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How Donald Trump's Reelection Could Amplify Global Inter-systemic Risk

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1. Introduction

The impending federal election in the United States could mark an abrupt inflection point not only in the evolution of the American polity but also in the direction of global society. In this report we examine whether and how the election's outcome could place the world on a far more perilous course.

Our world's tightly linked economic, geopolitical, technological, and environmental systems are currently under enormous stress and potentially close to tipping points. Pushed beyond critical thresholds, these systems could swiftly reconfigure their internal structures and change their fundamental behaviors.

In this context of rising vulnerability, a Harris-Walz administration would likely implement policies that, on balance, tend to stabilize today's highly perturbed global systems. Donald Trump, in contrast, sees himself—and acts—as a system disrupter; he is also highly unpredictable. Both characteristics make extreme outcomes more probable, should he become President.

Mr. Trump has already injected into American political discourse a range of possible outcomes—such as seizing, incarcerating, and deporting millions of undocumented immigrants; invoking the Insurrection Act and federalizing the National Guard to suppress domestic protest; and withdrawing the US from NATO—that were almost inconceivable a decade ago. Even the election process itself—the results of which are almost certain to be complex and contested, because of a loss of trust in US electoral institutions that Mr. Trump has himself engendered—could trigger a period of intense domestic turmoil with grave consequences for the world.

With this in mind, we focus our analysis on the impacts of a second Trump administration.

Mr. Trump's second term is likely to be far more disruptive than his first. He now appears motivated by a desire for retribution; he will return to office with a much more competent and prepared administrative team with detailed, radical policy plans; that team will likely act quickly to subordinate to the President key instruments of state power, including the

Departments of Justice and Defense; and constraints on the President’s use of this power are far weaker, in no small part because of the US Supreme Court’s recent immunity ruling.

In the language of statistics, Mr. Trump’s radical political influence within and beyond the United States is skewing the probability distributions of future global risks, stretching their tails into extremes that were hitherto thought highly, even vanishingly, unlikely.

This report assesses these diverse and entangled *global inter-systemic risks*. Intended for policymakers, the investment community, public commentators, and risk analysts, it applies a set of analytical tools to identify likely critical junctures, causal pathways, “Nth-order” impacts, and feedback loops arising from the 2024 US election.

To date, researchers and commentators have mostly focused on the election’s possible first-order impacts on specific US policy domains, including defense posture, immigration, and abortion rights. Less examined are potential multi-stage impacts that could spill across affected systems far beyond American borders.

To better understand and assess these potential consequences, we use three analytical tools—derived from complex-systems science—to explore how Mr. Trump’s reelection might interact with larger global systems to both amplify and create major risks.

1. We apply a **stress-trigger-crisis model** that discriminates between, as causes of crisis, Mr. Trump’s influence on slow-moving, large-scale stresses and his impacts on fast-moving, local trigger events (see Box 1).
2. We identify a set of **critical junctures** likely to arise from the election itself or from a Trump administration’s actions following the election (see Box 2).
3. We then combine our results from these two steps to inform a **causal-loop analysis** that identifies potentially dangerous self-reinforcing feedbacks that could operate across multiple global system boundaries.

This report is a *first* assessment of the inter-systemic consequences of a second Trump presidency. It integrates evidence and opinion we have gathered from informed commentary on possible election impacts and from confidential interviews with a diverse group of field experts, both in the US and abroad, some of whom identify as ideologically conservative. We recognize that our own values and beliefs have influenced our analysis, but we have aimed to ensure that those assumptions are visible and open to critique. We plan to release an *updated* assessment in late October.

Our analysis in this report indicates that, compared to a Harris administration, a second Trump administration is much more likely to ignite a trade war with China that slows global economic growth; empower authoritarianism domestically and abroad; weaken multilateral institutions that provide vital global public goods; diminish the international security presence of the US, perhaps stimulating regional arms races; and increase uncertainty about how the US responds to crisis.

These outcomes will further disrupt global systems that are already fragile and vulnerable. The result is likely to be a more fragmented, competitive international order, and ultimately, in the worst case, great-power war and a far more severe global polycrisis. But whether the risk of these worst outcomes is low or high depends crucially on how other actors around the world—nations, firms, multilateral institutions, non-governmental organizations, transnational groups, and civil societies—respond to Mr. Trump’s actions. The worst is far from inevitable.

Box 1: The stress-trigger-crisis model

Drawing on complexity science, the Cascade Institute has developed a “stress-trigger-crisis” (STC) model to better understand and predict the behavior of the world’s connected geopolitical, economic, environmental, and other systems. The model assumes these systems generally function within a “dynamic equilibrium”—a set of conditions, stabilizing feedbacks, and structural relationships that keeps their behaviors and properties within a “normal” range.

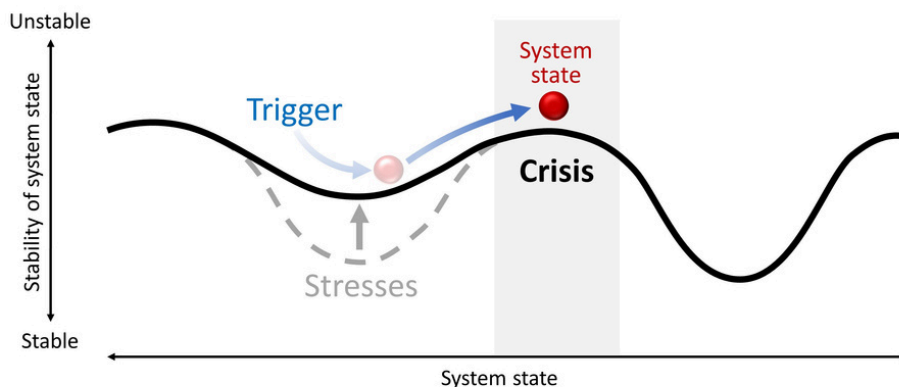
Stresses are pressures, contradictions, or vulnerabilities that operate over long periods of time and at a large scale (societal, regional, or global); their slow pace makes them somewhat predictable. They reduce a system’s resilience and thereby create *systemic risk*, which is the potential for a problem to spread through an entire system and into other systems, disrupting their functions. *Trigger events*, in contrast, operate quickly (on a rough timescale of seconds to weeks) and tend to be local or regional in scale, while their exact timing and location are largely unpredictable.

A system goes into *crisis* when one or more slow-moving systemic stresses interacts with a fast-moving trigger event to force the system out of its equilibrium into a state of

disequilibrium. A multi-year drought, for instance, is a stress that creates conditions in which a random lightning strike can trigger a forest fire.

The figure below in this box illustrates these relationships using a “stability landscape diagram” (a common complex-systems graphical device). A dip in the landscape is a “basin of attraction” in which stabilizing feedbacks act like gravity to keep the system state, represented by the ball, in equilibrium, by pulling it back towards the bottom amidst its day-to-day fluctuations. But over time, stresses can make the basin shallower, which means the system is losing resilience. Chances increase that one or another trigger event (including some that earlier would have had little consequence) will push the system out of equilibrium into crisis. When crises with connected causes occur across multiple global systems and result in a large-scale loss of global wellbeing, we call it a *global polycrisis*.

We argue here that Mr. Trump can affect the risk of global polycrisis by both altering the force of existing long-term stresses and generating trigger events that interact with those existing stresses to catalyze crisis.



The stress-trigger-crisis model

Box 2: Critical-juncture analysis

History can be interpreted as a chain of “critical junctures”—short episodes of rapid system change separated by longer periods of stasis. Critical junctures arise when underlying stresses or other factors combine to create conditions ripe for a system shift, perhaps catalyzed by a trigger event. Each critical juncture generates a fan of possible pathways for the system’s further evolution.

Analysts can anticipate some critical junctures because, for instance, they arise from institutional arrangements; a good example is the forthcoming US federal election. Mr. Trump is creating possibilities for new critical junctures in the US political, economic, and social systems—ones that can potentially be anticipated—by advocating policies not previously considered feasible (for instance, imposition of major tariffs and deportation of millions of undocumented migrants).

Analysts can also identify the pathways that might follow an anticipated critical juncture and assign each pathway a (usually rough) probability. Sometimes, even if anticipated, a particular critical juncture can occur only along a specific pathway, which makes it contingent on earlier critical junctures.

