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SPEECHES AND TESTIMONY

The CIA in the New World Order: Intelligence Challenges Through 2015

**Remarks by John C. Gannon
Chairman, National Intelligence Council**

**to the
Smithsonian Associates'
"Campus on the Mall"**

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Thank you for the warm introduction. I'm delighted to represent our Director, George Tenet, at the Smithsonian Associates' "Campus on the Mall." This is an exceptional public education program that takes on today's challenging issues in a creative and stimulating manner that is in keeping with benefactor James Smithson's well-known commitment to what he called the "increase and diffusion of knowledge." I look forward after my remarks to your comments and questions, which, for me, is the "value added" of having to listen to myself talk.

When my former boss, Bob Gates, was here in 1992, he entitled his address, "The End of the Cold War: Where Do We Go From Here?" I actually had thought of calling mine, "Ten Years After the Cold War: Where Do We Go From Here?" Now, the typical Washington cynic would say that this just proves intelligence bureaucrats are notoriously slow in responding to change.

On this subject, I hear that a world-renowned geologist lectured here recently about some ancient rock formations in the American Mid-West. "It took over two hundred million years to complete this," he pointed out in one dramatic interlude. A member of the audience shouted, "Was that an Intelligence Community project?"

I am proud to say that the US Intelligence Community today is in much better shape than that. What we have learned in the eight years since Bob Gates stood here is that, absent the remarkably stable order of the Cold War world, global change is a constant. The answer to Bob's question, "Where do we go from here?" will always be a work-in-progress requiring closer collaboration across the Intelligence Community, greater investment in technology and skills, and in fresh approaches to both analysis and collection. This recognition is at the heart of George Tenet's strategic direction.

In fact, the world and the workplace of the CIA analyst have changed more in the past decade than in the previous 40 years of the Agency's existence. The single strategic threat from the Soviet Union, a remarkably stable intelligence target throughout

the Cold War, has gone and is not coming back. Threats to the United States today are more diverse and dispersed — distributed, if you will — and intelligence priorities shift continuously — presenting a tougher and enduring environment for both collection and analysis.

The post-Cold War challenge has been increased by the revolution in information technology and telecommunications, which has fundamentally transformed the globe we cover, the service we provide consumers, and the workplace in which we function. Information abounds. A lot of open-source material is relevant to our needs. Everybody is better informed. Intelligence requirements, as a result, tend to be sharper and more time sensitive. Everything moves faster! And Will Rogers' advice still holds: "It isn't good enough to be moving in the right direction. If you are not moving fast enough, you can still get run over!"

Let me add some personal context to a discussion tonight that will often focus on technology. It was about fifteen years ago, when I was managing European analysts at CIA, that I began to see the impact of Mikhail Gorbachev's too-little, too-late efforts to respond to the rapid—and, in his view, alarming—advance of technology in the West. He correctly saw the Soviet Union on the wrong side of a widening technological gulf. We were engaged in the final contest of the Cold War, during which Soviet and Western nuclear forces had the potential literally to annihilate the human race. Let me note, however, that we saw this awesome threat as attenuated by verifiable arms control agreements, by explicit nuclear doctrine that both sides had reasonable confidence would be observed, by the control of nuclear delivery systems by civilian and disciplined military forces, and by the existence of effective procedural and technical safeguards over the systems themselves.

So, what, in shorthand, will the picture look like over the next fifteen years? My one-sentence encapsulation would say the following: "Globalization will provide mankind with the unprecedented opportunity to improve the quality of human life across the planet; but progress will be hampered by economic volatility, by the political and security implications of sharpening inequalities in income, and by the growing threat from multiple, relatively small-scale programs of weapons of mass destruction." By contrast with the massive but arguably contained Soviet threat, we now face a serious challenge from lesser developed—and less disciplined—states, well-financed international terrorist groups, and powerful individuals with increasingly easy access to conventional explosives and to biological, chemical, and, to a lesser extent, nuclear weapons, along with the missile systems to deliver them. The bottom line is that these adversaries, who are often motivated by ideological rage or ethnic hatred, will have fewer and less powerful weapons than the Soviets, but are more likely to use them!

