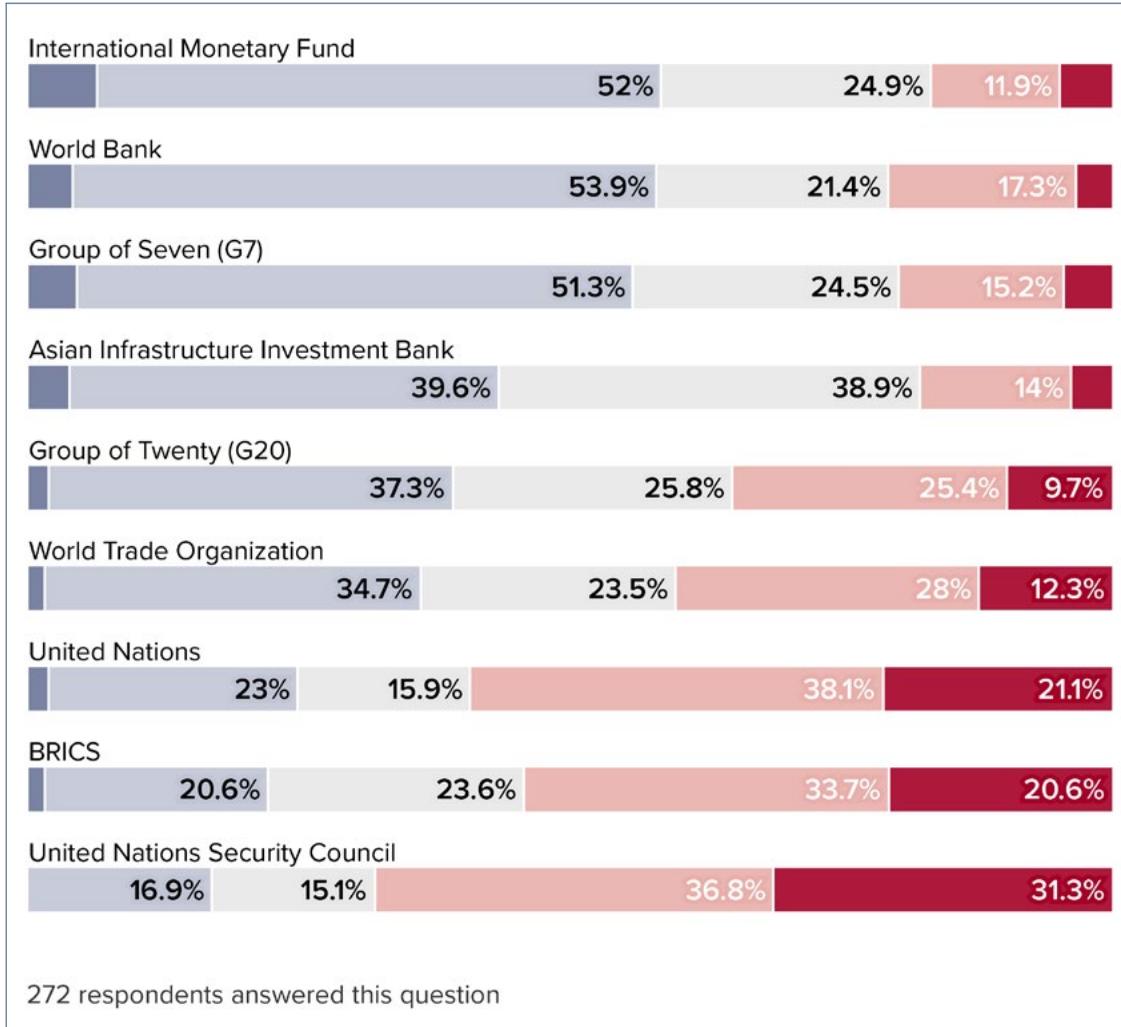
In 2034, Ukraine will be:



