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Global Strategic Trends

A combined summary of the MOD Global Strategic Trends Report and International Crisis Group's "10 Conflicts to watch in 2022"

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Executive Summary

The MOD's Global Strategic Trends document lays out the trends and events across the world up to the year 2050. The most recent iteration of the document was released in 2018 and took two years of research and writing to produce.

The document sets out six thematic areas in which trends are identified. These themes are:

- The Environment and Resources
- Human Development
- Economy, Industry, and Information
- Governance and Law
- Geopolitics
- Conflict and Security

The document first analyses these themes globally and provides a prediction of the general worldwide trends within these themes. It then breaks down the world into regions and applies the themes to each geography.

It further states that governments, NGOs, MNCs, and other international actors will encounter trends that either require adaptation, exploitation or mitigation, or action. Failure to act in these ways will lead to actors being left behind or suffering from the implications of the trends.

The GST document also sets out the possible different future worlds that could define how states and actors interact with each other. The four future worlds identified are:

- Multilateralism
- Multipolarity
- Network of actors
- Fragmentation

These worlds are based off two scales. One going from extreme cooperation to complete competition, and the other going from extremely powerful state actors to mass diffusion of power.

As with all discussions about future relations and trends there is a degree of uncertainty surrounding it, but the GST was developed with academic researchers, experts of the various fields and geographies covered, and military personnel. This makes the trends and predictions laid out in the document some of the most well informed and accurate out there.

The International Crisis Group's "10 Conflicts to Watch in 2022" comprised of active conflicts and major hot spots across the world. These situations could remain frozen or escalate and are likely to be influenced by both local and global factors mentioned in the MOD GST Document.

This summary has reduced both documents into accessible chunks. First the key points from each theme is explored. After this each geography is condensed to allow for quick and easy access to the information on the themes of that geography.

Themes

Environment and Resources

- Extreme weather events will become more frequent, with military equipment and operations adapting to deal with these.
- Supply routes such as the Panama and Suez canals are vulnerable, potentially causing mass disruption to the supply of food, products, and medical supplies from east to west and vice versa.
- Significant potential for criminal groups, terrorists, or states to exploit water supply shortages or other resource supply issues. Both through controlling the resource, or by using shortages as a grievance to exploit.
- Resource nationalism (states limiting the supply of natural resources, especially minerals in the face of increased demand and potential shortages) could lead to areas of conflict and tension.
- Water basins are becoming the hotspots for local conflict, and for transboundary water management agreements and tensions.
 - Poor water governance and management is one of the biggest policy driven factors behind shortages and a way to potentially avoid future conflict.
- Global Commons - Oceans
 - 50% of the world's population live in coastal communities, and most cities are coastal, making them particularly vulnerable to flooding from rising oceans.
 - Receding ice creates new avenues of travel in the Arctic and creating exploitation activities in the Antarctic, creating new arenas of tension and hybrid warfare.
 - Dispute claims over waters and access are going to rise, South China Sea being a particular area of interest.
 - Sea criminality is also likely to rise (Piracy, smuggling, human trafficking).

Human development

- Population
 - Half the world population growth over the next 30 years (2.3 billion roughly) is concentrated in just 9 countries – DRC, Ethiopia, India, Indonesia, Nigeria, Pakistan, Tanzania, Uganda, and the USA.
 - Average ages are rising, creating a smaller workforce to dependants' ratio.
- Migration
 - Current trends will see the number of migrants increase from 258 million worldwide (2017) to 400 million (2050).
 - The importance of successful migrant integration into new host communities is going to become much more pertinent.
 - Increased instability caused by climate change and hybrid conflicts may increase mass migration.
- Urbanisation
 - Cities in developing countries will become a haven for terror groups and violence will soar if good governance isn't in place and sustainable development isn't employed.
- Health
 - Risk of a global pandemic (Already seen), but also the significant risk that diseases are to become resistant to antibiotics, and that they will stop working as a treatment for infections.

Themes

- Obesity could be the world's most pressing health challenge by 2050. Coupled with the aging populations, this could cause security issues.
- Communication
 - The volume of information available to people is increasing in an exponential manner, and is going to continue this trend.
 - This exacerbates the echo chamber effect.
 - Digital manipulation and the employment of dis/misinformation is going to become more and more prevalent as a tactic used by state and non-state actors.
- Beliefs and religions
 - Increasing number of young people are looking for spiritual inspiration on the internet which leaves them vulnerable to radicalisation by unscrupulous actors.

Economy, Industry, and Information

- Changing Economic Balance
 - The largest 7 emerging economies (China, India, Brazil, Indonesia, Mexico, Russia, and Turkey) are due to overtake the G7 by 2050.
 - If Asia achieves the share of economic power that is predicted, it is likely to cause a political and military shift over to the east as well.
 - A shift to the east will also reduce the West's soft power due to its declining importance in financial services, law, and loaning.
- International financial institutions
 - The prevalence and influence of international financial institutions like the world bank and the IMF will diminish.
 - Chinese state financial institutions could become just as dominant, especially if their belt and road initiative is realised and sanctions continue to be the main point of retaliation by the West.
- Growth and personal finances
 - Low economic growth domestically will affect citizens of states. This will increase inequality and resentment, weakening social cohesion, and has the potential to spill over into domestic and international conflict.
- Manufacturing and production
 - Developments in technology such as 3D printers may allow dispersion of manufacturing, and make it harder to stop illegal production of weapons, and easier for enemy forces to target manufacturing points.
- Information
 - Predicted that by 2040 almost everyone in the world will have access to the internet, with most people being able to access it through a phone.
 - With the speed that technology is advancing, the amount of information available to people, and the speed at which they can access it is increasing exponentially.

