



Global Foresight 2025

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The Atlantic Council Strategy Papers series is the Atlantic Council's flagship outlet for publishing high-level, strategic thinking. The papers are authored by leading authorities, including a range of established and emerging strategic thinkers from within and outside the Atlantic Council.

In October 2019, the Atlantic Council published *Present at the Re-Creation: A Global Strategy for Revitalizing, Adapting, and Defending a Rules-Based International System*. This bold paper proposed a comprehensive strategy for rebuilding and strengthening a rules-based order for the current era. In July 2020, the Council published *A Global Strategy for Shaping the Post-COVID-19 World*, outlining a plan for leading states to recover from the health and economic crisis, and also to seize the crisis as an opportunity to build back better and rejuvenate the global system.

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Table of Contents

Introduction	1
Welcome to 2035	3
1 The specter of world war	4
2 Conflict with China and Russia	5
3 The China-Russia-Iran-North Korea axis.....	8
4 Nuclear proliferation and use	10
5 The future of US power	16
6 The endgame in Ukraine.....	20
7 Prospects for Israeli-Palestinian peace	22
8 The outlook for multilateral institutions.....	25
9 The chances of democratic depression.....	27
10 Gender and the global future.....	28
Six ‘snow leopards’ to look out for in 2025	31
The terrorist threat that could sever global connections	32
The low-carbon energy source that could power nearly half of US homes...	34
The yellow powder that cleans carbon dioxide out of the air.....	36
The return of wild land.....	38
The coming quantum leap in energy storage	41
The very online generation’s susceptibility to misinformation.....	43
Three worlds in 2035	45
The reluctant international order	46
China ascendant.....	51
Climate of fear.....	56
Appendix – The Global Foresight 2025 Survey: full results	62

Introduction

Global Foresight 2025 is the fourth edition of an annual foresight series produced by the Atlantic Council's Scowcroft Center for Strategy and Security. As was true of all previous editions, the goal of *Global Foresight 2025* is to provide the reader with original and provocative insights about the world's future. Although it is impossible to predict the future with certainty, one can develop a deeper understanding of how trends and uncertainties might shape the future. In this pursuit, the report should help the reader both comprehend which phenomena are driving change today in 2025 and what the consequences of that change—positive and negative—might be for the world writ large over the coming decade and beyond.

Global Foresight 2025 contains three main analytical components. The first consists of findings from a survey of 357 leading geostrategists and foresight practitioners. These experts, drawn from the Atlantic Council's global networks, were asked to share their thoughts about what world affairs will look like in the year 2035. Survey questions range across numerous categories: geopolitics; war, peace, and conflict; technological disruption; demography; democracy, rights, and freedoms; climate change and Earth systems; and more. (At the end of this report, an appendix provides raw survey data.) The second component of *Global Foresight 2025* consists of six "snow leopards," which are under-the-radar phenomena that might have unexpected yet critically important impacts in 2025 and beyond. This year's wide-ranging snow leopards focus on: armed non-state groups attacking undersea infrastructure such as fiber-optic cables, the potential of enhanced geothermal energy systems, a chemical powder that might dramatically cut the cost of pulling carbon dioxide from the atmosphere, the possible mass scaling of the world's wild lands, the breakthroughs promised by quantum devices such as batteries, and misinformation's misunderstood impacts on Gen Z. The third component is a new feature this year. It consists of written scenarios—stories—about what the world might look like in 2035. The three scenarios presented in this section describe: a world in which China has emerged as the dominant power, eclipsing the United States; a world in which climate change has driven hundreds of millions to seek new lives abroad, with grim results; and a world in which the so-called "rules-based international order" somehow has managed to muddle through in 2035, despite powerful countercurrents that are threatening to kill it.

As an Atlantic Council Strategy Paper, *Global Foresight 2025* is the latest in a longstanding series of intellectually robust analyses of the world. In part because the work that underpins *Global Foresight* is so creative and wide-ranging, the series has become the Atlantic Council's most widely read long-form publication each year, and by a large margin. We hope that you, the reader, finds this fourth edition of *Global Foresight* to be as valuable for your thinking as previous editions in this series have been.

Dr. Peter Engelke

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

Welcome to 2035

What the world could look like in ten years, according to nearly 350 experts

Another devastating world war, potentially bringing China and the United States into direct conflict. The spread and even the use of nuclear weapons. The wars in Ukraine and Gaza failing to ultimately produce favorable outcomes for Kyiv and Israeli-Palestinian peace. A more multipolar world without robust multilateral institutions. A democratic recession further devolving into a democratic depression.

These are just some of the future scenarios that global strategists and foresight practitioners pointed to when the Atlantic Council's Scowcroft Center for Strategy and Security surveyed them, in late November and early December 2024 following the US elections, for its third-annual survey on how they expect the world to change over the next ten years.¹

Not all the projections were pessimistic. Fifty-eight percent of those who participated in our *Global Foresight 2025* survey, for example, felt that artificial intelligence would, on balance, have a positive impact on global affairs over the next ten years—an increase of 7 percentage points from our *Global Foresight 2024* survey. Roughly half of respondents foresaw an expansion of global cooperation on climate change.

But the grimmer forecasts were in keeping with a dark global outlook overall, with 62 percent of respondents expecting the world a decade from now to be worse off than it is today, and only 38 percent predicting that it will be better off.

The 357 survey respondents were mostly citizens of the United States (just under 55 percent of those polled), with the others spread across sixty countries and every continent but Antarctica. Respondents skewed male and older, and were dispersed across a range of fields including the private sector, nonprofits, academic or educational organizations, and government and multilateral institutions.

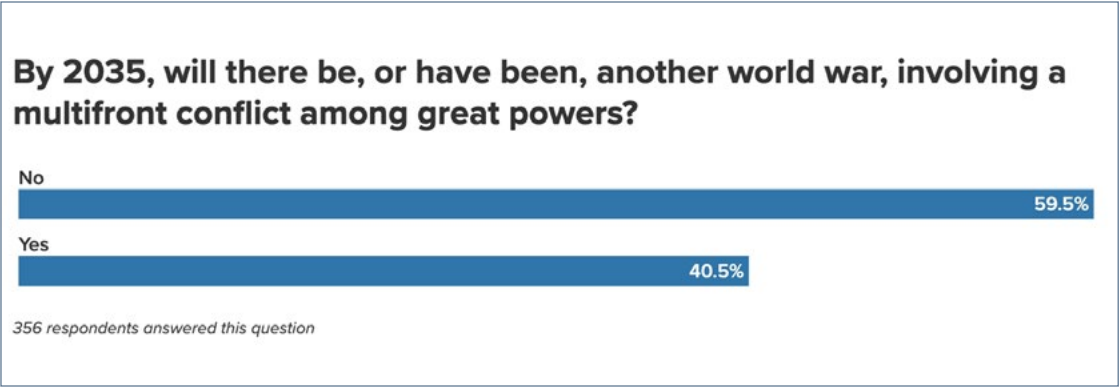
¹ Mary Kate Aylward, Peter Engelke, Uri Friedman, and Paul Kielstra, "Welcome to 2034: What the world could look like in ten years, according to nearly 300 experts," The Atlantic Council, January 12, 2024, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/welcome-to-2034-what-the-world-could-look-like-in-ten-years-according-to-nearly-300-experts/#top>.

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

1 FORTY PERCENT OF RESPONDENTS EXPECT A WORLD WAR IN THE NEXT DECADE—ONE THAT COULD GO NUCLEAR AND EXTEND TO SPACE

For the first time in our annual survey, we asked respondents whether they expected there to be another world war by 2035. We defined such a war as involving a multifront conflict among great powers. And the results were alarming, with 40 percent saying yes.

While this was a new question, our Global Foresight 2024 survey surfaced a similar concern, with nearly a quarter of respondents pointing to war between major powers as the greatest threat to global prosperity over the next ten years.²



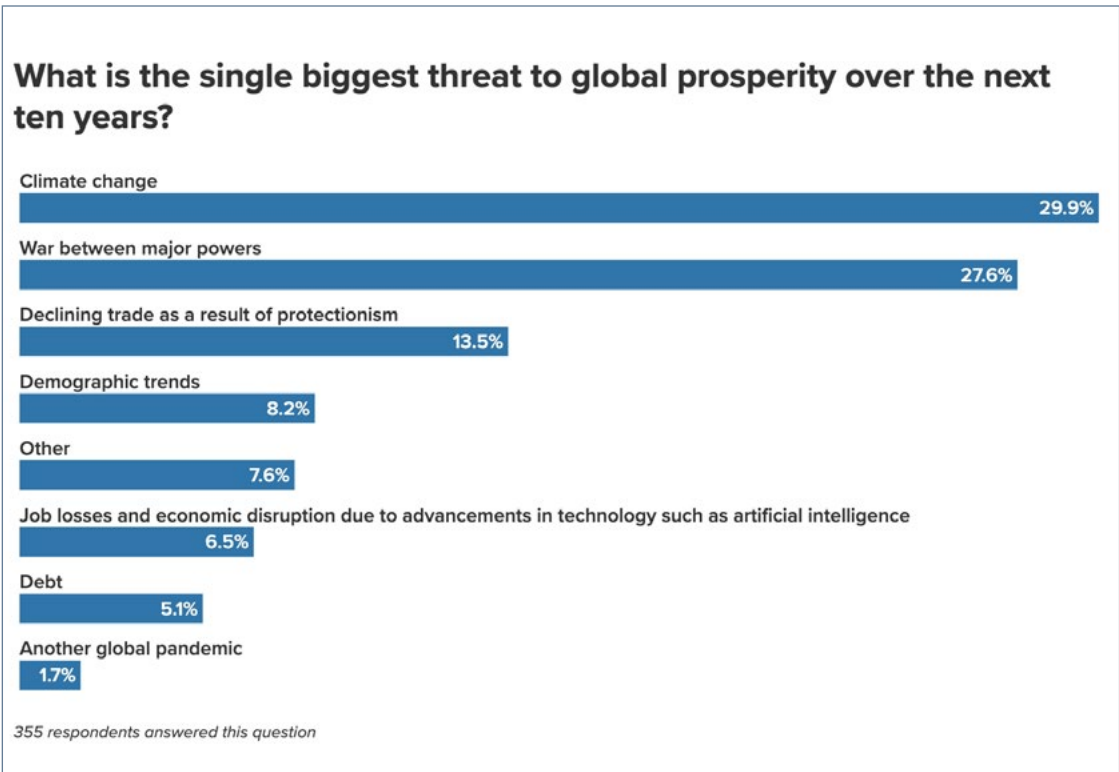
The finding tracks with worries expressed by other experts amid major wars in Europe and the Middle East, growing tensions between the United States and China, and increasing cooperation among China, Russia, North Korea, and Iran. Surveying this treacherous global landscape this past summer, for example, the historian and former US diplomat Philip Zelikow assigned a 20 to 30 percent probability to the prospect of “worldwide warfare” and warned of a “period of maximum danger” within the next one to three years.³

Judging by our respondents’ answers, another world war might feature nuclear weapons. Forty-eight percent of respondents overall (and 63 percent of those predicting World War III) expected nuclear weapons to be used in the coming decade by at least one actor.

Such a conflict also may play out in outer space. Forty-five percent of respondents overall (and 60 percent of those predicting World War III) expected the next decade to include a direct military conflict fought, at least in part, in space.

² Aylward, et al, “Welcome to 2034.”
³ Philip Zelikow, “Confronting Another Axis? History, Humility, and Wishful Thinking,” *Texas National Security Review* 7 (2024): 80-99, accessed February 21, 2025, <https://tnsr.org/2024/05/confronting-another-axis-history-humility-and-wishful-thinking/>.

And it could be devastating to the global economy. Twenty-eight percent of respondents identified war among major powers as the single biggest threat to global prosperity over the next ten years.



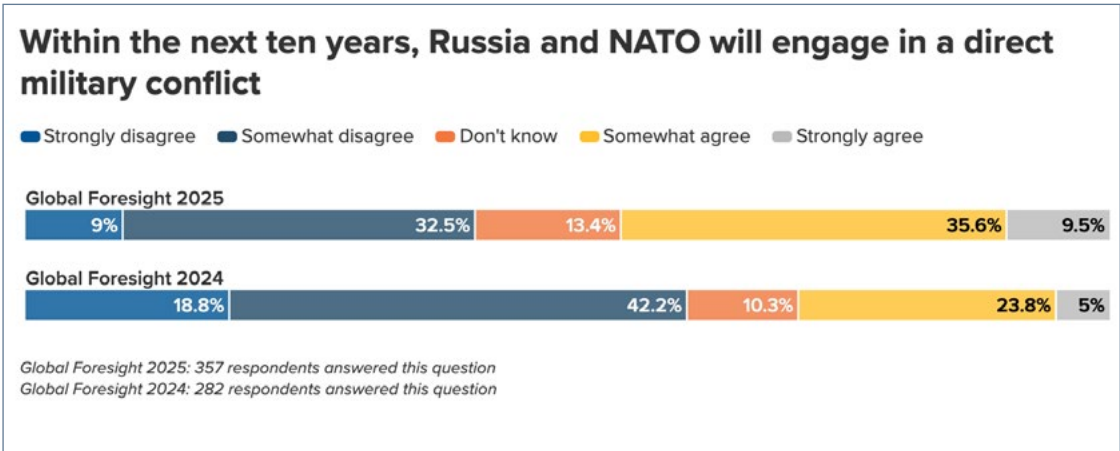
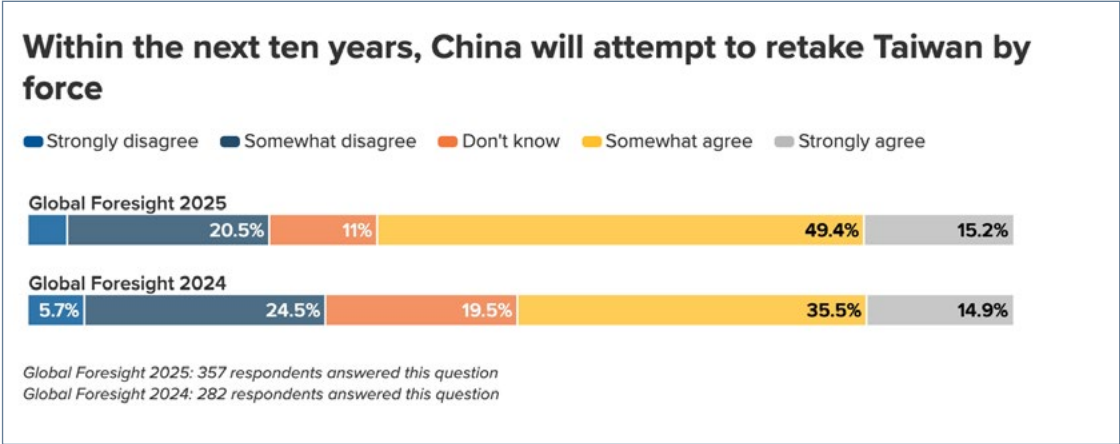
2 TENSIONS WITH CHINA AND RUSSIA ARE POTENTIAL VECTORS FOR MAJOR CONFLICT

By definition, a world war would involve more than two belligerent nations. But across multiple questions in the survey, respondents forecast a future in which today's strategic competition and geopolitical tensions between the United States and China in particular could sharpen into something more dangerous.

Survey respondents, for instance, were significantly more inclined than a year earlier to foresee a military conflict over Taiwan, which could draw in the United States in support of the island and against China. Sixty-five percent of all respondents somewhat or strongly agreed that China will try to retake Taiwan by force within the next decade, and only 24 percent somewhat or strongly disagreed. In our Global Foresight 2024 survey, that split was 50 percent to 30 percent.⁴ Among those predicting the breakout of another world war, the proportion was even higher: Seventy-nine percent believed China will attempt to forcibly retake Taiwan over the next ten years.

⁴ Aylward, et al, "Welcome to 2034."

A US-China confrontation is not the only potential pathway to a multifront conflict among great powers. Forty-five percent of respondents somewhat or strongly agreed that Russia and NATO will engage in a direct military conflict within the next ten years—a significant increase from the 29 percent who felt this way in our Global Foresight 2024 survey.⁵ Among respondents expecting another world war within the next decade, 69 percent anticipated a direct clash between Russia and NATO.



Though this year's survey findings may seem worrisome at first because respondents see increasing risks of war, I find them reassuring. The change from last year shows a greater awareness of the nature of the threats we face in the Indo-Pacific, particularly the risk of confronting simultaneous conflicts with multiple adversaries and nuclear attacks.¹

That a clear majority of respondents now expect Beijing to try to take Taiwan by force in the coming decade is actually a hopeful signal to me. Chinese President Xi Jinping has been clearly building up military forces suited for offensive operations and has repeatedly stated that he will not renounce the use of force to bring Taiwan under control.² Meanwhile, polls suggest that the vast majority of the people of Taiwan are disinclined to be ruled by Beijing, favoring either the status quo or outright independence.³

This would seem to set Beijing and Taipei on an inevitable collision course. Yet there is also good reason to believe that China overwhelming Taiwan is not inevitable, in part because invasion would be a far more difficult operation than is commonly recognized.⁴ It will take the increasing sense of threat of force identified by the survey to prompt Taiwan and the United States to make the investments necessary to increase their preparedness for deterring and defeating such use of force.

This growing awakening on the part of the United States and its allies can become the basis for a call to action for the populations, governments, and militaries of these countries. The United States has typically waited until war was thrust upon it before preparing comprehensively. Now is the time to act, to prepare, ideally to deter such aggression, and to be ready to hold firm if deterrence fails and we face either a short, sharp war or a protracted one.⁵



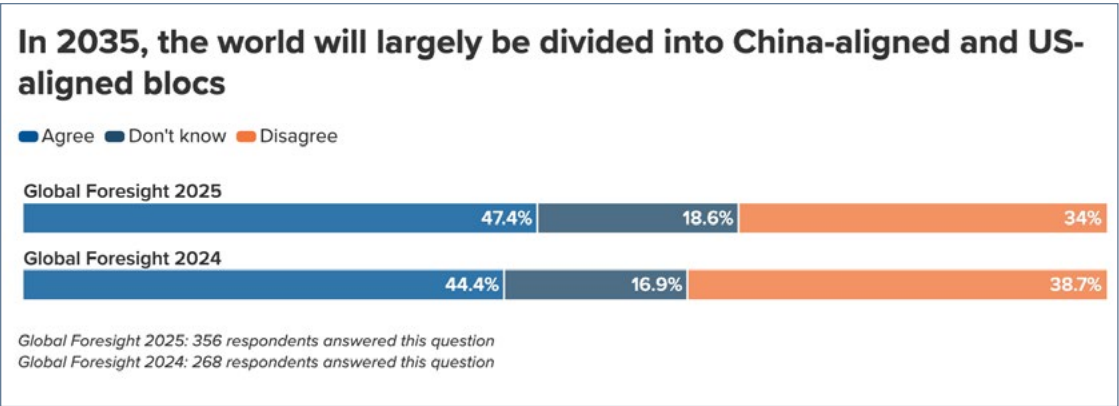
MARKUS GARLAUSKAS, Director, Indo-Pacific Security Initiative, Scowcroft Center for Strategy and Security

- 1 Markus Garlauskas, *The United States and its allies must be ready to deter a two-front war and nuclear attacks in East Asia*, The Atlantic Council, August 16, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/report/the-united-states-and-its-allies-must-be-ready-to-deter-a-two-front-war-and-nuclear-attacks-in-east-asia/>.
- 2 U.S. Department of Defense, Annual Report to Congress: *Military and Security Developments Involving the People's Republic of China*, U.S. Department of Defense, 2024, <https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF>; Joe Cash and Ben Blanchard, "China won't renounce use of force over Taiwan; Xi visits frontline island," *Reuters*, October 16, 2024, <https://www.reuters.com/world/asia-pacific/china-says-it-will-not-renounce-use-force-over-taiwan-2024-10-16/>.
- 3 Craig Kafura, Dina Smeltz, Kuan-Chen Lee, and Christina Chen, "Americans and Taiwanese Favor the Status Quo," The Chicago Council on Global Affairs, December 2, 2024, [https://globalaffairs.org/research/public-opinion-survey/americans-and-taiwanese-favor-status-quo#:~:text=Indeed%2C%20a%20majority,for%20now%20\(22%25\)](https://globalaffairs.org/research/public-opinion-survey/americans-and-taiwanese-favor-status-quo#:~:text=Indeed%2C%20a%20majority,for%20now%20(22%25)).
- 4 Brian Kerg, "Think China can already take Taiwan easily? Think again." The Atlantic Council, June 14, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/think-china-can-already-take-taiwan-easily-think-again/>.
- 5 Brian Kerg, "There will be no 'short, sharp' war. A fight between the US and China would likely go on for years," The Atlantic Council, March 19, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/there-will-be-no-short-sharp-war-a-fight-between-the-us-and-china-would-likely-go-on-for-years/>.

3 JUST UNDER HALF OF RESPONDENTS EXPECT CHINA, RUSSIA, IRAN, AND NORTH KOREA TO BE FORMAL ALLIES WITHIN A DECADE, POTENTIALLY IN A WORLD FEATURING CHINA- AND US-ALIGNED BLOCS

Other geopolitical dynamics forecast by survey respondents could serve as the kindling for whatever spark ignites a wider war or, alternatively, emerge as byproducts of such a conflict.

Forty-seven percent of respondents predicted that, by 2035, the world will largely be divided into China-aligned and US-aligned blocs; among that group, nearly 60 percent expected the China-aligned bloc to include Russia, Iran, and North Korea as formal allies, presumably with China leading the alliance.



Overall, just under half of our survey respondents (46 percent) agreed that the emerging axis of Russia, Iran, China, and North Korea will be formal allies in 2035.⁶ While this was the first time we asked this question regarding all four countries, in our Global Foresight 2024 survey 33 percent of respondents thought Russia and China would be formal allies in ten years' time.⁷

6 Frederick Kempe, "War is Coming. Will Our Next President Be Ready?," *The Atlantic*, October 22, 2024, <https://www.theatlantic.com/politics/archive/2024/10/us-election-wartime-president/680326/>.

7 Aylward, et al, "Welcome to 2034."

Economically, there is movement underway toward a US-and-allies versus China-aligned bloc structure, but this movement is still nascent. How far it goes will largely depend on whether the United States can overcome its domestic political reticence to actively shaping the global economic order and once again begin negotiating market-access trade deals.

Beijing seeks a global system in which other nations must abide by its wishes and there are no constraints—legal, normative, or otherwise—limiting Beijing's own actions. Beijing is using global commerce to enforce this approach. For nations that depend on trade or investment with China, Beijing is increasingly willing to shut off the flow of goods and capital to enforce its demands in other issue areas. Beijing is also using those partners as consumption dumping grounds, exporting excess capacity across a wide array of goods (such as steel and electric vehicles) at rock-bottom prices, which addresses over-supply in the China market but drives local producers out of business. This is leading many nations to reduce their exposure and vulnerabilities to Beijing's market interference. Many of those nations increasingly view Western, US-centric supply chains as a more attractive option.

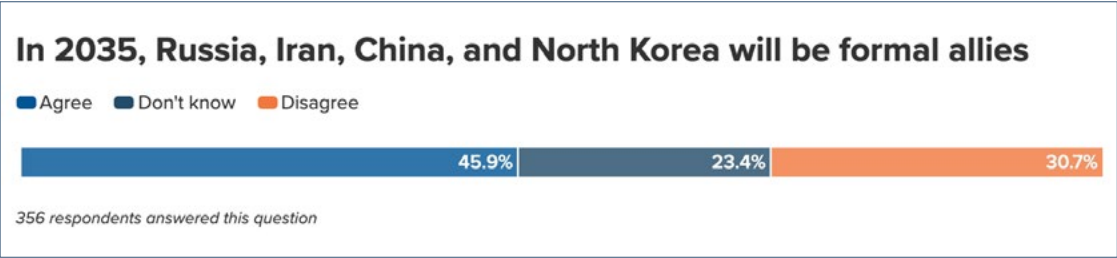
As this shift unfolds, it could lead to new economic blocs—for example, a new multilateral trading structure in which the United States and its allies are at the center of a global trading bloc that China is not allowed to join. However, that will depend on Washington shaking off its trade malaise and figuring out how to negotiate new trade deals that create new, formal structures centered on US and allied rules of the road. China is busy creating its own options—such as the Regional Comprehensive Economic Partnership in Asia—but the United States is hanging back. Without more assertive US-led action on the trade front, the biggest risk is that China will form a new, massive global economic bloc and write the rules to benefit itself at our expense, while the United States and its allies watch from the sidelines.