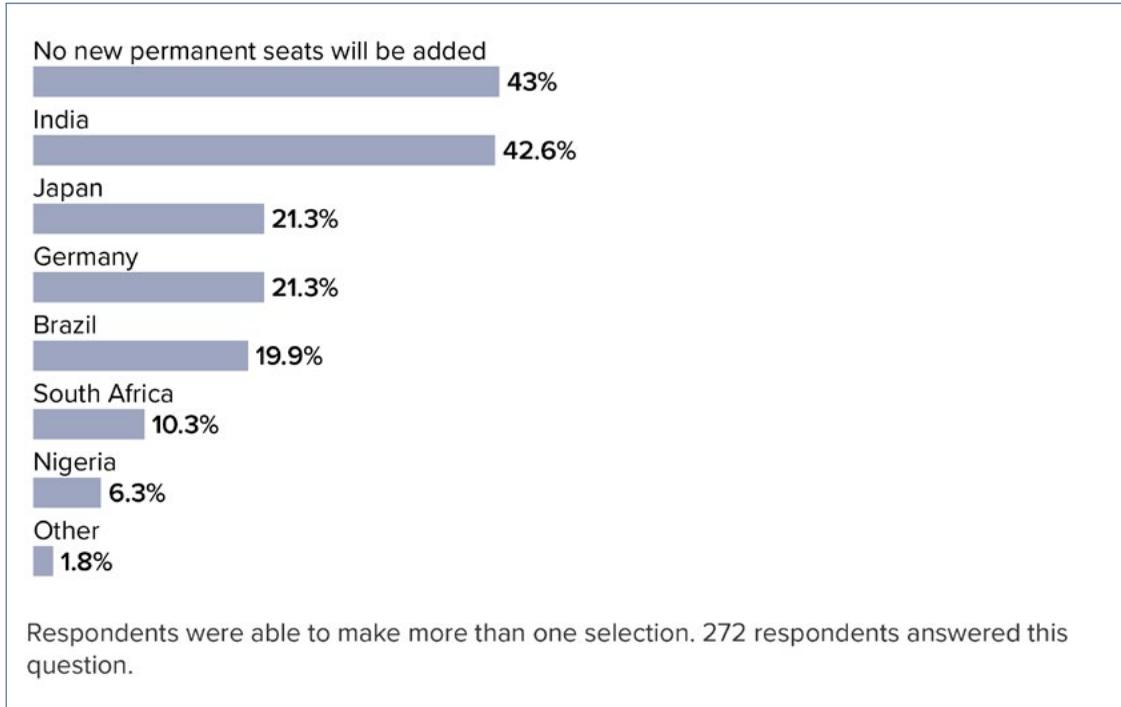
In 2034, Israel will:



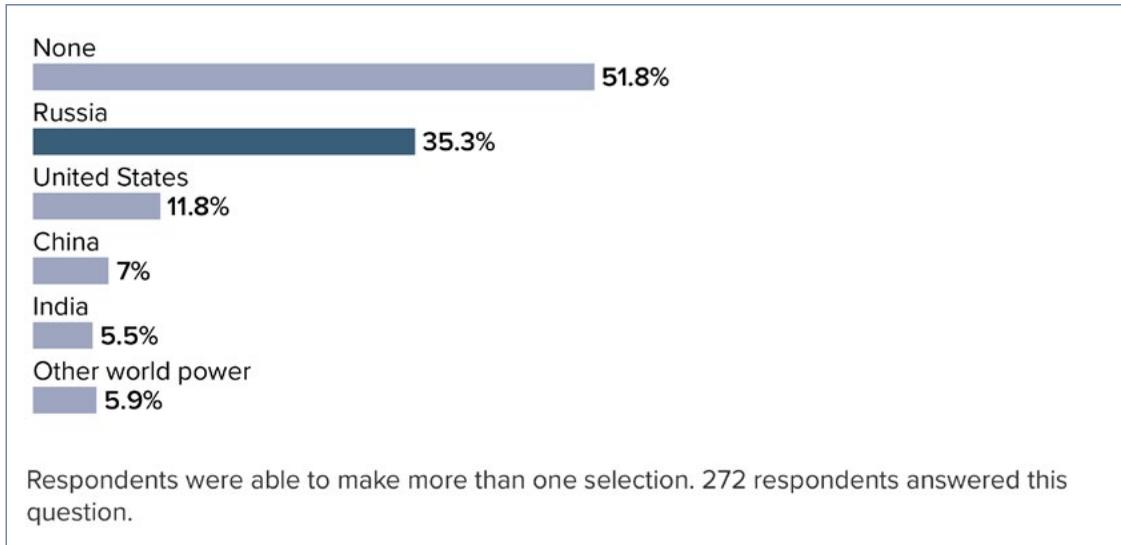
By the year 2034, how capable of solving challenges core to their mission do you expect the following international institutions to be?