Themes

Governance and Law

- International Order
 - Liberal institutions and order are likely to be put under more strain as the world turns more multipolar.
 - Rising powers must be accommodated within international institutions, or risk the fragmentation of those institutions.
 - China will become increasingly authoritarian on the world stage, and the influence of Russia is likely to diminish, triggering increased brinkmanship by Putin. India is to be caught in the middle and will most likely look to forge new partnerships to gain support (As seen recently with the US/Israel/UAE/India quad).
 - A chance or reform to the UNSC and the P5, including veto powers.
 - International legal mechanisms are going to become less effective, especially around issues such as human rights and war crimes, but will continue to reinforce international norms around issues such as trade.
- The state/nationalism/politics
 - Whilst the state system is not going to disappear, nationalist and populist ideologies will be an increasing strain on states method or governance and possibly erode sovereignty.
 - Alternatively developing countries are likely to increase the power of their state through an increase in tax revenue due to more people moving into the formal economy of those countries.
 - If inequality in communities continues to grow, then crime may become more socially acceptable.
- Poverty, fragility, and security
 - Levels of poverty are to reduce over the next 30 years, with absolute poverty being almost completely eradicated, however sub-Saharan Africa is likely to lag behind.
 - If countries with large populations descend into conflict, then it could stop this decline, and potentially reverse it.
 - Poverty will be very closely linked to fragility. The fragility of states and their governments will determine the rate at which poverty is alleviated within a state.
- Political Pressures
 - There is a current trend of rising religious nationalism adopted by governments. Hungary, Russia, India, and Turkey are all examples.
 - This rising religious nationalism will exacerbate current social tensions and flashpoints both internally and between countries.
 - This is also a concern when populations particularly in Europe and the west are becoming more ethnically and religiously diverse which could lead to more tension.
 - Nationalism and anti-immigration sentiment are set to continue to rise, exacerbated by homegrown and state-sponsored disinformation.
 - Digital communications will become more and more pertinent as a tool for political mobilisation and organising opposition and resistance.
 - Separatists demands will not disappear, and there may be several states fragmented by 2050 into new look states and autonomous regions. This could also include an increased number of city states.

Themes

- Crime and corruption
 - Organised crime will continue to be a nuisance to states, but also will be employed increasingly as a weapon of hybrid warfare.
 - Many developing cities in poorer states could start to see murder rates rising to unprecedented level, especially in areas of SSA and SEA.
 - The drugs trade may move more towards synthetic drugs and drugs able to be produced at home, and away from traditional opioid and cocaine related drugs. This could dwindle the importance of drug growing economies such as Afghanistan and areas of South and Central America.
 - Cybercrime in all guises is to become the biggest area of crime over the coming decades.
 - Further to this, the ability to control, influence, and subjugate cyberspace (including social media) will be the best way for states to assert dominance.

Conflict and Security

- Hybrid conflict
 - Sub-threshold conflict is set to increase in occurrence, and states will expand past the traditional diplomatic/military/economic arenas and into cyberspace, information, and technology.
- The global commons
 - This refers to the oceans, the polar regions, and space.
 - They will become the focus of intense competition, and possibly conflict, especially over resources.
- Urbanisation
 - Policing and military tactics will have to be adapted to the increasing number and size of cities and the populations that inhabit them.
 - This increase in size and frequency of cities will also give rise to increasing hiding spaces for insurgents and VEOs as well as create ethnic tensions that can be exacerbated by state-sponsored disinformation operations.
- Actors
 - States – Likely to remain as the key security actors. There is however likely to be a rise in services that are traditionally provided by the state being handed over to private actors.
 - Alliances – Traditional alliances such as NATO are set to continue, however there may be a rise in hybrid alliances being formed such as states, MNCs, PMCs, and global institutions.
 - Private sector companies – With minor, small-scale conflicts increasing in frequency, the employment of PMCs will also increase as an effective way to keep political face and plausible deniability whilst militarily responding.
 - VEOs – Attacks will increase, with separatist ideologies, jihadism, and anti-immigration/right-wing sentiments being the drivers behind them.
 - SAA, MENA, and SEA are the hotspots, with SEA potentially overtaking both MENA and SAA in decades to come.
 - Protracted instability in the US may lead to an increase in Right-wing inspired violence.

Themes

- OCGs – Traditional transnational criminal activities will continue but there will also be a continuing rise in cybercrime.
 - These groups may find themselves co-opted by state security forces to assist in Hybrid Warfare operations.
 - There will also remain a significant overlap between traditional OCG activity and terrorist groups.