As for China, Russia, Iran, and North Korea, these four nations are partners with a clear shared interest—namely, their desire to undermine the United States and the liberal international order—but they are not true allies. China's need for integration with the global economy is likely to limit the degree to which today's partnership evolves in the future into a more formal alliance similar to the alliance the United States enjoys with its NATO partners.

The Chinese Communist Party has staked its regime legitimacy—its pitch for the Chinese people's continued support—largely on its ability to deliver economically. Unfortunately, the party has also decided that the reforms required to deliver next-level economic growth are too risky, as they would require the party to cede more internal political control over the nation's economy, legal system, and society. As long as Chinese leaders are unwilling to do that, they will lag behind the West in technology innovation, and they will depend on access to Western companies, universities, and markets to help fill that gap. That dependence limits China's willingness to sign up for a comprehensive alliance with Russia, Iran, or North Korea, because Beijing does not want to join those nations in an economic wilderness that cuts Chinese companies off from the world's leading technology powers.



MELANIE HART, Senior Director, Global China Hub



Many respondents appeared to associate these potential developments with the prospect of a world war. Among respondents who foresaw both the world being divided into China- and US-aligned blocs and China, Russia, Iran, and North Korea becoming formal allies, 62 percent also anticipated another world war over the next decade; among other survey respondents, that figure was far lower at 33 percent.

4 THE PROLIFERATION AND USE OF NUCLEAR WEAPONS IS A GROWING RISK, WITH NEARLY HALF OF RESPONDENTS EXPECTING A NUCLEAR WEAPON TO BE USED BY 2035

Since the dawn of the Atomic Age and particularly since the latter part of the Cold War, nuclear non-proliferation efforts have sought to prevent additional countries from acquiring the world’s most destructive weapons, with varying success. And after the United States did so in 1945, no country has used nuclear weapons in war. But according to our survey respondents, the coming decade could bring very concerning developments on both these fronts.

Iran is the most likely—but not the only potential—new nuclear-weapons power on the horizon

In our latest survey, 88 percent of respondents expected at least one new country to obtain nuclear weapons in the coming decade, a slight uptick from 84 percent in the Global Foresight 2024 edition.⁸ As in our previous survey, just under three quarters of respondents predicted that Iran will go beyond its current threshold status and join the nuclear-weapons club within the next ten years, making it the survey’s most-cited candidate to become a nuclear-weapons state in the future.⁹

⁸ Aylward, et al, “Welcome to 2034.”

⁹ *A bipartisan Iran strategy for the next US administration—and the next two decades*, The Atlantic Council, October 8, 2024, <https://www.atlanticcouncil.org/in-depth-research-reports/report/a-bipartisan-iran-strategy-for-the-next-us-administration-and-the-next-two-decades/>.

The coming years could bring a range of policy responses to this anticipated development, from strikes against Iran's nuclear facilities to a new round of nuclear negotiations with Tehran.¹⁰ Perhaps in recognition of these scenarios, more than a third of respondents expected Israel to have engaged in a direct war with Iran by 2035.

What is new is the jump in the percentage of respondents expecting other countries to get these weapons. In our Global Foresight 2024 survey, for example, a quarter of respondents thought South Korea would acquire nuclear weapons. In our most recent survey, that figure was 40 percent. The percentage of respondents expecting Japan—the only country ever subject to a nuclear-weapons attack, where the survivors of the Hiroshima and Nagasaki bombings are a prominent national presence—to acquire nuclear weapons also increased ten percentage points over 2024, from 19 percent to 29 percent.¹¹ (Notably, while the percentage of respondents anticipating a nuclear Iran in ten years' time remained steady year over year, so did the roughly 40 percent of respondents expecting nearby rival Saudi Arabia to acquire nuclear weapons as well.)

Is Iran's acquisition of a nuclear weapon inevitable or at least highly likely in the next decade? Far from it. Whether Iran acquires a nuclear weapon will depend on policy choices made by Iran, Israel, and the United States regarding Tehran's nuclear program.

Currently, Iran still officially disavows an intent to produce a nuclear weapon, but there has been much more talk among Iranian officials during the past year of the need for one as pressure on Iran has increased due to Israeli military actions against Tehran's "resistance axis" and Iran itself.¹

Iran's military and economic weaknesses have intensified an ongoing debate between moderates and hardliners in Iran over the direction of the country's foreign and nuclear policy.² Moderates want to negotiate a freeze on Iran's nuclear program in return for the lifting of economic sanctions and an opening of trade and investment with the West and Arab Gulf states. Hardliners argue Iran must double down on its expansionist regional policies, its threshold status as a military nuclear power, its growing ties to Russia and China, and its hardline stance toward the United States and the West to rebuild deterrence and resilience.

Iranian Supreme Leader Ali Khamenei will have to make the call on which policy to pursue, and uppermost in his mind will be which approach—or mixture of the two—best ensures the survival of the Islamic Republic, his overarching priority.

1 Devid E. Sanger and Farnaz Fassihi, "As Iran Picks a President, a Nuclear Shift: Open Talk About Building the Bomb," *The New York Times*, June 27, 2024, <https://www.nytimes.com/2024/06/27/us/politics/iran-president-nuclear-bomb.html>.

2 Ehud Yaari, "A Fateful Debate in Tehran," *The Jerusalem Strategic Tribune*, December 2024, <https://jstribune.com/yaari-a-fateful-debate-in-tehran/>.

10 Frederick Kempe, "Dispatch from the desert: Trump's first global test is Iran" *The Atlantic Council*, November 20, 2024, <https://www.atlanticcouncil.org/content-series/inflection-points/dispatch-from-the-desert-trumps-first-global-test-is-iran/>.

11 "The Nobel Peace Prize Announcement," *The Nobel Prize*, October 11, 2024, <https://www.nobelprize.org/prizes/peace/2024/press-release/>.

Israeli officials continue to monitor Iran's nuclear program closely and have reiterated warnings that Israel will resort to military force if Iran seeks to acquire a nuclear weapon.³ Israel under Prime Minister Benjamin Netanyahu has been emboldened by its military successes over the past year, including the destruction of Hamas's and Hezbollah's military capabilities and Iran's air defenses, as well as the weakening of Iran's missile-production capabilities. Senior Israeli officials probably believe conditions are ripe to destroy or set back Iran's nuclear program without major threat of retaliation, given the Islamic Republic's current vulnerability, but also seem to recognize that Israel would need US military support to do lasting damage.⁴

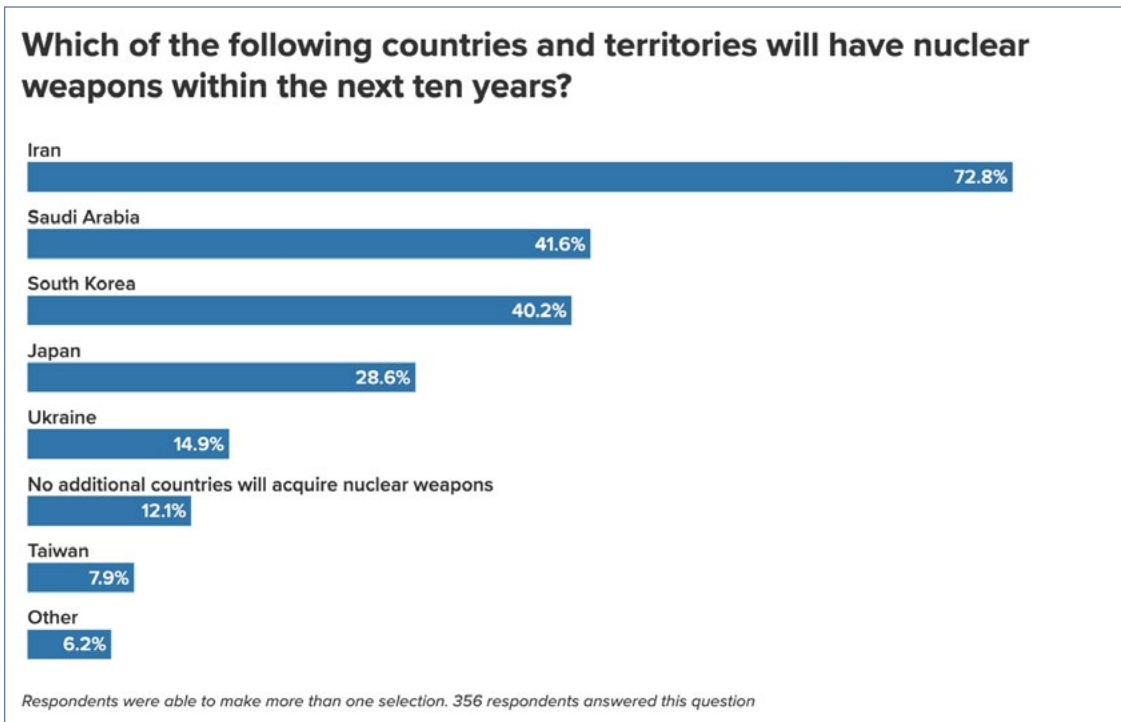
The Trump administration is committed to restoring its previous maximum-pressure campaign of sanctions against Iran to compel it to agree to a new nuclear deal and curbs on its malign regional behavior.⁵ Trump's transition team reportedly discussed the possibility of a preemptive attack on Iran's nuclear facilities given that Iran now has enough highly enriched uranium for several bombs and that sanctions could take a long time to work.⁶ They may have leaked this option to frighten Iran into agreeing to negotiations, but clearly the Trump administration is signaling a willingness to go beyond sanctions and diplomacy to achieve its objectives.⁷

With Iran's axis of resistance shredded, and Iran itself weakened militarily and economically, the United States has an extraordinary opportunity—working with Israel, Arab allies, and European countries—to use economic and diplomatic pressure backed by the threat of military force to secure an agreement that walks Iran back from the nuclear brink and curbs its destabilizing regional policies.⁸



ALAN PINO, former US National Intelligence Officer for the Near East

- 3 "Israel PM again warns Iran after top diplomat talks of revising nuclear doctrine," France 24, November 29, 2024, <https://www.france24.com/en/live-news/20241128-iran-to-hold-nuclear-talks-with-three-european-powers>.
- 4 Emanuel Fabian, "IDF sees chance for strikes on Iran nuke sites after knocking out Syria air defenses," The Times of Israel, December 12, 2024, <https://www.timesofisrael.com/iaf-says-preparing-for-strikes-on-iran-nuke-sites-after-knocking-out-syrias-air-defenses/>; Alexander Ward and Laurence Norman, "Trump's Team Weighs Options, Including Airstrikes, to Stop Iran's Nuclear Program," *The Wall Street Journal*, December 13, 2024, https://www.wsj.com/world/middle-east/trump-iran-plan-nuclear-weapons-def26f1d?mod=Searchresults_pos16&page=1.
- 5 Ward and Norman, "Trump's Team Weighs Options."
- 6 Ward and Norman, "Trump's Team Weighs Options."
- 7 Ward and Norman, "Trump's Team Weighs Options."
- 8 Ward and Norman, "Trump's Team Weighs Options."



**North Korea and Russia are considered the most likely to launch a nuclear-
weapons attack**

Forty-eight percent of respondents expected nuclear weapons to be used in the coming decade, up from 37 percent in our previous survey.

This finding demonstrates that nuclear weapons have returned to the center of geopolitics. For years after the end of the Cold War, many assumed that nuclear weapons were obsolete relics from the past. The Obama administration made eliminating nuclear weapons a top priority. At the time, Washington assessed that there was virtually zero chance of a nuclear war among states and the greatest nuclear threats came from terrorism or accident.

Now, nearly half of our respondents assess that nuclear weapons will be used in the coming decade. This shows that nuclear weapons are not twentieth-century curiosities but the ultimate instrument of force and essential tools of great-power competition. China is engaging in the most rapid nuclear buildup since the 1960s, Russia is issuing regular nuclear threats, North Korea's nuclear arsenal continues to grow, and Iran's dash time to the bomb is now measured in weeks.

This means that the United States will need to once again strengthen its strategic forces to deter adversaries and assure allies. By doing so, I hope the United States can prove our respondents wrong and ensure that the world's most powerful weapons are never used again.



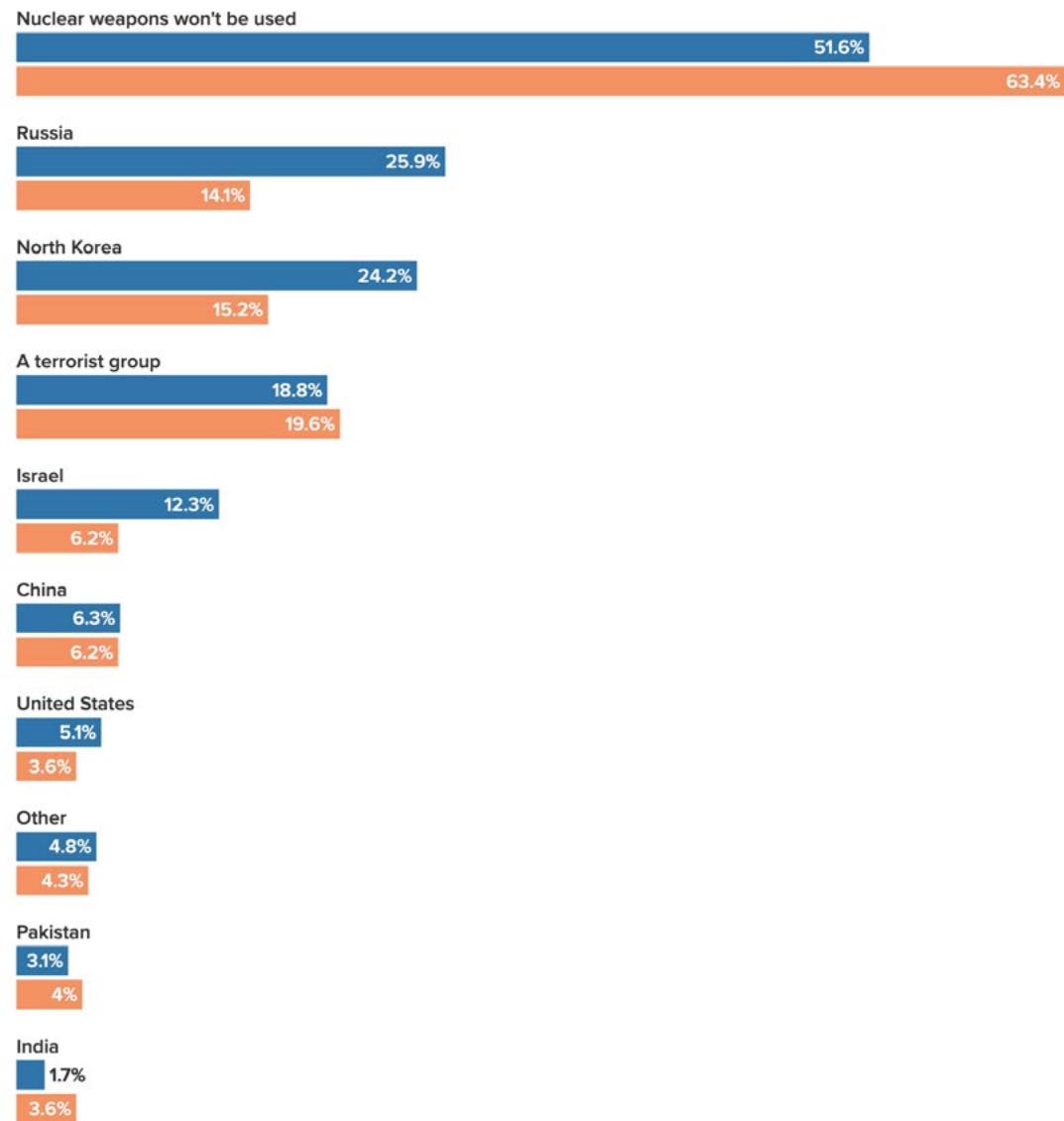
MATTHEW KROENIG, Vice President and Senior Director, Scowcroft Center for Strategy and Security

Roughly one-quarter of respondents predicted that Russia will use a nuclear weapon by 2035, with around the same percentage saying the same regarding North Korea, amid reports of near-Russian nuclear use early in its war against Ukraine and concerns about crumbling deterrence on the Korean peninsula.¹² Both cases represent significant increases relative to our previous survey, when only 14 percent expected Russia to employ a nuke and 15 percent believed North Korea would do so.

¹² David E. Sanger, "Biden's Armageddon Moment: When Nuclear Detonation Seemed Possible in Ukraine," *The New York Times*, March 9, 2024, <https://www.nytimes.com/2024/03/09/us/politics/biden-nuclear-russia-ukraine.html>; Markus Garlauskas and Lauren D. Gilbert, *Deterrence is Crumbling in Korea: How We Can Fix It*, The Atlantic Council, November 9, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/report/deterrence-is-crumbling-in-korea-how-we-can-fix-it/>.

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

Global Foresight 2025 Global Foresight 2024



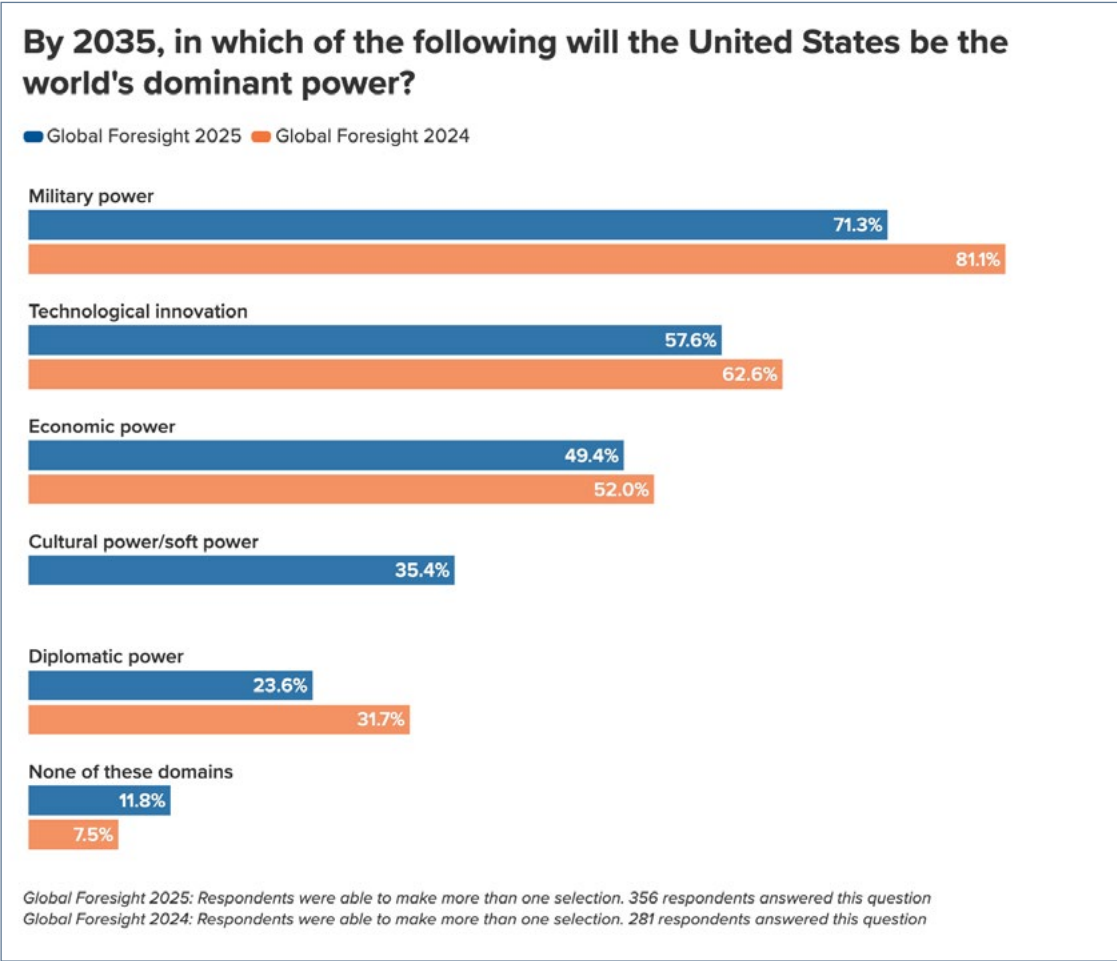
Global Foresight 2025: Respondents were able to make more than one selection. 351 respondents answered this question
Global Foresight 2024: Respondents were able to make more than one selection. 276 respondents answered this question

5 THE UNITED STATES IS STILL LIKELY TO BE DOMINANT MILITARILY IN 2035— BUT WITH RELATIVELY LESS ECONOMIC, DIPLOMATIC, AND SOFT POWER AS IT NAVIGATES A MULTIPOLAR WORLD

Three-quarters of respondents in our latest survey agreed that the world in 2035 will be multipolar, with multiple centers of power, in line with the findings in our previous survey.¹³

A slightly smaller percentage of respondents—71 percent—expected the United States to remain the world’s dominant military power by that time. A majority (58 percent) envisioned the United States being the world’s dominant technology innovator a decade from now.

On other measures of power—economic, cultural, and diplomatic—respondents predicting US dominance in 2035 were in the minority, if only ever so slightly in the case of economic power, in which 49 percent of respondents expected the United States to be dominant.



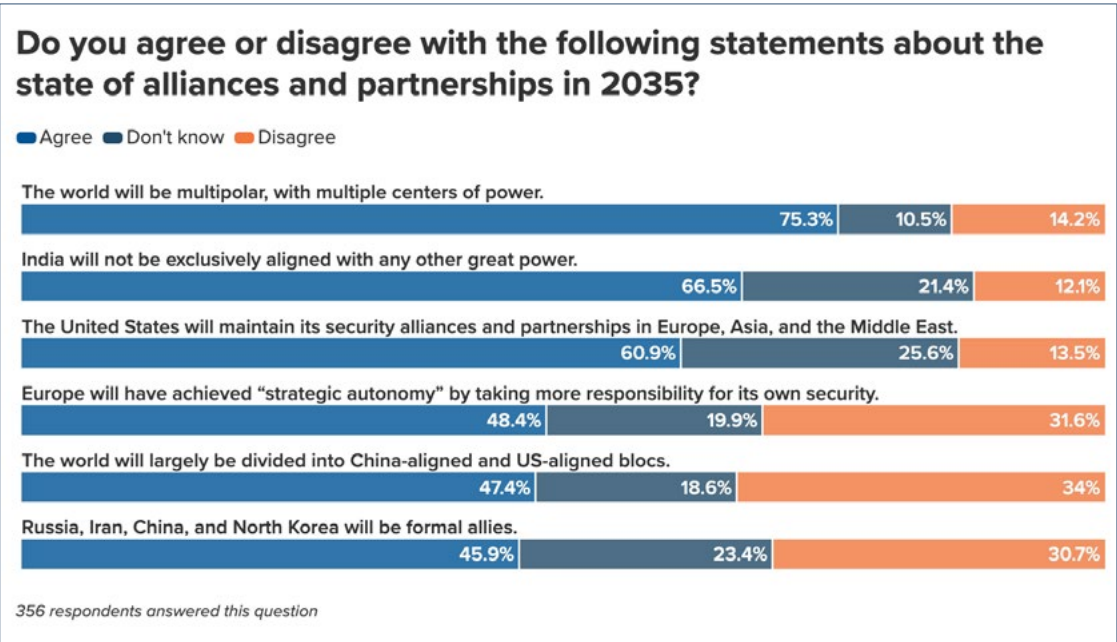
13 Aylward, et al, “Welcome to 2034.”

Between our latest survey and the previous year’s, confidence in US dominance over the next decade dropped across several measures of power, particularly diplomatic and military clout. Those forecasting US dominance in ten years’ time declined from 81 percent to 71 percent for military power, 63 percent to 58 percent for technological innovation, 52 percent to 49 percent for economic power, and 32 percent to 24 percent for diplomatic power. (The Global Foresight 2024 survey did not ask about future US dominance in cultural or soft power, which 35 percent of respondents expected in our most recent survey.) Slightly more respondents (12 percent) relative to our prior survey (7 percent) forecast that the United States will be dominant in none of these areas by 2035.