Tonight, I will try to describe the world as we see it evolving over the next 15 years, and I will attempt to assess the impact of all this on the intelligence business. I hope this broad approach will set the stage for the seven distinguished speakers who will follow me in this series on intelligence in the new world order. I assure you that these folks, many of them my colleagues and friends, will feel free to elaborate on any point I make or to disagree, if so inclined. There obviously is no single or simple response to the challenges we face. Some debate would be healthy! I will make four points:

First, a networked global economy will be a net contributor to increased political stability in the world. US national interests will increasingly be tied to our dependence on global networks that ensure the unrestricted flow of economic, political, and technical information, as well as people, goods, and capital—which, by the way, is my definition of "globalization." I recently read that an American electronics producer had put on a shipping label the following statement: "Made in one or more of the following countries: Korea, Hong Kong, Malaysia, Singapore, Taiwan, Thailand, Indonesia, or the Philippines. The exact country of origin is unknown." This, in fact, is not surprising when we appreciate the growing impact of a global economy driven by information technology.

Today's tough challenges, such as North Korea, Iraq, Iran, and Serbia, may well be transformed tomorrow into opportunities for constructive engagement. But as a rule, in areas not effectively integrated into the world economy, disaffection will grow as both economic development and investment in people lag behind. Terrorism and weapons-of-mass-destruction programs will, to some degree, reflect such disaffection and pose threats to American citizens, soldiers, territory, allies, and global interests. "Bad actors" on the world stage, often motivated by ethnic hatred and revenge and with allegiance to no state, will increasingly have ready access to critical information, to technology, to finance, and to deception and denial practices. Little guys with less-than-state-of-the-art weapons will be able to do us harm!

Second, global change in the decades ahead will broaden our definition of "national security" and expand the US intelligence agenda in both the numbers and complexity of issues we cover. In 15 years, CIA will still be focused on the proliferation of weapons of mass destruction, terrorism, narcotics, and organized crime. But newer issues, such as information operations and threats to our space systems, will command a growing amount of our time. And we will be engaged, even more than today, in covering regional conflicts, refugee crises, peacekeeping, humanitarian emergencies, environmental problems, global health issues, technological developments, and key economic trends. The fast-moving, broadly distributed threat environment is here to stay.

Third, technology will challenge us in every area of the intelligence business to be smarter, more agile, more responsive to the policymakers we serve, and more collaborative with experts, wherever they may be found – in academia, the private sector, and non-governmental organizations (NGOs). The center of gravity for expertise on both Research & Development and many of the substantive issues we cover has shifted outside the Intelligence Community in recent years. We need to be out there to get it.

Fourth, the intelligence business is fundamentally about skills and expertise, and this means people—people in whom we will need to invest more to deal with the array of complex challenges we face over the next generation. This, you may know, is one of George Tenet's highest priorities. No system or technology by itself will enable us to master the new threat environment that I am describing tonight or the glut of information we will face in the years ahead. We will need a skilled and expert workforce enabled by technology and armed with the best analytic tools.

Now, getting to the meat of my remarks, let me summarize some of the preliminary research we are conducting in the National Intelligence Council, or NIC, which I am proud to chair. The NIC is a sort of Intelligence Community "think tank," staffed by senior experts, called National Intelligence Officers, who have regional specialties, such as Latin America and the Middle East, or functional specialties, such as global, economic or military issues. They produce authoritative National Intelligence Estimates, coordinated throughout the Intelligence Community, on issues of high stakes for US national security.

The work I am about to summarize, which involves extensive collaboration with experts in academia and the private sector, attempts to identify the drivers that will influence the world of 2015. We call it "Global Trends 2015," and it follows on a similar strategic study we completed in 1996. Now, some people think intelligence analysts are arrogant in the bold way they make assertions about the future. When we roll up our sleeves with outside experts, moreover, that image is enhanced. What follows is clearly and confidently stated, but the intent is to encourage, not curtail, debate. The Intelligence Community, to date, has no sources in God's inner circle.

The first driver is global population trends. Despite substantial drops in fertility in some countries, the momentum of the existing population translates into an increase in the world's population from 6 billion to around 7.2 billion by 2015. Ninety-five percent of this growth will be in developing countries. But population patterns will vary markedly in different regions of the world.