Geographies

Central Asia

- Environment
 - The region will see an increase in droughts and water shortages in West Kazakhstan, Uzbekistan, and Turkmenistan, however rising temperatures may lead to a rise in agricultural output in Northern and Eastern Kazakhstan.
 - Many obsolete and unsustainable water management practices in the agricultural sector.
 - Earthquakes and severe flooding could become prominent issues, especially in the Fergana valley, and the area is ill equipped to deal with these issues.
- Human Development
 - Population to grow about 40% by 2050, with the majority around the Fergana valley.
 - Potential rise in social tensions with poorer rural citizens holding more traditional beliefs moving to cities and mixing with higher educated urban citizens.
 - An update to the education system that is based off the old soviet way is needed to provide modern education for a modernising workforce.
- Economics
 - Heavy dependence on natural resources, however this may diversify
 - Corruption and infrastructure shortcomings need to be tackled
 - China's BRI is likely to take focus on CA in the coming decades
- Governance
 - Through control of the media, Russia is likely to continue having significant control over the region
 - Due to corruption, Russian interference, and OCGs, change is likely to be resisted
 - Increasing domestic tensions – inflamed by foreign interference, corruption and climate-related shortages – will likely lead to increased protest movements that will be met with violent repression; as seen in Kazakhstan in Jan 2022
 - This will increase Russia's influence in the region and weak regimes turn to it for security assistance
- Geopolitics
 - Central Asian countries come under heavy influence from Russia, and sign up to Russian led blocs (Collective Security Treaty Organisation (CSTO) and Eurasian Economic Union (EAEU)), but also cooperate with the West and their institutions such as NATO
 - Recent trends show a shift towards China, with CCP investment in the region overtaking Russian in 2009. Leading to a likely competition for influence between the two in the region
 - Public sentiment is largely anti-Chinese, but this may change, however the region could become a point of tension between China and Russia
- Security
 - Ethnic tensions are a looming threat (Kyrgyzstan 2010) and border disputes, especially in the Fergana valley.
 - Border disputes also tend to revolve around access to water and resources
 - Religious extremism and organised crime are unlikely to stop unless due to the influence from Afghanistan and Pakistan
 - The significant amount of military equipment left in Afghanistan after the TB takeover will likely go on the black market, increasing the capabilities of VEOs and other non-state actors in the region

Geographies

South-West Asia (The Middle East)

- Environment
 - Trends of high temperatures and water shortages are to continue, with some areas of the region becoming uninhabitable by 2050.
 - Countries (apart from Turkey) will become reliant on food imports.
 - Water stress and food shortages may drive large scale migration and conflict.
 - The end of water subsidies was believed to be a factor in the outbreak of the protests that led to the Syrian Civil War.
 - Turkey's Anatolia project: bridging the river Tigris, threatens Iraq's water supply, creating significant tensions.
 - Recent water-shortage in Khuzestan has resulted in protests in Iran.
- Human development
 - A predicted 50% population rise by 2050, majority of this happening in the region's unstable states.
 - Estimated 70% to be living in cities by 2050. These will be a mix of technologically advanced cities (Tel Aviv, Dubai, Beirut), and other places that are more slum like cities.
 - Women's rights and equality laws are set to continue to be hampered by religious and cultural norms, however improvements in education, healthcare, and political participation will see progress.
 - The region has seen a large rise in non-communicable diseases between 1990 and 2010, a trend set to continue (Diabetes 87%, strokes 35%, heart disease 44%).
- Economics
 - Saudi Arabia and Iran will be the leading economies; however, Turkey can outperform them with the implementation of reforms.
 - The regions reliance on oil exports and levels of conflict could hamper growth significantly.
 - Trade with China and the region has increased fiftyfold in the last since 1998, but India are also set to become big players in the region.
 - Gulf states – particularly Saudi Arabia – are seeking to diversify economies away from oil.
- Governance
 - Increasing social dissatisfaction with political Islam will drive a trend towards greater religious moderation.
 - Growing divide across sectarian lines (Shia/Sunni in particular) fuelled by the competition between Iran and Saudi Arabia.
 - Theocratic nature of Iran's government could come under significant scrutiny with the potential for domestic uprisings after the death of current supreme leader Ali Khamenei, which will occur soon.
 - Israel is currently governed by a large and unstable coalition.

Geographies

- Geopolitics
 - Competition and tension between Iran and Arab states will continue.
 - If Iran succeeds in acquiring an Atomic Bomb there is a substantial risk of an arms race in the Middle East and increased instability leading to direct preventive strikes or through proxies.
 - At the same time, this may improve already growing cooperation between Israel and the Arab powers.
 - Turkey to move away from Europe and towards creating stronger local partnerships.
 - US influence likely to diminish as energy dependency decreases, with Russia potentially filling the void, using Syria as a launchpad. China will look for more influence too.
 - New states may emerge such as an independent Kurdish state, or at least a de facto autonomous region but its emergence is unlikely to occur without bloodshed.
- Security
 - Propensity for conflict in the region will remain high, with drivers being socio-economic issues, water, and discrimination.
 - VEOs will continue to be a significant threat to internal and external stability.
 - Certain conflicts will remain “frozen” as rival states compete for influence, at the same time Proxies will increase their own capabilities.
 - In Yemen the Saudi coalition will continue to be stuck in a quagmire while Iran will provide support to Ansar Allah (the Houthis), increasing their capabilities to undermine Saudi Arabia and its allies. On Jan 17, 2022, the Houthis claimed a drone and missile attack on the UAE capital, this type of attack is likely to spread to other groups.
 - The Israel-Palestine conflict continues, albeit heavily in favour of Israel while Iran and Hizballah will continue to support Hamas as a primary proxy against Israel. Social media has become a prominent arena for the conflict in order to cultivate international sympathy (a strategy known as “Tiktok intifada”) and for Right Wing VEOs to attract potential recruits.
 - In Syria Hizballah has significantly increased its reach, adding a new front against Israel. At the same time the Assad regime has been severely weakened and become dependent on Iranian-militias and Russian airpower, reducing it to a vassal/launch pad.
 - Major military powers will remain as Turkey, Israel, and Iran, along with Saudi led coalitions.
 - Majority of conflict will be intrastate, but the possibility of interstate conflict cannot be ruled out at all, particularly in the event of a nuclear Iran.