A bright but more uncertain future for US alliances

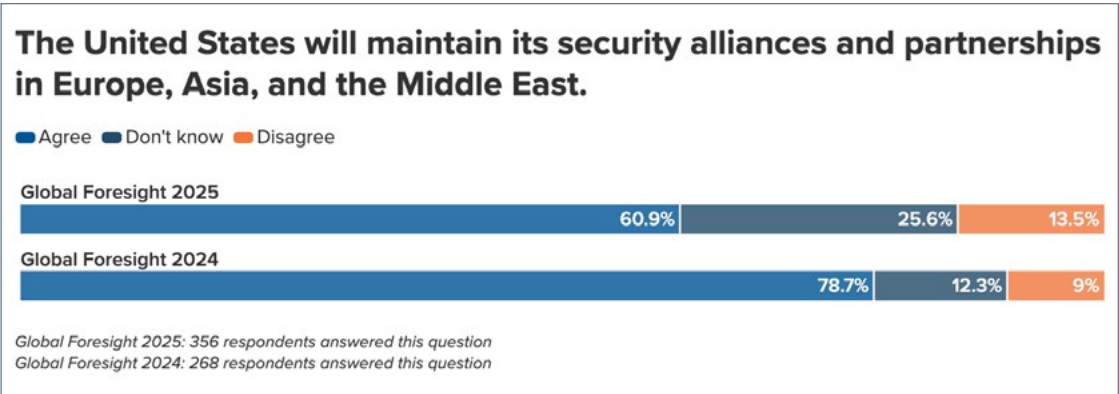
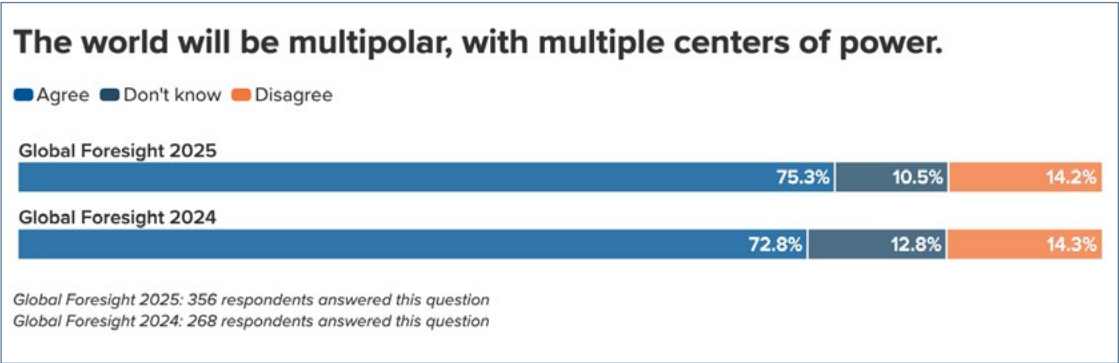
While a majority of respondents (61 percent) expected the United States to maintain its security alliances and partnerships in Europe, Asia, and the Middle East in 2035, this figure was markedly down from our previous survey (79 percent), with much of the shift seeming to stem from those answering that they “don’t know” (26 percent in the Global Foresight 2025 edition relative to 12 percent in the 2024 edition).

Responses on the future of US military dominance and alliances appear correlated. Among those who expected the United States to retain such dominance by 2035, 67 percent believed that it would maintain its network of alliances. Among those who did not think the United States would be the world’s dominant military power in a decade, only 46 percent believed that the country would preserve its alliance network.



In our Global Foresight 2024 survey, just under a third of respondents expected Europe to have achieved “strategic autonomy”¹⁴ within the next decade by taking more responsibility for its own security and thus relying less on the United States. In our latest survey, however, almost half of respondents (48 percent) expected Europe to achieve “strategic autonomy” over the next ten years—a notable increase as President Donald Trump presses European countries to substantially increase their defense spending.

Do you agree or disagree with the following statements about the state of alliances and partnerships in 2035:



14 Aylward, et al, “Welcome to 2034;” Oliver-Remy 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/>.

Europe will have achieved “strategic autonomy” by taking more responsibility for its own security.

Agree Don't know Disagree

Global Foresight 2025



Global Foresight 2024



Global Foresight 2025: 356 respondents answered this question

Global Foresight 2024: 268 respondents answered this question

The dangers of a diminished United States

Those who anticipate a diminished United States over the next decade may link such a scenario to worse outcomes for the world. Among respondents who said that by 2035 the United States will be the dominant power in none of the domains listed in the survey, for instance, only 24 percent believed that the world will be better off in a decade's time. Among other respondents, 40 percent expected the world to be better off ten years from now. Similarly, among those who didn't expect US dominance in any domain of power in a decade, 62 percent envisioned a world war occurring over that timeframe. For the rest of the survey pool, 38 percent anticipated another world war.

In the United States, declinism is a national pastime with a poor track record. In the 1970s, many thought the Soviet Union was on a trajectory to overtake the United States as the world's leading superpower. In the 1980s, economists projected that Japan would unseat the United States as the world's leading economy. In the 2010s, many thought it was inevitable that China would become the world's largest economic power.

All of those predictions turned out to be incorrect.

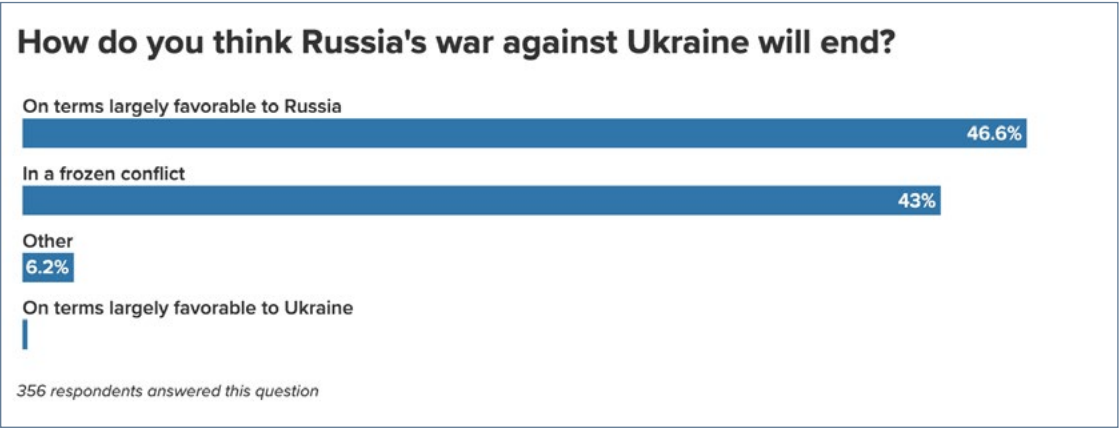
The United States is now a rising power, claiming 26 percent of global gross domestic product (GDP), its largest share in two decades. Meanwhile, China is declining; Xi Jinping's desire to assert Chinese Communist Party control over all aspects of Chinese society is stifling Chinese growth, and his aggressive foreign policy is undercutting the global economic engagement strategy that fueled China's rise. Europe's share of global GDP has fallen from a quarter in the 1980s to roughly 15 percent today. Russia's GDP is smaller than Italy's and Spain's. To whom then is the United States supposedly ceding all of this power?



MATTHEW KROENIG, Vice President and Senior Director, Scowcroft Center for Strategy and Security

6 MANY RESPONDENTS ARE PESSIMISTIC ABOUT THE WAR IN UKRAINE
ENDING ON TERMS FAVORABLE TO UKRAINE

Amid a push by the incoming Trump administration to bring the war in Ukraine to an end three years after Russia’s full-scale invasion of the country, and as Ukraine and Russia each seek to secure the best possible terms in any future negotiated peace deal, respondents were split on the likely outcome of the conflict. Forty-seven percent predicted that Russia’s war against Ukraine will end on terms largely favorable to Russia and 43 percent forecast that it will result in a “frozen conflict.” Only 4 percent expected the war to end on terms largely favorable to Ukraine.



Expectations about the future change in the wake of historic developments and perceptions of those developments. Perhaps the single most important factor in determining the outcome of Russia's aggression in Ukraine is US policy.

Simply put, a strong US policy providing Ukraine the weapons to drive Russian forces largely out of Ukraine and rallying the political West to supply Ukraine's economic needs would lead to a clear defeat for Russian President Vladimir Putin that would return much of occupied Ukraine to Kyiv's control, and with a US-led effort would vouchsafe Ukraine's security and territorial integrity via NATO membership. Alternatively, a US decision to cut off aid to Ukraine would likely lead to a disaster that would ensure Kremlin political control of the country, produce a direct threat to NATO, and encourage aggression by US adversaries in the Far and Middle East.

US President Joe Biden gave substantial support to Ukraine, but he stopped well short of giving Ukraine the arms and permission to take back most of the country. Trump has stated that he wants Ukraine to survive and would not abandon the country, but he is seeking a durable peace that requires compromise from Ukraine as well as Russia. Ukrainian President Volodymyr Zelenskyy has indicated a readiness to compromise; Putin has not. Recognizing this, Trump and his team have identified Putin as the recalcitrant party and have spoken of major economic measures—tougher sanctions, transferring the \$300 billion in frozen Russian state assets to Ukraine—to persuade Russia to negotiate. Respondents to the survey pay attention to the major factors affecting this war, including the Trump angle. But respondents to surveys are not seers, and survey questions are not written to explore the insights that seers might provide.

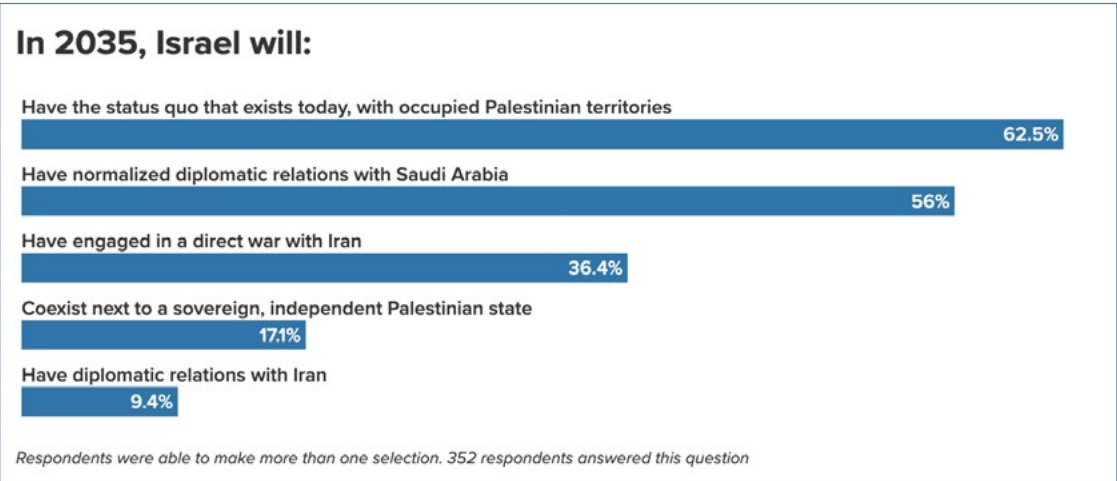
What therefore might we expect to happen with the war this coming year? First, Trump will roll out a peace initiative that likely includes four elements already public. Two are hard for Zelenskyy: territorial concessions (at least de facto) and no NATO membership for Ukraine for twenty years minimum. And two are hard for Putin: the demilitarized zone enforced by European troops and arming Ukraine to the hilt to prevent future Russian aggression. We can expect Putin to try hard to get Trump to drop those last two points before and then during the talks. But if Putin is persuaded that Trump will arm Ukraine with far more advanced weapons if Russia is unyielding, he might agree to terms that he intends to violate. Trump's hopes for a Nobel Peace Prize depend on him insisting that Russia compromise to the point of ensuring a viable and stable future for Ukraine, and being ready to confront the ever-treacherous Russian dictator if Putin violates an agreement whose terms would yield that outcome.



JOHN HERBST, Senior Director, Eurasia Center

7 RESPONDENTS ARE MUCH MORE OPTIMISTIC ABOUT A BREAKTHROUGH IN ISRAELI-SAUDI RELATIONS THAN IN ISRAELI-PALESTINIAN PEACE

Ever since Hamas’s October 7, 2023 terrorist attacks against Israel and Israel’s ensuing war in Gaza set off transformative changes in the broader Middle East, US officials have linked reviving work on normalizing diplomatic relations between Israel and Saudi Arabia with renewing the push for a pathway to a Palestinian state as part of an eventual Israeli-Palestinian peace deal, with the Saudis insisting on the latter as a condition for the former.¹⁵



But our survey respondents—who, notably, shared their views before Israel and Hamas reached their January cease-fire and hostage deal—were much more bullish about the prospects for Israeli-Saudi normalization in the coming decade than about the chances of an Israeli-Palestinian two-state solution.¹⁶ Fifty-six percent envisioned Israel having normalized diplomatic relations with Saudi Arabia by 2035—roughly similar to the percentage who said the same in our post-October 7, 2023, Global Foresight 2024 survey—relative to 17 percent who expected Israel to be coexisting next to a sovereign, independent Palestinian state within that timeframe.¹⁷ More than 60 percent of respondents predicted that when it comes to the Israeli-Palestinian conflict, today’s status quo, with occupied Palestinian territories, will persist.

15 “US Secretary of State Antony Blinken on the Biden record in the Middle East—and what comes next” The Atlantic Council, January 14, 2025, <https://www.atlanticcouncil.org/commentary/transcript/us-secretary-of-state-antony-blinken-on-the-biden-record-in-the-middle-east-and-what-comes-next/>.

16 Jonathan Panikoff, Shalom Lipner, Ahmed Fouad Alkhatib, Gina Abercrombie-Winstanley, Carmiel Arbit, Liz Cathcart, Danny Citrinowicz, Thomas S. Warrick, Marc Polymeropoulos, and Alex Plitsas, “Experts react: Everything you need to know about the Israel-Hamas cease-fire and hostage deal,” The Atlantic Council, January 15, 2025, <https://www.atlanticcouncil.org/blogs/new-atlanticist/experts-react/everything-you-need-to-know-know-about-the-israel-hamas-cess-fire-and-hostage-deal/>.

17 Aylward, et al, “Welcome to 2034.”

In 2035, will Israel have the status quo that exists today, with occupied Palestinian territories?

Hamas's surprise attack on Israel on October 7, 2023 has taught us the dangers of thinking a status quo will continue indefinitely. Israeli leaders' belief that Hamas had reconciled itself to the status quo in Gaza—in which Gazans received economic benefits in return for Hamas not attacking Israel—left them unprepared for the most devastating attack on the Jewish state since its war of independence in 1948.¹

And the war in Gaza that resulted from Hamas's attack has brought further surprises: Israel's almost complete destruction of Hamas as a military and political organization; the killing of most of Hezbollah's military leaders and elimination of a majority of its vaunted rocket and missile arsenal; direct Iranian and Israeli attacks on each other's territory, with Israel wiping out all of Iran's most advanced air-defense systems; and the almost overnight collapse of the Syrian military and the regime of Syrian President Bashar al-Assad in the face of a renewed rebel offensive.²

The Middle East's geopolitical landscape has been dramatically transformed, and Iran's image as a regional hegemon and defender of the Palestinians badly tarnished. Israeli leaders have been emboldened by Israel's military successes and seem to believe that maintaining military dominance alone will deter the country's enemies.³

But some observers, looking ahead, ask whether the cycle of violence since October 7 is likely to repeat itself at some point if Israel doesn't address the issue of Palestinian aspirations for independence.⁴ The Biden administration and others have called for a return to the idea of a two-state solution as necessary to forestall future cycles of Israeli-Palestinian violence.⁵

Admittedly, the current environment is not propitious for discussion of a Palestinian state. A large majority of Israelis, still traumatized by Hamas's horrific attack on October 7, reject the idea as posing a grave risk to Israel's security.⁶ Israeli Prime Minister Benjamin Netanyahu has repeatedly refused calls from the United States to incorporate the concept of an eventual Palestinian state into Israel's post-war strategy, and right-wingers in the current Israeli

1 "Why Hamas Attacked—and Why Israel Was Taken by Surprise: A Conversation With Martin Indyk," *Foreign Affairs*, October 7, 2023, <https://www.foreignaffairs.com/middle-east/martin-indyk-why-hamas-attacked-and-why-israel-was-taken-surprise>.

2 Amos Yadlin and Avner Golov, "An Israeli Order in the Middle East: A Chance to Defeat the Iranian Vision for the Region and Improve on the American Vision," *Foreign Affairs*, December 17, 2024, <https://www.foreignaffairs.com/middle-east/israeli-order-middle-east>.

3 Dov Lieber, "Israelis See Chance to Remake Middle East in War's Wake," *The Wall Street Journal*, December 26, 2024, https://www.wsj.com/world/middle-east/israel-regional-power-global-struggle-dfd9e694?mod=middle-east_more_article_pos2/.

4 Yadlin and Golov, "An Israeli Order in the Middle East."

5 Merissa Khurma, "Biden's Stance on the Palestinian-Israeli Conflict: A Call for Humanitarian Aid and a Two-State Solution," *The Wilson Center*, March 8, 2024, <https://www.wilsoncenter.org/article/bidens-stance-palestinian-israeli-conflict-call-humanitarian-aid-and-two-state-solution>.

6 Natan Sachs, "Peace Between Israelis and Palestinians Remains Possible But to Get There, Both Sides—and America—Need to Be Realistic About What's Achievable Now," *Foreign Affairs*, January 19, 2024, <https://www.foreignaffairs.com/israel/peace-between-israelis-and-palestinians-remains-possible>.

government want to annex a large part of the West Bank, keep long-term control of the Gaza Strip, and return Israeli settlements to Gaza.⁷

But the Palestinian issue is not likely to go away. Anti-Israel militancy and violence by Palestinians is growing in the Israeli-occupied West Bank, and Israel hasn't totally suppressed attacks by Hamas in Gaza after more than a year of fighting.⁸ Arab publics are seething with anger over the large number of Palestinians killed and displaced by Israeli military operations in Gaza.⁹ And world opinion has increasingly turned against Israel as Palestinian casualties have mounted.¹⁰

The Palestinian issue remains a roadblock to Israel becoming fully integrated into the region, a key goal of Netanyahu's that he hopes will put a capstone on his legacy as Israel's longest-serving prime minister. Responding to popular sentiment, Saudi leaders have indicated that Riyadh won't normalize relations with Israel—an essential step to create a political and security bulwark against renewed threats from Iran—unless Jerusalem endorses a clear pathway to Palestinian statehood.¹¹

New elections will probably need to take place in Israel, bringing new leadership open to the idea of a political horizon for the Palestinians, if the current status quo is to change. The United States has an important role to play here by encouraging Israeli leaders to think about how to translate their military success into a regional strategy that includes a vision for ending the Israeli-Palestinian conflict.

The odds of such a development seem long right now, but October 7 is a reminder that clinging to an unstable status quo can be riskier than seeking to change it.



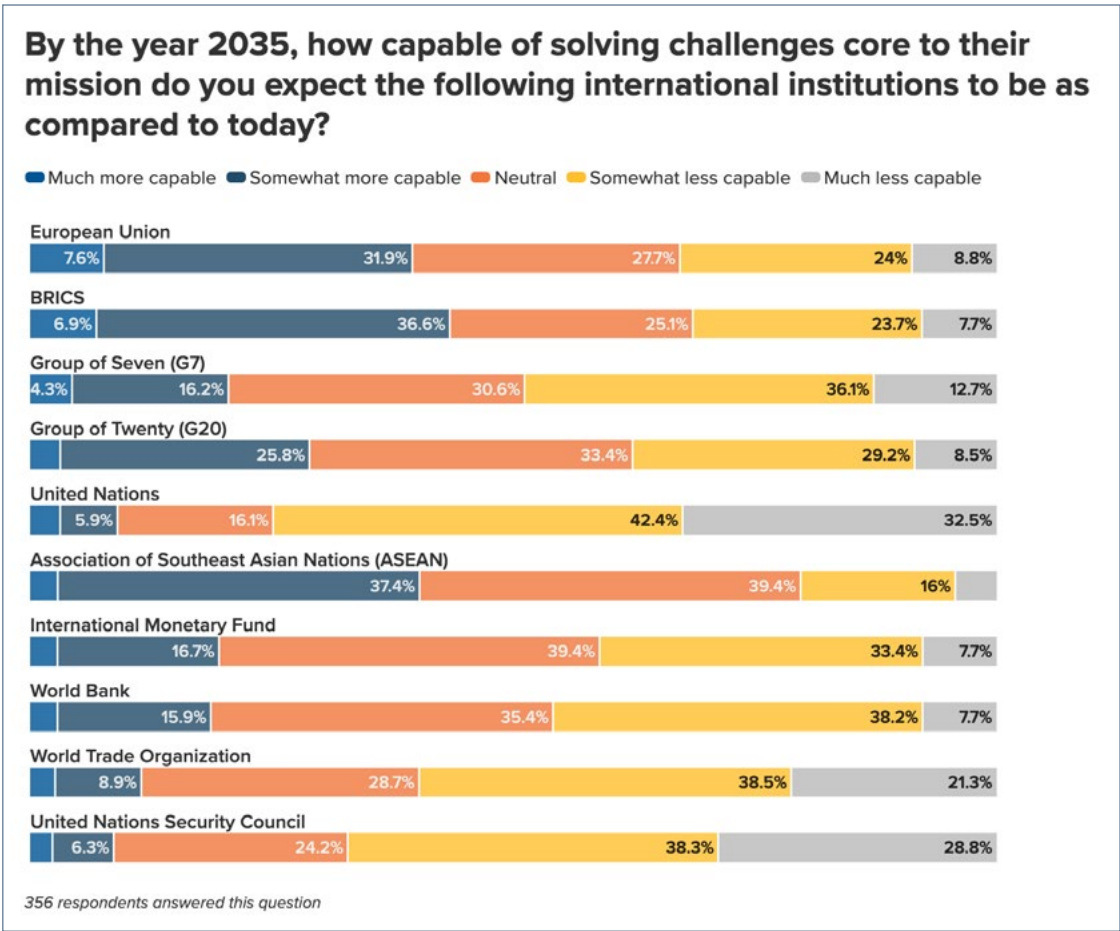
**ALAN PINO, former US National Intelligence Officer
for the Near East**

- 7 "Israeli PM tells U.S. he opposes a two-state solution in postwar Gaza," Canadian Broadcasting Network, January 19, 2024, <https://www.cbc.ca/news/world/israel-palestinians-netanyahu-two-state-solution-1.7087705>; Martin Indyk, "The Strange Resurrection of the Two-State Solution: How an Unimaginable War Could Bring About the Only Imaginable Peace," *Foreign Affairs*, February 20, 2024, https://www.foreignaffairs.com/israel/martin-indyk-palestine-strange-resurrection-two-state-solution?utm_medium=newsletters&utm_source=fatoday&utm_campaign=The%20Strange%20Resurrection%20of%20the%20Two-State%20Solution&utm_content=20240220&utm_term=FA%20Today%20-%20112017; Dennis Ross and David Makovsky, "Why Israel Should Declare a Unilateral Cease-Fire in Gaza: A Chance to Turn the Tables on Hamas and Iran and Advance Normalization With Saudi Arabia," *Foreign Affairs*, May 1, 2024, https://www.foreignaffairs.com/middle-east/why-israel-should-declare-unilateral-cess-fire-gaza?utm_source=dailybrief&utm_medium=email&utm_campaign=DailyBrief2024May1&utm_term=DailyNewsBrief.
- 8 Panikoff, et al, "Experts react."
- 9 "Arab Public Opinion Under Pressure: Seven experts take the pulse of public opinion in the Middle East and North Africa, from evolving views of external and regional powers to political priorities to the impacts of social media," Middle East Council on Global Affairs, December 12, 2024, https://mecouncil.org/blog_posts/public-opinion-under-pressure/.
- 10 "Why Israel is losing the war of global public opinion over its tactics in Gaza," NPR, April 12, 2024, <https://www.npr.org/2024/04/12/1244265663/why-israel-is-losing-the-war-of-global-public-opinion-over-its-tactics-in-gaza>.
- 11 Martin Indyk, "The Strange Resurrection of the Two-State Solution."