- Most population growth will occur in relatively low income, developing countries in Sub-Saharan Africa and parts of South Asia, as well as in much of the Middle East. Much of this growth will occur in crowded and volatile cities.
- In many developing countries, particularly in Sub-Saharan Africa and the Middle East, a "youth bulge" — the burgeoning number of people between ages 15 and 24— will strain educational systems, infrastructure, and job markets.
- At the same time, the overall populations of many developing countries are gradually aging, as better primary health care and vaccinations for childhood disease have enabled most people to live to adulthood. Increasingly, the needs of older people will also impose economic demands and burdens on poor societies.
- But not all developing countries will experience population growth. Despite fairly high birth rates, some countries in Africa, which are heavily affected by HIV/AIDS and associated diseases, such as tuberculosis, will have stable or even declining populations.
- And Russia's population is likely to shrink—perhaps substantially— as a result of declining life expectancy, which is linked to poor health care, as well as declining birth rates.
- Meanwhile, in the industrialized world, slow or negative population growth means that some governments, particularly in Europe, will have to deal with providing social welfare and health services to aging populations while labor forces—the people whose taxes help finance services—will shrink.
- Additionally, "national security" in the industrialized world will rely on volunteer military forces, drawing from a shrinking or static pool of military-age men and women.

Facing labor shortages, some industrialized countries will encourage immigration; thus voluntary migration will increase, often raising sensitive questions of citizenship and national or cultural identity.

- Some countries will discourage large flows of immigrant labor: both because of their effects on local wage and living standards and because of their challenge to national and social cohesion. They will prefer to substitute technology for labor or to outsource labor requirements overseas.
- As the immigration question becomes increasingly salient in some countries, extremist politicians will play on fears of immigration, and tensions with immigrant populations—as well as their countries and cultures of

origin—will grow. I don't have to tell you how this works in today's world, even in strong democracies.

Other diversity problems loom. Throughout the world, there are now more than 2,000 distinct ethnic and indigenous groups, which are minorities in the states in which they live. Countries with distinct ethnic or religious minorities which lack established traditions of political rights and civil liberties are likely to experience increased communal tensions, political instability and even conflict.

- Ethnic or other communal tensions will persist in parts of Africa, the Caucasus, Central Asia, Southeastern Europe and parts of Indonesia, generating large flows of displaced people and spreading instability into neighboring countries.
- Ethnic networks will mobilize expatriates and kindred groups in diasporas and fellow-believers to raise money, buy weapons and recruit fighters for their respective causes. By 2015, at least a few new ethnicity-based nation-states are likely to come into being.

As a sidebar to population trends, let me mention another issue—the growing threat from infectious diseases, a topic we covered in a recent National Intelligence Estimate that I have made available to this audience tonight.

- Fueled in part by migration, in addition to a number of other factors, some infectious diseases, such as tuberculosis and malaria, are reemerging throughout the world in deadlier, drug-resistant forms.
- Moreover, new infectious diseases are appearing: we estimate that at least 30 previously unknown diseases have appeared globally since 1973, including HIV/AIDS, Hepatitis C, Ebola hemorrhagic fever, and the encephalitis-related Nipah virus that emerged in Indonesia last summer. Many are still incurable.

Indeed, senior policymakers are becoming increasingly concerned about the implications of growing infectious disease threats for U.S. citizens at home and abroad, for US armed forces deployed overseas, and for countries and regions in which the United States has major interests.

- Asia is likely to witness a major increase in infectious disease deaths, driven by the spread of HIV/AIDS, replacing Africa as the epicenter of the disease before 2015.
- Eurasia and Europe will also see substantial increases in infectious diseases.

Moving on to a second global trend, the demand for food, water, and energy will increase over the next 15 years, while the uneven distribution of natural resources will persist in many developing countries.

The good news is that world food stocks are projected to be sufficient to meet overall global needs by 2015.

- But despite promising technologies and liberalized trade, bottlenecks remain in the distribution of food. Thus, the problems of feeding the world's poorest populations, as well as those affected by internal conflicts, will persist.
- North Korea, in particular, will continue to risk nationwide famine—exacerbated by frequent natural disasters—until there are major regime and policy changes.
- And famines will continue to occur in poor countries embroiled in internal conflicts, which are often accompanied by deliberate destruction of crops. Many of these countries—such as Sudan and Somalia—are also subject to frequent natural disasters.

