



What's Next? Future Scenarios in an Era of Global Insecurity

2023 JOINT NDIA/AIA SPRING INDUSTRIAL SECURITY CONFERENCE

Key Assumptions

- 1. The post-WWII and post-Cold War world orders are changing; we're entering a new, as of yet undefined, era**
- 2. Neither Russia nor China will suffer a major political collapse**
- 3. A nation-state's intelligence and security service activities reveal its government's true agenda**
- 4. Non-state threat actors have increasing capability and intent**

Three Scenarios

1. **SYSTEMS HOLD**
2. **RIVAL BLOCS**
3. **BATTLE ROYALE**

SYSTEMS HOLD

- **Despite enormous pressure, the international order (political alliances, commerce, etc.) bends, but doesn't break**
- **Intensifying competition across all aspects of national power, (DIMEFIL)**
- **Increasing regulation of economic interaction in key areas of technology with national security impact**

RIVAL BLOCS

- **Realignment of the world's major economies around two distinct economic blocs**
- **Near complete strategic decoupling of US/PRC economies**
- **Intense competition for resources and markets which are not part of either block (i.e., another Cold War, but one that involves economic, not ideological, competition)**

BATTLE ROYALE

- **Current globalized economic system breaks down, but no new world-wide system arises to replace it**
- **Economies become extremely regionalized and localized, including transportation, energy, agriculture, manufacturing, and finance**
- **Widespread geopolitical disruptions: interstate conflict, domestic unrest, and collapse of political systems**