8 AS GLOBAL ORGANIZATIONS BECOME LESS CAPABLE OF SOLVING THE WORLD'S PROBLEMS, REGIONAL GROUPINGS AND THE BRICS MAY RISE IN IMPORTANCE

Respondents foresaw many global institutions growing less effective over the coming decade. Seventy-five percent expected the United Nations (UN) to be less capable of solving challenges core to its mission by 2035 relative to today, compared with 9 percent who anticipated it becoming more capable of doing so. The figures for the United Nations Security Council are only slightly better, with 67 percent of respondents predicting less capability and 9 percent more capability. Sixty percent of respondents envisioned the World Trade Organization being less capable in a decade than it is today.

Respondents also may be skeptical about the UN's capacity to tackle global-governance challenges such as climate change. Just under 40 percent of respondents predicted that greenhouse-gas emissions will have peaked and begun to decline by 2035, despite signs that this tipping point is already near.¹⁸ Only about half of respondents believed that renewable energy technologies will be



18 Lauren Sommer, "When will greenhouse gas emissions finally peak? Could be soon," NPR, November 14, 2024, <https://www.npr.org/2024/11/13/nx-s1-5178085/climate-change-emissions-peak-cop29>.

the dominant form of electricity production globally by then, despite significant growth in demand for renewable energy.

The forecast was less dire for the World Bank, with 46 percent predicting less capability and 19 percent more capability, and International Monetary Fund (IMF), with 41 percent predicting less capability and 20 percent more capability. A similar if slightly more sanguine picture emerged regarding organizations consisting of the world's leading powers. Forty-nine percent of respondents predicted less capability and 21 percent more capability for the Group of Seven (G7), while 38 percent expected less capability and 29 percent more capability for the Group of Twenty (G20).

But respondents seemed to hold out even more hope for regional blocs and the BRICS, which is now expanding its membership beyond Brazil, Russia, India, China, and South Africa.¹⁹ Forty percent of respondents predicted that the Association of Southeast Asian Nations will be more capable of fulfilling its mission by 2035, while 20 percent said the opposite. For the European Union, those figures were 40 percent and 33 percent. (Respondents from EU countries were even more optimistic, with 50 percent expecting greater capability and 22 percent less capability.) For the BRICS, the numbers were 43 percent and 31 percent.

The findings show in hard data what many analysts believe—that the international financial institutions, in particular the Bretton Woods institutions, remain the most functional parts of the multilateral system. That's because they deliver real money every day to countries around the world.

But the responses also show a growing recognition that these institutions are not self-perpetuating. The tenuous consensus that allows them to go about day-to-day business is predicated on an understanding that functioning IMF and World Bank institutions serve every country (including the United States) better than dysfunctional ones. With Donald Trump's return to office, there are questions about whether that consensus will hold. For what it's worth: The first time Trump was in office, it did, and Trump and his team saw the value in both institutions, even if they disagreed with some policy decisions.

The one area of the findings that seems off-target is on the BRICS. The likelihood of the BRICS succeeding in fulfilling their main goals seems vastly overstated in these findings (likely a product of media reporting on BRICS expansion during 2023 and 2024). Here's the question that is much tougher to answer: What do the BRICS actually want to achieve? What they oppose—the Western-led system—is clear. But what is their proactive agenda? Until they answer that question, the ability of BRICS to succeed as an institution will be limited at best.



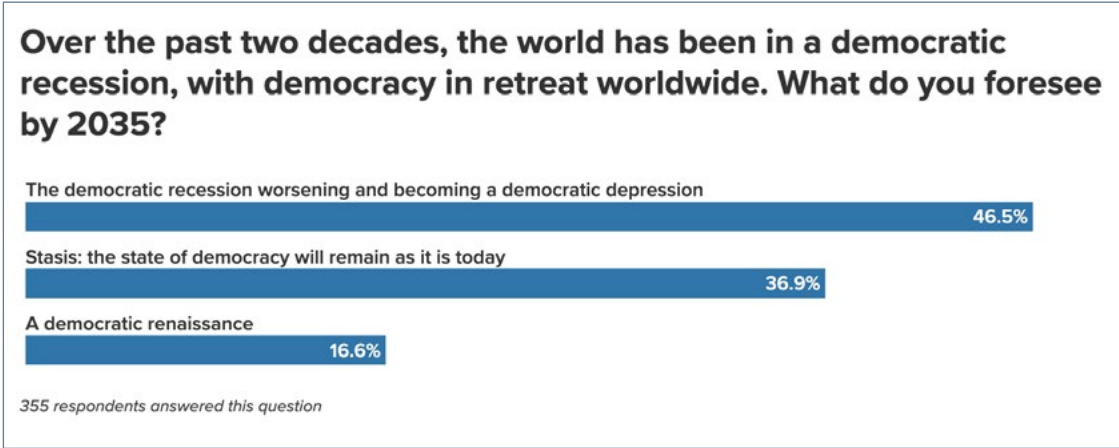
JOSH LIPSKY, Senior Director, GeoEconomics Center

¹⁹ Hung Tran, Jonathan Panikoff, Rama Yade, Colleen Cottle, Michael Bociurkiw, Valentina Sader, Kapil Sharma, Holly Dagres, and Mrugank Bhusari, "BRICS is doubling its membership. Is the bloc a new rival for the G7?" The Atlantic Council, August 24, 2023, <https://www.atlanticcouncil.org/blogs/new-atlanticist/experts-react/brics-is-doubling-its-membership-is-the-bloc-a-new-rival-for-the-g7/>.



TODAY'S DEMOCRATIC RECESSION MAY DEEPEN INTO A DEMOCRATIC DEPRESSION

Overall, respondents appeared gloomy about the prospects for democracy around the world by 2035. Just under half envisioned the current “democratic recession” worsening and becoming a “democratic depression,” while only 17 percent anticipated a “democratic renaissance” instead.²⁰ The remaining 37 percent expected the global state of democracy to remain much as it is today, with some encouraging progress but also considerable headwinds and backsliding.²¹



Sixty-five percent of respondents also forecast that global press freedoms will decrease by 2035, with another quarter expecting them to stay about the same as they are today and very few anticipating those freedoms increasing over the coming decade.

Our question on the state of global democracy in our previous survey was not identical and therefore not directly comparable.²² Nevertheless, its results—24 percent expected more democracies a decade hence, 38 percent forecast fewer democracies, and another 37 percent foresaw stasis—presaged the dim outlook expressed in our latest survey.

20 Rachel Owens, “Is the World Still in a Democratic Recession?,” Stanford University Center on Democracy, Development, and the Rule of Law, November 2, 2023, <https://cddrl.fsi.stanford.edu/news/world-still-democratic-recession>.

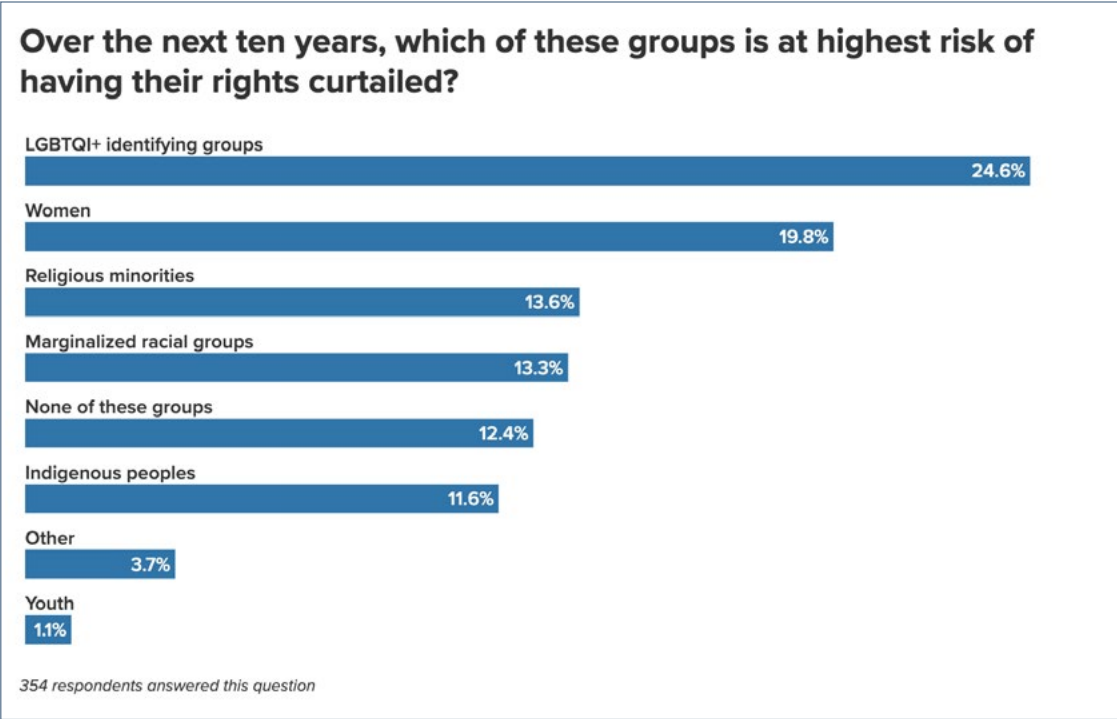
21 Patrick Quirk, *Advancing Freedom, defeating authoritarianism: A democracy agenda for 2025-2029*, The Atlantic Council, July 3, 2024, <https://www.atlanticcouncil.org/in-depth-research-reports/report/advancing-freedom-defeating-authoritarianism-a-democracy-agenda-for-2025-2029/>.

22 “The Global Foresight 2024 survey: Full Results,” *The Atlantic Council*, 2024, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/the-global-foresight-2024-survey-full-results/>.

10 WOMEN ARE MORE PESSIMISTIC ABOUT THE GLOBAL FUTURE THAN MEN ARE

Women notably expressed a bleaker outlook across many questions in the survey related to conflict, their own rights, and US clout over the next decade.

For instance, 61 percent of female respondents predicted that nuclear weapons will be used in the coming decade, compared with 44 percent of male respondents who said the same. Women (54 percent) were also more likely than men (44 percent) to expect a democratic depression. Thirty-two percent of women pointed to women as the most likely group to have their rights curtailed in the coming decade—twice the proportion of men who gave the same answer. Women, moreover, were less likely than men to envision the United States as the world’s dominant military power (58 percent relative to 76 percent) and technological innovator (47 percent relative to 61 percent) in a decade’s time.



The pessimism from women likely reflects persistent inequities in military, economic, and political representation and participation, as well as the disproportionate impacts of crises and shocks—whether those are economic (like inflation), security-related (from wars such as those in Ukraine or Gaza), the result of political turmoil or transition, or the product of natural disasters and climate events.

Compounding these situations are the challenges of child or family care and pay gaps, which limit the work and earnings of many women, and worsening domestic and gender-based violence, which devastates women's lives in all dimensions. In the United States, the rollback of *Roe v. Wade* has left many women believing their rights and protection more broadly are at risk.



NICOLE GOLDIN, nonresident senior fellow with the Atlantic Council's GeoEconomics Center and head of equitable development at United Nations University Centre for Policy Research



MARY KATE ALYWARD, Publications Editor, Atlantic Council

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Kielstra is a freelance author who has published extensively in fields including business analysis, healthcare, energy policy, fraud control, international trade, and international relations. His work regularly includes the drafting and analysis of large surveys, along with desk research, expert interviews, and scenario building. His clients have included the Atlantic Council, the Economist Group, the Financial Times Group, the World Health Organization, and Kroll. Kielstra holds a doctorate in modern history from the University of Oxford, a graduate diploma in economics from the London School of Economics, and a bachelor of arts from the University of Toronto. He is also a published historian.



Six ‘snow leopards’ to look out for in 2025

Consider the snow leopard. *Panthera uncia* sports some of the most effective camouflage in the animal kingdom, its white coat with gray and black spots blending in perfectly with the rocky, snowy Himalayan landscape it inhabits. It’s known as “the ghost of the mountains,” seeming to appear out of thin air on the rare occasions it is seen in the wild.

There’s an equivalent phenomenon in global affairs: under-the-radar trends and events that elude even the most seasoned observer. When their effect on world affairs eventually becomes apparent, they may seem to have come out of nowhere. But these “snow leopards” were there all along. Trends slowly gathering momentum while the crisis du jour dominates headlines, technological developments whose real-world application is still theoretical, known but underrated risks—all of these phenomena have the power to reshape the future. Some already are.

Any forecast of the future needs to account for these snow leopards. As we brought together experts across the Atlantic Council for our annual look into the future, our next-generation staff took on the challenge of spotting the hard to spot.²³ They surveyed the world around them for overlooked risks, trawled scientific journals and the websites of obscure government departments, and came up with a list of potentially world-changing trends and developments.

In the year to come and beyond, keep an eye on these six snow leopards.

23 “Global Foresight 2024: The authoritative forecast for the year ahead—and beyond,” The Atlantic Council, 2024, <https://www.atlanticcouncil.org/in-depth-research-reports/report/global-foresight-2024/>; “Global Foresight 2023: The authoritative forecast for the year ahead—and beyond,” The Atlantic Council, 2023, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/global-foresight-2023/>; “Global Foresight 2022: The authoritative forecast for the year ahead—and beyond,” The Atlantic Council, 2022, <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/global-foresight-2022/>.



The terrorist threat that could sever global connections

When you send a message on WhatsApp to a friend in Colombia or share a video call with family in India, the data—images, text, and video—gets broken down into packets and travels along undersea cables that connect continents in fractions of a second. Nearly 99 percent of international data passes through these cables, including terabytes of sensitive data sent by the US military to command posts overseas as well as an estimated ten trillion dollars transferred every day through the global financial system.²⁴ In an increasingly interconnected world, nonstate actors pose a serious threat to this critical digital infrastructure, which often lies in shallow waters where it is vulnerable to everything from cyber threats to explosive devices to dragging anchors.

It doesn't take advanced equipment like submarines to damage these undersea cables. In 2013, for instance, Egyptian authorities arrested three divers who had used underwater explosives to slice through the South East Asia-Middle East-West Europe 4 internet cable, which runs for 12,500 miles and connects three continents.²⁵ This incident came five years after a similar attack on the same cables and three years after terrorists in the Philippines successfully cut cable lines near the Filipino city of Cagayan de Oro.²⁶ While the possible involvement of China and Russia in recent cord-cutting

24 Alex Capri, "The new geopolitics of undersea cables, Hinrich Foundation, April 30, 2024, <https://www.hinrichfoundation.com/research/wp/tech/the-new-geopolitics-of-undersea-cables/#:~:text=Undersea%20cables%20play%20a%20critical,%2410%20trillion%20in%20transactions%20daily>; Jill C. Gallagher, "Undersea Telecommunication Cables: Technology Overview and Issues for Congress," Congressional Research Service, September 13, 2022, <https://crsreports.congress.gov/product/pdf/R/R47237>; Insikt Group, *The Escalating Global Risk Environment for Submarine Cables*, June 27, 2023, <https://go.recordedfuture.com/hubfs/reports/ta-2023-0627.pdf>.

25 "Divers Caught Trying to Cut Egypt's Undersea Internet Cable," CNBC, March 28, 2013, <https://www.cnbc.com/2013/03/28/divers-caught-trying-to-cut-egypts-undesea-internet-cable.html>.

26 "Backgrounder from the Maritime Awareness Project: Submarine Cables," The National Bureau of Asian Research, <https://www.nbr.org/publication/submarine-cables/>.

incidents has drawn international scrutiny, these prior incidents indicate that nonstate actors also perceive these cables as an opportune target.²⁷

In late 2023, a Telegram channel affiliated with Yemen's Houthi rebels threatened this vital underwater infrastructure by posting a map showing the subsea communications cables in the Mediterranean Sea, the Red Sea, the Arabian Sea, and the Persian Gulf.²⁸ An ominous message accompanied the map: "There are maps of international cables connecting all regions of the world through the sea. It seems that Yemen is in a strategic location, as internet lines that connect entire continents—not only countries—pass near it." Of note, the Houthis possess an arsenal of underwater mines, and Houthi militants have reportedly undergone combat diver training in the Red Sea.²⁹

The Houthis' bold assertion could inspire other nonstate actors to put undersea cables in their crosshairs, expanding the threat to this vital infrastructure beyond the region. The same day the Telegram post appeared, a Hezbollah-affiliated Telegram channel shared a similar message and questioned whether the Houthi statement was a "veiled message to the Western coalition."³⁰

Since these cables facilitate financial transactions and are the only hardware capable of accommodating the huge volumes of military sensor data that inform ongoing operations, terrorist groups may see them as high-value targets that can be attacked at a relatively low cost. Furthermore, non-state actors with growing cyber capabilities could exploit vulnerabilities in these networks, potentially disrupting services or stealing sensitive data. This confluence of high-tech and low-tech threats should sound alarms about the future security of global communication networks.



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- 27 Elizabeth Braw, "Suspected sabotage by a Chinese vessel in the Baltic Sea speaks to a wider threat," The Atlantic Council, November 21, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/suspected-sabotage-by-a-chinese-vessel-in-the-baltic-sea-speaks-to-a-wider-threat>; Bojan Pancevski, "Russia Suspected as Baltic Undersea Cables Cut in Apparent Sabotage," *The Wall Street Journal*, November 20, 2024, <https://www.wsj.com/world/europe/russia-suspected-as-baltic-undersea-cables-cut-in-apparent-sabotage-801cb392>.
 - 28 "In Veiled Threat, Telegram Channels Linked to Houthi Ansar Allah Movement Point To Submarine Internet Cables Off Yemeni Coast," Memri Jihad and Terrorism Threat Monitor, December 26, 2023, <https://www.memri.org/jttm/veiled-threat-telegram-channels-linked-houthi-ansar-allah-movement-point-submarine-internet>.
 - 29 Farzin Nadimi, "Under Fire in the Bab al-Mandab: Houthi Military Capabilities and U.S. Response Options," The Washington Institute for Near East Policy, December 8, 2023, <https://www.washingtoninstitute.org/policy-analysis/under-fire-bab-al-mandab-houthi-military-capabilities-and-us-response-options>; Farzin Nadimi and Michael Knights, "The Hodeida Campaign (Part 3): Detering Houthi Retaliation," The Washington Institute for Near East Policy, May 16, 2018, <https://www.washingtoninstitute.org/policy-analysis/hodeida-campaign-part-3-detering-houthi-retaliation>.
 - 30 "In Veiled Threat, Telegram Channels Linked to Houthi Ansar Allah Movement Point To Submarine Internet Cables Off Yemeni Coast," Memri Jihad and Terrorism Threat Monitor.

A photograph of a geothermal landscape. In the foreground, there's a rocky, brownish-yellow terrain with patches of green and yellow. A large plume of white steam or smoke rises from the ground, partially obscuring the background. The sky is overcast with grey and white clouds. The overall scene suggests a volcanic or geothermal area.

The low-carbon energy source that could power nearly half of US homes

In 2023, the United States produced more oil in a single year than any other country in history—largely due to fracking, which injects fluid under high pressure into rocks, cracking them open to access oil stored within them.³¹ The same technique can be used to draw cleaner sources of energy—such as the heat trapped in the earth’s crust—to the surface and send it out to homes across the United States. Geothermal energy harnesses that heat and constitutes a low-carbon energy source. With new technology on the horizon that could make it easier to utilize geothermal energy in more parts of the country, the United States is poised to unlock a major source of energy.

Geothermal-power extraction is currently confined to traditional hydrothermal regions, mostly in the western continental United States plus Hawaii and Alaska. In these regions, conventional geothermal systems tap into the naturally occurring hot water or steam from the earth to drive turbines that generate electricity.³²

Through enhanced geothermal systems (EGS), geothermal-energy production could be expanded far beyond traditional hydrothermal regions. According to the US Department of Energy, by replicating the physical dynamics present in these regions, EGS has the potential to power more than 65

31 Andrea Miller, Christina Locopo, and Lindsey Jacobson, “Why the U.S. is pumping more oil than any country in history,” CNBC, September 4, 2024, <https://www.cnbc.com/video/2024/09/04/why-the-us-is-pumping-more-oil-than-any-country-in-history.html#:~:text=The%20U.S.%20produced%20more%20oil,built%20into%20the%20tax%20code>.

32 Henry P. Heasler, Cheryl Jaworowski, and Duncan Foley, “Monitoring Geothermal Systems and Hydrothermal Features,” National Park Service, 2009, <https://www.nps.gov/articles/geothermal-systems-and-monitoring-hydrothermal-features.htm>.

million homes—a little under half of all American homes.³³ EGS is similar to fracking in that it involves injecting fluid into the ground to create new fractures or reopen old ones, resulting in increased permeability. The hot fluid is then pumped to the surface, where it is used to generate electricity. This method works in areas where the ground is hot enough but there may not be enough naturally occurring fluid or permeability to make geothermal power viable without the addition of EGS.³⁴

Currently, the United States has utilized less than 0.7 percent of its geothermal-electricity resources, with the remaining potential expected to become available via EGS.³⁵ The Department of Energy has started to recognize the potential of EGS, funding projects in Nevada, California, and Utah.³⁶ The department's Enhanced Geothermal Shot initiative seeks to reduce the cost of EGS by 90 percent by 2035 to \$45 per megawatt hour.³⁷ It's an ambitious goal, but one that, if successful, would dramatically increase access to this low- or no-carbon energy source across the United States.

That could help address an urgent need. One analysis estimates that power demand in the United States will grow 4.7 percent over the next five years, outpacing the 0.5 percent growth in annual demand over the last decade.³⁸ Though not a silver bullet, expanding access to geothermal power could help meet this demand in a clean, predictable, and relatively cheap way.



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33 "Enhanced Geothermal Systems," U.S. Department of Energy, accessed February 24, 2025, <https://www.energy.gov/eere/geothermal/enhanced-geothermal-systems>.

34 "Enhanced Geothermal Systems."

35 "Geothermal Energy Factsheet," University of Michigan Center for Sustainable Systems, 2024, <https://css.umich.edu/publications/factsheets/energy/geothermal-energy-factsheet#references>.

36 "Enhanced Geothermal Systems."

37 "Enhanced Geothermal Systems."

38 Jeff St. John, Suddenly, "US Electricity demand is spiking. Can the grid keep up?," Canary Media, December 20, 2023, <https://www.canarymedia.com/articles/transmission/suddenly-us-electricity-demand-is-spiking-can-the-grid-keep-up>.



The yellow powder that cleans carbon dioxide out of the air

Given the political and technical difficulties of getting countries to reduce the amount of greenhouse gases they pump into the air, the quest for technologies that can remove these gases has grown ever more important. One such technology, direct air capture (DAC), involves pulling carbon dioxide (CO₂) out of the air and permanently storing it somewhere else, usually deep underground in rock formations.³⁹ Because current methods of direct air capture are costly and energy-intensive, they have made only a marginal contribution to meeting global climate goals.

Yet carbon capture might be poised for a transformation thanks to a yellow powder. DAC technologies are expensive to scale because they use substantial amounts of water and energy and are designed to capture concentrated sources of carbon such as the exhaust from a power plant.⁴⁰ A new CO₂-absorbing material called COF-999, created by a University of California at Berkeley-led team of scientists, could collect CO₂ far more cheaply, using substantially less water and energy, than current DAC processes.⁴¹ Utilizing a covalent organic framework—involving the strongest chemical

39 Katie Lebling, Haley Leslie-Bole, Zach Byrum, and Liz Bridgwater, “6 Things to Know About Direct Air Capture,” World Resource Institute, May 2, 2022, <https://www.wri.org/insights/direct-air-capture-resource-considerations-and-costs-carbon-removal>.

40 Adele Peters, “7 ounces of this yellow powder can capture as much CO₂ as a tree,” Fast Company, November 1, 2024, <https://www.fastcompany.com/91220305/7-ounces-of-this-yellow-powder-can-capture-as-much-co2-as-a-tree>; Robert Sanders, “Capturing carbon from the air just got easier,” UC Berkeley News, October 23, 2024, <https://news.berkeley.edu/2024/10/23/capturing-carbon-from-the-air-just-got-easier/>.