By linking together anticipated critical junctures with pathway probabilities, analysts create branching diagrams that identify possible first-, second-, and Nth-order impacts. Importantly, once a system starts down a particular branch, it often becomes “locked-in” along that pathway, so that the juncture essentially disappears in the past, and its other branches decline sharply in feasibility.¹

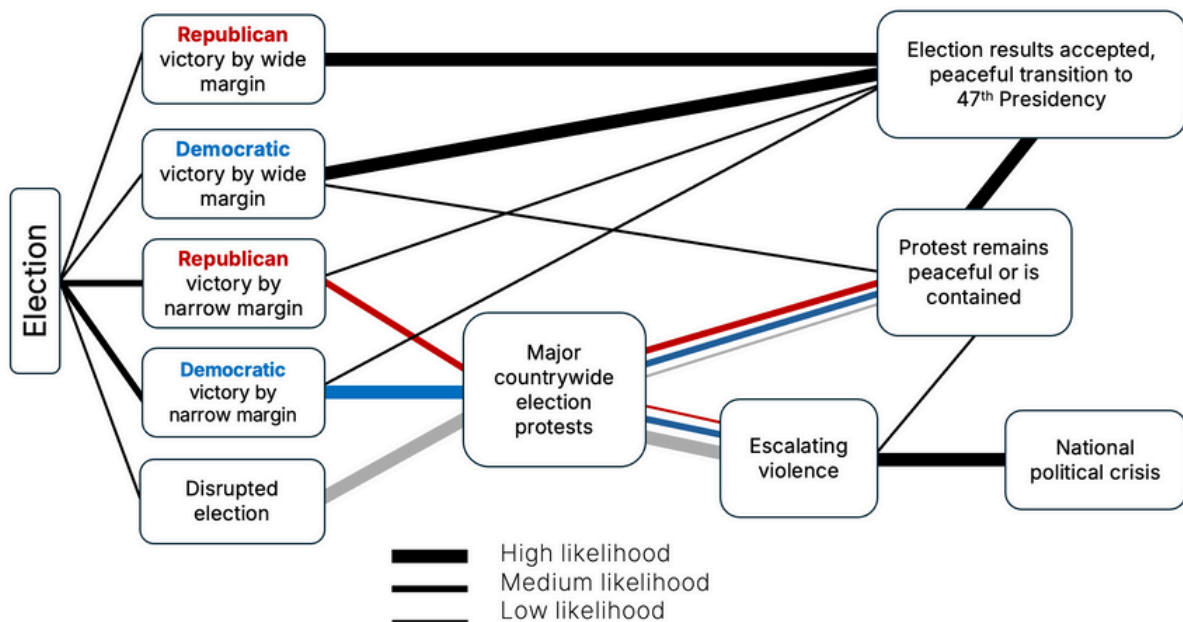


Figure 1. Critical Juncture: Electoral College outcome

Figure 1 (“Electoral College outcome”) is a critical-juncture diagram of the 2024 US election and the social instabilities that could occur in its immediate aftermath. Line thickness indicates estimated likelihood of outcomes and subsequent impacts. The figure begins, on the left, with five possible outcomes of the electoral college vote. If either the Republicans or Democrats win by a wide margin, both would likely accept such a decisive outcome, allowing a peaceful transition to the 47th Presidency (with a slight chance that Republicans would protest even a decisive Harris-Walz victory). But if margins are close (decided by, say, a few thousand votes in a swing state), or if electoral disruptions (such as officials’ refusal to certify vote totals) prevent a clear outcome, then nation-wide protests could ensue. For these pathways, the red, blue, and gray lines allow the reader to trace proposed lines of causation (and their associated likelihoods) from either a Republican or Democratic narrow victory or from a disrupted election through consecutive critical junctures.

For example, if Democrats win by a small margin, Mr. Trump will almost certainly denounce the results as fraudulent and call on his supporters to disrupt electoral processes. We therefore estimate that such an Electoral College outcome would have a high probability of producing countrywide protests (represented by the thick blue line). Those protests would themselves create a critical juncture. Federal security institutions are still relatively non-politicized and have undoubtedly learned from the January 6 insurrection how to better cope with such electoral protest, but a genuine risk would remain of a spiral into large-scale violence. The two subsequent blue lines therefore indicate that we estimate a medium likelihood for both possible outcomes (protest remaining peaceful or escalating violence) in the event of a narrow Democratic victory.

2. Impact assessment

General concerns about another Trump presidency fall into two main categories.

The first encompasses concerns about Mr. Trump’s personality and psychological and cognitive wellbeing. His narcissistic, impulsive, and generally unpredictable nature, combined with his transactional approach to politics, could trigger a crisis or cripple the US response to one. Mr. Trump has also grown more psychologically erratic and distractible, showing signs of cognitive decline that would diminish his decision-making ability in a perilous world (see Box 3, “Implications of cognitive decline”).

The second category encompasses concerns about the loss of guardrails that personnel and institutional constraints have previously provided. Many commentators, and several of our interviewees, believe a second Trump administration will quickly dismiss large numbers of government personnel regarded as obstacles to the new administration’s agenda and replace them with staunch loyalists. This campaign would clear the way for a policy program far more radical and organized than that of Mr. Trump’s first term.

Beyond these general concerns, analysts and our interviewees focus on the impacts of Mr. Trump’s *specific* policies. Below, we use, where possible, critical-juncture analysis to highlight likely first- and second-order impacts of a second Trump administration’s policies. We group these specific policy impacts under three broad headings: institutional capture and deepening authoritarianism; socio-economic turmoil (particularly within economic, energy, climate, and health systems); and international conflict and insecurity. We focus on impacts that could have major consequences for global systems—consequences that we further analyze in Section 3.

Box 3: Implications of cognitive decline

Dementia is a degenerative disease in which deterioration worsens over time, beginning with mild cognitive impairment and progressing to an inability to execute daily functions without aid. Mr. Trump is susceptible to dementia simply because of his age (78) and family history (his father had Alzheimer's disease). Some of his behaviors indicate cognitive decline that is either a precursor to, or evidence of, dementia.

Though he cannot be diagnosed without being subject to a full battery of neuropsychological tests, over 2,800 licensed clinicians have signed a [public statement](#) indicating that Mr. Trump is showing unmistakable signs of cognitive decline and probable dementia. Signatories cite an overall deterioration from his baseline level of verbal fluency; memory impairments beyond normal age-related forgetting of names and places; disordered speech filled with dementia-specific errors (tangential digressions and non-sensical words, for example); evident impairment of motor control in gait and hand coordination; and deteriorating control of impulses and judgments.

While dementia is heterogenous in both time of onset and progression, if Mr. Trump has the disease, certain outcomes are probable: he will show progressively more aggressiveness (especially if he has Alzheimer's disease); a greater loss of insight, judgment, and impulse control; grander delusions; and further deterioration in verbal ability. His capacity to distinguish between reality and fiction, already uncertain, will decline.

Depending on the speed of disease progression, he could ultimately become incapacitated and unable to perform his presidential duties. Various pathways are then possible: the Vice President and a majority of Cabinet secretaries might invoke section 4 of the 25th Amendment, declaring the President cannot discharge his official responsibilities; an inner circle around the President might try to hide his dysfunction, making decisions on his behalf; or conflict among advisors and within the Cabinet could create a void in executive power.

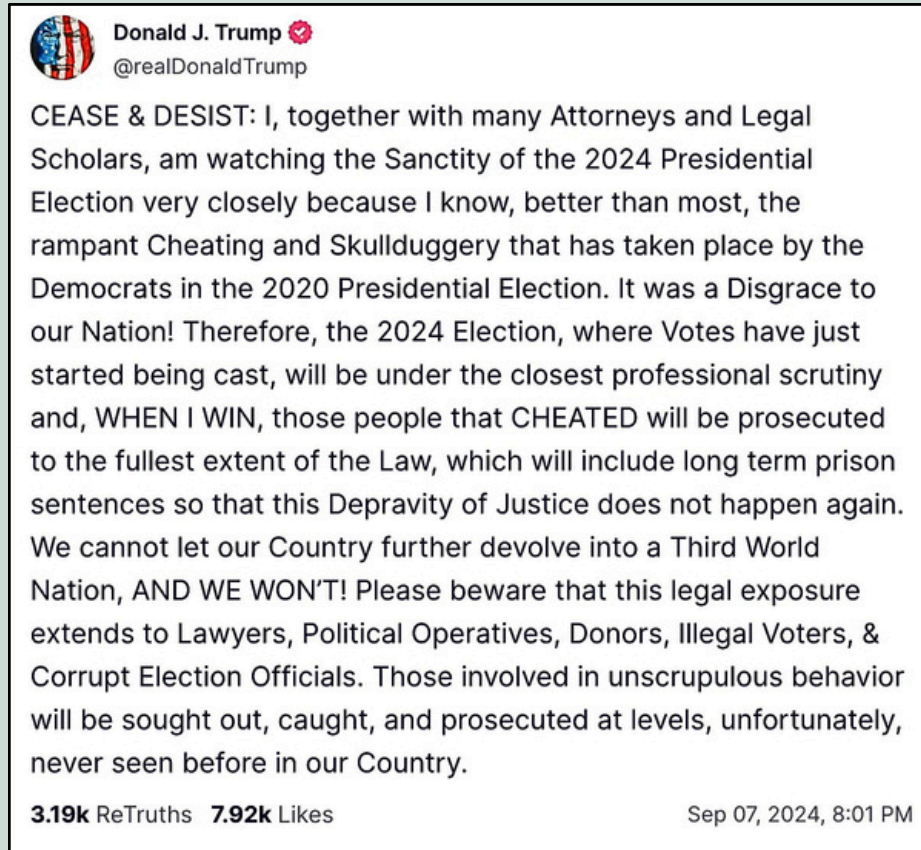
2.1 Institutional capture and deepening American authoritarianism

Many analysts, including several of our interviewees, believe that Mr. Trump will attempt to capture government institutions, recast them in more authoritarian forms, and potentially use violent repression to reinforce and protect his rule.