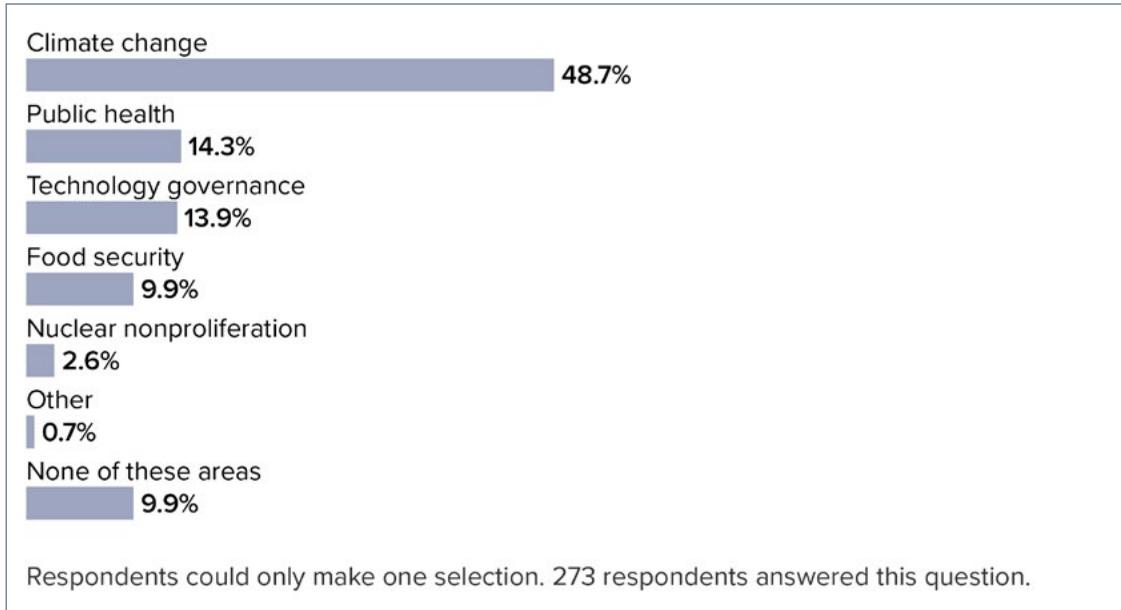
Which of the following countries will receive a new permanent seat on the UN Security Council within the next ten years?



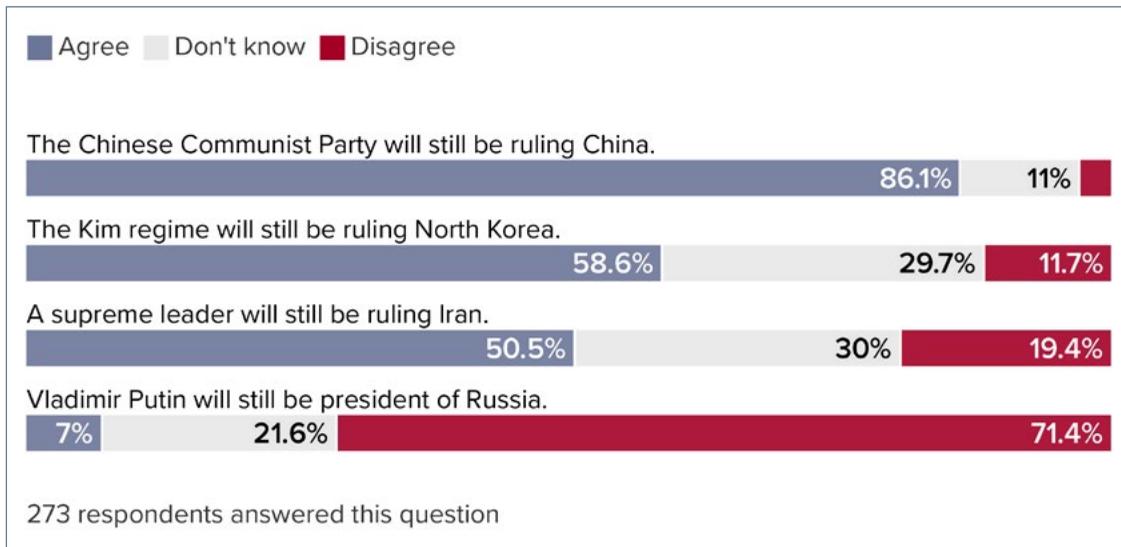
By 2034, do you expect any of the following world powers to break up internally for reasons including but not limited to revolution, civil war, or political disintegration?