41 Zihui Zhou, Tianqiong Ma, Heyang Zhang, Saumil Chheda, Haozhe Li, Kaiyu Wang, Sebastian Ehrling, Raynald Giovine, Chuanshui Li, Ali H. Alawadhi, Marwan M. Abduljawad, Majed O. Alawad, Laura Gagliardi, Joachim Sauer, and Omar M. Yaghi, “Carbon dioxide capture from open air using covalent organic frameworks,” *Nature* 635 (2024), <https://www.nature.com/articles/s41586-024-08080-x#citeas>; Zhou, et al, “Carbon dioxide capture.”

bonds in nature—the material promises to be dependable and sustainable. The powder is less likely to be damaged by humidity, reaches half its capacity in only eighteen minutes, is reusable (it can be used through one hundred cycles of the carbon-removal process, with minimal capacity loss), and might effectively pull CO₂ out of the air around us, which has far lower concentrations of carbon than, for example, power-plant exhaust.

Current carbon-capture technology, according to some estimates, could account for 14 percent of the global-emissions reductions needed to meet climate targets by 2050.⁴² The market is already expected to rapidly expand, with a projected compound annual growth rate of 6.2 percent over the next five years and estimated value of four trillion dollars by 2050.⁴³ The invention of COF-999 could supercharge these numbers. It could be easily implemented in existing carbon-capture systems, or scientists could experiment with ways to take advantage of its ability to clean ambient air.⁴⁴ “We took a powder of this material, put it in a tube, and we passed Berkeley air—just outdoor air—into the material to see how it would perform ... It cleaned the air entirely of CO₂,” said Omar Yaghi, a Berkeley chemistry professor who worked on the study.⁴⁵ As atmospheric CO₂ levels hit record highs, and extreme heat waves, wildfires, floods, and hurricanes increase in frequency, the yellow-powder breakthrough is one example of the creative science needed to counter inaction on rising global emissions.⁴⁶



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- 42 David Yang Shu, Sarah Deutz, Benedikt Alexander Winter, Nils Baumgärtner, Ludger Leenders, and André Bardow, “The Role of carbon capture and storage to achieve net-zero energy systems: Trade-offs between economics and the environment,” *Renewable and Sustainable Energy Reviews* 178 (2023), <https://www.sciencedirect.com/science/article/pii/S1364032123001028>; “Carbon Capture,” Center for Climate and Energy Solutions, accessed February 25, 2025, <https://www.c2es.org/content/carbon-capture/>.
- 43 Ayla Majid, “Why carbon capture is key to reaching climate goals,” World Economic Forum, October 16, 2023, <https://www.weforum.org/stories/2023/10/why-carbon-capture-is-key-to-reaching-climate-goals/>.
- 44 Sanders, “Capturing carbon from the air just got easier.”
- 45 “Yaghi Laboratory,” UC Berkley, accessed February 25, 2024, <https://yaghi.berkeley.edu/>.
- 46 Rebecca Hersher, “There is more carbon dioxide than ever in the atmosphere. That’s bad for the climate,” NPR, June 7, 2024, <https://www.npr.org/2024/06/06/nx-s1-4992290/carbon-dioxide-record-high-atmosphere>; “Emissions Gap Report 2024,” UN Environment Programme, October 24, 2024, <https://www.unep.org/resources/emissions-gap-report-2024>.



The return of wild land

If you have fifteen million dollars to spare, an unused ancestral estate, or even a small plot of land in need of transformation, you too can get in on the hot new trend of rewilding—or the process of rebuilding natural ecosystems on landscapes disrupted by humans.⁴⁷ The concept represents a fundamental shift in the way governments, ecologists, and ordinary people view conservation. It focuses on restoring to health native environments—including their balance of plants and animals—rather than on trying to protect scarce undisturbed areas such as wilderness (only 3 percent of the Earth’s land surface is ecologically intact).⁴⁸ The idea first took off in North America and has spread like kudzu, including to the estates of the ultra-wealthy.⁴⁹ Although rewilding remains a niche solution to various conservation problems, it may be on the verge of an explosion, with major consequences for the global climate.

Some estimates already put the global total of land available for rewilding at a billion acres, which is roughly half the area of the Australian landmass—and even more is set to become available over the course of this century as a combination of factors reduce pressure for the intensive use of land.⁵⁰ Some two-thirds of humanity is projected to live in cities by 2050, and the world’s total population

47 Andrew R.C. Marshall, “Who Owns Scotland? The Rise of the Green Lairds,” Reuters, January 27, 2022, <https://www.reuters.com/investigates/special-report/scotland-environment-green-lairds/>; Anne von Osterhausen, “How to Rewild Your Garden: Rewild your green space and help native plants & wildlife,” Mossy Earth, <https://www.mossy.earth/rewilding-knowledge/rewild-your-garden>.

48 Damian Carrington, “Just 3% of world’s ecosystems remain intact, study suggests,” The Guardian, April 15, 2021, <https://www.theguardian.com/environment/2021/apr/15/just-3-of-worlds-ecosystems-remain-intact-study-suggests>.

49 David Johns, “History of rewilding: ideas and practice,” in *Rewilding*, ed. Sarah M. Durant and John T. du Toit (Cambridge: Cambridge University Press, 2019), 12-33, https://www.researchgate.net/publication/331069335_History_of_rewilding_ideas_and_practice; Marshall, “Who Owns Scotland?.”

50 Fred Pearce, “Abandoned Lands: A Hidden Resource for Restoring Biodiversity,” *Yale Environment* 360, October 3, 2023, <https://e360.yale.edu/features/abandoned-lands-restore-biodiversity>.

(urban and rural) is expected to peak by the mid-2080s.⁵¹ At the same time, agricultural productivity is increasing, technology and innovation are decoupling food output from land input, and alternative proteins, which are far less land- and carbon-intensive than animal-based proteins, are becoming increasingly popular.⁵²

A 2024 study found that a quarter of land in Europe is suitable for rewilding, with Scandinavian countries, Scotland, Ireland, Spain, and Portugal at the top of the list.⁵³ A lot of land is viable for rewilding beyond Europe, too, including in Japan and North America.⁵⁴ In the United States alone, around thirty million acres of cropland has been abandoned since the 1980s.⁵⁵

Rewilding may help the environment by absorbing carbon and reversing biodiversity loss. Recent declines in biodiversity around the world, including a 73 percent decrease in wildlife populations over the last fifty years and one million species on the verge of extinction, are linked to accelerated climate change and the spread of infectious diseases.⁵⁶ There could be economic benefits as well. Nature tourism is responsible for \$600 billion in revenue globally and twenty-two million jobs; revitalized natural spaces and the reintroduction of large animals into them can help raise those numbers.⁵⁷ Restoration and rewilding can also increase farming yields, the availability of water, and global fish populations, while also reducing the degradation of agricultural land.⁵⁸ Mangroves, coastal wetlands, and coral reefs can lessen flood risk. Putting large herbivores back into their native areas can lower wildfire risk.⁵⁹

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- 51 “Urban Development Overview”, World Bank Group, accessed February 25, 2025,
- 53 Miguel B. Araújo and Diogo Alagador, “Expanding European protected areas through rewilding,” *Current Biology* 34 (2024),
- 55 Erin Blakemore, “Tens of millions of acres of cropland lie abandoned, study shows,” *The Washington Post*, June 8, 2024,
- 57 Michelle Mainek, “Biophilia is the new travel trend – this is why it matters,” World Economic Forum, May 29, 2024,
- 59 “New study finds large herbivores can reduce wildfire risk,” Rewilding Europe, September 7, 2021, [ATLANTIC COUNCIL](https://rewildingeurope.com/news/new-study-finds-large-herbivores-can-reduce-wildfire-risk/.</p>
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Just as the potential benefits of rewilding are becoming clearer, so too are its possible costs. Some experts fear that rewilding efforts may, like some net-zero carbon pledges, allow governments and industry to sidestep decarbonization efforts in favor of carbon offsets, which are unregulated and can be reversed.⁶⁰ The reintroduction of animals and plants, particularly large predators, can also induce a public backlash, which may harm rewilding and restoration.⁶¹ Restoration of ecosystems might increase the risks of tick- and other vector-borne diseases as well.⁶² As the world grows hotter, it could prove difficult to reintroduce some desired species.⁶³

Nevertheless, if the land resources and financial incentives for ecological restoration combine with messaging and public sentiment in favor of individual and community action, rewilding may become a movement capable of restoring wide swathes of land to their original states. In so doing, it might open a new route to address the effects of a changing climate.



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60 Jamie Arnold and Perrine Toledano, "Corporate Net-Zero Pledges: The Bad and the Ugly," Columbia Center on Sustainable Investment, December 1, 2021, <https://ccsi.columbia.edu/news/corporate-net-zero-pledges-bad-and-ugly>.

61 Sophie Hardach, "The Alpine row over 'problem bears'," BBC, June 29, 2023, <https://www.bbc.com/future/article/20230627-the-alpine-row-over-problem-bears>.

62 Clara Florentine Köhler, Maya Louise Holding, Hein Sprong, Patrick A. Jansen, and Helen J. Esser, "Biodiversity in the Lyme-light: ecological restoration and tick-borne diseases in Europe," *Trends in Parasitology* 39 (2023), <https://www.sciencedirect.com/science/article/abs/pii/S147149222300034X>.

63 "World endures 'decade of deadly heat' as 2024 caps hottest years on record," The Guardian, December 30, 2024, <https://www.theguardian.com/world/2024/dec/30/world-endures-decade-of-deadly-heat-as-2024-caps-hottest-years-on-record-un-antonio-guterres>.



The coming quantum leap in energy storage

In 2019, scientists Akira Yoshino, M. Stanley Whittingham, and John B. Goodenough won the Nobel Prize in chemistry for their development of the rechargeable, renewable lithium-ion battery.⁶⁴ The committee commended the trio for having “laid the foundation of a wireless, fossil fuel-free society.” Since their debut in the 1990s, batteries have become ubiquitous in all kinds of electronics. But there’s something even better on the horizon, and not a moment too soon: quantum batteries.

These novel batteries store energy by drawing on quantum mechanics (the study of physics on a microscopic scale) and particularly quantum chemistry, which is crucial to battery research and allows scientists to understand the chemical structure and reaction of atoms at significantly quicker speeds than current models.⁶⁵ It’s a promising emerging technology to watch amid a broader exploration of alternative battery chemistries that could offer the energy density and stability to perform better than lithium-ion batteries for certain functions.⁶⁶

64 “Press Release,” Nobel Prize in Chemistry, October 9, 2019, <https://www.nobelprize.org/prizes/chemistry/2019/press-release/>.

65 David Morin, “Intro to quantum mechanics,” in *Introduction to Classical Mechanics: With Problems and Solutions*, David Morin (Cambridge: Cambridge University Press 2008), https://bpb-us-e1.wpmucdn.com/sites.harvard.edu/dist/0/550/files/2023/11/waves_quantum.pdf; “Quantum Chemistry,” ScienceDirect, accessed February 27, 2025, <https://www.sciencedirect.com/topics/chemistry/quantum-chemistry>; “Quantum-Theory Guided Battery Design,” Stanford University, accessed February 27, 2025, <https://nanoenergy.stanford.edu/battery>; Jeannette Garcia, “IBM and Daimler use quantum computer to develop next-gen batteries,” IBM, January 8, 2020, <https://www.ibm.com/quantum/blog/next-gen-lithium-sulfur-batteries>.

66 “Alternative Battery Chemistries and Diversifying Clean Energy Supply Chains,” The Atlantic Council, September 2022, https://www.atlanticcouncil.org/wp-content/uploads/2022/09/Alternative-Battery-Chemistries-and-Diversifying-Clean-Energy-Supply-Chains_2pager.pdf.

One application is medical devices.⁶⁷ About 26 percent of the US adult population has some type of disability that requires a medical device—such as cochlear implants or a pacemaker—and these devices rely on lithium-ion, lithium, or lithium-iodine batteries for energy.⁶⁸ Supply of such batteries isn't guaranteed; beginning in 2022, for instance, a lithium-ion battery shortage upended electric-vehicle and medical-device supply chains in the United States. These batteries also often require recharging or a replacement, which can necessitate additional surgeries if the medical device that uses them is implanted.

Since quantum batteries could have higher energy density, quantum devices could provide more efficient and long-lasting performance than lithium-based options, reducing the number of battery exchanges that put patients at risk.⁶⁹ The energy stored in quantum batteries also could power medical facilities and electric vehicles, improving emergency services in vulnerable and remote areas—a crucial concern worldwide, as climate change brings stronger storms along with longer and more intense heat waves, which not only raise health risks but also strain power grids. During power outages, most hospitals today rely on fossil-fuel and battery-system generators, which often experience complications.⁷⁰ In the future, quantum batteries could power these facilities instead. Additionally, since quantum batteries could accelerate charging times for electric vehicles from the current thirty minutes to seconds at high-speed stations (and from about ten hours to a few minutes at home), electrically powered ambulances and medical devices could be charged and ready to go in seconds—a unit of time that can make all the difference for first responders.⁷¹

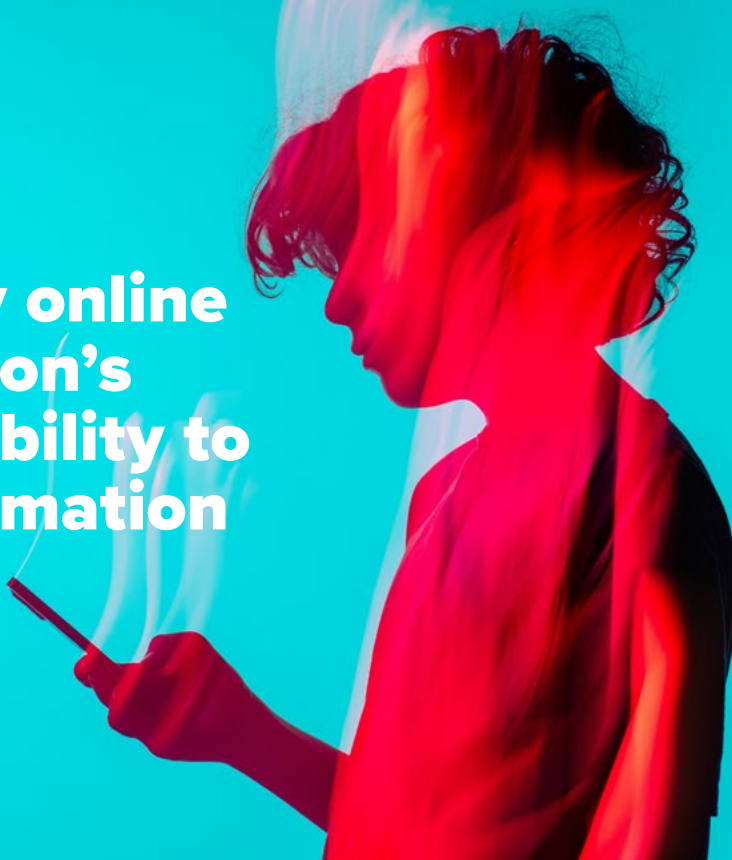


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- 67 Nabeel Aslam, Hengyun Zhou, Elana K. Urbach, Matthew J. Turner, Ronald L. Walsworth, Mikhail D. Lukin, and Hongkun Park, "Quantum sensors for biomedical applications," *Nature Reviews Physics* 5 (2023): 157-169, <https://www.nature.com/articles/s42254-023-00558-3>.
- 68 So-Yoon Yang, Vitor Sencadas, Siheng Sean You, Neil Zi-Xun Jia, Shriya Sruthi Srinivasan, Hen-Wei Huang, Abdelsalam Elrefaey Ahmed, Jia Ying Liang, and Giovanni Traverso, "Powering Implantable and Ingestible Electronics," *National Library of Medicine* 31 (2021), <https://pmc.ncbi.nlm.nih.gov/articles/PMC8553224/>.
- 69 "Quantum Batteries," CSIRO, accessed February 27, 2025, <https://research.csiro.au/quantumbattery/research/quantum-batteries/>; Alex Yong Sheng Eng, Chhail Bihari Soni, Yanwei Lum, Edwin Khoo, Zhenpeng Yao, S. K. Vineeth, Vipin Kumar, Jun Lu, Christopher S. Johnson, Christopher Wolverton, and Zhi Wei Seh, "Theory-guided experimental design in battery materials research," *Science Advances* 8 (2022), <https://www.science.org/doi/10.1126/sciadv.abm2422>.
- 70 *Healthcare Facilities and Power Outages: Guidance for State, Local, Tribal, Territorial, and Private Sector Partners*, FEMA, August 2019, <https://www.fema.gov/sites/default/files/2020-07/healthcare-facilities-and-power-outages.pdf>.
- 71 James Quach, "Quantum batteries: rethinking energy storage is possible," *Polytechnique insights*, April 19, 2023, <https://www.polytechnique-insights.com/en/columns/science/quantum-batteries-rethinking-energy-storage-is-possible/>.

The very online generation's susceptibility to misinformation



Picture someone falling for an online hoax. If an elderly internet user came to mind, think again. A recent study from Cambridge University revealed that the generation that grew up with the internet—and that reported in the study spending the most time online—had a hard time telling real headlines from fake ones.⁷²

Though they tend to be tech savvy and certainly are not the only generation vulnerable to inaccurate information, members of Generation Z (those born in the late 1990s and early 2000s) are more susceptible to mis- and disinformation than widely assumed.⁷³ Often relying on social media as a primary news source, digital natives are vulnerable to manipulation.⁷⁴ In the Cambridge study, as well as in research conducted by the Center for Countering Digital Hate, they demonstrated a propensity to believe in conspiracy theories.⁷⁵ Gen Z might be conscious of the threat posed by biased feeds and manipulated media, but its members continue to scroll and share—and their amplification of mis- and disinformation will be a serious challenge in the future.⁷⁶

72 Fred Lewsey, “The Misinformation Susceptibility Test: ‘Very online’ Gen Z and millennials are most vulnerable to fake news,” The University of Cambridge, June 29, 2023, <https://www.cam.ac.uk/stories/misinformation-susceptibility-test>.

73 Lewsey, “The Misinformation Susceptibility Test”

74 Kari Paul, “Teens much more likely to believe online conspiracy claims than adults – US study,” *The Guardian*, August 16, 2023, <https://www.theguardian.com/us-news/2023/aug/16/teens-online-conspiracies-study#img-1>.

75 Paul, “Teens much more likely to believe online conspiracy.”

76 Bron Maher, “Report finds Gen Z more likely to fact-check information – and believe Covid conspiracies,” *Press Gazette*, January 18, 2023, <https://pressgazette.co.uk/publishers/digital-journalism/gen-z-fact-check-conspiracies-news-movement-oliver-wyman/>; Kalhan Rosenblatt “Gen Z isn’t immune to misinformation. These zoomers are making sure their peers don’t get fooled,” NBC News, March 11, 2022, <https://www.nbcnews.com/pop-culture/pop-culture-news/ukraine-conflict-shows-gen-z-isnt-immune-misinformation-online-rcna19606>.

Social media is a central fact of life for the vast majority of Gen Zers in the developed world, and it has become an indispensable informational tool for those in developing countries as well. In 2024, a report surveying nearly 4,500 individuals across the United States, Canada, the United Kingdom, Ireland, and Australia found that 91 percent of Gen Z social media users are on Instagram and 86 percent are on TikTok.⁷⁷ Gen Z is forming judgments based on the content appearing on their social media feeds—often curated by algorithms that privilege content with higher engagement levels regardless of whether it is true or false—and circulating it to their digital communities.⁷⁸ Their decisions about who to follow on social media are not necessarily rooted in the authenticity or credibility of those figures.⁷⁹ Instead their social media consumption is often parasocial: They tend to follow media streams and engage with the causes of individuals who they don't know personally, be they influencers or politicians.⁸⁰

A generation growing up with seemingly unlimited access to information and extensive knowledge about what digital technologies like algorithms do, but with limited ability to verify that information, represents a significant sociological change. As members of Gen Z proceed in their careers and assume more powerful positions, there is a real risk that they have been left ill-prepared to navigate the overwhelming scale of online information ecosystems.⁸¹ The mis- and disinformation surrounding global challenges ranging from war to migration to climate change may also make Gen Zers more mistrustful of both institutions and other individuals, rendering them less capable of addressing these challenges. Collaborative efforts between Gen Z and older generations—engaging private companies, governments, and individuals—are needed to manage a transformed information landscape and prevent subsequent generations from growing up in an era of misinformation or falling for online hoaxes.



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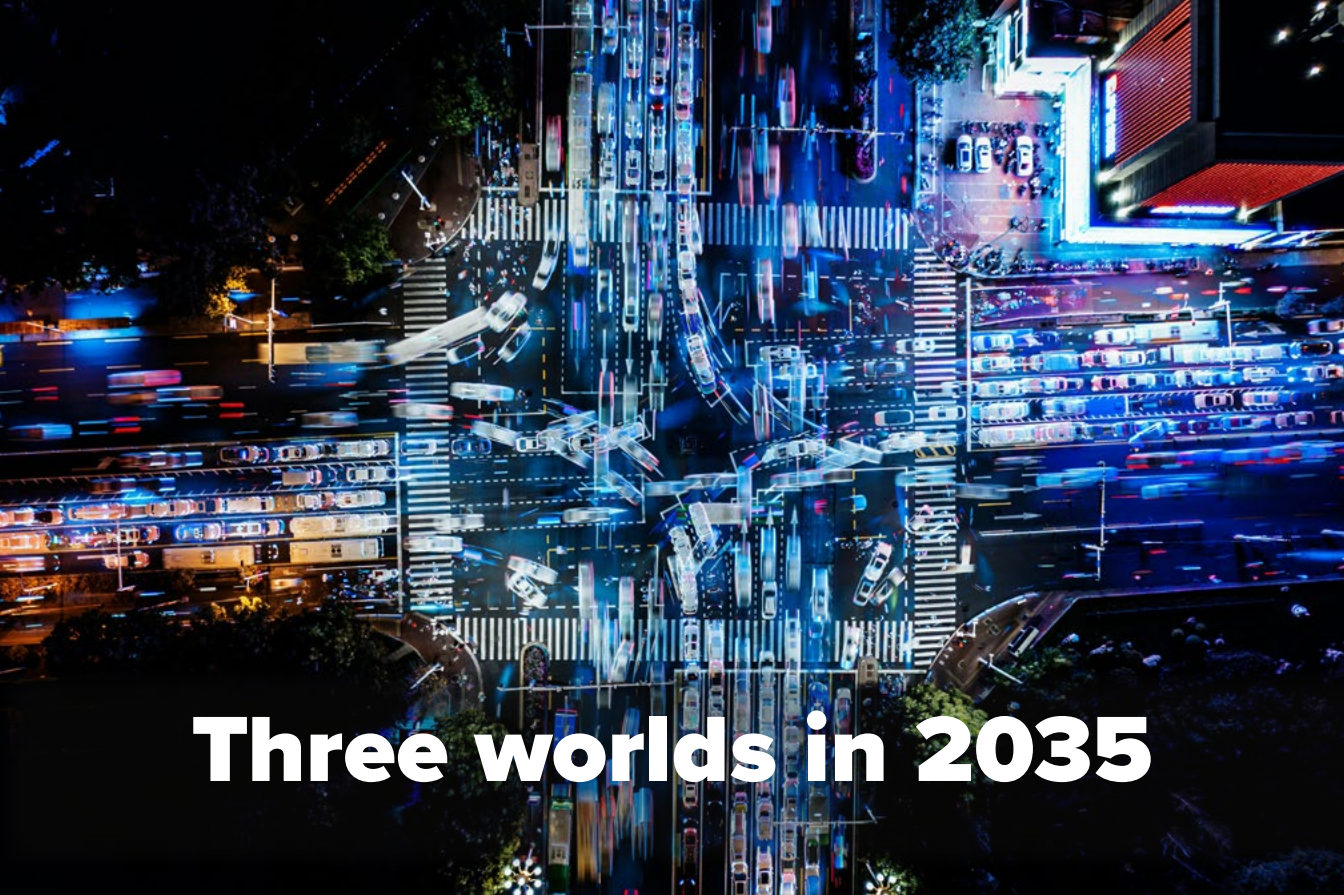
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- 77 Aubree Smith, "How Gen Z uses social media and what that means for brands," Sprout Social, October 22, 2024, <https://sproutsocial.com/insights/gen-z-social-media/>.
- 78 Kirsti Lang, "Decoding the Facebook Algorithm in 2025: Everything You Need to Know," Buffer, November 6, 2023, <https://buffer.com/library/facebook-news-feed-algorithm/#meaningful-interactions%20rel=>
- 79 Smith, "How Gen Z uses social media."
- 80 Stefanie Z. Demetriades, Nathan Walter, and Jonathan Cohen, "Parasocial Experiences in the Political Arena," in *The Oxford Handbook of Parasocial Experiences*, ed. Rebecca Tukachinsky Forster (Oxford, Oxford University Press, 2023), 335-353. <https://doi.org/10.1093/oxfordhb/9780197650677.013.15>.
- 81 Bernard Marr, "How Much Data Do We Create Every Day? The Mind-Blowing Stats Everyone Should Read," *Forbes*, May 21, 2018, <https://www.forbes.com/sites/bernardmarr/2018/05/21/how-much-data-do-we-create-every-day-the-mind-blowing-stats-everyone-should-read/>.