- **Politicized civil service:** By reintroducing the Schedule F employment category for civil servants, Mr. Trump could replace tens of thousands of civil servants with loyalists. Doing so would likely spur a secondary exodus of experienced civil service employees, taking with them invaluable experience and institutional memory. If the President were to adopt the Unitary Executive Theory, he might try to interpret Article 2 of the Constitution as legal justification to place the entire executive apparatus (including the Department of Justice and the Pentagon) under direct Presidential authority. Mr. Trump could order agencies such as the IRS to harass his opponents; and to bypass congressional opposition, he might rely on rule by executive order, vetoes, impoundment (of Congressionally allocated funds), and other extraordinary measures. While this approach to governing could allow Mr. Trump to advance his political agenda, it could also critically weaken the federal government's ability to carry out key functions, from basic administrative tasks to disaster response. Mr. Trump's actions could also incentivize judges to become more ideologically extreme to earn favour with the executive and improve their chances of ascending in the federal court system or to avoid repercussions of his wrath.²
- **Weakened rule of law:** The recent Supreme Court immunity ruling places the President substantially above the law. Even in this ruling's absence, Mr. Trump likely has strong grounds to defer existing criminal proceedings until he has left the White House. He could also have the Department of Justice tell appellate courts that it no longer wishes to pursue conviction. The Department might additionally be used to advance the interests of the President's allies and pursue charges against perceived political opponents (see Box 4 "Donald Trump on prosecuting election 'cheating'"), as he has already threatened to do with Joe and Hunter Biden. Mr. Trump could achieve these ends by appointing a loyalist as Special Counsel and using this appointee to pursue charges. This action might be part of a wider strategy of installing partisan loyalists across federal agencies to influence their rulings. He could pardon convicted January 6th protestors and right-wing extremists. He might also instruct the Office of Legal Counsel to issue opinions that support extreme policies such as the use of the

military against opposition protestors, seizing state voting machines, or using lethal force at the southern border. The rights, due processes, and checks and balances at the heart of a functioning judicial system would diminish accordingly.³

Box 4: Donald Trump on prosecuting election “cheating”



- **Imperiled civil-military relations:** The US has long benefited from strong norms of professionalism governing the relationship between civilian and military officials. Even within those boundaries, the President can issue a wide range of “awful but lawful” orders that the military would be obliged to carry out. But Mr. Trump could additionally weaken existing civil-military norms by replacing the upper echelon of the armed forces with loyalists, and by exploiting divisions within the ranks. On grey-area issues (for instance, torture and assassinations), he could exercise more personalistic and partisan control over the military, perhaps even corroding its commitment to defend the Constitution.

Box 5: Extraordinary presidential powers

The US President has available a wide range of extraordinary powers for use in specific circumstances. These powers confer abilities and permit measures not otherwise legal. Two main laws govern these powers: the Insurrection Act and the National Emergencies Act. The President may also have the authority to declare martial law.

The **Insurrection Act** allows a President to deploy the US Armed Forces or National Guard to stem protests, rebellion, or civil disorder. In essence the act temporarily suspends the Posse Comitatus Act, which prohibits the military from assisting with domestic law enforcement. Three sections specify the conditions under which the Insurrection Act can be invoked:

- Section 251 allows for state legislatures to request federal military assistance in the event of rebellion.
- Section 252 allows for the deployment of the military to quell a rebellion or insurrection that makes it “impracticable” to enforce laws in the usual manner. It does not require the consent of the state.
- Section 253 allows for the use of federal troops if an insurrection, conspiracy, or act of domestic violence either deprives state citizens of their constitutional rights and states are incapable of dealing with the situation, or if a state “opposes or obstructs the execution of the laws of the United States or impedes the course of justice under those laws.” It also does not require the consent of the state.

These sections, especially 253, are broad and vague. The US President has the authority to define what constitutes an insurrection, conspiracy, rebellion, or act of domestic violence sufficient to invoke them.

The **National Emergencies Act** provides the President with a set of 150 emergency powers: 137 potential statutory powers if the President declares a national emergency, and another 13 if Congress passes the declaration. What constitutes a “national emergency” is arbitrary, since it has never been legally defined. These powers, which are in effect for only one year unless renewed, include the ability to surveil political opponents and to block domestic transportation and financial transactions. As of September 11, 2024, 42 national emergencies were still in effect. President Trump himself declared a national emergency during his first term to procure billions of dollars of funding for a southern border wall (Proclamation 9844). He extended this national emergency twice (for a year each time), before it was repealed by President Biden.⁴

Martial Law in the US allows for the military to assist with non-law-enforcement activities domestically, engage in law enforcement, and to temporarily replace civilian government with military rule. In the most extreme case, military tribunals can replace the civilian judiciary, and the Constitution and normal rule of law are suspended. A state governor or Congress can invoke martial law, an act that has occurred 68 times in US history. Despite this frequency, the legality of martial law remains unclear. “Martial law” is not mentioned in the Constitution, Congress has never defined it, and Supreme Court rulings about it are “inconsistent and vague.”⁵ Whether the President can invoke martial law is contested, and arguably only section 253 of the Insurrection Act gives the President such authority. A President has declared martial law at a national level only once in US history, when Abraham Lincoln used it to suppress dissenters during the Civil War by suspending habeas corpus and civil rights across the country.⁶

- Security crackdowns:** If Mr. Trump fulfills his promise to implement some of his more extreme proposals immediately after his inauguration—such as mass-deportation of undocumented immigrants—left-leaning protestors could flood the streets countrywide, provoking right-wing counter-protests. Mr. Trump’s response is unlikely to be measured. He might leverage the unrest to justify a security crackdown by, for instance, directing the Department of Justice and FBI to target opponents or invoking the Insurrection Act to permit the military to suppress protests (see Box 5, “Extraordinary presidential powers”). Right-wing militias could join in attacks on opposing protesters. In the worst case, one of our interviewees argued, Mr. Trump could create a “state of exception” in which the executive is perceived to be legitimately and perpetually above the rule of law.⁷

In Figure 2 we represent a Trump administration’s implementation of radical policies early in its tenure as a critical juncture with four possible subsequent pathways of public protest and administration response.

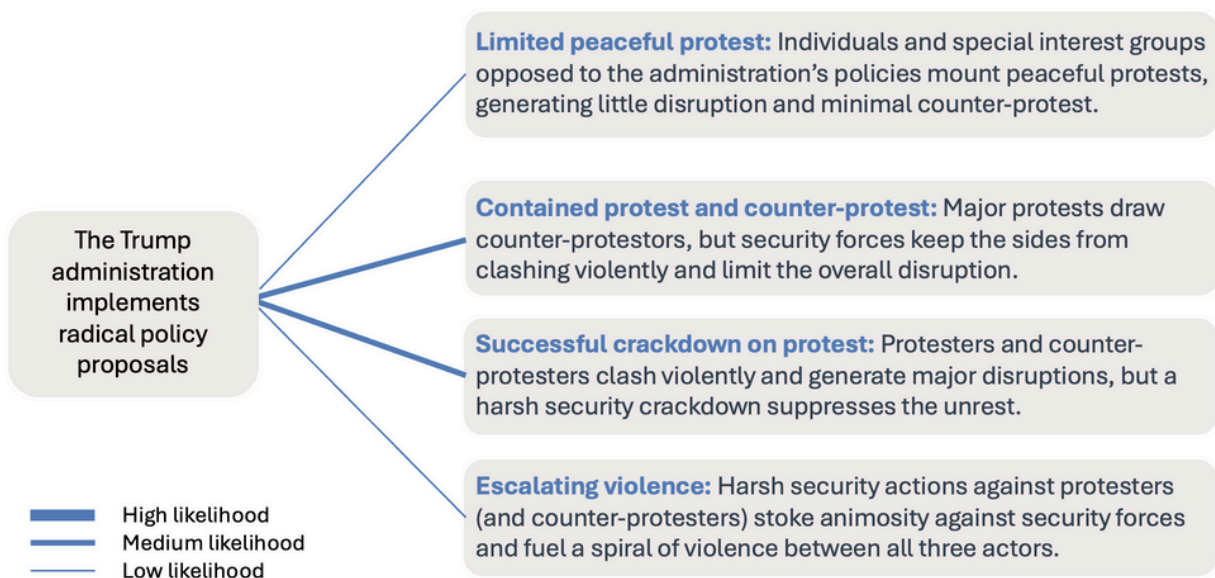


Figure 2. Critical juncture: Protests and responses

- Populist authoritarian contagion:** A Trump victory could embolden far-right movements worldwide. The measures described above, if implemented in the US, could legitimize populist authoritarian movements and their leaders elsewhere. But the strength of such a contagion effect, our interviewees stressed, would vary by region.

In Europe, the appeal of the far right is more limited than in America, because mainstream conservatives generally refuse to work with the far right, so the latter cannot subsume the former as Mr. Trump and his followers have done with the Republican Party. On the European continent, a second Trump presidency may indeed serve more to catalyze pro-democracy movements than to further empower the extreme right.

In Latin America, however, Mr. Trump's first term legitimized copycat leaders like Brazilian President Jair Bolsonaro, and a second term would further embolden such leaders and the movements supporting them. Across the global South, an American shift towards authoritarianism would validate the politics of existing and aspiring authoritarian leaders.