Water is a big issue! Fresh water, while globally abundant, is scarce today in much of South Asia, northern China, the Middle East, and parts of Africa, and will become scarcer in the years ahead. As you may know, access to water is a critical issue in Israel's treaty negotiations with both Syria and the Palestinians.

- Experts at the Global Water Policy Project estimate that by 2025, 40 percent of the world's population will live in countries that are "water stressed,"—a sixfold increase over 1995. These countries will be unable to provide sufficient water for agricultural, industrial, and household needs.
- The majority of those affected will live in Africa and South Asia. Given such scarcities, there are serious risks of future "water wars" along several large rivers and seas.

At the same time, growing populations and increases in per capita income will drive the demand for more energy. By 2015, the world's demand for oil will have grown by as much as 60 percent over present levels. Fortunately, this demand will not be difficult to meet.

- The oil deposits most economically exploited remain in the Persian Gulf region and Venezuela, with new areas coming online in the West African Basin and the Caspian Sea.

- The global shift to natural gas—with its fixed installations for fuel delivery—will establish long-lasting energy dependencies. Neighboring countries will become increasingly reliant upon natural gas supplies from Russia, Algeria, and Central Asia.
- Improvements in the efficiency of solar cells and batteries will result in greater use of these and other renewable energy resources, but they are unlikely significantly to affect global reliance on fossil fuels in the foreseeable future.

Now let me turn to the third major driver, economic growth. I've heard the cynical barb about economists who, when asked for a telephone number, can only give estimates. I am also aware that the global financial crisis of two years ago, in fact, surprised us all. Notwithstanding the uncertainty, we anticipate that accelerating global trade and the growing integration of capital markets will lead to at least modest real growth in world GDP and in per capita income.

We expect world per capita income to increase at an average annual rate of at least 2 percent between now and 2015, but the rising tides will not lift all boats. Not every state will benefit equally, nor will every group within every state. Divisions between "haves" and "have-nots" will have political implications in some cases, such as the recent populist-inspired regime changes in two democratic countries to our south--Venezuela and Ecuador. This dichotomy between rich and poor is less likely to provoke mass unrest in more authoritarian systems in African and the Middle East, where populist dissidence is more likely to be crushed.

- Output from countries now outside the Organization for Economic Cooperation and Development, or OECD, which is today comprised of 29 industrialized countries, is likely to rise from 45 percent to around 60 percent of global GDP by 2015.
- Thus, global economic influence and power will spread from the current G-7 countries of North America, Europe, and Japan to a more multipolar global economic system in which Brazil, India, China, and South Korea will be economic centers.
- Market liberalization and economic growth will ultimately benefit additional developing countries, but their inclusion in the global economy will be bumpy and slow. And countries with internal conflicts will fall further behind economically.

Market liberalization and economic growth will, over time, include more women in modern economic and mainstream social activity, although this process will lag in traditional Islamic societies.

- Disparities within societies will increase in almost all countries. The wealthy and well educated will get richer, while the poor will get poorer, with middle classes moving toward one or the other group.
- In the globally wired world, the persistence of poverty amid wealth will become more striking. As uneven distribution of wealth becomes more visible, discontent will increase, particularly among the 600 million relatively poor urban dwellers in developing countries whose aspirations will exceed their economic prospects.

Volatility will be a major downside of global economic integration. All states will become more vulnerable to shocks and disruptions. These shocks could take several forms, including a major disruption in global energy markets stemming from political instability in the Persian Gulf; a major US stock market correction, which would have a significant impact on the world economy; or another major financial crisis in the developing world.

The fourth global trend is that scientific and technological developments will permeate every aspect of the global environment.

- The continued digital data and communications revolution will further shrink distances and weaken barriers to the flow of information.
- Optical fiber and newer technologies will add enormous capacity for data transmission among nodes around the world.
- International affairs, in all its dimensions, will increasingly involve competition over control of information networks.
- The problem of "haves" versus "have-nots" may become a problem related to information as much as to economics. But information and technology will not be "owned" by a single country, nor can they be easily contained.

Information and communications technologies will continue to advance and diffuse rapidly, empowering individuals and groups of all kinds, with widespread but uneven economic, political, and social consequences.

- Communications technology will become so inexpensive that most countries will be able to connect to the

global information infrastructure.