Three worlds in 2035

Welcome to three possible worlds in the year 2035. As resident and non-resident senior fellows in the Atlantic Council’s foresight practice, we produced these scenarios by assessing how current trends and uncertainties across a variety of categories—including geopolitics, the economy, demography, the environment, technology, and society—might interact with one another in the years to come.

These are not forecasts or predictions of what the future will bring. Instead, these scenarios are intended to inspire imagination and spur readers to consider possible futures, including future worlds that do not align with the readers’ expectations. To paraphrase a sentiment often expressed by the physicist and futurist Herman Kahn, the point of working with future scenarios is to find out what you don’t know and should know but that you didn’t even know you didn’t know.⁸²

We invite readers to interpret these scenarios in that spirit. Consider the interplay among the cause-and-effect elements that lead to each of the potential future worlds, as well as the myriad other possible scenarios that could emerge in the years to come.

Perhaps the world of 2035 might vaguely resemble one of the three scenarios presented here, but that is not the central purpose of this exercise. The primary reason why we crafted these scenarios is to generate deeper insights into how today’s actions and inactions might create a better or worse world ten years from now.

82 The Millennium Project, “A sometimes forgotten reason for writing scenarios,” YouTube, March 5, 2020, 2:42, https://www.youtube.com/watch?v=HxgaBOla_Y.



The reluctant international order

Global governance has never been more complicated than it is in 2025. But although the problems are complex, thus far the governance landscape is proving capable of containing at least some of them, as occurred several years ago when we endured a near-miss catastrophe from a bio-weapon-fueled pandemic.

We might not be experiencing the halcyon days of a revitalized multilateralism, but thankfully we're also not inhabiting a kill-or-be-killed nihilistic hellscape. We seem to be living through what some commentators are now calling the "Reluctant International Order."

Let's begin with what has not happened: neither the much-feared collapse nor the much-hoped-for revitalization of what often is called the rules-based international order (we'll use the acronym "RBIO"). Which means that neither the 1930s nor the 1990s have returned.⁸³

The international order that the United States and its allies created and maintained after 1945 delivered benefits for decades—benefits that were admittedly partial and often uneven but nonetheless real. Embedded within the RBIO are norms, such as non-aggression toward other countries and respect for human rights, that are laudable ideals. And at its core are multilateral institutions, including the United Nations (UN), World Bank, and World Health Organization (WHO), which were designed to contain conflict, assist with economic development, anticipate and then manage crises of various kinds, and provide some governance in an otherwise anarchic world. The whole order is premised on the notion that international cooperation, combined with the open exchange of ideas and goods, will lead to a better and more peaceful world.

⁸³ Richard Fontaine, "Under pressure: the present and future of international order," *The Interpreter*, October 17, 2022, <https://www.lowyinstitute.org/the-interpreter/under-pressure-present-future-international-order>.

Yet there has long been dissatisfaction with the RBIO.⁸⁴ Today, as before, many countries are unhappy with the RBIO and seek to upend or reform it. China and Russia, the two most powerful and vocal of these states, have remained steadfast in their opposition to at least parts of this order, although it also has become clear that their ends are not identical. A decade ago, both began to join with North Korea and Iran to form a grouping that was labeled an “axis of aggressors” because of widespread concern about those countries coordinating to directly challenge the West and the international order, militarily and otherwise.⁸⁵ Numerous other countries, often middle and emerging powers in the so-called Global South have sought, at a minimum, to modify the RBIO. These states—with India and Brazil the most prominent examples—have accused the RBIO of being unrepresentative and its defenders of being hypocritical because of their selective application of the order’s underpinning norms.⁸⁶ Even the core group of democratic nations that historically defended the order, including the United States, often have acted against the RBIO when it suited their interests.

Resilient rules

Despite all this, the various challenges to the RBIO have never been powerful enough to destroy it. Neither the axis of aggressors nor the partnership between China and Russia ever amounted to real military alliances, reflecting weak rather than strong bonds among them.⁸⁷ These revisionist states have acted in disjointed fashion, as a result of their divergent interests, and never staged a coordinated attempt to directly confront the West. Partly for that reason, there has been no global war and thus no wholesale shock that reset the global governance system, as occurred after World War II.

Russia emerged from its war against Ukraine (which ended in a negotiated peace in 2026) far weaker than it was when the conflict began, and it has yet to sufficiently recover to mount another similar challenge westward in Europe. China has made no overt move to seize control of Taiwan either. Evidently, Chinese President Xi Jinping has decided he does not want to gamble his country’s future in a confrontation with the United States, which after all remains a great economic and military power with a formidable nuclear deterrent. (The United States’ increased investment in defense of the Western Pacific also appears to have influenced Xi’s calculations.) It does not help China that Russia is a much-debilitated junior partner.

84 Stewart Patrick, “Rules of Order: Assessing the State of Global Governance, Carnegie Endowment for International Peace,” September 12, 2023, <https://carnegieendowment.org/research/2023/09/rules-of-order-assessing-the-state-of-global-governance?lang=en>.

85 “Governance and parallel institutions,” The Atlantic Council, April 2022, <https://www.atlanticcouncil.org/governance-and-parallel-institutions/?lang=en>.

86 Jose Francisco Lynce Zagallo Pavia, “The West and the Rest: The Global South Challenging the International Liberal Order,” Sciences Po, <https://www.sciencespo-grenoble.fr/blogs/west-and-rest-global-south-challenging-international-liberal-order>; John B. Alterman and Lily McElwee, “Pursuing Global Order in the Twenty-First Century,” Center for Strategic and International Studies, April 22, 2024, <https://features.csis.org/pursuing-global-order/>.

87 John E. Herbst, Michael Schuman, Matthew Kroenig, Kimberly Donovan, Andrew A. Michta, Shelby Magid, and Markus Garlauskas, “Experts react: What will Putin and Xi’s ‘new era’ of cooperation mean for the world?” The Atlantic Council, May 16, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/experts-react-what-will-putin-and-xis-new-era-of-cooperation-mean-for-the-world/>; Christopher S. Chivvis and Jack Keating, “Cooperation Between China, Iran, North Korea, and Russia: Current and Potential Future Threats to America,” Carnegie Endowment for International Peace, October 8, 2024, <https://carnegieendowment.org/research/2024/10/cooperation-between-china-iran-north-korea-and-russia-current-and-potential-future-threats-to-america?lang=en>.

The case of Taiwan is important for another reason. It underscores that, so far, China and the United States have decided that coexistence is the preferable direction for their relationship, which has prevented the international system from collapsing altogether. Their rivalry has been channeled through other pathways short of war, including diplomatic efforts to curry favor abroad and support for various minilateral and multilateral institutions.⁸⁸ And they've found, more than occasionally, that their interests actually intersect. In the realm of nuclear nonproliferation, for example, both China and the United States have continued working in tandem to prevent Iran from developing a nuclear weapon, albeit by utilizing very different mechanisms and forms of leverage.⁸⁹

But while the RBIO has not collapsed—meaning there has been no repeat of the era between World War I and World War II—it also has not been revitalized. There has been no return to a triumphalist end of history, no 1990s-style heyday wherein major and middle powers mostly work in concordance with one another toward peaceful and prosperous coexistence within what they perceive as a benign set of global norms and institutions.⁹⁰ Hence the increasing references to a “Reluctant International Order,” if meant in jest.

What has happened instead has been an evolution rather than a revolution, characterized more by experimentation and incrementalism than by some jarring disruption. This has occurred because the world's problems demand coordinated responses even for countries reluctant to do so and because those countries recognize that the opportunity costs of not engaging are so high.

Today, the outward institutional trappings of the RBIO remain in place. The UN continues its work as before, partially because China does not want to destroy it. (The UN's embrace of state sovereignty, for example, appeals to China's interests.) Global trade is still growing, despite the tariff wars of the mid-to-late 2020s, owing in part to technological developments that have continued to lower the cost of trade.⁹¹ And the norms underpinning the RBIO haven't disappeared, either, since many around the world—national and sub-national governments, civil-society and non-profit organizations, grass-roots groups and ordinary citizens—want to preserve them and continue to see value in cooperative approaches to transnational problems.

Trading places

Consider trade. More than a decade ago, many nations began curtailing their exposure to global trade flows out of justifiable concern that trade was having detrimental impacts on their security, economies, and societies. Yet despite extensive anti-globalization rhetoric and policies (with the tariff wars the best example), the prevailing perception is that the benefits of trade continue to outweigh the costs. China and the United States, for instance, still have one of the largest bilateral trade relationships of any two countries in the world, despite their now lengthy history of trade disputes, including tariffs and a range of trade restrictions in sensitive technologies.⁹²

88 C. Raja Mohan, “The Nimble New Minilaterals,” *Foreign Policy*, September 11, 2023, <https://foreignpolicy.com/2023/09/11/minilateral-alliances-geopolitics-quad-aukus-i2u2-coalitions-multilateralism-india-japan-us-china/>.

89 Samuel H. Hickey, “China and Iran, An Unlikely Constructive Role,” Center for Arms Control and Non-Proliferation, February 16, 2022, <https://armscontrolcenter.org/china-and-iran-an-unlikely-constructive-role/>.

90 Chris Fleming, “The End of History: Francis Fukuyama's controversial idea explained” *The Conversation*, November 16, 2022, <https://theconversation.com/the-end-of-history-francis-fukuyamas-controversial-idea-explained-193225>.

91 Eddy Bekkers, Erwin Corong, Jeanne Métivier, and Daniil Orlov, “How will global trade patterns evolve in the long run?,” World Trade Organization, January 2023, https://www.wto.org/english/res_e/reser_e/ersd202303_e.htm.

92 “International Trade Data Insights,” UN Trade and Development, 2023, <https://unctadstat.unctad.org/insights/theme/9>.

The leaders of many countries have realized that they have a compelling interest in remaining engaged in trade and talks to increase trade. This has resulted in the creation, maintenance, or expansion of a number of regional free-trade agreements. Several of these efforts have proven quite successful, perhaps best illustrated by the African Continental Free Trade Area (AfCFTA). Over the past fifteen years, African states have joined with the African Union to extend and deepen AfCFTA and, in so doing, to realize several of its longer-term objectives such as the reduction of intra-continental tariffs and loosening of visa restrictions.⁹³ The case of AfCFTA and others like it—for instance, strengthened trade agreements between the Gulf Cooperation Council countries and Asian countries—underscore that while global trade volume has grown since the mid-2020s, the geography of trade continues to shift.⁹⁴

Nonstate actors have been critical to the maintenance of this system. Multinational companies around the world have made their support for trade well-known, which has helped compel countries to continue defining their interests in pro-trade terms.

Bioweapon-inspired cooperation

Nothing underscored both the value of cooperation and the powers (positive and negative) of non-state actors like the 2029 bioweapon scare.

That year, a shadowy, transnational doomsday cult—akin to Aum Shinrikyo, which terrorized Japan with sarin gas in 1995—used an artificial intelligence (AI)-enhanced synthetic biology (“SynBio”) process to develop a deadlier and more easily transmissible strain of smallpox.⁹⁵ Because the cult’s plot to release it was foiled at the last minute, owing to frantic collaboration among national intelligence services and INTERPOL, the world narrowly avoided a pandemic that would have been far worse than the COVID-19 pandemic.

Horrified by this close call, most of the world’s governments—including the United States, China, and Russia—grasped for solutions.⁹⁶ Since pandemics do not respect boundaries, world leaders recognized that there was an upper limit on how much they could protect their people on their own. In response, they quickly sought to deepen collaboration with one another and with leading multilateral public-health institutions such as the WHO, multinational corporations including companies that develop major AI platforms, and the global scientific community that sets standards and runs laboratories. The mandate was clear: Determine how to monitor and regulate the biotechnology space more effectively—or risk perhaps hundreds of millions dying in an AI-enhanced, SynBio-caused (“AIBio”) pandemic along the lines that the doomsday cult had almost willed into existence.⁹⁷

93 Rama Yade, “The African Union is at a crossroads. It’s time to seize the moment.” The Atlantic Council, February 23, 2023, <https://www.atlanticcouncil.org/blogs/africasource/the-african-union-is-at-a-crossroads-its-time-to-seize-its-moment/>; Shola Lawal, “Can Africa’s new free trade treaty boost business on the continent?,” Aljazeera, February 16, 2024, <https://www.aljazeera.com/news/2024/2/16/afcfta-can-africas-new-trade-treaty-boost-business-on-the-continent>.

94 Alexandre Kateb, “The GCC’s Multipolar Pivot: From Shifting Trade Patterns to New Financial and Diplomatic Alliances,” Malcome H. Kerr Carnegie Middle East Center, May 28, 2024, <https://carnegieendowment.org/research/2024/05/the-gccs-multipolar-pivot-from-shifting-trade-patterns-to-new-financial-and-diplomatic-alliances?center=middle-east&lang=en>.

95 “The spectre of smallpox lingers,” *Nature*, August 13, 2018, <https://www.nature.com/articles/d41586-018-05936-x>.

96 Barry Pavel and Vikram Venkatram, “Facing the future of bioterrorism,” The Atlantic Council, September 7, 2021, <https://www.atlanticcouncil.org/commentary/article/facing-the-future-of-bioterrorism/>.

97 J. Kenneth Wickiser, Kevin J. O’Donovan, Michael Washington, Stephen Hummel, and F. John Burpo, “Engineered Pathogens and Unnatural Biological Weapons: The Future Threat of Synthetic Biology,” The Combatting Terrorism Center at West Point, August 2020, <https://ctc.westpoint.edu/engineered-pathogens-and-unnatural-biological-weapons-the-future-threat-of-synthetic-biology/>; “AIBIO,” Johns Hopkins Bloomberg School of Public Health, accessed February 27, 2025, <https://centerforhealthsecurity.org/our-work/aibio>.

One of this new coalition's proposals, which was quickly funded and implemented, was to create an institution similar to the International Atomic Energy Agency but focused on AIxBio.⁹⁸ Its formal membership is based on a novel multi-stakeholder model that includes national governments, big-tech firms, and scientific organizations.

The smallpox bioweapon scare vividly illustrated, even for adversarial major powers, the intolerably high risk of countries not engaging with one another through international institutions and on international norms to address the world's greatest challenges—and on the enduring relevance and value of the RBIO ninety years after its creation. Halting progress in some areas of the international system doesn't qualify as a renaissance. But even a Reluctant International Order is better than retreat.

98 Kateb, "The GCC's Multipolar Pivot."



China ascendant

Welcome to 2035, and a world whose center of gravity has shifted decisively toward Beijing.

China now has more influence on world affairs than does any other country, including the United States. It is ascendant on every metric of power—diplomatic, military, economic, and technological. That power has enabled Beijing to begin remaking the world to its liking. It has been busy recasting the global system, including multilateral institutions such as the United Nations (UN), in its preferred image, and is in the process of dismantling the democratic norms that have animated the international order since 1945.

China has arrived at this ascendant position in part because the United States has not done much to stand in its way. At the turn of this century, such an outcome would have been impossible to imagine. Even a decade ago, when Washington's commitment to the rules-based international order showed initial signs of wavering, such an outcome would have been difficult to forecast. But US leaders have been consumed by the challenges of dealing with the country's weakening economy, fraying societal bonds, and unrelentingly harsh domestic politics. These dynamics have eliminated the longstanding bipartisan consensus around defending the global order that the United States, along with its many allies and partners, had built and maintained for decades.

The result has been that the United States no longer has an unwavering commitment to its allies and partners, the core multilateral institutions at the center of the order that it built, and the norms and principles that it stood behind all those years. Instead, the United States has definitively turned inward. By nearly every metric, the United States remains a major power. But it no longer has much interest in maintaining its leadership role in the world. It has ceded that ground to others, especially to China.

Taiwan-style tipping points

The impact of the US withdrawal from global affairs is evident in various flashpoints around the world, including in Taiwan. While the prevailing fear in the 2010s and early 2020s was of a devastating clash between the United States and China over the island, the Taiwan issue was resolved without firing a shot.⁹⁹ China subordinated Taiwan by applying intense pressure—via sabotage, cyber operations, propaganda campaigns, overt and covert influence campaigns within Taiwan, espionage, murky hybrid operations on the island and around its waters—to influence Taiwanese domestic politics toward a cross-Straits settlement with the People’s Republic of China.¹⁰⁰ Its efforts to shape domestic politics within Taiwan succeeded.¹⁰¹ In 2030, Taiwan’s government agreed to (among other things) such a settlement, which included ceasing defense cooperation with foreign governments and reducing Taiwan’s direct engagement with foreign officials. The United States, which did not respond to China’s various forms of pressure against Taiwan, ultimately could not prevent the cross-Straits agreement, given the Taiwanese government’s support for it. None of China’s individual provocations were dramatic enough for an already hesitant United States to risk a direct military confrontation with China over it.

What happened in Taiwan has also played out on a global scale. There was no one exceptional event or even set of events that triggered a transformation of the international system—no explosion that China engineered to blow up the global order. Thus, there never was a single focal point for China’s rivals—especially the United States—to rally their citizens around and respond to in a coordinated and decisive way. Rather, there has been a gradual and now inexorable shift away from the US-led order and toward a Chinese-led one. This shift resulted from decisions made by both US and Chinese leaders: inward-looking in the case of the former, outward-looking in the case of the latter. It was, in short, a slow-motion fait accompli.

China has positioned itself as the world’s inevitable leader, seizing on its strengths to curry favor with other countries and on the opportunity presented by the United States’ implosion to diminish its rival. Take the performance of the two countries’ economies as an example. A decade ago, the economic outlook was bleaker for China than it was for the United States. But over the past ten years, that script has flipped. In the mid-2020s, Chinese President Xi Jinping managed to right China’s sputtering economy, stabilizing it and returning it to steady growth (if less spectacular growth than during the country’s long boom). He did so by successfully transitioning the country to what many are now calling “an innovation system with Chinese characteristics,” striking a balance of rewarding innovation and entrepreneurialism while maintaining the Chinese Communist Party’s control over the nation’s political apparatus.¹⁰²

All this has enabled China to return to selling itself and its economic rebound on the one hand, plus the United States’ economic stagnation (due to dysfunctional politics) on the other, as a compelling

99 Dan Blumenthal, Frederick W. Kagan, Jonathan Baumel, Cindy Chen, Francis de Beixedon, Logan Rank, and Alexis Turek, “From Coercion to Capitulation, How China Can Take Taiwan Without a War, Institute for the Study of War,” May 13, 2024, <https://www.understandingwar.org/backgrounder/coercion-capitulation-how-china-can-take-taiwan-without-war>.

100 Markus Garlauskas “Dispatch from Taipei: Why Taiwan’s survival may depend on deterrence through resilience” The Atlantic Council, June 28, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/dispatch-from-taipei-why-taiwans-survival-may-depend-on-deterrence-through-resilience/>.

101 Brian Hioe, “As Taiwan’s Election Nears, China’s Espionage, Interference Attempts Come Under Scrutiny,” The Diplomat, December 15, 2023, <https://thediplomat.com/2023/12/as-taiwans-election-nears-chinas-espionage-interference-attempts-come-under-scrutiny/>.

102 Hung Tran, “Can China transform its economy to be innovation-led?,” The Atlantic Council, April 19, 2022, <https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/can-china-transform-its-economy-to-be-innovation-led/>.

reason why the United States is both unreliable and a poor economic model for the rest of the world, and by extension why China represents a better model. That message has even more resonance around the world now than it did ten years ago.

Because of the pull of China's growing economy, which remains integrated within global trade flows, plus the relative weakness of the US economy, foreign governments have become more willing to sign onto China's various economic diplomacy efforts, such as the Global Development Initiative.¹⁰³ Beijing now hosts a robust schedule of international economic forums that position it at the center of the economic universe, and thus as the destination for intergovernmental bargaining and influence on issues such as trade and investment. To outside observers, the economic pull of Beijing has eclipsed that of Washington and, for that matter, of Brussels, London, Paris, Seoul, or Tokyo.

As a result, China's influence has grown in many parts of the world. In the Global South, lower- and middle-income countries in Africa, Latin America, and South Asia (where China remains engaged with India in a long-running contest for influence) have been even more eager to trade with and receive investment from China than they were in the 2020s. This outcome is the product of years (in some cases decades) of aggressive economic diplomacy by China and disinterest from the US government. It also stemmed from reform to China's overseas lending and investment vehicles, which China recognized needed fine-tuning to make them more palatable abroad and deflect rising criticism of the unsustainable debt and other problems they engendered. Thus far, these policy shifts appear to have worked. China has also become the world's largest trading nation for both imports and exports, ahead of the United States. Shifting trade in goods also has accelerated movement away from trade denominated in US dollars and toward trade denominated in renminbi—a sure sign of the relative strengths of the two economies.¹⁰⁴

For China, the advantages are enormous: more wealth at home and influence abroad. China's diplomatic ties with major materials exporters such as Brazil (soybeans and other crops), the Gulf Cooperation Council states (oil), and the Democratic Republic of the Congo (critical minerals such as cobalt) have increased. For the United States, the reverse has been true. For the average American, wages and incomes have stagnated, and imported goods are more expensive. Abroad, US goods are less competitive in foreign markets than Chinese goods are.

Allies hedging

The United States still has numerous allies and partners, but the bonds that held them together are weaker now than they were in the past owing to the rise of China and the self-induced retreat of the United States.

In Asia, nervous US allies including Japan, South Korea, Australia, and the Philippines are hedging between China and the United States in more ways than they were in the 2020s. But now, having witnessed what happened in Taiwan, these countries are even more concerned about the security guarantee that the United States has provided to them. Both Japan and South Korea have admitted that they are exploring options to acquire nuclear weapons in order to deter China and North Korea,

103 Michael Schuman, Jonathan Fulton, and Tuvia Gering, "How Beijing's newest global initiatives seek to remake the world order," The Atlantic Council, June 21, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/how-beijings-newest-global-initiatives-seek-to-remake-the-world-order/>.

104 Niels Graham and Hung Tran, "Dedollarization is not just geopolitics, economic fundamentals matter," The Atlantic Council, January 22, 2024, <https://www.atlanticcouncil.org/blogs/econographics/sinographs/dedollarization-is-not-just-geopolitics-economic-fundamentals-matter/>.

and most analysts expect both to become nuclear-weapons states by 2040. Various forms of US-led minilateral diplomacy in the Asia-Pacific such as the Quad have died slow deaths, the result of both US indifference and Asian countries' doubts about the value of these efforts to counter and contain a rising China.¹⁰⁵ India, for example, believes it can achieve more through its own bilateral actions to check Chinese influence than it can by working through such forums.

Also contributing to the deep unease of US allies is the growth of China's military in size and capabilities, and its increasing forward presence in the Asia-Pacific and elsewhere around the world. China has been steadily increasing its number of basing agreements globally to the point where, just as US intelligence services feared a decade ago, China now has bases in Africa, South Asia, the Caribbean, the Middle East, and the islands in the Pacific and Indian oceans.

A similar story is playing out in Europe, albeit focused on a different threat. There, European NATO members are arming themselves rapidly, spending well above the 2 percent of gross domestic product threshold for defense spending that Washington had been requesting for decades. Although that amounts to a victory of sorts for US foreign policy, it really is a defeat because the spending is an expression of serious doubt about the United States' commitment to NATO and the Alliance's Article 5 collective-defense pledge should war come again to the continent. Although the previous war in Ukraine ended in a negotiated stalemate, most European observers believe that it is only a matter of time before a rearmed and resurgent Russia decides to test NATO, likely through a long-feared invasion focused on the Baltics.