More generally, since World War II the US has been a crucial exemplar of how democracy, peace, and prosperity can powerfully reinforce each other. No other country or bloc—not even the European Union—is well-positioned to pick up this mantle, should Mr. Trump abandon it. Conservative movements worldwide are already increasing their cooperation, and the loss of the American example will further cede ideological space to authoritarian ideology.

2.2 Socio-economic turmoil

Mr. Trump's economic proposals could exacerbate inflation and weaken the country's economic prospects in ways that ripple through the global economy and intersect with other socio-economic vulnerabilities.

- **Tariffs and inflation:** The first Trump presidency implemented the biggest increase in tariffs since the Great Depression. For his second term, Mr. Trump has proposed blanket tariffs of 10 to 20 percent on almost all imports, and 60 percent or more on Chinese imports. Our interviewees indicated that such measures would increase inflation in the American economy by at least 2 percent, hinder long-term planning and investment, and perhaps trigger a wage-price spiral. The inflationary pressures would worsen further if Mr. Trump were to opt to “run the economy hot” by pursuing near-zero interest rates, cutting taxes, and using economic regulations to reward supporters and punish opponents. These measures would increase the US deficit, perhaps to the point of jeopardizing investor confidence. Any effort by Mr. Trump to politicize the Federal Reserve and directly influence monetary policy would worsen these stresses. In Figure 3, we represent the Trump administration's trade policy as a critical juncture with three possible pathways of first-order effects on the US economy.

Inflation and malaise in the US economy would exacerbate economic stress worldwide. Sharply higher US tariffs would almost certainly spur retaliatory protectionism by other countries, slowing growth in the global economy by 1 to 2 percent. These impacts would not in themselves push the world economy into recession, but they could do so in combination with other forces.

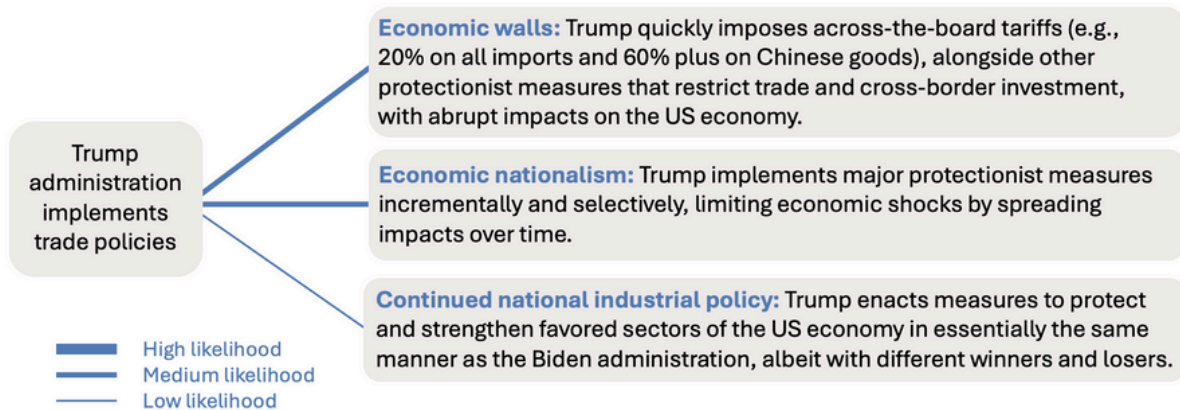


Figure 3. Critical juncture: Trade policy

- **Mass deportations:** Mr. Trump has proposed deporting up to 10 million undocumented immigrants. The process would involve mass raids and arrests, internment in camps, re-imposition of Title 42 expulsion policy to curtail land entry, and use of the military along the border on land and sea to stop the drug trade. He has also proposed ending birthright citizenship.

Our interviewees argued that deportation measures are unlikely to be implemented at such a scale. A militarized cross-country deportation campaign would be incredibly complicated and economically disruptive. Farmers would react strongly to the sudden loss of essential agricultural labor. But even deportations at a smaller scale would raise inflation, dislocate labor markets, and involve draconian measures. And climate and other global stresses will continue to drive migration towards the US through the course of a second Trump administration, providing an ongoing motivation to harden the southern border and direct xenophobic anger against immigrants.

Figure 4 shows potential pathways arising from the critical juncture of a Trump administration’s immigration policy decisions.

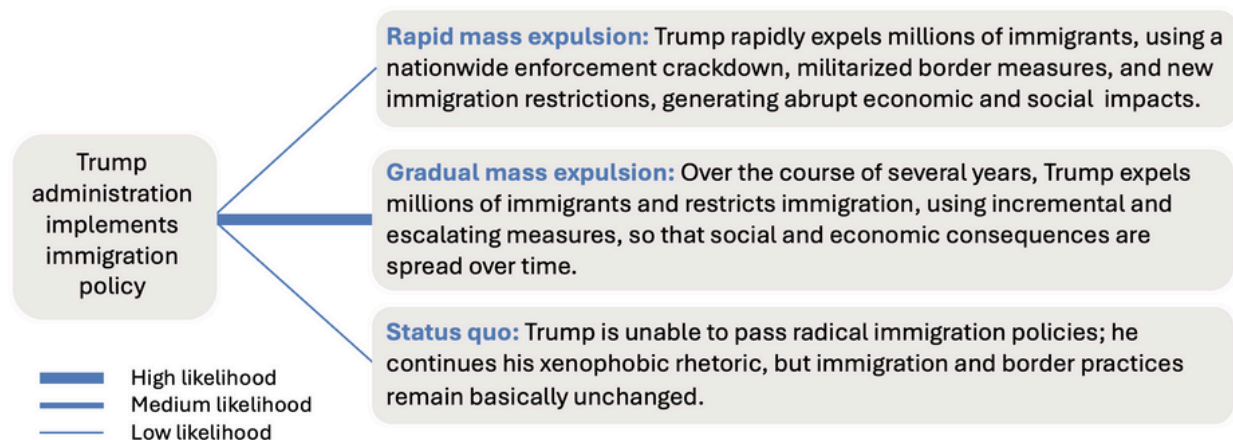


Figure 4. Critical juncture: Immigration policy

- **Derailed climate action:** Mr. Trump will almost certainly withdraw again from the 2015 Paris Climate Agreement, dismantle domestic climate and environmental regulations (particularly those seen to hamper the fossil fuel industry), and actively oppose a transition to green energy.

Modelling suggests that likely Trump administration climate and energy policies would result in 4 billion more tonnes of US carbon emissions by 2030, compared to estimated emissions under a Harris administration, producing around \$900 billion in additional climate damages worldwide. Yet many commentators argue that bipartisan support in Congress for Inflation Reduction Act policies (the returns from which flow disproportionately to Republican states) will temper Mr. Trump’s attacks on the Biden administration’s climate legacy.⁸

Nonetheless, our interviewees noted that if the United States, one of the world’s largest carbon emitters, withdraws from international climate action (and then actively hinders such efforts), other countries may have scant incentive to pursue their own climate action. They may even imitate Mr. Trump’s environmental deregulation to remain economically competitive. But broad defection from the international climate regime did not occur during the first Trump administration. It seems equally possible that a collection of national, international, sub-national, private, and non-governmental actors would redouble their climate efforts to offset American inaction, or that China would step into the role of global climate leader to expand its influence (see Figure 5).

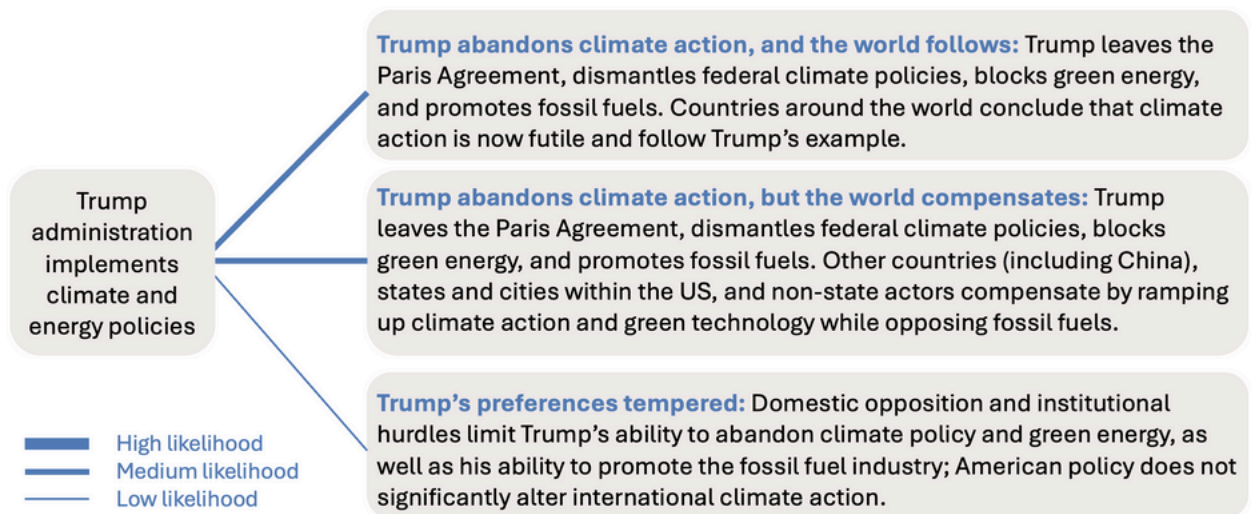


Figure 5. Critical juncture: Climate and energy policy

- **Poor pandemic response:** During the COVID-19 pandemic, Mr. Trump successfully executed Operation Warp Speed, creating a funding pipeline for rapid vaccine development. But he also actively spread misinformation and castigated the medical establishment, imperilling millions of lives. His disdain for scientists as part of a cosmopolitan elite would likely continue in his second term. Nominations of scientific and medical advisors and personnel within the administration would emphasize ideological alignment and loyalty over scientific expertise, increasing the risk that the administration would disseminate poor advice or even outright disinformation should another pandemic occur.

