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
- Declining hegemonic security and economic interdependence
- Growing nationalism
- Decline in democratic governance and increased authoritarian and personalist rule
- Technological change and accelerated pace of warfare
- AI decisionmaking
- Misinformation and disinformation overtakes or distorts objective truth
- Unclear rules and norms
- Declining deterrence
- Heightened geopolitical competition
- Centralized decisionmaking
- Long-range weapons advancements
- Murkier information environment
- Alternative non-kinetic options
- Survivable 2nd strike capability
- Leaders’ fears

**FACTORS THAT COULD REDUCE THE LIKELIHOOD OF CONFLICT**

- Cyber attacks, information operations, economic coercion, and precision use of force can produce strategic effects while avoiding costs of traditional armed conflict
- Leaders fear prohibitive economic, humanitarian, and political damage or disruption
- Leaders fear uncontrollable escalation dynamics and lack confidence they can deter retaliation
- Absent major technological change, potent nuclear arsenals will leave deterrence intact; nuclear war will remain unwinnable and prohibitively costly

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