In this climate, many are pinning their hopes on Beijing rather than Washington, believing that China will restrain Russia, its junior partner, from going on the offensive in Europe. Partly for this reason, and the fact that China is now Europe's largest trading partner (having surpassed the United States in the early 2030s), European leaders have muted their criticisms of China's record on human rights, including privacy rights, and have eased China's access to the common market despite ongoing concerns about dumping, intellectual-property theft, and other such practices.¹⁰⁶

Institutional shifts

In part because China never has been interested in tearing down the entire international system and replacing it with something else entirely, few Western leaders have paid much attention to how China has been busy recasting these institutions in its image. And indeed, the UN system and the Bretton Woods institutions (the World Bank and International Monetary Fund) continue, with China maintaining its representation in them as it has for decades.

But there have been important changes within the UN system. Recently, for instance, China has been far more successful than it was in previous decades at getting its appointees installed within various technical standard-setting bodies such as the UN's International Telecommunication Union—a function of China's unrelenting focus on these specialized bureaucracies plus its rising economic, scientific, and technological prowess.

105 "A conversation with Deputy Assistant Secretary Dawson on Indo-Pacific strategy," The Atlantic Council, October 27, 2023, <https://www.atlanticcouncil.org/event/a-discussion-with-deputy-assistant-secretary-dawson-on-indo-pacific-strategy/#:~:text=new%20and%20flexible-,minilateral,engagements%20into%20the>.

106 "EU trade relations with China. Facts, figures and latest developments," European Commission, accessed February 27, 2025, https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/china_en#main-content.

Or consider the UN's historic role in maintaining peace and security. China was long willing to support UN peacekeeping operations around the world by providing troops and funds, at least to an extent. Yet with the United States and its democratic allies among the UN Security Council's five permanent members—France and the United Kingdom—now far less willing to spearhead these operations, China has yet to pick up the leadership mantle. China remains willing to contribute to peacekeeping but generally not to lead large-scale efforts, whether in terms of the Security Council's broad peacekeeping mandates or the financial, human, and technical resources necessary to build them. The result has been fewer such operations and weaker ones as well, leaving more of the world's conflicts to devolve and even in some cases metastasize.

Perhaps the most worrisome change has to do with the norms and principles that underpin the global system—both within the UN and more generally as well. Although China expresses support for some of the system's principles—for example, the UN's emphasis on state sovereignty and territorial integrity—it manifestly does not support others and especially those based upon democratic values. As a result, serious emphasis on human rights and related norms, as well as global oversight of them, has collapsed within multilateral institutions, including the UN.

These developments are having real, on-the-ground impact. China has successfully built a more robust surveillance apparatus globally that includes more sophisticated cyber-espionage operations capable of tracking the communications of ordinary people around the world, along with a major expansion of China's overseas police stations.¹⁰⁷ The Chinese government claims that these stations are designed only to service the Chinese diaspora, but their true purpose seems to be to keep track of and pressure both the diaspora and China's external critics as well.

The erosion of global human-rights enforcement speaks to a broader trend: The so-called democratic recession that has been plaguing the world since the early 2000s is now bordering on a depression. With China ascendant, the world's autocratic leaders are acting with greater confidence at home and abroad. Midway through the 2030s, the long-running contest between democratic and authoritarian systems appears to be resolving—in favor of the latter.

107 Emile Dirks and Diana Fu, "China's overseas police stations: An imminent security threat?," Brookings Institute, February 16, 2024, <https://www.brookings.edu/articles/chinas-overseas-police-stations-an-imminent-security-threat/>.



Climate of fear

In 2035, the Earth's climate is hotter and less stable than it's ever been in human history. This instability is causing people to turn on one another—and politics to become more abrasive than it was a decade ago. Climate-driven turbulence is making nearly every other problem—be it geopolitical or conflict-related—harder to solve. These challenges transcend national boundaries and afflict every country, whether rich or poor, to the north or south. Numerous local conflicts and one tense regional standoff (in South Asia) have been fueled by the consequences of a changing climate.

These trends have produced some positive outcomes as well, but in the 2030s it's difficult to foresee a bright future. As a result, many are looking to radical solutions to get humanity out of its predicament.

Ecological crisis

There is almost no good news to be found in the natural world. A range of climate-induced problems are all worse than they were a decade ago. Observable, on-the-ground environmental changes have consistently outpaced scientists' predictions from twenty or even ten years ago.

The data indicates that several climate tipping points—including the drying of the Amazon rainforest, the melting of the West Antarctic ice sheet, and the ongoing slowing of the Atlantic Meridional Overturning Circulation system, which regulates temperatures and precipitation in Europe, Africa,

and elsewhere—are nearer than we previously thought.¹⁰⁸ Scientists’ modeling, based on real-world data in the 2030s, now points even more strongly toward one or more of these or other critical systems collapsing in the next few decades. When these systems begin to collapse, there will be no practical way back from truly horrific ecological disasters.

Even short of such disasters, the world today lacks the capacity to adjust quickly enough to the climate impacts that are here already. Chronic heat is a problem nearly everywhere in the world, with lengthy heat waves now routine on every continent—including on Antarctica, where record highs, well above freezing, are increasingly common. Most frightening is the rapid increase in “wet bulb” days in some regions near the equator, where high heat plus high humidity make it impossible for humans to survive for long outdoors.¹⁰⁹ Massive storms—flash flooding in the wake of record-breaking torrential rainfall, for example, or hurricanes and cyclones that strike well inland—are commonplace now as well. Several coastal cities around the world, including Bangkok, Miami, and Jakarta, regularly flood, even more frequently than they did a decade ago.¹¹⁰ In 2029, China’s low-lying Pearl River Delta was hit by a massive typhoon that crippled the region’s manufacturing output for months, disrupting global supply chains.¹¹¹

These developments have numerous second- and third-order consequences. The world’s forests, for example, have become tinderboxes, which means that firefighting has become a significant part of national-security planning for an ever-lengthening list of the world’s governments.

(Geo)political upheaval

Politics and geopolitics are changing with the natural world, largely for the worse. Climate change has weakened the world’s democracies, which already had suffered through decades of decline. From Spain and Greece to South Africa, Nepal, and Panama, storms and suffocating heat waves have disrupted elections by making it harder for some voters to cast their ballots. Such events have also affected who participates in elections in the first place, given how they have influenced the outflows and inflows of people through cities and countries, and the voter registration and verification problems that have followed.

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- 108 Ayesha Tandon, “Drying of Amazon could be early warning of ‘tipping point’ for the rainforest,” Carbon Brief, October 4, 2023, <https://www.carbonbrief.org/drying-of-amazon-could-be-early-warning-of-tipping-point-for-the-rainforest/>; Eric Rignot, Enrico Ciraci, Bernd Scheuchl, Valentyn Tolpekin, and Christine Dow, “Widespread seawater intrusions beneath the grounded ice of Thwaites Glacier, West Antarctica,” PNAS 121 (2024), <https://doi.org/10.1073/pnas.2404766121>; “What would happen if the Atlantic Meridional Overturning Circulation (AMOC) collapses? How likely is it?,” Ask MIT Climate, November 7, 2024, <https://climate.mit.edu/ask-mit/what-would-happen-if-atlantic-meridional-overturning-circulation-amoc-collapses-how-likely>.
- 109 “Too Hot to Handle: How Climate Change May Make Some Places Too Hot to Live,” NASA, March 9, 2022, <https://science.nasa.gov/earth/climate-change/too-hot-to-handle-how-climate-change-may-make-some-places-too-hot-to-live/>.
- 110 Mazoe Ford and Supattra Vimonsuknopparat, “Bangkok is sinking and rising sea levels from climate change could threaten the homes of its 11 million people,” Australian Broadcasting Group, August 10, 2023, <https://www.abc.net.au/news/2023-08-11/bangkok-is-sinking-residents-warn-rising-seas-will-swallow-city/102559364>; Mario Alejandro Ariza, “Miami is Entering a State of Unreality,” *The Atlantic*, June 18, 2024, <https://www.theatlantic.com/science/archive/2024/06/miami-climate-change-floods/678718/>; “Work of the Climate High-Level Champions,” United Nations Climate Change, accessed February 27, 2025, <https://unfccc.int/climate-action/engagement/marrakech-partnership-for-global-climate-action/actors/meet-the-champions/work-of-the-climate-high-level-champions>.
- 111 Dr. Roy Clisby and Will Nichols, “China’s manufacturing heartland most at risk from rising seas: Environmental Risk Outlook 2020,” Verisk Maplecroft, February 27, 2020, <https://www.maplecroft.com/insights/analysis/chinas-manufacturing-heartland-most-at-risk-from-rising-seas/>.

Many years ago, when climate-driven migration was first hypothesized in the scientific literature, few paid attention.¹¹² Not so today, as fears about the consequences of so-called climate migrants or climate refugees have generated real policies involving real people. These fears often have been based on lurid imagination about crime and chaos rather than on facts.

In 2035, there are an estimated 150 million migrants worldwide who are either temporarily displaced or permanently on the move because of climate impacts, although no one knows the true number because migration is such a complex, multifaceted phenomenon. Yet everyone agrees that more migrants are coming.

Most climate-driven migration remains within national boundaries, often coming in the form of rural-to-urban migration into cities such as Bogotá and Karachi.¹¹³ Or it is intra-regional migration within areas such as Sub-Saharan Africa, the Middle East and North Africa, and South Asia.¹¹⁴ Such trends are also occurring within wealthy regions and countries such as the United States.¹¹⁵

These migration patterns have reminded many of the Syrian crisis of the early 2010s, which was preceded by drought-stressed migrants fleeing the countryside for the cities. Although that internal migration likely was only an indirect cause of the subsequent uprising against the Assad regime—which lasted well over a decade and ultimately resulted in the regime’s overthrow—many now see repetition of that past.¹¹⁶ They point to how climate-fueled internal displacements have increased recruitment into armed nonstate groups.¹¹⁷ They note the increasing number of communities around the world where climate impacts have exacerbated preexisting vulnerabilities to cause local conflicts, too many of which have started to become deadly.¹¹⁸ And they cite the increasing number of failed and failing states resulting in part from climate-driven disasters such as intense, multi-year drought.

Governments have responded through pull-up-the-drawbridges measures—and not just in Europe or the United States, where one might expect that to happen, but around the world, including within the Global South. Border walls designed to keep migrants out were already widespread ten years ago. They are everywhere now.¹¹⁹

112 Mathew E. Hauer, Sunshine A. Jacobs, and Scott A. Kulp, “Climate migration amplifies demographic change and population aging,” *PNAS* 121 (2024), <https://doi.org/10.1073/pnas.2206192119>.

113 “Eight million climate migrants predicted to arrive in ten Global South cities by 2050 if emissions don’t fall,” *C40 Cities*, September 18, 2024, <https://www.c40.org/news/eight-million-climate-migrants-arrive-ten-south-cities-by-2050/>.

114 *Africa Migration Report (Second edition) Connecting the threads: Linking policy, practice and the welfare of the African migrant*, IOM UN Migration, 2024, <https://publications.iom.int/books/africa-migration-report-second-edition>; Christina Bouri, “From Bad to Worse: Climate Migration in Middle East,” *Lawfare*, March 24, 2024, <https://www.lawfaremedia.org/article/from-bad-to-worse-climate-migration-in-middle-east>; Michael Kugelman, “Climate-Induced Displacement: South Asia’s Clear and Present Danger,” *The Wilson Center*, September 30, 2020, <https://www.wilsoncenter.org/article/climate-induced-displacement-south-asias-clear-and-present-danger>.

115 “Noah J. Gordon, Climate Migration Comes Home,” *Lawfare*, August 21, 2024, <https://www.lawfaremedia.org/article/climate-migration-comes-home>.

116 Marwa Daoudy, “The Syrian Revolution: A Story of Politics, not Climate Change,” *The Royal United Services Institute for Defence and Security Studies*, March 22, 2022, <https://rusi.org/explore-our-research/publications/commentary/syrian-revolution-story-politics-not-climate-change>.

117 Bouri, “From Bad to Worse.”

118 Federica Cappelli, Valeria Costantini, Mariagrazia D’Angeli, Giovanni Marin, Elena Paglialunga, “Local sources of vulnerability to climate change and armed conflicts in East Africa,” *Journal of Environmental Management* 355 (2024), <https://doi.org/10.1016/j.jenvman.2024.120403>.

119 Gianna-Carina Grün, “As migration is rising, so are border barriers,” *DW*, August 13, 2021, <https://www.dw.com/en/as-migration-is-rising-so-are-border-barriers/a-58848161>.

India, for example, has clamped down on its borders with Bangladesh and Myanmar, heavily fortifying them with more personnel, fencing, sophisticated electronic-surveillance systems, and autonomous enforcement technologies such as drones.¹²⁰ Numerous critics, both within India and outside of it, have voiced objections, but the Indian government insists that it is only doing what its voters want. This has led to a volatile diplomatic situation in South Asia. Pakistan, which long ago patched up its relations with Bangladesh, has joined Bangladesh and Myanmar in loudly and publicly pushing India to reverse its border policies, to no avail.¹²¹ The region is not at war, nor is there an immediate risk of one. But it is at a knife's edge, with climate-driven migration having become one of the biggest sources of friction.

Turbulence-induced transformations

There are some bright spots in this otherwise discouraging picture. Renewables are now firmly established as the world's dominant sources of energy, reflecting both their market competitiveness and the rapid electrification of the global economy. And nuclear energy has begun making a comeback in much of the world, with the latest reactor designs now seen as safely providing reliable, zero-emission electricity.¹²² (New power plants, however, remain rare.) In addition, green-technology markets are expanding rapidly across many industries such as food, water, energy, transportation, and consumer goods. Nearly a third of the world's stock of cars and trucks is fully electric.¹²³

The challenge lies in the rate at which decarbonization is occurring—a pace that simply has not been fast enough. Although global greenhouse-gas emissions finally peaked in the late 2020s, humankind nonetheless surpassed the carbon budget required to stay within the target of keeping global warming above pre-industrial levels to 1.5 degrees Celsius, as laid out in the 2015 Paris Agreement.¹²⁴ Scientists had prioritized staying below this target to limit the worst impacts of climate change.¹²⁵

One of the factors contributing to this challenge is that much of the world's legacy energy infrastructure remains in place.¹²⁶ Decommissioning such infrastructure, particularly coal and natural-gas plants, is expensive. Too many of the world's high-carbon plants still exist, especially coal-fired power plants concentrated in China.¹²⁷

120 Saqlain Rizve, "The Deadly Border Between Bangladesh and India" *The Diplomat*, February 23, 2024, <https://thediplomat.com/2024/02/the-deadly-border-between-bangladesh-and-india/>; Chanchinmawia and Yashraj Sharma, "'Separated': Why is India sealing its Myanmar border, dividing families?," *Aljazeera*, April 11, 2024, <https://www.aljazeera.com/features/2024/4/11/were-a-single-village-india-seals-myanmar-border-dividing-families>.

121 Kallol Bhattacharjee, "Bangladesh wishes to have normal relation with Pakistan: Foreign Affairs Adviser of Bangladesh," *The Hindu*, September 18, 2024, <https://www.thehindu.com/news/international/bangladesh-wishes-to-have-normal-relation-with-pakistan-foreign-affairs-adviser-of-bangladesh/article68652585.ece>.

122 Matt Bowen, *The global future of nuclear energy*, The Atlantic Council, August 24, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/report/the-global-future-of-nuclear-energy/>.

123 "Outlook for electric mobility," International Energy Agency, 2024, <https://www.iea.org/reports/global-ev-outlook-2024/outlook-for-electric-mobility>.

124 "Executive Summary," International Energy Agency, 2024, <https://www.iea.org/reports/world-energy-outlook-2024/executive-summary>.

125 Tom Di Liberto, "What's in a number? The meaning of the 1.5-C climate threshold," National Oceanic and Atmospheric Administration, January 9, 2024, <https://www.climate.gov/news-features/features/whats-number-meaning-15-c-climate-threshold>.

126 Dan Tong, Qiang Zhang, Yixuan Zheng, Ken Caldeira, Christine Shearer, Chaopeng Hong, Yue Qin & Steven J. Davis, "Committed emissions from existing energy infrastructure jeopardize 1.5°C climate target," *Nature* 572 (2019): 373-377, <https://doi.org/10.1038/s41586-019-1364-3>.

127 Colleen Howe and Ella Cao, "In China's coal country, full steam ahead with new power plants despite climate pledges," *Reuters*, November 30, 2023, <https://www.reuters.com/sustainability/chinas-coal-country-full-steam-ahead-with-new-power-plants-despite-climate-2023-11-30/>.

Behind all this is global energy consumption, which has continued to rise fast, consistently outstripping renewables' capacity to fully meet the demand.¹²⁸ (A challenge here is that interest rates for borrowing in riskier storm-affected regions have increased, constraining the expansion of capital-intensive renewables such as offshore wind farms.) There are many drivers of this increasing demand, including technological developments such as advances in artificial intelligence (AI). As was feared in the mid-2020s, the infrastructure necessary to support AI's growth—in the form of computing power and data centers—boosted global energy demand.¹²⁹ Although tech companies have greened their models, the problem is about scale: AI's ubiquity translates into a massive source of energy usage.¹³⁰ Some tech companies have become players in the nuclear-energy space for this reason.¹³¹

As they navigate this turbulence, and as already foreshadowed in the 2020s, both right- and left-wing populist governments are no longer reflexively hostile to policies to combat climate change like they once were.¹³² There is renewed interest in accelerating decarbonization efforts, including revitalizing the moribund United Nations-led process for mitigating climate change.

Another response to the unsustainable status quo has been the embrace of more radical solutions. Geoengineering—and specifically solar radiation modification (SRM), which refers to atmospheric and even space-based efforts to reduce warming by reflecting sunlight back into space—has rapidly gone from a scientific curiosity to a subject of serious research.¹³³ Although SRM engineering is complex, compared with other approaches it is straightforward and inexpensive. As a result, already in 2035 both state and nonstate actors are experimenting with SRM in the atmosphere. There is great fear that the implementation of these new approaches will be a nightmare, as for-profit companies, tech billionaires, and rogue states initiate their own unilateral solutions, while countries fight over the expected (but dimly understood) impacts on their regions. Although the scientific community is warning that SRM's consequences aren't yet sufficiently understood, there is a growing sentiment among many (though not all) politicians that it should be tried at scale. But everyone is asking whether effective geoengineering is even possible without some sort of global governance and regulatory regime.

Meanwhile, the clock is ticking and the climate is changing. Humankind's efforts to master the natural world during the post-industrial era produced the climate crisis. Now, in 2035, the Earth increasingly seems the master of human affairs rather than the other way around.

128 "International Energy Outlook 2023," U.S. Energy Information Administration, October 11, 2023, <https://www.eia.gov/outlooks/ieo/narrative/index.php>.

129 Dara Kerr, "AI brings soaring emissions for Google and Microsoft, a major contributor to climate change," NPR, July 12, 2024, <https://www.npr.org/2024/07/12/g-s1-9545/ai-brings-soaring-emissions-for-google-and-microsoft-a-major-contributor-to-climate-change>.

130 Payal Dhar, "The carbon impact of artificial intelligence," *Nature Machine Intelligence* 2 (2020): 423-425, <https://doi.org/10.1038/s42256-020-0219-9>.

131 Jennifer T. Gordon and Lauren Hughes, "Tech companies are showing a new, strong interest in nuclear power. Here's why," The Atlantic Council, October 29, 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/tech-companies-are-showing-a-new-strong-interest-in-nuclear-power-heres-why/>.

132 Zia Weise, "Europe's right wing shows Trump how to do climate, MAGA-style," Politico, November 13, 2024, <https://www.politico.eu/article/europe-right-wing-show-donald-trump-climate-maga-style-cop29-azerbaijan-giorgia-meloni-viktor-orban-nuclear-power/>.

133 Kelly Wanser and Ira Straus, "Accelerating climate intervention research to improve climate security," The Atlantic Council, October 4, 2024, <https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/accelerating-climate-intervention-research-to-improve-climate-security/>.



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Appendix – The Global Foresight 2025 Survey: full results

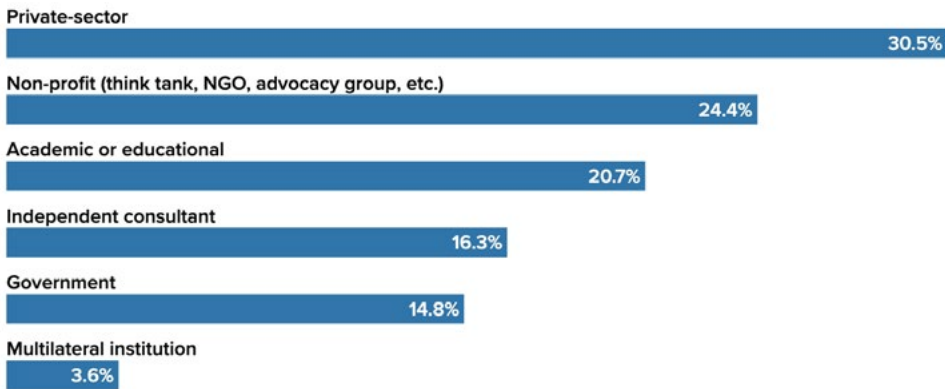
Demographic data

What is your country of citizenship?

Country	Number	Country	Number	Country	Number
United States	195	Barbados	2	Ecuador	1
Canada	16	Guatemala	2	Estonia	1
United Kingdom	15	India	2	Georgia	1
Germany	10	Lithuania	2	Hungary	1
Brazil	8	Mexico	2	Iran	1
Argentina	7	Norway	2	Ireland (Republic)	1
Italy	6	Panama	2	Jamaica	1
Colombia	5	Peru	2	Liberia	1
Switzerland	5	Thailand	2	Malaysia	1
Turkey	5	Algeria	1	Mali	1
Ukraine	5	Belgium	1	Morocco	1
El Salvador	4	Bosnia Herzegovina	1	New Zealand	1
Netherlands	4	Botswana	1	Nigeria	1
Spain	4	Bulgaria	1	Portugal	1
Venezuela	4	Chile	1	Russian Federation	1
Australia	3	Comoros	1	Singapore	1
Finland	3	Congo (Democratic Republic)	1	Slovenia	1
France	3	Costa Rica	1	South Africa	1
Poland	3	Croatia	1	Trinidad & Tobago	1
Sweden	3	Denmark	1	Uruguay	1

Note: 357 respondents answered this question

For which type of organization do you work?



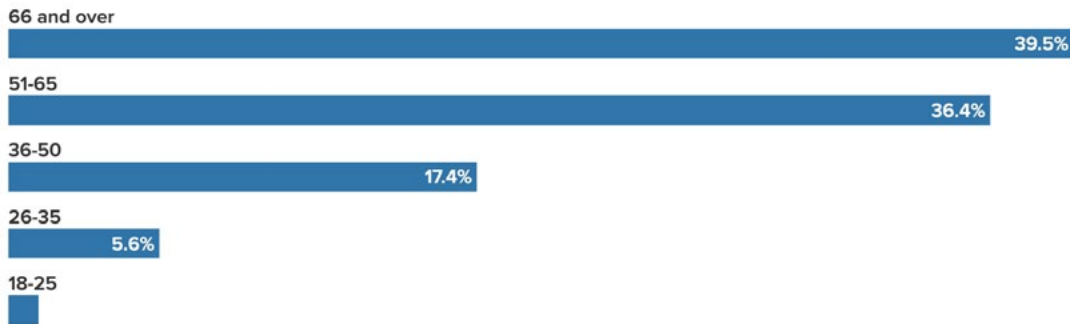
357 respondents answered this question

What is your gender identity?



357 respondents answered this question

How old are you?



357 respondents answered this question

Survey questions

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



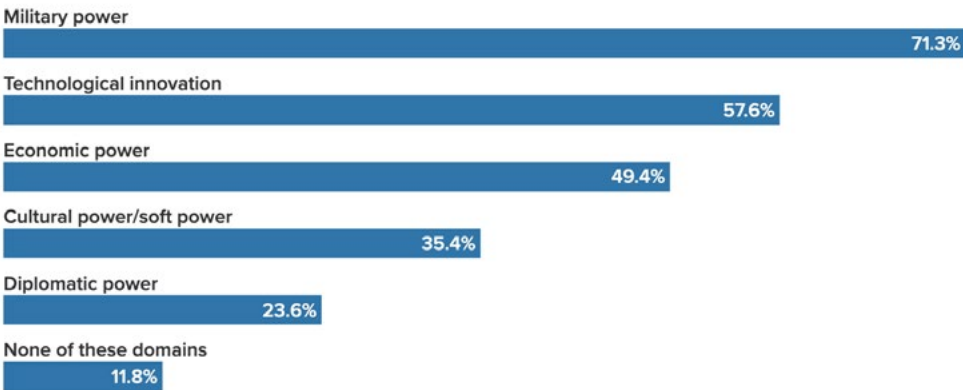
357 respondents answered this question

By 2035, will there be, or have been, another world war, involving a multifront conflict among great powers?