Geographies

South Asia

- Environment
 - A region highly vulnerable to climate change. Rising sea levels are a particular threat to many pacific islands.
 - Access to water won't be a direct source of conflict, but will contribute to rising tensions, especially over water sources in disputed regions.
 - Steep rise in energy demands, driven mostly by India. China will be seen by many small countries as a potentially better energy partner than India.
- Human Development
 - India to overtake China as the most populous country by 2025.
 - The region has a growing working age population which if harnessed can bring economic benefits and growth to the region.
 - Rural populations will remain significant. Education levels remain low all over.
 - Religious and sectarian tensions will rise, with India due to overtake Indonesia as the largest Muslim population in the world, but remaining 76% majority Hindu.
- Economy
 - Was the fastest growing economy in the world in 2015 – prompted by India, Pakistan, Bangladesh, and Bhutan.
 - The increasing working age population in India can benefit economic growth, but can also hinder it if not enough jobs are created, or automation overtakes humans in manufacturing jobs.
 - Regional economic cooperation is lacking with intra-regional trade representing just 5% of total trade.
 - China's BRI will bring significant economic opportunity to the region.
- Governance
 - India will remain a key advocate for democracy in the region, but its message is being undermined by state-sanctioned Hindu-nationalism.
 - Unlikely that state borders will see a shift in the future, however there may be more pressure for increased devolution of powers in various states.
- Geopolitics
 - Relationship between China, India, and Pakistan will be the biggest focus.
 - The status of Kashmir will be an ongoing arena of competition and focus of hybrid conflicts.
 - China is boosting Pakistani support through the China-Pakistan Economic Corridor Project (CPECP). They are attempting to negotiate something similar with Sri Lanka.
 - India-China relations will remain tense, but increasing trade could act as a stabiliser.
 - China's "Land and Borders Bill" (01 Jan 2022), codifying its resolve to "defend territorial Sovereignty and border security" is a strong message the border issue will persist.
 - India may seek to strengthen western ties in a counter to CCP influence in the region.
 - India's joining of 'the Quad' is indicative of this. At the same India's Defence Minister has suggested India and America have a defence pact "in all but name".
 - However, India continues to purchase military hardware from Russia; indicating it seeks to maintain broad relations for leverage. This may change in the event of a Russian invasion of Ukraine.
 - Sri Lanka, The Maldives, Nepal, and Bangladesh will seek stronger ties with the UK, France, and The US as a way of countering CCP BRI projects.

Geographies

- Security

- India-Pakistan tensions will continue to persist (especially in the wake of the Taliban take over in Afghanistan, emboldening Pakistan and freeing resources in the East).
- Chinese-Indian border skirmishes may continue, as well as Chinese skirmishes with Bhutan and potentially Nepal.
- Kashmir is likely to become the primary arena for Hybrid Warfare operations by Pakistan and China against India.
- Terror attacks and deaths reduced drastically between 2010 and 2016, however, again in the wake of the situation in Afghanistan and rising tensions with Pakistan, terror attacks in the region are increasingly likely.
- India may look to conduct joint military exercises with the US, Japan, the UAE, and Saudi. They will also look to increase the technological level of their military.

East Asia

- Environment

- Rising sea levels, a particular issue for a large coastal population in the region.
- Overfishing in the SCS could be a spark point for tension and possible conflict.
- There will be a rise in the demand for energy, mainly from the modernisation of China and other states in the region (DPRK, Mongolia).
- In the short term there is to be an increase in the levels of emissions released.

- Human Development

- Population is predicted to age considerably, and decrease in numbers (3%).
- Dependency ratios are set to increase considerably, putting strain on the state.
- 50% of the current Chinese population are expected to move to cities by 2050.

- Economy

- The region is likely to account for 25% of the world's economy by 2050.
- Will be a transition from labour-driven to technology-driven economies, and this may pose a socio-economic risk.
- Intra region trade is expected to be expanded upon, with plans already in place for a China-South Korea-Japan trade agreement.

- Governance

- The CCP are to remain the strongest actors in the region and continue to spread the China message overtly and covertly.
- There may be a rise in the voices of minorities, especially religious groups.
- South Korea has seen a rise in extreme Christian groups gaining support and following.
- In China, numbers of Christian worshipers have risen from 8 million in 1991 to 70 million in 2010.
- The DPRK is likely to stay as an autocracy unless the regime collapses.
- Female representation in government will hopefully rise considerably.

