

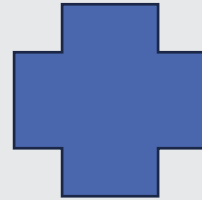
Mapping, Charting, and Navigating Uncertainty

Geopolitics in the twilight of globalization

GEO = EARTH



POL = PEOPLE

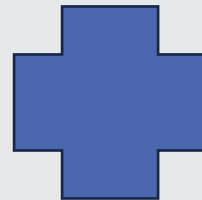


Geopolitics is political power linked to geographic space

POWER = MIGHT



COMPETITION = ZERO SUM



Great power competition is the fight over global resources



Geopolitical Waypoints



**Economic
Cooperation**



**Trade
Alliances**



Diplomacy



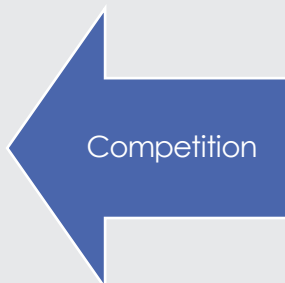
**Non-kinetic
Conflict**



**Military
Alliances**



**Military
Conflict**



Competition



Conflict



Where we are



Current
geopolitical landscape



Uncertainty Creates Conflict



MIGRATION



EXTREME WEATHER



WATER SCARCITY



ENERGY TRANSITION



FOOD INSECURITY



NEW TRADE ROUTES

National Security, Climate Change, and Economic Disparity intensify conflict



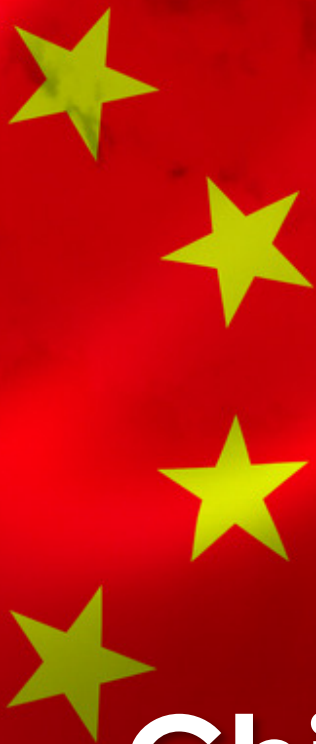
Where We're Going

Political	Geopolitical competition between China and US will generate new risks for businesses as both sides seek to impose their own norms and standards through executive orders, policies, regulations, sanctions, and tariffs
Economic	A revival of industrial policies that favor national security over efficiency will create problems in the global economy. It will increase trade friction, contribute to supply chain shortages, and will force MNCs to relocate (friend shoring, near shoring, and reshoring)
Social	Middle-class anger continues to rise as economic disparities widen in the covid recovery period. Shortages of essential goods cause protests to become violent and impacts business operations. Grievance and identity politics merge and drive poor economic policies and outcomes
Security	Political and social unrest become more frequent, more widespread, more violent, and more difficult to resolve in emerging and developed markets.
Technological	US-China competition creates non-interoperability risks between China-dominated and US-dominated spheres of influence. The race to master and dominate AI and even quantum is on. Cybersecurity threats multiply and become more complex and widespread. Cybercrime will overtake natural disasters as the most expensive risks.
Environmental	Fast changing values increase the demand for climate change mitigation and adaptation in transportation, power, and housing. The green energy revolution will disrupt business models in new and unpredictable ways.



Flashpoints, Fissures, and Fault Lines





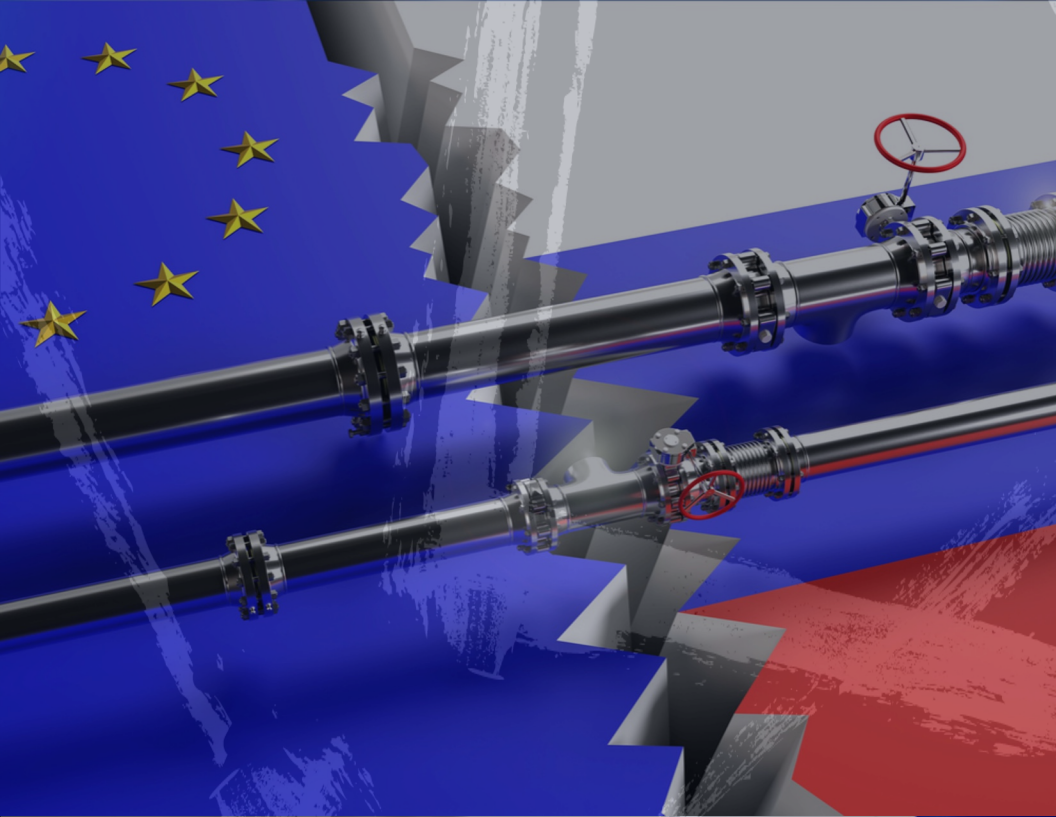
China





Russia





Europe



Israel
Iran
Saudi Arabia



KEY TAKEAWAYS



The Cycle usually
ends in
CONFLICT



CLIMATE CHANGE
Gets a vote



The **UKRAINE CONFLICT**
is a window into
the future



ENERGY needs will
shape geopolitical
blocs



FOOD AND WATER
INSECURITY are already
here



TRADE will become
a National Security
Issue



How We Can Help

Decision-makers combat a myriad of risks every day, but in today's fast-moving information environment, geopolitical risks are much harder to pin down, analyze and mitigate.

Geopolitical intelligence can inform critical decisions about how to operate, what markets to enter and leave, what resources to allocate, and when to commit them.



-  **Executive briefing, training, and workshops**

Recurrent executive-level and C-Suite briefings about geopolitical events, trends, and outlooks tailored to your business.
-  **Country risk deep-dive**

Forward-looking analysis and impact assessment of political, economic, social, security, technological, legal, and environmental risks at the national and subnational levels.
-  **Risk mitigation strategies**

Identification of risk exposure to specific risks and development of offset strategies.
-  **Scenario development**

Scenario-based modeling, simulation and development that incorporates emerging and future technologies

Questions?