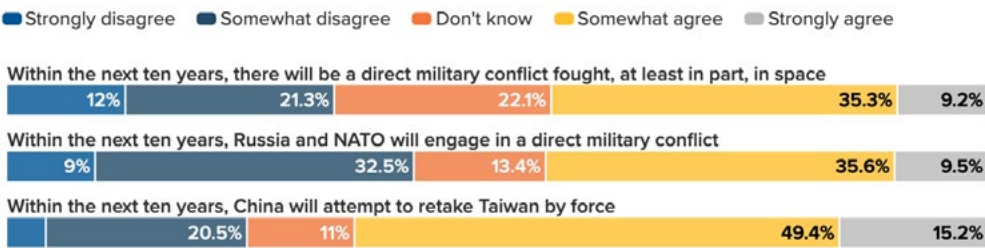
356 respondents answered this question

By 2035, in which of the following will the United States be the world's dominant power?



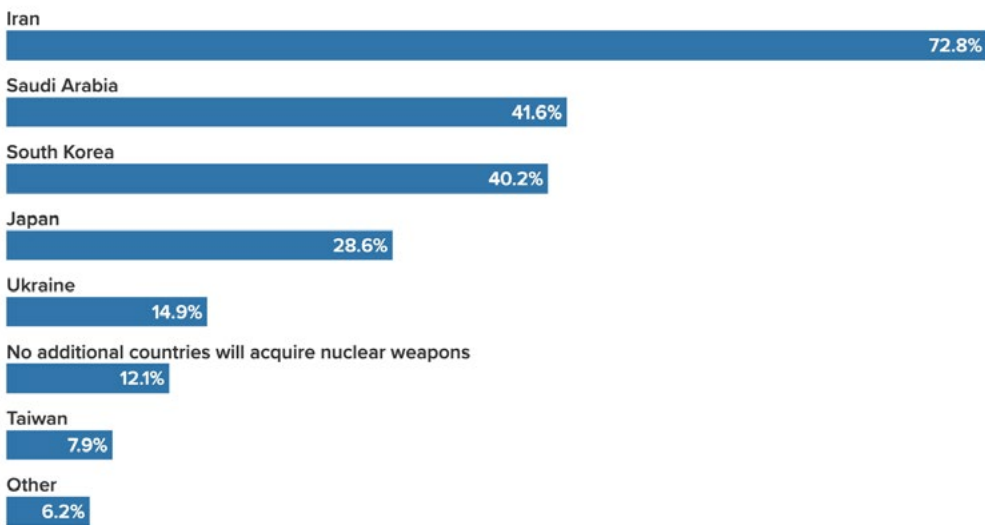
Respondents were able to make more than one selection. 356 respondents answered this question

Do you agree with the following statements?



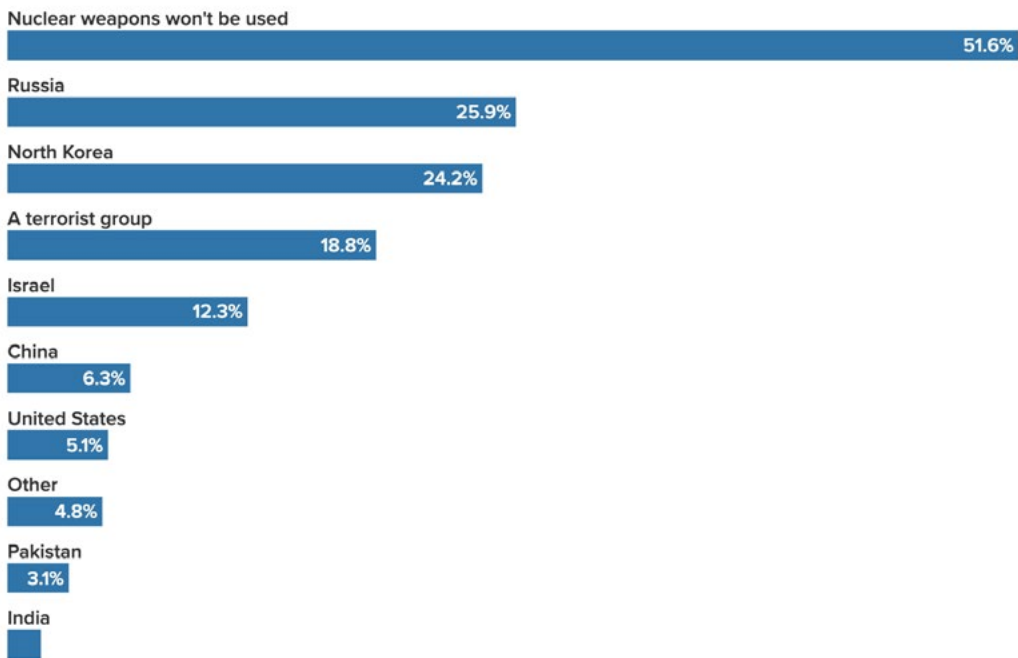
357 respondents answered this question

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



Respondents were able to make more than one selection. 356 respondents answered this question

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



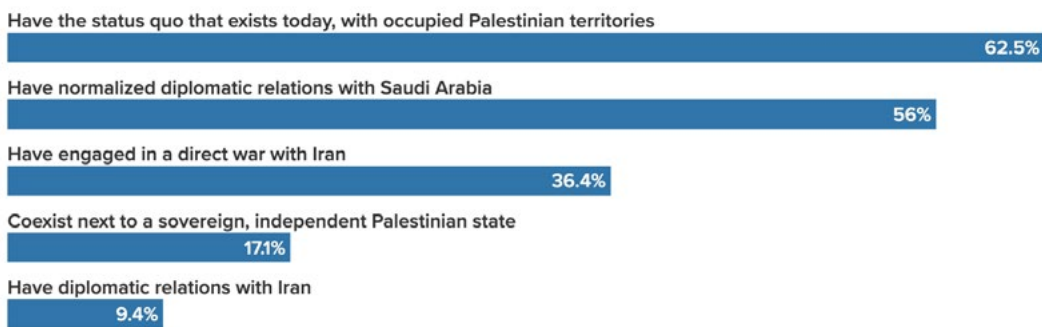
Respondents were able to make more than one selection. 351 respondents answered this question

How do you think Russia's war against Ukraine will end?



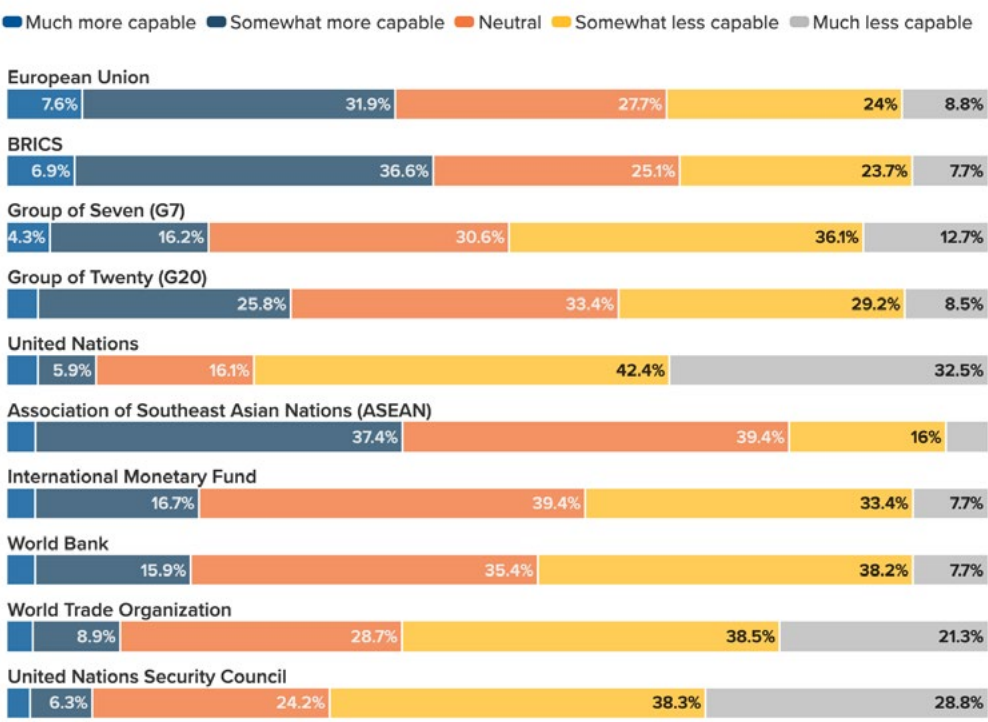
356 respondents answered this question

In 2035, Israel will:



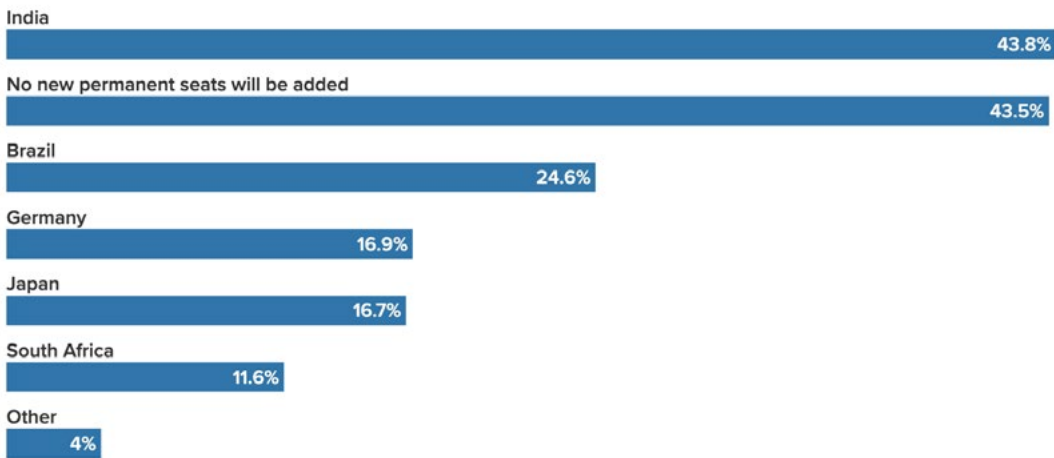
Respondents were able to make more than one selection. 352 respondents answered this question

By the year 2035, how capable of solving challenges core to their mission do you expect the following international institutions to be as compared to today?



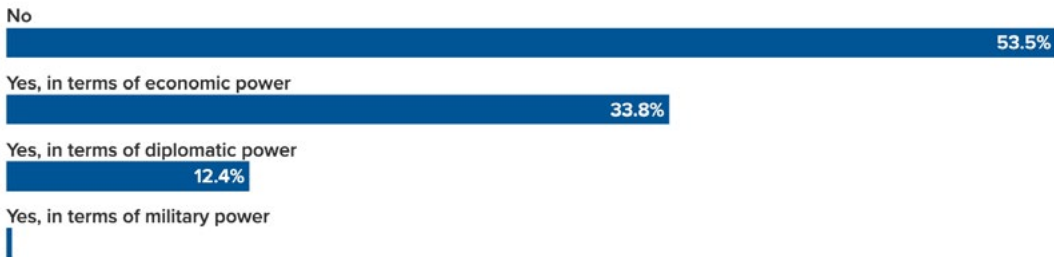
356 respondents answered this question

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



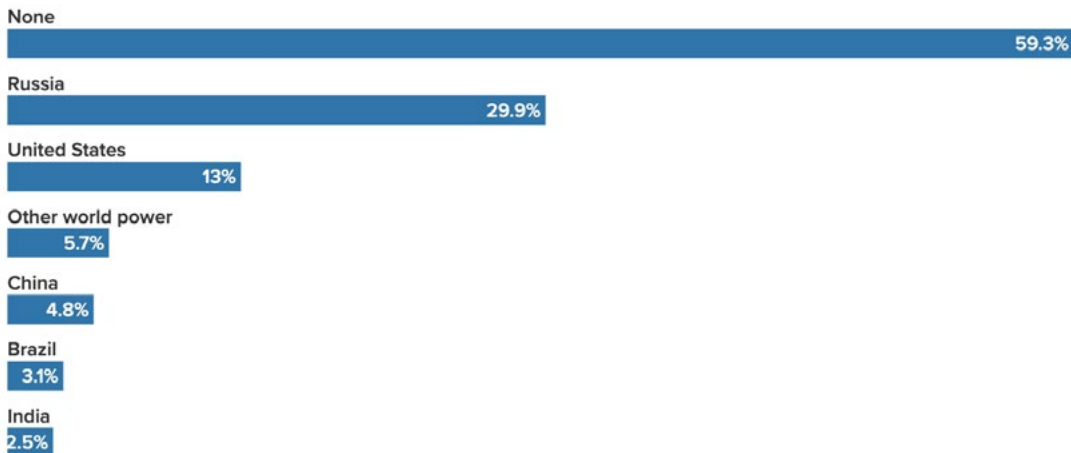
Respondents were able to make more than one selection. 354 respondents answered this question

Will India surpass China in the next ten years?



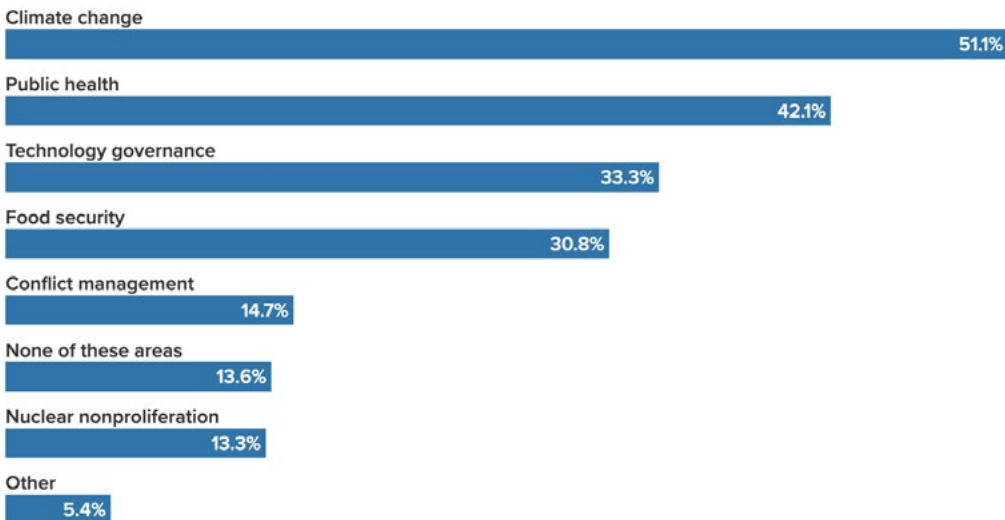
355 respondents answered this question

By 2035, 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?



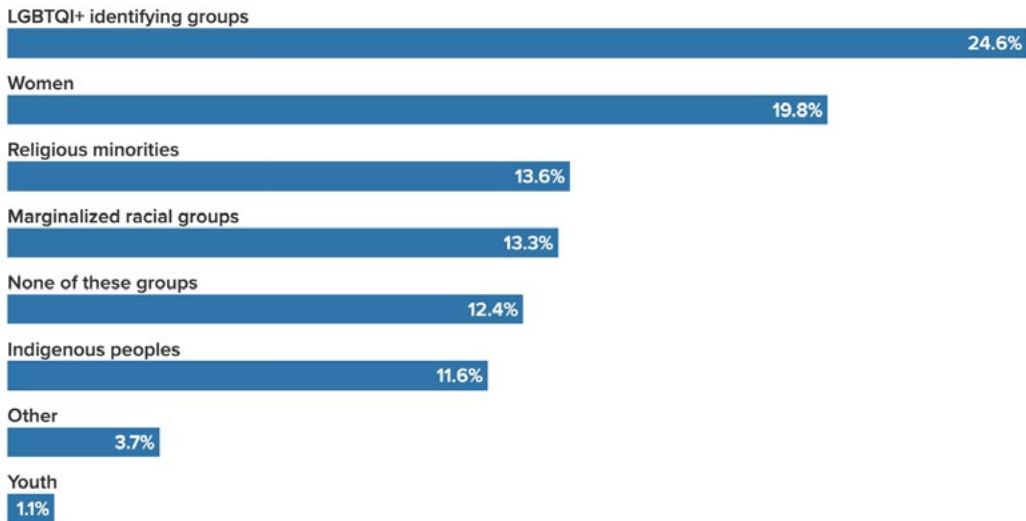
354 respondents answered this question

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



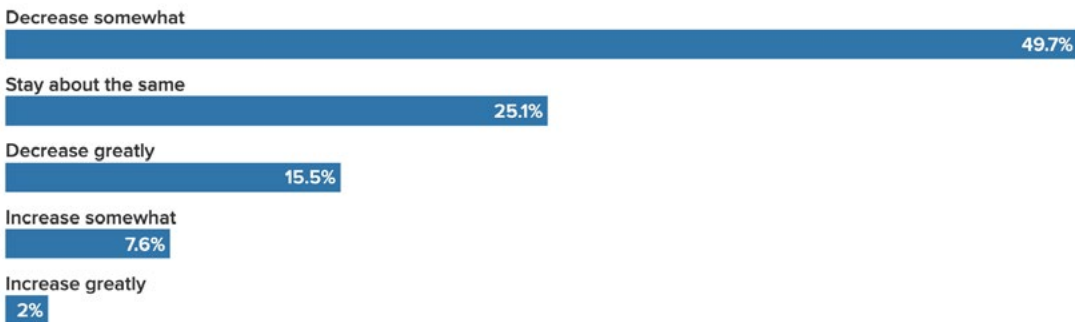
354 respondents answered this question

Over the next ten years, which of these groups is at highest risk of having their rights curtailed?



354 respondents answered this question

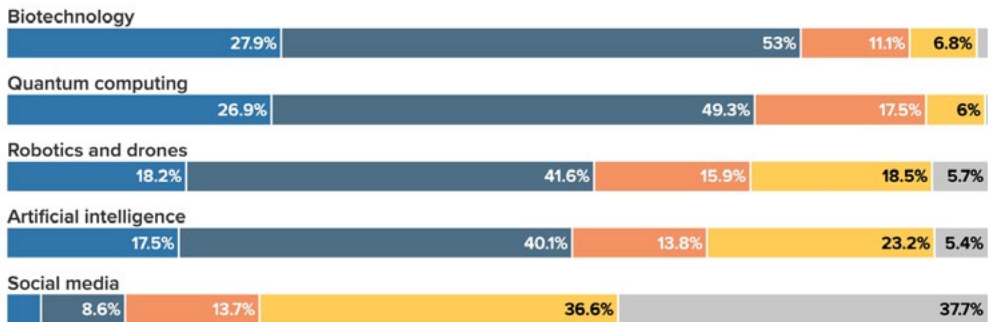
By 2035, do you expect global press freedoms to:



354 respondents answered this question

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.

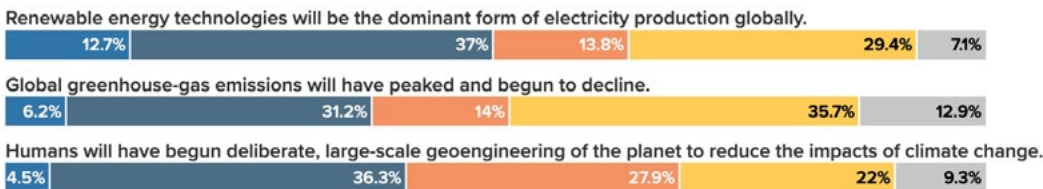
Very positive Somewhat positive Neutral Somewhat negative Very negative



353 respondents answered this question

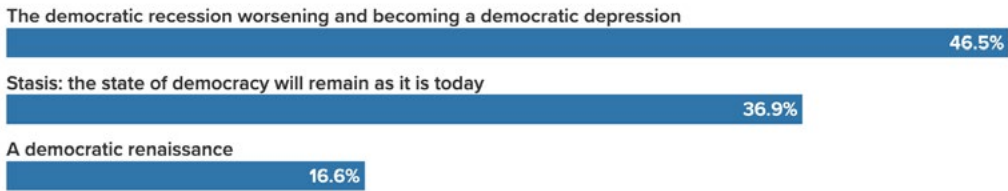
Do you agree or disagree with the following statements about the most likely conditions by 2035?

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



356 respondents answered this question

Over the past two decades, the world has been in a democratic recession, with democracy in retreat worldwide. What do you foresee by 2035?



355 respondents answered this question

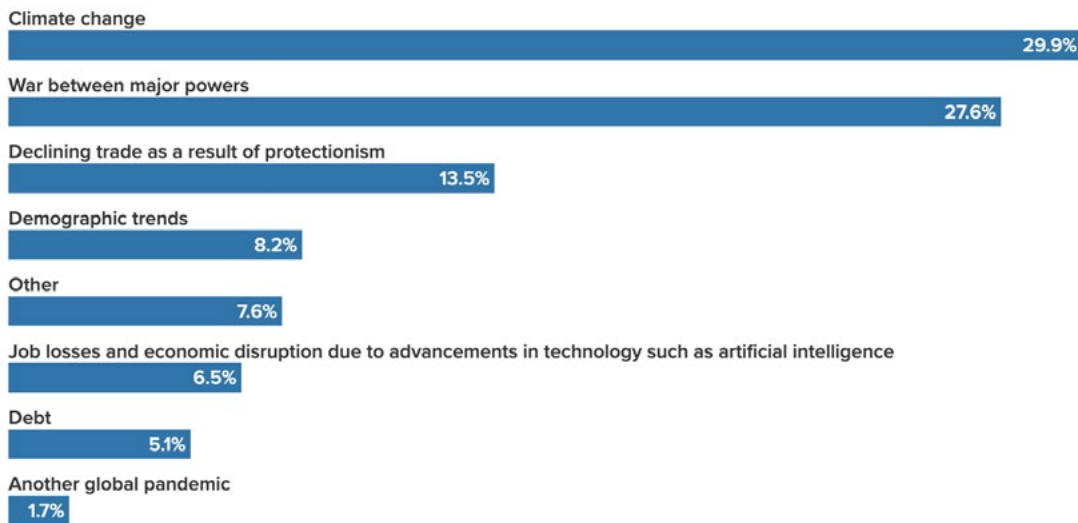
In ten years, will a higher or lower percentage of the world's population be living in extreme poverty relative to today?

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.



355 respondents answered this question

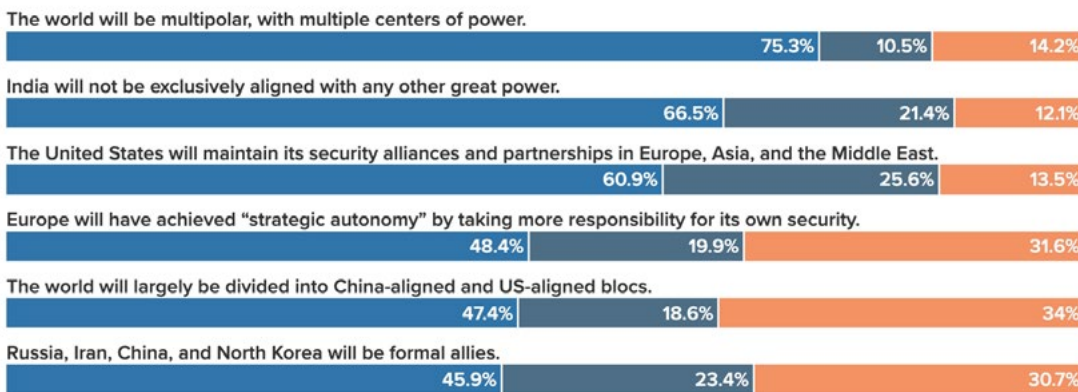
What is the single biggest threat to global prosperity over the next ten years?



355 respondents answered this question

Do you agree or disagree with the following statements about the state of alliances and partnerships in 2035?

Agree Don't know Disagree



356 respondents answered this question



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