- Countries and groups with the requisite human capital, skill base, and infrastructure will benefit, enabling some groups to accelerate their entry into the global economy.
- But rigid and authoritarian governments—such as North Korea—that resist the flow of information associated with communications advances will fall further behind technologically, economically, and politically.

The diffusion of information technology will create powerful synergies with other dynamic fields of science and technology.

- The biological sciences will be increasingly important primarily for their potential applications to medicine and agriculture.
- Advances in basic biology have the potential to allow us to diagnose and cure diseases, but most biomedical advances will remain expensive, benefiting only those with the resources to access them, most of whom will live in developed countries.

However important cutting-edge technologies may be over the next 15 years, applications and distribution of established technologies to new uses and markets will also have an immense impact. Examples range from using established technologies for development projects in Sub-Saharan Africa to the proliferation of weapons of mass destruction technologies throughout the world.

- The capability to purchase, copy, or steal existing technologies rather than developing new ones offers significant "catch-up" opportunities for less-developed countries and nonstate actors.

To cite a fifth trend, the relative power and influence of many nation-states will continue to erode over the next 15 years, while transnational networks of all kinds will almost certainly grow in number, economic power, and political significance.

- Globalization and the permeability of borders to the flow of people, goods, and information are all combining to erode state sovereignty.
- The state's power is shifting in three directions: outward to nonstate actors, downward to subnational and local levels of government, and upward, to a certain degree, to regional and international institutions and legal regimes.
- The information technology revolution will allow widely dispersed but globally connected groups to communicate more freely, facilitating new transnational networks built around shared values and interests of all kinds.

Nonstate actors will pose a much greater threat to the US homeland than ever before. Aided by technology, terrorist groups, criminal organizations, and narcotraffickers are expanding their operations and sometimes forming "alliances" of convenience.

- We are particularly concerned with the emergence of a new breed of terrorist has emerged that is skilled in conventional explosives, interested in weapons of mass destruction, and able to maintain international networks.
- Even small groups are using laptop computers, establishing Websites, becoming increasingly mobile, and using sophisticated encryption.
- And international crime and narcotics groups are using networks to organize criminal activities, including narcotics trafficking, illegal migration, and money-laundering.

In some countries, criminal networks will be better armed than the government and will be able to control portions of national territory.

International businesses and financial institutions will play increasingly important roles in the world market economy and in broader society.

- At times, this will present problems for US national security policymakers, as US businesses, tightly integrated into national, regional, or even global economies, find their interests diverging from US policies.

At the same time, nongovernmental organizations will continue to expand in sheer numbers, range of activity, and political clout. Although no widely accepted global count exists, worldwide, NGOs today may number "in the millions" if one includes the full range of organizations from large international groups to tiny village associations.

- These NGOs and other concerned groups and individuals will increasingly network to mount campaigns for or against social causes or political change. As you know, this already is happening today.

- On the positive side, NGOs can increase their effectiveness in responding to crises such as humanitarian emergencies. On the negative side, networking by extremist groups, such as neo-Nazis, can fuel social hostility.

The "upward" shift of power from nation states to international legal regimes and international and regional organizations is evidenced by the role of supranational bodies such as:

- the European Community;
- international organizations, such as the World Health Organization and UNICEF, which provide resources that developing countries cannot or will not deliver;
- and intergovernmental forums which negotiate global norms on issues such, as trade, the environment, and human rights.

In addition, a large body of international laws and treaties govern international commercial and financial transactions, international technical standards, global environment and health issues, and human rights.

- Whether international institutions and legal agreements will be capable of adequately addressing the complex transnational problems of the future is an open question.

The sixth trend points to a shift in power relationships and international alignments. The world currently has only one superpower, but it will not be a hegemon, as other states – principally the collective European Union, Japan, Russia, and China – try to shape the world of the future.

- Shifting power alliances will take place because of the increased economic and political power of Europe and East Asia and because of the potential for American internationalism to continue to wane over time.