A Trump administration crackdown on migrants, who make up the vast majority of agricultural and factory farm workers, would both prevent virus testing (as workers avoid contact with authorities) and push those being detained for deportation into crowded facilities enhancing contagion. Mr. Trump has also said he would probably dismantle the Office of Pandemic Preparedness and Response Policy, an action that would hamper the government's ability to prevent virus spread and counter misinformation. His likely weak support for public health measures (lockdowns, masks, vaccines, and the like) would exacerbate an outbreak.

2.3 International conflict and security

Mr. Trump has proposed actions in the foreign-policy and security spheres that—while appealing to his domestic constituencies—would greatly erode America’s international influence. His “transactional isolationism,”⁹ would lead to a more uncertain and conflictual world order.

- **Weakened NATO, emboldened Russia:** Mr. Trump has suggested that the US might withdraw from NATO; he has threatened to abandon allies to Russian aggression; and he has brow-beaten NATO members into raising their defense spending. Yet the US is unlikely to leave NATO, as doing so would require a two-thirds majority vote in the Senate. Still, ambivalent or ambiguous support for NATO and its members, involving actions such as withholding diplomatic envoys or cutting funding, would critically undermine the alliance (see Figure 6).

Mr. Trump would probably end US military support of Ukraine, leaving Europe struggling to fill shortfalls in materiel. Together, US ambivalence about NATO and a Ukrainian defeat (of some kind) could encourage President Putin to extend his military aggression to other countries formerly part of the Soviet orbit (perhaps starting with Moldova). The resulting security panic in Western Europe would divert attention and spending from other policy priorities.

But our interviewees stressed that all these outcomes are uncertain due to Mr. Trump’s unpredictability. He may attempt to broker a ceasefire between Ukraine and Russia to bolster his image as a “dealmaker” (though neither Ukraine nor Russia would likely agree to any settlement Mr. Trump could propose). And even if the US disengages from Europe, Russia may still act cautiously, fearing Mr. Trump’s volatile nature.

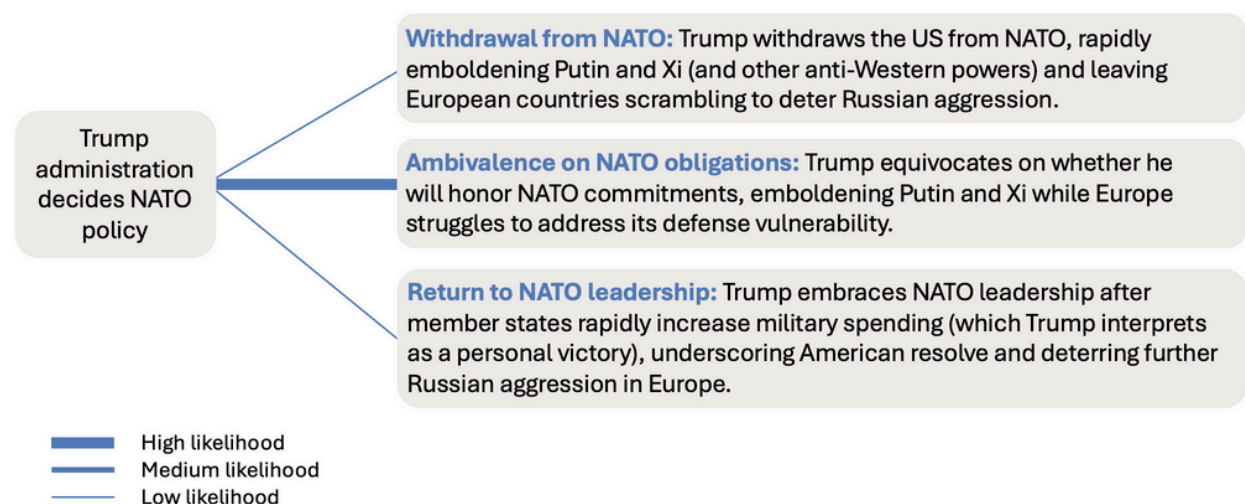


Figure 6. Critical juncture: NATO policy

- **Middle East conflict:** Arguably, the Abraham Accords were the first Trump administration’s most significant foreign policy success. A second Trump administration would likely return to that playbook, by working to bridge the widening gulf between Israel and Saudi Arabia. But Mr. Trump’s affinity for Israeli Prime Minister Benjamin Netanyahu will handicap this strategy if the Israeli leader and his coalition supporters remain entirely unwilling to consider a realistic pathway to Palestinian statehood. US policy towards Iran will return to the extreme hardline taken by the first Trump administration.
- **Chinese aggression towards Taiwan:** Our interviewees were divided as to whether a return of Mr. Trump to office would embolden Chinese President Xi Jinping to attack Taiwan, or if the return of Mr. Trump’s unpredictability might instead deter Chinese aggression. But they agreed that were Xi to act, President Trump would be more likely (than President Harris, were she in office) to make rash and unconsidered decisions, thus escalating the crisis—and ultimately perhaps stumbling into nuclear war.
- **Transactional isolationism and international leadership:** In a second administration, Mr. Trump would eschew America’s longstanding international leadership in favor of “transactional isolationist” diplomacy and a broad turn inward. The world could progressively lose the coordination, security, and stability that America has provided by acting as a global referee and protector of international public goods, such as shipping routes. Mr. Trump would also reduce financial support for multilateral organizations, including United Nations’ agencies and international legal bodies, and scapegoat them for the world’s ills.

The international community’s long-term planning and conflict/crisis management capacities would erode, with adverse effects on development assistance, international trade, north-south relations, macro-economic stability, climate action, and peacebuilding. Our interviewees suggested, as shown in Figure 7, that Mr. Trump’s transactional isolationism and reliance upon military coercion as a single, blunt foreign policy instrument could ultimately create a more anarchic world order based on the principle of self-help; or it could create openings for China to expand its leadership around the globe, with all the risks that entails; or, finally, it could spur more collaborative and effective global governance by the European Union, middle powers, and overlapping coalitions.



Figure 7. Critical juncture: Foreign policy

- **Weakened nuclear command and control:** The experts we consulted argued that the chain of command involving nuclear weapons is more robust than conventionally appreciated. Two scenarios involving Mr. Trump’s possible use of nuclear weapons are commonly presented. In the first, the Pentagon alerts the President about an emergency that requires his immediate decision on whether to use the weapons. In such circumstances, because the military would already be aware of the threat, it would be primed to respond, and key military and intelligence personnel would be ready to advise the President on appropriate actions. In the second, Mr. Trump, based on his own inclinations, unexpectedly orders the military to launch nuclear weapons. Here, the military apparatus is unprepared for launch, so various officials would have to review the President’s decision and reasoning, thereby delaying action. The public is most concerned about the second scenario—in which Mr. Trump uses nuclear weapons on a whim—but that kind of situation is highly unlikely to result in a nuclear launch. Of greater concern is the first scenario where the decision truly comes down to the President’s judgment and the quality of advice on offer, likely under extreme pressure.

3. Feedback assessment

In Section 2, we identified some significant first- and second-order impacts of a second Trump Presidency. In this section, we propose that these impacts could produce eight feedback loops in global systems that would further magnify inter-systemic risks.

We then show how connections amongst these eight feedback loops could have additional, cascading effects that escalate into a new and more perilous phase of global polycrisis—a complex tangle of simultaneous crises that, combined, would cause enormous human harm.

This section thus fundamentally concerns the relationship between Donald Trump—an impulsive and unpredictable decision maker with an immense need for self-affirmation and a radical political agenda supported by a powerful, coordinated group of conservative US elites—and global geopolitical, economic, technological, and governance systems. It echoes longstanding debates about the relative roles of structure and agency in the course of human history.

In many ways, Mr. Trump is a product, or a symptom, of global systemic stresses that were worsening for decades before he became a Presidential candidate. Growing economic precarity and inequality, widespread political and social alienation, soaring international migration, American hegemonic retrenchment, and the weakening of multilateral institutions all predated Mr. Trump's first term. He exploited many of these trends to gain office. The Biden administration found itself subject to the same array of stresses and felt compelled to continue many of the first Trump administration's policies, including trade measures targeting China, harsh immigration restrictions, and support for domestic fossil-fuel production. A Harris-Walz government would likely do similar things. Global systemic stresses and the global polycrisis will continue to escalate regardless of the 2024 electoral outcome.