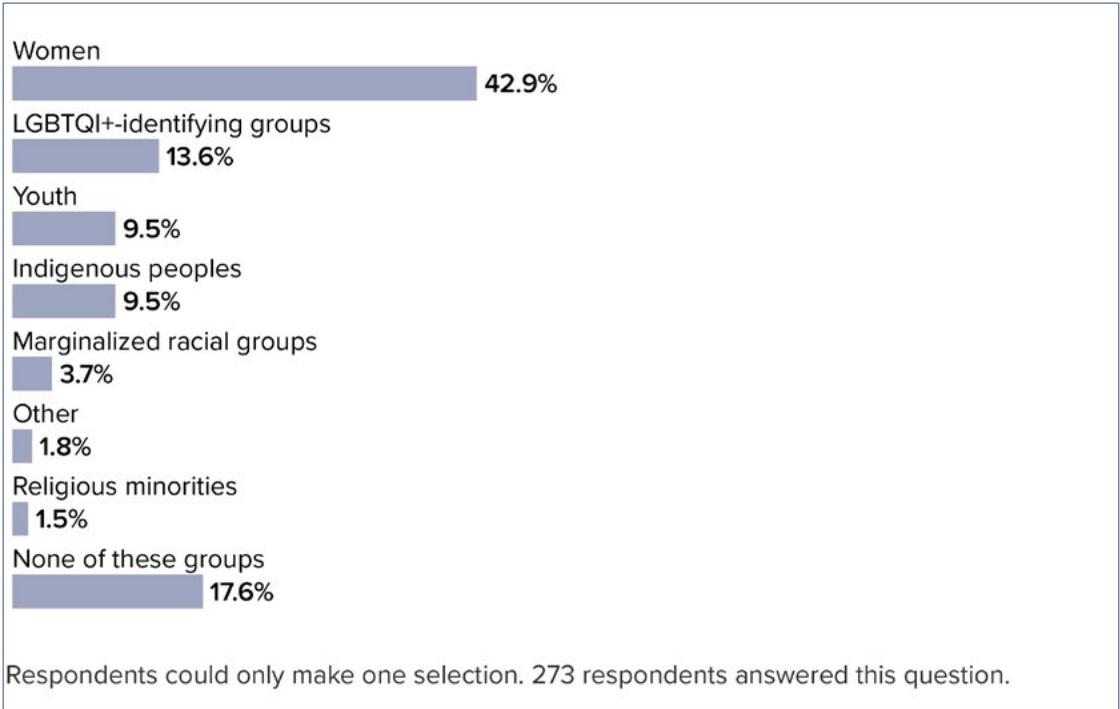
In which of the following fields do you expect the greatest expansion of global cooperation over the next ten years?