Power alignments are in great flux as key states undergo uncertain transitions:

- European states—through a new EU military organization linked to NATO—will retain ties with the United States to ensure Washington's nuclear umbrella and continued military presence in the region.
- US ties with Japan and Korea may become more attenuated, but neither is likely to discard its American connections.
- Russia's claim to continued great power status rests almost entirely on nuclear weapons. Russia is likely to spend the next 15 years trying to restore its economy and struggling to reconcile the gap between its reduced capabilities and the continuing great power aspirations of many of its elites. I try to keep an open mind about Russia, but I am often reminded of the difference between the Russian optimist and the Russian pessimist. The pessimist says, "Things cannot possibly get any worse." The optimist replies, "Oh, yes they can!"
- China is a rapidly modernizing country with growing economic strength and assertive national and regional interests. The direction China goes will be determined by its internal political and economic evolution.

Our best judgment, however, is that the risk of conflict among the great powers and the United States remains low.

- The most dangerous consequence of a return to multipolarity will be the reemergence of national rivalries within East Asia, and even within Europe, if American internationalism declines.

Several regional powers in Asia and the Middle East—North Korea, India, Pakistan, Iran, and Iraq—will continue to pursue regional agendas that collide with US interests. All these states are developing weapons of mass destruction and long- or medium-range ballistic missiles.

- Such weapons will enable regional powers to do three things they otherwise might not be able to do against the United States:
 - try to deter the United States by threatening to significantly damage an urban center of one of our allies;
 - attempt to constrain US policy and military operations in a given region; and
 - try to cause direct harm to the US homeland.

The seventh and final trend is the changing nature of warfare. The widespread consensus is that the United States will have no peer military competitor by 2015. But our military and technological prowess will not be enough to guarantee that our interests are protected.

- Many countries and groups will try to blunt US military superiority in other ways — for example:
 - by improving their capabilities relative to those of their neighbors, and

- by using asymmetric means, such as terrorism and weapons of mass destruction, instead of large conventional forces.

Terrorist incidents are likely to continue, at least at current levels, and may increase by 2015. Terrorists will be better armed with more sophisticated weaponry. Some groups are already pursuing chemical and biological weapons capabilities. In the future, terrorists will seek to cause more casualties per incident, the vast bulk of whom will be civilians.

Because of the high cost involved in developing a nuclear capability, most countries or groups are unlikely to take the path followed by India and Pakistan, although we cannot rule this out.

- Instead, they probably will focus on chemical and biological weapons as more feasible and cost-effective ways to threaten their neighbors and to raise the potential costs of US or other outside involvement in their region.

As you may know, last year the NIC published and declassified a National Intelligence Estimate on the worldwide ballistic missile threat.

- We project that during the next 15 years the United States will face ICBM threats from Russia, China, and North Korea; we go on to project that the US probably will face an ICBM threat from Iran and possibly from Iraq.
- We said that the arsenals of the new missile powers will be dramatically smaller, less reliable, and less accurate than those of Russia and China.
- Nonetheless, the probability that a missile armed with chemical or biological weapons may be used against US forces or interests is higher today than during most of the Cold War. More nations now have longer range missiles and warheads armed with weapons of mass destruction.

Although the majority of systems being developed and produced today are short- or medium-range ballistic missiles, North Korea's Taepo Dong-1 in August 1998 demonstrated North Korea's potential to cross the 5,500-km-range ICBM threshold. Other potentially hostile nations could cross that threshold during the next 15 years.

Our potential adversaries are likely to conclude that the threat of using longer range missiles would complicate US decision-making during a crisis.

- Some of these systems may be sought principally for their political impact, while others may be built to perform more specific military missions.
- The bottom line is that we could find that what some call a doctrine of "massive technological superiority" is limited in its applications and effectiveness today, just as was the doctrine of "massive nuclear retaliation" some years ago.

Viewing the world of 2015 as a whole, no country, no ideology, and no movement will emerge to threaten US interests on a global scale. Nonetheless, the regional agendas of some countries will collide with those of the United States, and the threat of terrorism directed against US interests —both at home and abroad — will remain.

The scenarios of the future world I have posited, by and large, are the most probable ones that matter today. We are realistic enough to understand, however, that in our business the only certainty is that there are no certainties. The world may well be a far more benign place than I have portrayed it. Economic growth may be more rapid. For example, the potential for global violence would decline if Middle East peace talks were successful; when Slobodan Milosevic, Saddam Hussein, Kim Jong Il, and Fidel Castro depart the scene; or Iran reasserts itself as a responsible regional power. Alternatively, however, we could be in for a rockier ride than I have projected.