Still, Mr. Trump has significantly accelerated many of these stresses, while adding more stresses and triggers to the morass. As a system disrupter, he is uniquely determined and effective. For example, while stresses in the international system stemming from changes in relative economic and military power certainly demanded strategic shifts in American leadership, in his first term, Mr. Trump went farther, largely eschewing American leadership altogether while maligning multilateral institutions. His derision for the rule of law, electoral results, and scientific evidence alongside his authoritarian predilections—often accompanied by xenophobia, racism, misogyny, and misinformation—have undermined America’s democratic model. And the promised policies of his second term, such as rescinding American security commitments or radically boosting protectionist measures, could be uniquely Trumpian triggers of global systemic crises.

Yet those crises will emerge and connect and then further escalate the polycrisis only if other countries and actors—outside the US—allow that to happen. For instance, the constituent emergencies of a larger polycrisis—economic downturn, pandemics, food crises, failed states, unmitigated climate change, and even great-power war (see Figure 14, in section 3.2 below)—are all at least partly contingent on declining multilateral cooperation and the formation of intensely competing geopolitical coalitions. How other actors respond to a second Trump administration’s actions—particularly whether they act to escalate or disrupt the vicious cycles set out below—will profoundly shape the ultimate outcome. And it is possible, even, that the administration’s actions could open up opportunities to transform global systems in more positive directions (see Box 6, “Silver linings”).

Box 6: Possible “silver linings” of a second Trump Presidency

We asked our expert interviewees if they could imagine any “silver linings”—beneficial outcomes, even if unlikely—arising from a second Trump administration. While several replied they could not, others offered the following ideas.

- **A pro-democracy reaction:** While a Trump victory might encourage far-right parties and authoritarians around the world, it could also galvanize a pro-democracy countermovement that concertedly resists the spread of populist authoritarianism and revitalizes democratic institutions, riding the momentum of recent right-wing electoral setbacks in the United Kingdom, France, and India.
- **The deterrence of unpredictability:** Mr. Trump’s sheer unpredictability could deter aggression by Chinese President Xi Jinping and Russian President Vladimir Putin, because uncertainty about his reaction would complicate their strategic calculations.
- **“Peace” in the Middle East:** There is an outside chance that Mr. Trump, in the persona of the master dealmaker, could draw on his ties to Saudi Arabia and the success of the Abraham Accords to orchestrate an agreement between key actors. But the specifics and desirability of any such “solution,” especially one involving Benjamin Netanyahu, are far from clear.
- **A transition to more sustainable food production:** Mr. Trump’s deportation and immigration policies could cause severe economic stress for labor-intensive, industrial food operations in the United States and engender a domestic food crisis. This outcome could, in turn, encourage firms to adopt sophisticated automated methods that would increase food quality while reducing agriculture’s climate impacts. But any such shift would involve major economic and political turmoil in the short term, especially for millions of agricultural workers.
- **A more balanced multipolar order:** If the new Trump administration were to adopt a foreign policy of “transactional isolationism” by withdrawing from multilateral fora, it could, counter-intuitively, open new opportunities for global governance. Europe is already increasing its military budgets to bolster its security. The European Union could adopt a larger role in world politics; more equitable arrangements involving a broader range of actors could fill emerging gaps in global governance (e.g., on climate action and pandemics); and countries everywhere may become more self-reliant by reducing their dependence on (and subordination to) the US. Finally, China could assume leadership of the global green transition to expand its influence (with a mixture of good and bad effects).

3.1 Eight possible vicious cycles in global systems

A second Trump administration's first- and second-order impacts could produce at least eight vicious cycles (feedback loops) in global systems that would propagate harms worldwide. Box 7, "Feedback diagrams," explains how to interpret this section's figures.

Box 7: Feedback diagrams

This section uses feedback diagrams, which are also known as "causal-loop diagrams." In these diagrams, the positive (+) and negative (-) signs indicate, respectively, positively correlated and negatively (or inversely) correlated relationships between causal factors in a system. So, if a positive sign appears above or beside an arrow between two elements, an increase in the first element leads to an increase in the second element; and if the element at the beginning of the arrow decreases, the element to which the arrow points also decreases. A negative sign over or beside an arrow indicates that the elements change in opposite directions: if the element at the beginning of the arrow increases, then the element to which the arrow points decreases; if the element at the beginning of the arrow decreases, the element to which the arrow points increases.

Feedback diagrams help capture deep casual mechanisms that drive systems' behaviors. For an introduction, see:

<https://cascadeinstitute.org/technical-paper/casual-loop-diagrams-handbook/>.

The feedback analysis below largely omits many harmful impacts that Mr. Trump's reelection could have within the US—including violations of civil, human, and women's rights—except when we judged that they might have global repercussions. Also, because this report is a risk analysis, we focus on pathways to severely negative outcomes and especially on the role of possible self-reinforcing feedback loops, while acknowledging that some of those pathways are unlikely and that additional, countervailing feedbacks may disrupt them.

Figure 14 in particular presents a worst-case scenario whose probability depends crucially on actions of non-US actors. But this scenario's severe costs more than counterbalance its uncertain probability—that is, its "expected disutility" (cost times probability) is without doubt extremely high—so it merits close attention.

- Trade war:** If implemented, Mr. Trump’s planned tariffs would almost certainly provoke retaliatory tariffs by other countries, especially China. The Trump administration would likely respond with additional tariffs and protectionist measures, triggering further reprisals and creating an escalatory cycle (which we call feedback loop 1, or “FL1”). Such a trade war would increase inflation and diminish global economic growth. Figure 8 illustrates a US-China trade war, but this dynamic could occur with other countries hit by US tariffs.¹⁰

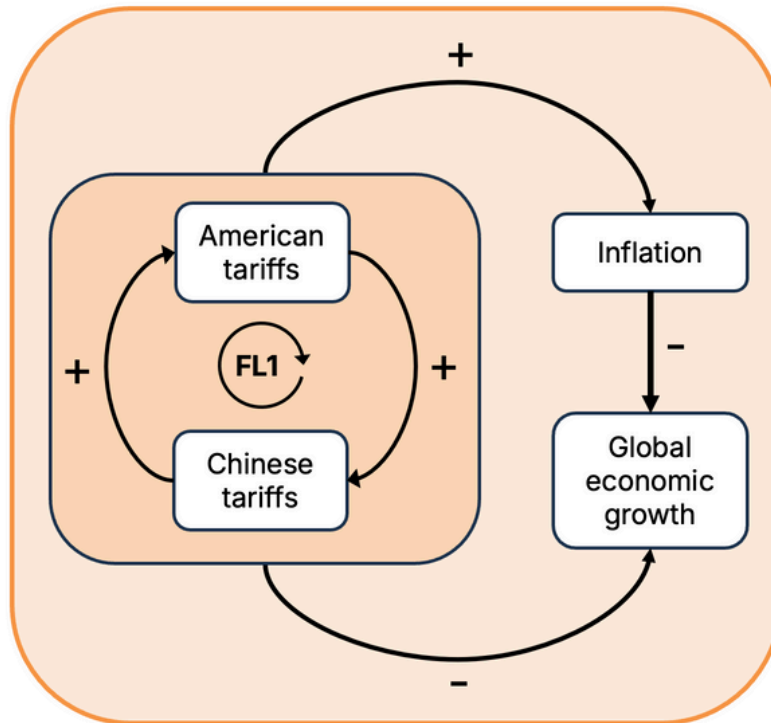


Figure 8. Trade war spiral (FL1)

FL1 likelihood: High

- Authoritarian contagion:** Mr. Trump’s efforts to expand his powers in office—whether by reintroducing Schedule F, invoking emergency powers, or subordinating the Departments of Justice and Defense to his direct authority—would weaken trust in government and public institutions, helping to normalize extraordinary measures, and thereby enabling further corruption and authoritarianism within the United States (FL2).¹¹

As we outlined in Section 2, an increasingly authoritarian Trump Presidency—by undermining America’s model of democracy as a viable alternative—could then

embolden far-right leaders and help legitimize authoritarian practices around the world. Authoritarian governments might emulate, support, and learn from one another. Even Mr. Trump could take pages from the playbooks of other authoritarian leaders, such as Hungarian Prime Minister Viktor Orbán (FL3). But the risk would vary by region. In Latin America, Mr. Trump could inspire copycats like former Brazilian President Jair Bolsonaro.¹² Despotic rulers in Europe and the Middle East, in contrast, have prospered without following an American model, and it is unclear how American authoritarianism would change their trajectory. A heavy-handed Trump administration could also deter populism in Europe by invigorating a democratic countermovement.