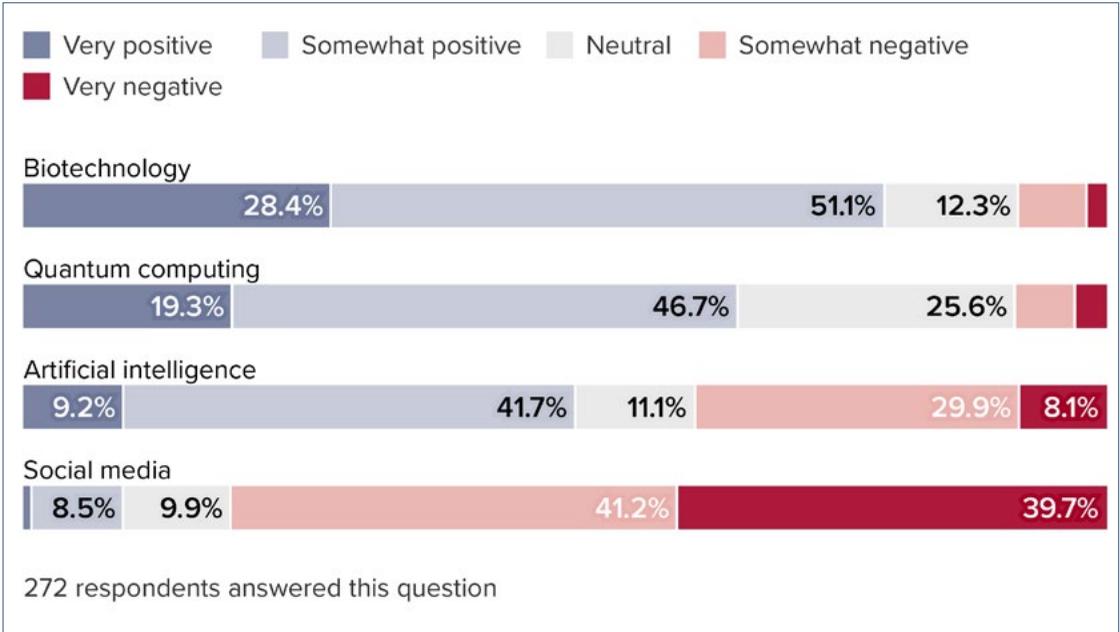
Do you agree or disagree with the following statements about how the following countries will be ruled in 2034?



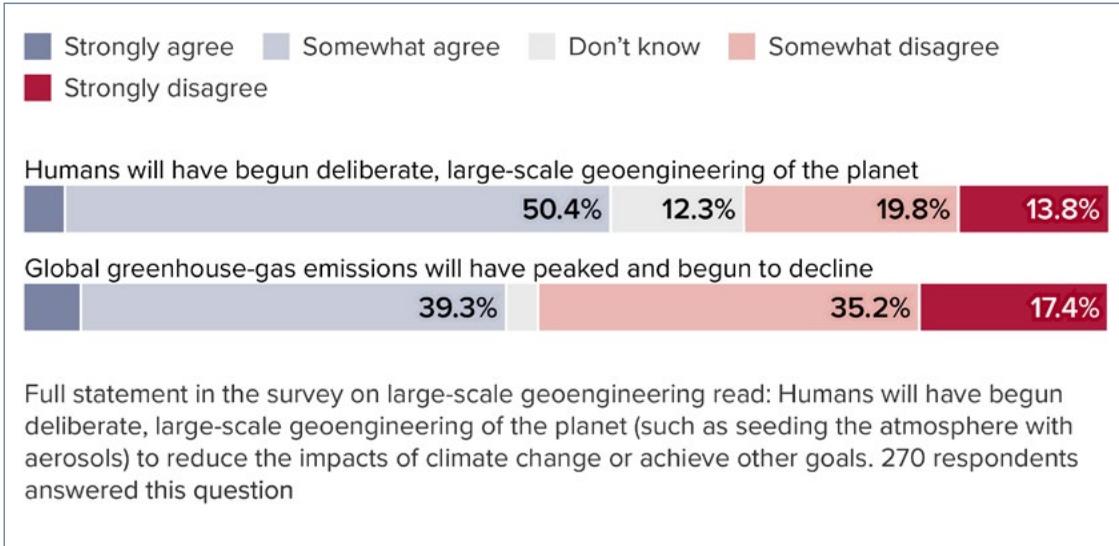
Over the next ten years, which of these groups do you expect to experience the greatest expansion of rights around the world?



