

MAJOR POWER COMPETITION INCREASING THE LIKELIHOOD OF KINETIC CONFLICT

Geopolitical trends and technology changes are increasing the risk of major power kinetic conflict through 2040. Non-kinetic actions could escalate—possibly unintentionally—to active shooting wars among major powers because of weaker rules, greater speed of engagement, murkier information environment, and new technologies.

FACTORS THAT INCREASE THE LIKELIHOOD OF MAJOR POWER CONFLICT

- > Eroding arms control frameworks
- > Weakening institutions

Unclear rules and norms

Declining deterrence

- > Declining hegemonic security and economic interdependence
- > Growing nationalism

Heightened geopolitical competition

- > Decline in democratic governance and increased authoritarian and personalist rule

Centralized decisionmaking

- > Technological change and accelerated pace of warfare
- > AI decisionmaking

Long-range weapons advancements

- > Misinformation and disinformation overtakes or distorts objective truth

Murkier information environment

FACTORS THAT COULD REDUCE THE LIKELIHOOD OF CONFLICT

Some countervailing factors may restrain full-scale conflict in this period.

Alternative non-kinetic options

- > Cyber attacks, information operations, economic coercion, and precision use of force can produce strategic effects while avoiding costs of traditional armed conflict

Leaders' fears

- > Leaders fear prohibitive economic, humanitarian, and political damage or disruption
- > Leaders fear uncontrollable escalation dynamics and lack confidence they can deter retaliation

Survivable 2nd strike capability

- > Absent major technological change, potent nuclear arsenals will leave deterrence intact; nuclear war will remain unwinnable and prohibitively costly