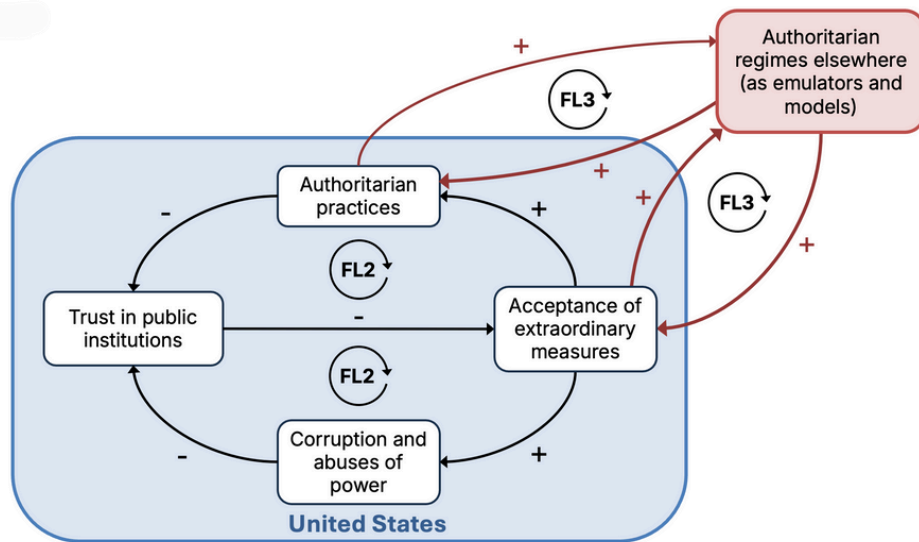


Figure 9. Authoritarian spiral (FL2 and FL3)

FL2 likelihood: Medium

FL3 likelihood: Low¹³

- **Economic downturn and xenophobia:** Mass deportations would create acute labor shortages in key sectors (especially agriculture) and constrain US economic production and growth. Encouraged by Mr. Trump’s xenophobic prejudices, many Americans might then blame immigrants for the resulting economic hardship. This could increase support for even more expansive deportations and immigration restrictions, further worsening the economic downturn (FL4).

In parallel, some of our interviewees argued, the Trump administration’s extreme policies could encourage liberal elites to leave the US in large numbers, normalizing emigration as an act of protest and contributing to economic losses (FL5). This feedback might also occur in other countries (as it did in the United Kingdom after Brexit), perhaps via the authoritarian contagion feedback (FL3).

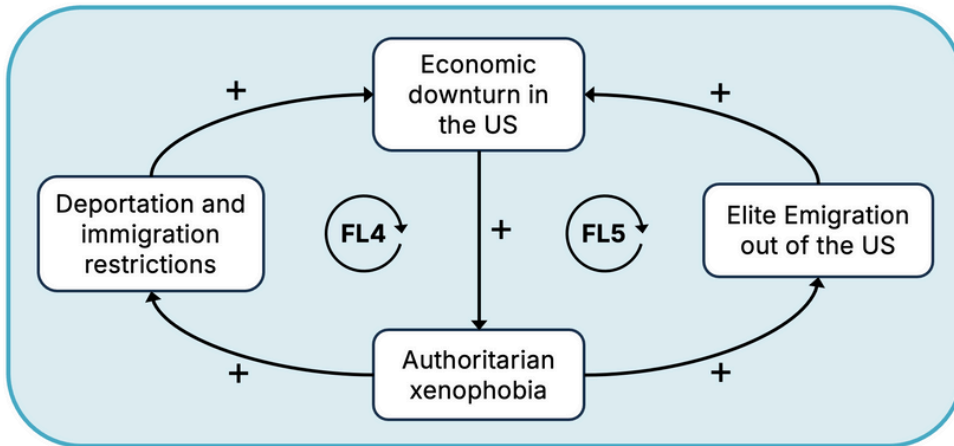


Figure 10. Economic downturn and xenophobia spiral (FL4 and FL5)

FL4 likelihood: Medium

FL5 likelihood: Low

- Multilateral exodus:** If a second Trump administration withdrew the US from key multilateral institutions—such as the Paris Climate Agreement, the World Health Organization, and other United Nations’ agencies—it would lower incentives for other countries to remain in these fora. Multilateral organizations create “network externalities”: the more members they have, the more benefit they bring to each member by increasing coordination and cooperative action. Their legitimacy also depends on broad participation, especially by leading countries. When key actors like the US leave, network externalities and legitimacy decrease, diminishing members’ benefits and encouraging others to leave (FL6).¹⁴ The process would accelerate if the US deliberately pressured other countries to withdraw from such bodies, although the likelihood of an American-led exodus varies substantially across institutions.

Even if countries do not leave multilateral fora, a widespread reduction in funding, staffing, support, and engagement would seriously degrade multilateral capabilities in such critical areas as pandemic response, conflict management, and climate action just when the world needs them most. Development assistance would also suffer, worsening global inequality.

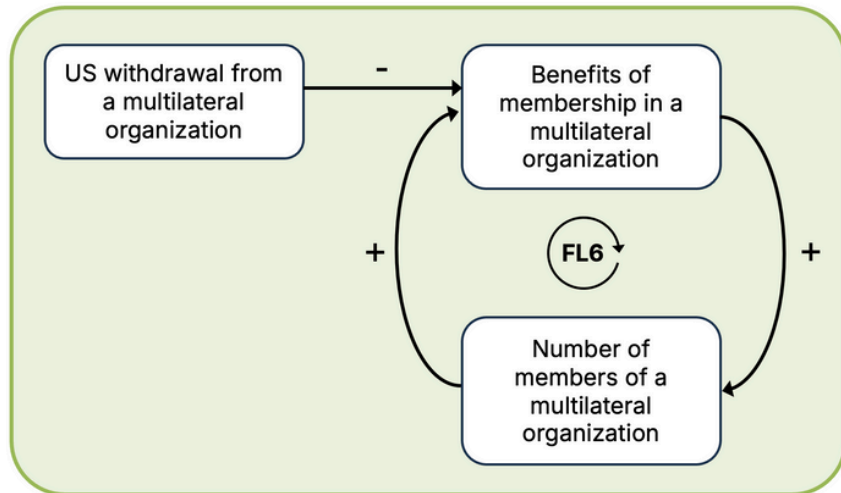


Figure 11. Multilateral exodus (FL6)

FL6 likelihood: Low-Medium (varying significantly by institution)

- **Arms races:** The US withdrawal from collective international security arrangements could trigger international arms races (FL7). Although a complete US exit from NATO is unlikely, a Trump administration would likely scale back funding, reduce representation and withdraw diplomats, disparage the alliance, and reduce US force commitments. America’s global military influence would suffer, giving rivals like Russia and China more space for aggressive action. Vulnerable US allies, especially in Europe, would then increase military spending and security cooperation, but such actions could provoke further hostility and armament by their rivals.

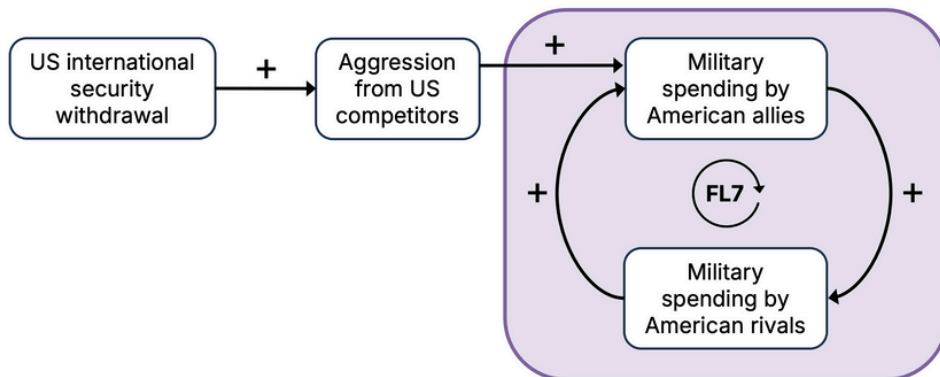


Figure 12. The arms race spiral (FL7)

FL7 likelihood: Medium-high

A second Trump administration could also provoke an arms race by increasing its military spending on artificial intelligence (AI). Key American tech magnates (such as Peter Thiel and Marc Andressen), aided by Vice President J.D. Vance, could capture the regulatory process, eliminate effective oversight, and expedite projects like lethal autonomous weaponry and integrated, autonomous command-and-control systems. Such actions would accelerate the AI arms race with China (FL8), which may then shift its AI strategy from a whole-of-society program to more focused military applications. An AI arms race would also probably induce export controls (on semi-conductors, rare earth metals, critical minerals, and the like) that would exacerbate the broader Sino-American trade war (FL1) and slow green technology innovations that depend on those exports.

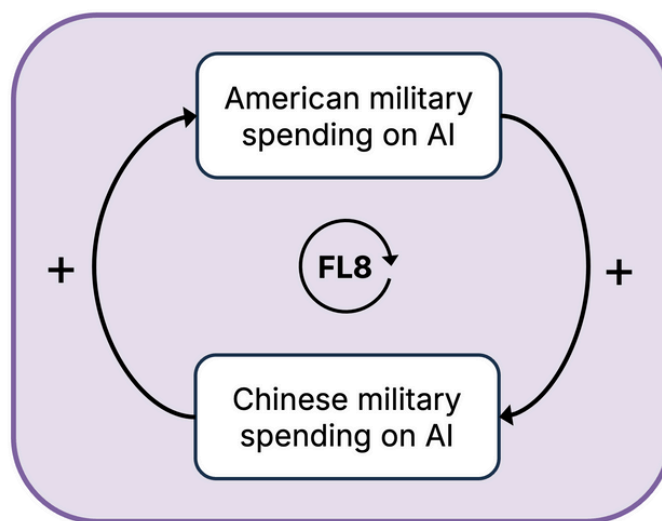


Figure 13: Sino-American AI arms spiral (FL8)

FL8 likelihood: Medium

3.2 From a second Trump Presidency to an escalated global polycrisis

The above spirals in global systems, which a second Trump Presidency might trigger or worsen, could then interact to severely escalate the current global polycrisis, as shown in Figure 14.