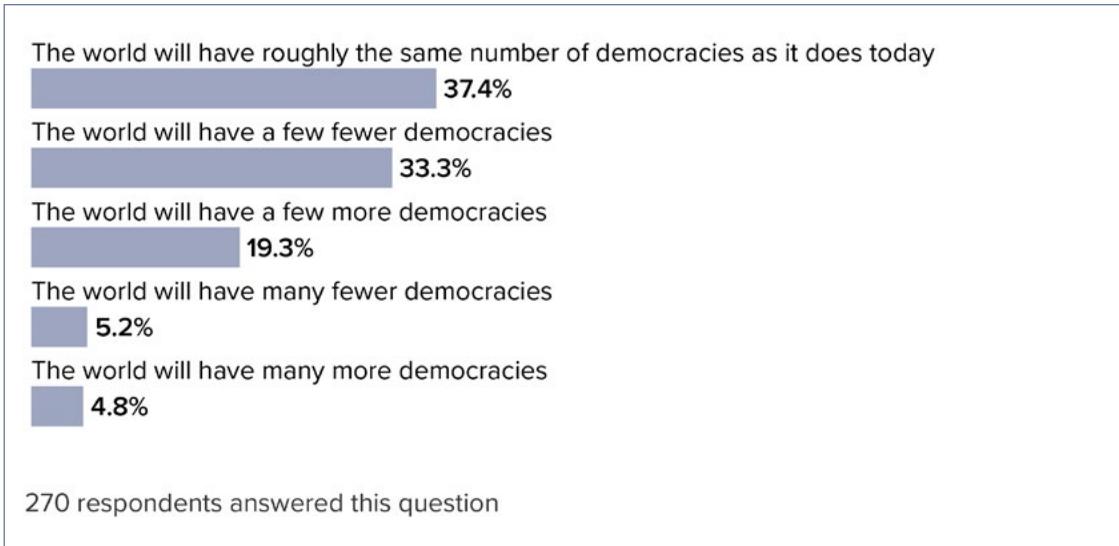
Please rate the following technologies in terms of whether you expect them, on balance, to have a negative or positive impact on global affairs over the next ten years.



Do you agree or disagree with the following statements about the most likely conditions by 2034?

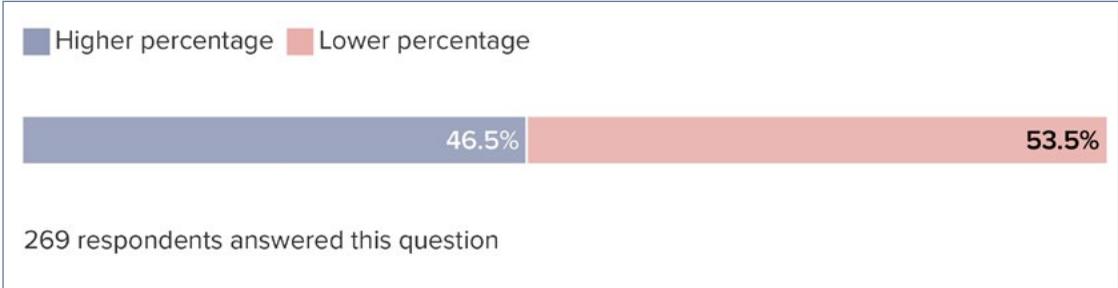


Which statement best describes what you expect the state of global democracy to be ten years from now?