What if:

- Economic turmoil in Latin America deepens and spreads, sparking difficulties in other emerging markets and engulfing whole regions and countries?
- Russia takes a turn toward authoritarianism domestically and acts like a regional bully or, alternatively, drifts into anarchy and even fragmentation?
- China cannot peacefully resolve its differences with Taiwan?
- North Korea in an act of desperation marches south?
- Nuclear conflict occurs in South Asia?
- Greece and Turkey come to blows over Cyprus?

- An information warfare attack on the US grinds major sectors of the economy to a halt?
- Iran or an Arab state, perhaps with the assistance of others, gets "the bomb"?
- A failure of the Middle East peace process leads to another Palestinian *intifada*, and Jordan and Egypt are dragged into a conflict with Israel?
- Foreign terrorists foul water supplies in a major metropolitan area or pollute the air abroad with toxic chemicals?
- A government unfriendly to the United States makes a major technological breakthrough that has at least the potential to do major damage to US security interests?

Perspective

So what does all this mean for CIA and the Intelligence Community? First of all, it means that America will continue to need a robust intelligence service to help our policymakers make sense of the complex, fast-moving world that will confront them. Over the next several years, intelligence consumers will demand carefully targeted clandestine collection to support their programs and will want rigorous all-source analysis that integrates classified and unclassified information, that is tailored to rolling policy agendas, and that presents disinterested analytic judgments free of policy bias. In an environment of distributed threats and shifting priorities, this job will be harder than ever to do.

Second, it means that we will have to devote more effort to strategic work such as I have described tonight, so that we can better understand the dynamics of the fast-changing world in which intelligence will be operating. And we will need to work harder to make our strategic analysis relevant and useful, not just to consumers, but also to resource planners in the defense and collection communities. The high cost of collection systems—and the increasingly heavy demands on them—will require a more integrated approach among intelligence analysts and collectors in developing collection requirements, evaluation, and procurement processes. By the way, I regard what I just said as an understatement.

Third, it means that we must continue our efforts to apply greater rigor to our analytic work—using competitive analysis and state-of-the-art gaming techniques to quickly and fully weigh alternative outcomes, both in our long-term and current production. This will be an imperative in a fast-paced, distributed threat environment in which surprise will be frequent and response time often short.

Fourth, it means that we must see technology as a golden opportunity as well as a challenge in every area of our business—from operations and collection in the field, to protecting our own information systems, to analytic tools, to dissemination of analysis to consumers. Technology, in fact, is our only hope to deal with what otherwise will be a future of frenzy. To deal with our packed agenda, moreover, we cannot think of intelligence as a compartment, existing apart from the information world. We will continue to be the storied espionage business that steals secrets and protects sources. But more and more, we will be a modern "knowledge business" that skillfully integrates classified reporting with the best available unclassified information—with the latter becoming an increasingly larger piece of the pie.

Fifth, it means we will have to recruit, train, and deploy a work force with more specialized skills and expertise. We will have to develop stronger incentives and rewards to develop our people both as regional and technical specialists and, at the same time, as broad-gauged intelligence officers who know our business—and our Intelligence Community--end to end.

Sixth, and mercifully last, it means we will have to be more collaborative with experts outside the Intelligence Community, both to improve our analysis and to get the cutting-edge technology we need. Making a virtue of necessity, I am glad to say that we are well on our way to building the outside partnerships to do this.

Let me close by saying that, with all my talk of change tonight, the fundamental role of the intelligence officer in 2015 will be essentially what it is today: to anticipate and meet the needs of our consumers, who are the President and his senior national security advisers, cabinet heads, diplomats, law enforcement officers, and warfighters.

Former national security adviser Brent Scowcroft summed it up in a recent letter to the Washington Post: "The most difficult task the foreign affairs policymaker faces is making decisions in an environment of ambiguity and inadequate information. The role of intelligence is to narrow the range of uncertainty within which a decision must be made. What really matters is not how well the Intelligence Community predicts particular events, but its ability to spot, track, and interpret trends and patterns." My key point tonight is that to keep doing this in the world we see ahead, smart intelligence officers are going to have to train harder, run faster, and team up with players outside the Intelligence Community.

Let me stop here. I look forward to your questions and comments.

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