Geographies

- Geopolitics

- China is likely to continue its path of achieving a great power status by asserting its dominance over the region, clamping down on protests and subversion in disputed and autonomous regions, cities, and states.
 - China's increasing assertiveness across the region and in South Asia is becoming a cause of concern and tension with potential partners in the region, fuelling cooperation.
- The US will keep a strong military presence in the region, particularly in the Korean peninsula, and China-US relations will determine the atmosphere of international cooperation in the region.
- China and Taiwan could become a potential flashpoint (as has been seen recently).
 - China will want to see the return of Taiwan by 2049 (centenary of its founding) at the latest.
- Japan-South Korea relations will become closer despite historical tensions.
- China and Russia will work together due to a mutual opposition to US containment, but there is unlikely to be much trust between the two as they compete for influence in central Asia.

- Security

- Eastern Asia lacks shared security mechanisms, but the regional threats of nuclear weapons would require collaboration, potentially bringing the nations closer.
- East Asian maritime disputes will persist, and potentially escalate with the added pressure of climate change and overfishing.
- The DPRKs nuclear capabilities remain uncertain, and their actions also remain hard to predict, but they will remain a security threat in the region.
 - If the DPRK were to collapse, China may intervene militarily to prevent any regime change that would be unfavourable to the Chinese State.
- There is the continued risk of VEOs in China, although they will struggle to operate in such a hostile, surveillance-pervasive environment.

South East Asia

- Environment

- There have been significant rises in recent rainfall rates, something which is set to continue as well as rising temperatures, particularly inland.
- The many islands in the region are all to come under significant flooding risk.

- Human Development

- There will be population growth, however disparity across the region with 9 countries due to fall below the replacement rate of 2.1 children per woman by 2050.
- Poverty is being reduced, however climate induced migration may hinder this progress.
- SEA is a region where human development standards and measurements vary greatly.

- Economy

- If considered as a bloc, SEA has the 7th largest economy in the world, and this is due to be 5th by 2050.
- Vietnam could be the fastest growing global economy over the next 30 years.
- Most of SEA (not Singapore or Brunei) are developing economies so may struggle to keep up with rapid urbanisation.

Geographies

- Governance
 - SEA lacks many effective democracies, with 5 'flawed democracies' and several other forms of government.
 - Some countries could see increasingly authoritarian measures put in place.
 - Political elites often undermine anti-corruption efforts.
- Geopolitics
 - The Association of Southeast Asian Nations (ASEAN) is central to how SEA states conduct their business in the wider Indo-Pacific region.
 - Cambodia – a pro-China state – chairs ASEAN as of Jan 2022, creating concerns that the group's ability to create a united front against China will be undermined.
 - Indonesia may push to take up a stronger leadership role in the region.
 - All major players, including the US, China, and India are looking to increase their influence in the region.
- Security
 - Non-violence is a bit of a norm in SEA now apart from a couple of long running insurgencies.
 - SEA states are drawn into the South China Sea dispute.
 - People trafficking and organised crime including piracy have increased in the region in recent times.
 - The Myanmar coup in February 2021 has significantly destabilised the country; leading to a resurgence of ethnic militias that could spread to the wider region.

Oceania

- Environment
 - Climate stresses are due to cause mass migration from small pacific islands, however it is not clear where they will migrate to or how they will be able to afford it with many having a tiny median monthly income compared to the standards of larger neighbouring states such as Australia and New Zealand.
 - Many nations in the region could find themselves in a constant state of recovery from natural disasters.
- Human Development
 - Any population growth in AUS and NZ will be down to migration and not replacement rate births.
 - There will be a surge in the coming years of working aged citizens in the islands, but not enough jobs or education provision for them.
 - Inequality and poverty are due to increase across the islands in the region.
 - Over 80% religious' adherence in the pacific islands (Christianity mainly).
- Economy
 - AUS and NZ economies will continue to grow, but at a declining rate.
 - Biggest challenge to the islands is their relative isolation from major markets.
 - The costs of natural disasters are rising, and the wealth of natural resources needs to be managed sustainably.

Geographies

- Geopolitics
 - AUS and NZ focus on regional stability through development projects to ensure their own national security.
 - Growing CCP economic involvement is challenging AUS and NZ influence.
 - The US will remain a major donor of foreign aid to the region and will maintain its military presence there as means to deter China.
 - The AUKUS pact has alienated France from the region despite them having territories there.
- Security
 - The region experiences relatively high levels of stability.
 - Transnational crime syndicates could possibly rise.
 - After the Christchurch attack and the rise of anti-China/anti-Asia sentiment, there is a risk of a rise in right-wing inspired violence.

Africa

- Environment
 - SAA contributes the least to global climate change, but is one of the worst affected.
 - Water stress and the repercussions that come with that (food scarcity, poor crop yields, disease, conflict) will be the biggest threat, then heat waves.
 - The adoption of high-yield, drought resistant crops could be a life saving behaviour change for many African farmers.
 - Water and other natural resource shortages will exacerbate existing geopolitical disputes and create new ones.
- Human Development
 - Population is predicted to double by 2050 (2.5 billion). This will boost the workforce, and it is predicted to be larger than both China's and India's by 2035.
 - Considerable levels of migration will be seen, particularly from the Sahel, Horn, and the Great Lakes regions.
 - Religious tensions will continue to be a potential driver of conflict.
 - There will be increases in the provision of healthcare and education, but Africa will still lag behind the rest of the world.
 - 90% of Africans will have internet access in 2050.
- Economy
 - If current rates are sustained, Africa's economy will quadruple by 2050.
 - Finding meaningful employment for young people will be the key to this growth.
 - Massive potential for Africa to develop its service provision economy.
 - Foreign direct investment is now a higher level than foreign aid into the continent.
- Governance
 - Democratic standards are increasing in many African countries which is set to continue, however there will be setbacks, and elections could prove to be particularly volatile.
 - Existing insurgencies, and difficulty handling of them due to poor resources, are leading to discontent within the armed forces of several countries. In Burkina Faso it has led to a coup 24 Jan 2022.