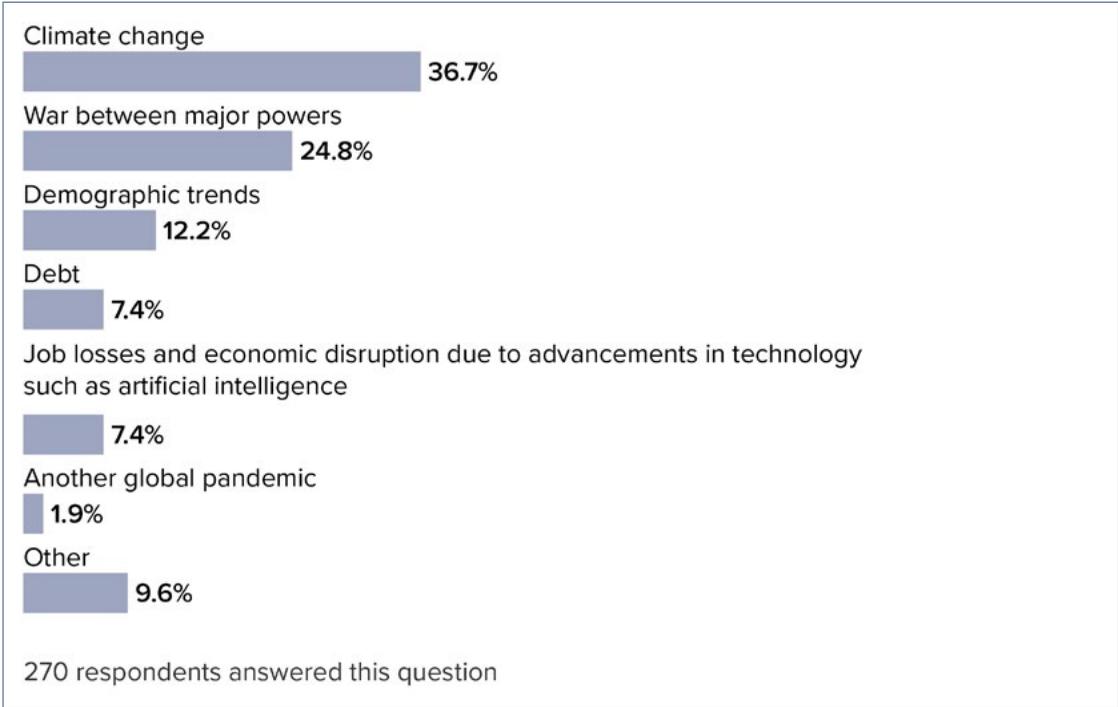


In ten years, will a higher or lower percentage of the world’s population be living in extreme poverty relative to today?

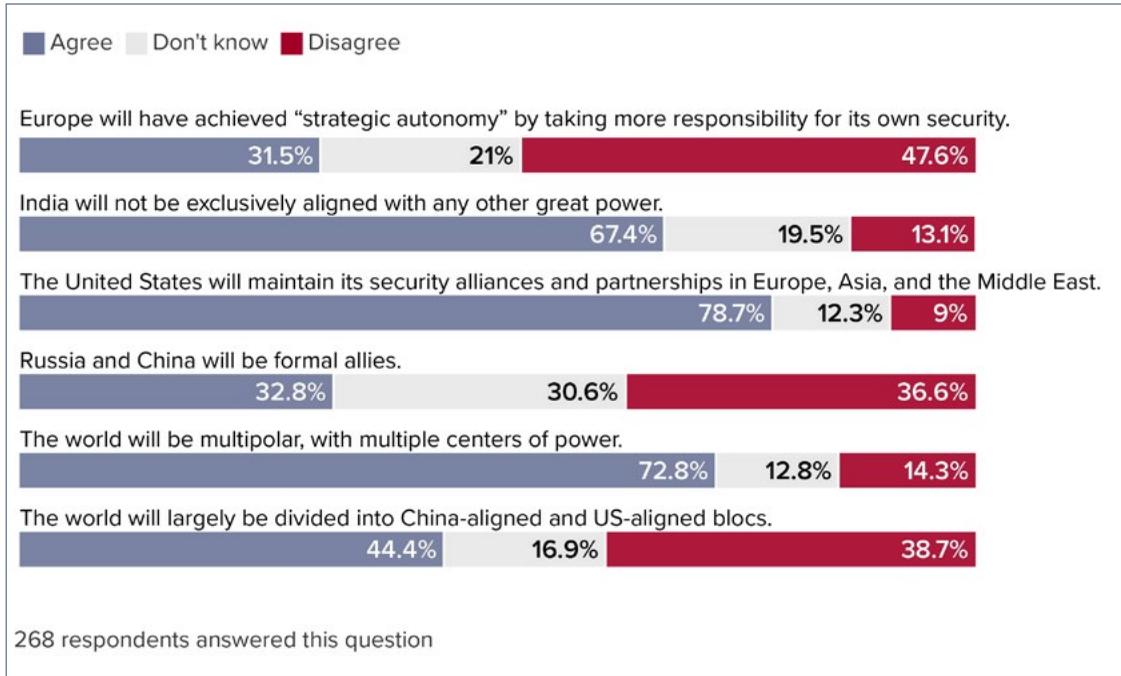
The World Bank currently estimates that 8 percent of the world’s population lives in extreme poverty, defined as living on less than \$2.15 per person per day.



What is the single biggest threat to global prosperity over the next ten years?



Do you agree or disagree with the following statements about the state of alliances and partnerships in 2034?





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List as of April 24, 2024



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