

# FOREWORD

Welcome to the 7th edition of the National Intelligence Council's Global Trends report. Published every four years since 1997, Global Trends assesses the key trends and uncertainties that will shape the strategic environment for the United States during the next two decades.

Global Trends is designed to provide an analytic framework for policymakers early in each administration as they craft national security strategy and navigate an uncertain future. The goal is not to offer a specific prediction of the world in 2040; instead, our intent is to help policymakers and citizens see what may lie beyond the horizon and prepare for an array of possible futures.

Each edition of Global Trends is a unique undertaking, as its authors on the National Intelligence Council develop a methodology and formulate the analysis. This process involved numerous steps: examining and evaluating previous editions of Global Trends for lessons learned; research and discovery involving widespread consultations, data collection, and commissioned research; synthesizing, outlining, and drafting; and soliciting internal and external feedback to revise and sharpen the analysis.

A central component of the project has been our conversations with the world outside our security gates. We benefited greatly from ongoing conversations with esteemed academics and researchers across a range of disciplines, anchoring our study in the latest theories and data. We also broadened our contacts to hear diverse perspectives, ranging from high school students in Washington DC, to civil society organizations in Africa, to business leaders in Asia, to foresight practitioners in Europe and Asia, to environmental groups in South America. These discussions offered us new ideas and expertise, challenged our assumptions, and helped us to identify and understand our biases and blind spots.

One of the key challenges with a project of this breadth and magnitude is how to organize all the analysis into a story that is coherent, integrated, and forward looking. We constructed this report around two central organizing principles: identifying and assessing broad forces that are shaping the future strategic environment, and then exploring how populations and leaders will act on and respond to the forces.

Based on those organizing principles, we built the analysis in three general sections. First, we explore **structural forces** in four core areas: demographics, environment, economics, and technology. We selected these areas because they are foundational in shaping future

dynamics and relatively universal in scope, and because we can offer projections with a reasonable degree of confidence based on available data and evidence. The second section examines how these structural forces interact and intersect with other factors to affect **emerging dynamics** at three levels of analysis: individuals and society, states, and the international system. The analysis in this section involves a higher degree of uncertainty because of the variability of human choices that will be made in the future. We focus on identifying and describing the key emerging dynamics at each level, including what is driving them and how they might evolve over time. Finally, the third section identifies several key uncertainties and uses these to create five **future scenarios** for the world in 2040. These scenarios are not intended to be predictions but to widen the aperture as to the possibilities, exploring various combinations of how the structural forces, emerging dynamics, and key uncertainties could play out.

When exploring the long-term future, another challenge is choosing which issues to cover and emphasize, and which ones to leave out. We focused on global, long-term trends and dynamics that are likely to shape communities, states, and the international system for decades and to present them in a broader context. Accordingly, there is less on other near-term issues and crises.

We offer this analysis with humility, knowing that invariably the future will unfold in ways that we have not foreseen. Although Global Trends is necessarily more speculative than most intelligence assessments, we rely on the fundamentals of our analytic tradecraft: we construct arguments that are grounded in data and appropriately caveated; we show our work and explain what we know and do not know; we consider alternative hypotheses and how we could be wrong; and we do not advocate policy positions or preferences. Global Trends reflects the National Intelligence Council's perspective on these future trends; it does not represent the official, coordinated view of the US Intelligence Community nor US policy.

We are proud to publish this report publicly for audiences around the world to read and consider. We hope that it serves as a useful resource and provokes a conversation about our collective future.

Finally, a note of gratitude to colleagues on the National Intelligence Council and the wider Intelligence Community who joined in this journey to understand our world, explore the future, and draft this report.

*The Strategic Futures Group  
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