Geographies

- Some African governments are using the pretext of security to restrict digital communications and citizens' rights with assistance from China. In the process, they are inadvertently contributing to economic losses and greater instability.
- Improving access to information and education rates could lead to greater pressure on governments to be more open and democratic
- Geopolitics
 - African states' influence on the global stage will rise, with dissatisfaction around western dominance of international institutions driving this.
 - Trade routes along Africa's eastern and western shores could become significant in terms of strategic trade.
 - Dominance of these areas, particularly in the disputed Western Sahel, could become drivers of conflict.
 - China will continue their expansive influence of the BRI in Africa and supporting infrastructure projects.
 - Russia will push their influence over the continent further, most likely in a more militaristic style than China through the use of PMCs.
 - Water shortages will create new geopolitical disputes.
 - Ethiopia's Great Renaissance Dam is creating tensions with Sudan and Egypt.
 - It is possible both will take military action or support the Tigrayan rebels in the ongoing civil war to disrupt Ethiopia's internal stability.
- Security
 - State fragility and climate change will continue to be driving forces behind conflict on the continent, and Africa will likely remain the area where most of the global conflict occurs.
 - VEOs will continue to use African states as bases to launch operations.
 - This has the added risk of inspiring home-grown attacks in the West.
 - There is the danger of 'no go' areas emerging in Africa which government forces have no control over due to crime and the control of VEOs.
 - Law enforcement and security services will improve their practices, but the problem will still remain large and difficult to police.

Europe

- Environment
 - Impacts will vary across Europe from extreme heat waves and droughts to heavy rains and flooding.
 - Yields could increase in northern Europe but decrease in the south.
 - The risk and frequency of forest fires will become much greater.
 - Climate-driven crises and conflicts abroad will motivate greater migration from trouble spots to Europe; stressing limited institutional capabilities to manage the influx and fuelling Right-wing populism and extremism.
- Human Development
 - Cities will continue to expand, but so will peri-urbanisation (Living rurally to commute into the cities).
 - Social inequalities persist both within countries and between countries.
 - The population is expected to shrink over the next 30 years, however international migration could reverse this.

Geographies

- Economy
 - Global economic position is likely to weaken as growth rates will be much slower than other global economies.
 - There is a relatively extreme level of unequal distribution of wealth for a developed region.
 - Unemployment and under-employment are due to rise pushing internal migration within the region.
 - Chinese investment could become a major stakeholder in eastern European states. Some states could end up becoming dependant on Chinese investment, and Chinese companies could end up controlling critical structural networks in Europe.
 - Continued reliance on Russian energy undermines Europe's abilities to counter Russian aggression and creates tension with the US.
 - The completion of the Nord-Stream pipeline will exacerbate this, though it has been placed on hold over the Ukraine crisis.
- Governance
 - Governance of European countries will be heavily influenced by the security and future of the EU.
 - Factors driving EU fragmentation (populism, nationalism, migration, liberal vs authoritarian) could also drive domestic government changes.
 - A fragmented Europe could easily be exploited by outside states.
 - Geopolitics
 - There will be a reduction in Europe's soft and hard power relative to other emerging states.
 - European states lack the ambition to act in a coordinated fashion to project a strong bloc image.
 - The relationship between Europe and the US will continue, although there may be periods of stress in this relationship.
 - European states that are not involved in the EU have the potential to be antagonists or allies to the rest of the region.
- Security
 - There will be continuing unstable situations on Europe's Eastern and Southern frontiers. Russia will be wanting to maintain it's influence over former Soviet countries, and more situations of annexation or military expansion like Crimea cannot be ruled out.
 - The terror threat will remain, but it will also remain at a relatively low level. Only 0.4% of global Islamic terror attacks between 2001 and 2014 took place in Western Europe.
 - There is significant potential for a rise in right-wing and anti-immigrant terrorism.
 - Increases in migration will likely be weaponised by Russia and Belarus by funnelling refugees toward Europe and engaging in massive disinformation operations to inflame ethnic tensions.

Geographies

Russia

- Environment
 - Northern Russia is particularly vulnerable to climate change, with the melting of Arctic ice leading the opening of the Northern Sea Route.
 - The Russian government is unlikely to make substantial policy moves to mitigate climate change.
 - Russia relies on 50% of its food to be imported, a number likely to rise.
- Human Development
 - Russia's population is due to fall slightly by 2050, but larger number of immigrants.
 - The ethnic makeup of Russia could change significantly by 2050 with non-Slavic minorities potentially making up 33% of the population.
 - Population density of the far east and north of Russia may fall to 1930s levels.
- Economy
 - The economy will be sustained by its vast natural gas reserves.
 - Federal government spending will continue to be dominated by military and social welfare.
 - Russian economy will grow, but it is unlikely to have globally leading industries.
- Governance
 - Current governance model is likely to continue for the next decade or so, but if it wishes to modernise as a country, it will have to adapt to less corrupt forms of governance.
 - There will be a concerted push towards nationalism and nationalist domestic and foreign policy, stressing the ethnic links between Russia and border-sharing countries as part of an ethno-nationalist geopolitical view in opposition to the Westphalian system to justify adventurism in the near abroad.
- Geopolitics
 - Russia's tactical methods for achieving its strategic goals will continue to be dominated by Hybrid Warfare (espionage, unacknowledged military intervention, cyber-attacks, information operations etc).
 - Will continue pushing for a multipolar world with Russia as one of the leaders. This will manifest itself by a decline in influence for the US and an increase for Russia.
 - Continued European reliance on Russian energy will remain a significant source of leverage for Russia.
 - Will increase its soft power and propaganda efforts to disrupt.
 - Russian interference will increase the world over, but particularly the Arctic and MENA
 - China and Russia will look to explore mutual interests and partnerships together, and China's growing reliance on Russian oil and gas imports could potentially make them major economic partners.
 - There will remain a lot of suspicions between the two powers, potentially limiting cooperation to areas of convenience.
 - Russia will continue to try to undermine NATO, pushing back on its expansion, particularly in its "near abroad".
 - Even if the current build-up of troops on the Ukrainian border is scaled back, Russia will continue to interfere in its affairs through hybrid warfare operations.

Geographies

- Security

- There will be a continued upsurge in the modernisation of Russia's military forces.
- A third of current military personnel are not fit for active duty and the dwindling numbers of young people will also mean a smaller pool from which to recruit.
- There is the possibility that domestic unrest may take hold.
- There will be a rise in the threat of radical Islam within Russia's borders.
- Recently, the Kremlin has entered a new period of repression; utilising vague language in its "Foreign Agent law" to discredit and shut down hostile press and NGOs (including Memorial, Russia's oldest Human Rights NGO chronicling Soviet atrocities). Not unlike China's National Security Law in Hong Kong.
 - If economic conditions deteriorate further (due to possible further sanctions and corruption) then increased repression can be expected.

North America

- Environment

- Due to the regions size and span, climate effects will vary from the frozen norths of Alaska, Canada, and Greenland, to the arid deserts of the Mid-West and south.
- Major cities such as New York, Miami, Boston, LA, and Washington DC are at great risk of flooding and severe weather events.
- Heatwaves will likely become more lethal; a heat wave in Canada from Jun-Jul 2021 killed 500 people.

- Human Development

- There will be a roughly 20% population increase, with net migration accounting for a lot of this.
- Some projections say that in 30 years' time, there may be no racial or ethnic majority.
- By 2050 urban populations will account for roughly 90% across the continent.
- Religion will still be a large factor in everyday life and governance, especially the US.

- Economy

- Economic agreements and relationships within the continent are likely to remain strong.
- China is making ground on the US in terms of economic influence globally.
- The distribution of wealth is highly uneven, and the disparity is continuing to grow, fuelling public resentment of the "super-rich".
- This has been further exacerbated by the pandemic, which saw the top ten richest peoples' wealth double.

- Governance

- Canadian politics will remain centrist regardless of which party is leading the government, though recent anti-vax protests have revealed a current of far-right thought.
- Polarity in the US is becoming stronger, as well as the two poles becoming further apart; hyper partisanship will become the new normal.
- The USA may enter a new period of chronic constitutional instability, with bitterly contested elections, gridlock and impeachment votes.

Geographies

- Geopolitics

- NAFTA will remain one of the world's strongest blocs, with the US the obvious leader and maintaining itself as a global leader.
- Despite political polarisation, partnerships between the US and its allies will remain strong. NATO will ensure strong security cooperation between North America and Europe.
- The US's continued demand that NATO members spend 2% of their GDP on defence could become a strenuous point between allies.
- The Indo-Pacific is growing in importance to the US (AUKUS) relatively to Europe and the MENA.
- The US and its allies have yet to create an adequate strategy for countering Hybrid Threats.

- Security

- The report claims that there will be very little internal instability in the region, however this may need reviewing after the Capitol storming.
- In terms of external threat, terrorism remains prominent, the DPRK are a potential threat, but attacks from other major world powers seem almost impossible.
- As alluded to, right-wing and nationalist terrorist attacks could become more frequent and larger in impact.
 - While systematic organised terror campaigns remain a remote possibility, incidents of lone-actor violence (targeted killing, mass shootings, bombings) will increase in occurrence if current trends remain.
- Ransomware attacks on the US's critical infrastructure in 2021 has highlighted a critical weakness that will likely increase in the near future as state and non-state actors seek to exploit it.

Latin America and Caribbean

- Environment

- Coastal urbanisation patterns to increase despite the increasing threat of coastal flooding.
- Water stresses will increase across much of the region, both coastally and in the mountains.
- Agriculture is a massive consumer of water in LAC, particularly meat and milk production.
- Costa Rica are a leading example on how to sustain an economy and energy use through sustainable means.

- Human Development

- The population of LAC is rapidly going to age due to falling fertility rates and a currently large youth population.
- Net migration of young, low-skilled workers to the US could slow to none in 2050 due to a declining number of opportunities.
- The gender pay gap is narrowing faster in LAC than most of the rest of the world.

Geographies

- Economy
 - Certain regional economies (Brazil, Mexico, Panama, Peru) will grow at great rates and become significant world players.
 - Regional cooperation such as the Pacific Alliance (Chile, Columbia, Mexico, and Peru) are set to continue and become more important.
 - Whilst the US is the regions largest external investor and trading partner, China and Japan are two nations who are upping their levels in LAC.
- Governance
 - There have been many transitions in the region over the last 20-40 years of dictatorships to democracies.
 - Populist sentiment surrounding the transition of power is set to continue.
 - Failure to improve democratic process may lead to civil unrest and conflict, as has been seen recently in Venezuela and Colombia.
- Geopolitics
 - The US will be the biggest nation that has security interests in the region.
 - The US's rivals will seek to increase their influence in the region in order to open another potential front to the US.
 - This will particularly increase in Venezuela under Maduro, which has already seen Russian military advisers, Iranian warships and China providing surveillance technology and training.
 - Political power in the region lies with the strongest economies.
- Security
 - There has not been a state-on-state conflict within the region since 1995 and armed conflicts between states will remain unlikely.
 - Most LAC nations use military forces for public order, and this will continue, with the added responsibility that they will be used to protect and secure natural resources.
 - VEOs are an emerging threat in the Caribbean. Trinidad had the largest IS recruitment rate in the western hemisphere in 2016.
 - There are significant crime rates in the region, both petty and organised. This is largely driven by drugs and cartels.
 - Hati's deteriorating security situation will see a growth in already significant VEO and OCG influence.
 - PMCs, having already played a role in the assassination of the President, may become a regular feature of political and social life - giving Russia a chance to extend its influence.

Opportunities for Albany

Climate Change

Climate change is emerging as one of the most pressing long-term existential threats to the international community. Its impacts will become drivers of conflict and migration. Strong messaging strategies will be required to mitigate the effects.

- As climate change causes shortages in natural resources (particularly water), states will need to engage in best practices for sustainable agriculture, water preservation etc.
- Likewise, states most at risk of increased natural disasters will need to conduct public safety messaging campaigns.
- Potential mass migration will create a need for messaging about best practices and counter anti-immigration messaging (state-sponsored and VEO) - it will also become a tool of hybrid warfare practitioners to exert pressure on states by directing immigration flows (e.g. Belarus, November 2021).

Hybrid Warfare

Hybrid Warfare is the new norm in peacetime. Influence and information operations – relying on communication – are the tip of the spear in Hybrid Warfare and one of the greatest concerns for policy makers. Albany's communications expertise make it well placed to take the initiative in this growing market.

- Russia's disinformation operations are designed to undermine democratic institutions, entrench division, inflame extremism and provide cover for military interventions. At the same time, it seeks to extend its military influence in Africa through PMCs.
 - Albany has already produced successful disinformation resilience programmes in the Baltics that can be replicated throughout Europe.
 - Similar messaging programmes could be conducted to highlight the risks of Russian PMCs to African policy makers and civilians (human rights abuses, corporate takeovers, track records of failure etc).
 - Albany's successful programme used to boost the Syrian National Council prior to the 2014 peace negotiations could be utilised to boost the profiles and struggles of governments under attack from Russia, like Ukraine.
- China is a particular strategic priority, and more sophisticated than Russia in cultivating influence; a growing concern for governments all over the world.
 - Albany has already produced successful disinformation resilience programmes in the Baltics that can be replicated in areas China is most active.
 - Albany's successful programme used to boost the Syrian National Council prior to the 2014 peace negotiations could be utilised to boost the profile of Taiwan or counter China's attempts to legitimise its territorial claims.
- Multiple officials from various governments have expressed the need for sharing expertise and best practices regarding Hybrid Threats. MI5 DG McCallum has continually asserted there is a need to educate the populace to be as on guard about influence campaigns as they are about terror threats.
 - Albany has had success in providing creating centres of excellence for CVE messaging in Djibouti.
 - This programme could be replicated to create centralised hubs for distributing hybrid warfare "playbooks" and techniques in countering state-sponsored disinformation.

Opportunities for Albany

CVE Messaging

Growing extremism needs to be addressed, particularly as internet access expands in vulnerable areas like Africa, but the West's reorientation towards state threats creates a need for private enterprises to step in.

- Albany has demonstrated successful CVE messaging programmes in Africa as well as disinformation resilience programmes in the Baltics that could be replicated.
- These programmes can be replicated and expanded to tackle growing Islamic threats in Africa and Right-wing VEOs in the West.
 - The ERI programme can be replicated in the Sahel region, where officials admit there is little cohesion in CVE messaging and efforts tend to be focused on governance programmes.
 - Although there have been no large-scale terror campaigns by right-wing VEOs yet, there is a growing desire to address their growing popularity and recruitment before they become more ambitious, particularly as their online recruitment methods become more sophisticated.
 - Albany could repurpose its resilience campaign in the Baltics to enhance resilience to right-wing VEO recruitment methods and propaganda.
 - Similarly, the training programme in Nigeria could be recreated to spread proficiency.

Cyber Threats

State-sponsored and criminal actors frequently utilise cyber-attacks for financial or strategic gain, with the number of instances growing.

- There is a growing market for cyber threat education that Albany could potentially break into by forging partnerships with cyber-savvy companies that lack messaging experience.