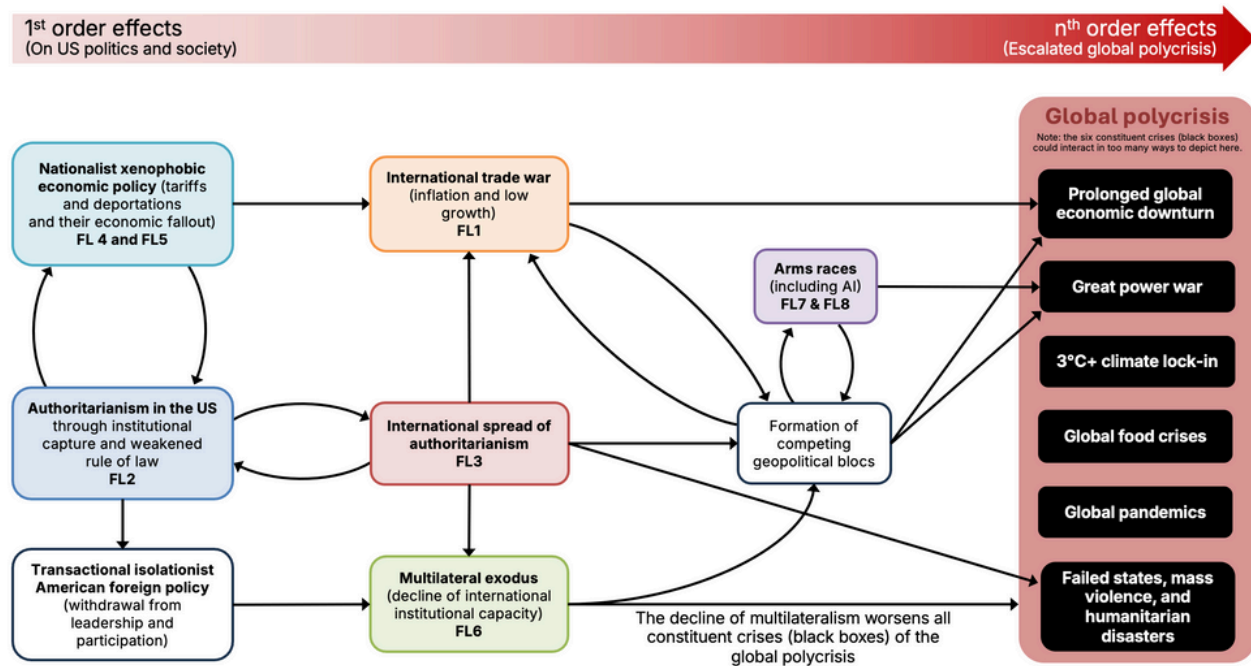


Figure 14: Connecting the vicious cycles

This figure shows, in a rough temporal progression from left to right, possible causal relationships between: the feedback loops explained above; two additional factors (in the white boxes); and six constituent crises of an escalated global polycrisis. On the far left are the planned policies of a second Trump administration (discussed in Section 2). Those policies and their domestic impacts could have the international systemic consequences shown in the second column from the left: a trade war, increasing authoritarianism, and the decline of multilateralism. Those effects could then provoke arms races between increasingly hostile geopolitical blocs locked in a security dilemma, as shown by the second column from the right. And along various pathways, these factors could contribute to the constituent crises of a severely worsened global polycrisis on the far right. Note that the decline of multilateralism plays a significant role in worsening vulnerability of global systems to crises. And the formation of competing economic blocs has high centrality in this diagram, suggesting that it is a crucial development to avoid. Note that all arrows indicate positive causal relationships.

A domestic economic downturn driven by xenophobic policies (FL4 and FL5) would increase the likelihood of a trade war (FL1), particularly with China. This outcome would in turn cause enormous disruption to the global economy, increasing inflation and decreasing growth worldwide and heightening the risk of a major global recession. A trade war would also encourage competing geopolitical blocs to coalesce, exacerbating the trade war's impacts. Both trade war and tightened geopolitical blocs would then independently promote a global economic crisis.

Expanded authoritarian practices at home (FL2) would likely bolster authoritarian governance elsewhere (FL3). Foreign authoritarianism could then reinforce domestic US authoritarianism, as Mr. Trump points to other countries' "strongmen" as exemplars. Greater authoritarianism globally would also contribute to an increase in failed states, mass violence, and humanitarian crises, while simultaneously promoting formation of competing geopolitical blocs, as nations of similar ideology and governance choose to cooperate with each other and sanction others.

America's reduced participation in NATO, other international security arrangements, the UN, and other multilateral institutions would have perilous knock-on effects. The world could suffer governance failures on everything from macro-economic stability and pandemic preparedness to conflict management—contributing to virtually all components of the polycrisis.

Multilateral exodus and the spread of authoritarian governments might combine with trade wars to reinforce the emergence of intensely competing—and mutually hostile—geopolitical blocs. This outcome would in turn encourage arms races and substantially raise the risk of great-power war (F7 and F8). Any major American advances on military applications of AI would supercharge these spirals (FL8).

For clarity, Figure 14 does not show potential feedbacks from elements of the global polycrisis back to the factors that exacerbate those elements. But the crises on the figure's right interact with the stresses and feedbacks on its left in many complex ways.

For instance, climate change would place additional strains on geopolitical arrangements. More frequent and severe weather events are already disrupting economies and worsening conflicts around the world. Impacts will intensify in the years ahead, especially if a second Trump administration manages to derail climate action. Geopolitical competition would further inhibit global climate cooperation in ways that could increase the likelihood that 3+°C warming becomes locked in. A rapidly warming world with decreasing cooperation and increasing geopolitical tensions would raise the risk of intrastate war and state failure while hampering international responses to new pandemics and financial crises. It would also raise the risk of war between great powers.

Finally, major external shocks, which we call "macro-triggers" (see Box 8) could dramatically exacerbate the processes identified in Figure 14. While the probability of any one of these specific triggers occurring may be relatively low, it is virtually guaranteed that the coming years will bring major and largely unexpected global shocks of one form or another.

Box 8: Potential macro-triggers of a global polycrisis

This report has detailed how a second Trump administration could increase stresses on the global systems identified in the feedback loops in Figure 14. As the resilience of these systems declines, they would become more vulnerable to exogenous trigger events that could have broad cascading effects, exacerbating the global polycrisis.

- **Breakout of H5N1 into a human pandemic:** Avian flu is spreading in mammalian species, recently leaping to cattle in dairy farms. H5N1 has been detected in unpasteurized milk; it has infected farm workers; and, very recently, it has been found in a hospitalized human with no known animal exposure. If the virus begins to spread through human-to-human contact, an outbreak could cause extraordinary global economic damage—especially if containment protocols, testing, and public health measures are not in place.¹⁵

Despite the COVID-19 pandemic, the world’s institutions and preparations for another global pandemic have not substantially improved. The likely US withdrawal from the World Health Organization under a second Trump administration would undermine a global response. A new, and potentially more deadly, pandemic could then exacerbate nationalist xenophobia, increase the risk of global recession, and further entrench economic inequality within and between nations.

- **A North Korean nuclear first strike:** Some experts argue that North Korea has recently abandoned its longstanding goal of re-uniting with South Korea to unify the Korean people.¹⁶ North Korean Supreme Leader Kim Jong Un instead now believes the South Korean state must be conquered and destroyed. These experts contend that Kim is preparing to initiate a southward invasion with a nuclear first strike. It is entirely unclear how the world would react, but Chinese President Xi Jinping could plausibly exploit the moment to invade Taiwan, with regional tensions cascading into a direct confrontation between great powers that risks further nuclear escalation.
- **Extreme climate events and multiple breadbasket failures:** Climate experts are increasingly concerned that more frequent and severe weather events—such as droughts, floods, and high temperatures—caused by climate heating will produce a simultaneous failure in two or more of the world’s major breadbaskets.¹⁷ Critical food shortages and sharp food price spikes would follow. Countries would likely respond by restricting food exports, only worsening the crisis. The shock could ultimately generate the collapse of a globally integrated food system, a system that so far has shown striking resilience in response to the Ukraine-Russia war and other supply-chain disruptions.

Our interviewees repeatedly expressed concerns about the capacity of a second Trump administration to respond to such complex crises, given Mr. Trump’s distractibility and his propensities to slash preparative measures, eschew international cooperation, and disregard the advice of the most knowledgeable experts.

3.3 Conclusion: Historical parallels and uncertain futures

There are striking parallels between the crises of the early 20th century and the pathways to an escalating polycrisis that we depict in Figure 14. The decades before World War II were marked by rising inequality and authoritarianism, the influenza pandemic of 1918, and the Great Depression of 1929-1932. These events culminated in a global battle between coalitions of authoritarian and liberal empires. The difference today is that the world's hardening blocs have nuclear weapons and reside on a warming planet with rapidly degrading ecosystems. And despite their mutual antagonisms, they remain tightly linked by flows of capital, energy, food, manufactured goods, information, and technology.

In this context, the nature of the risks that a second Trump administration poses can only be understood in systemic terms. Mr. Trump is both a product and accelerant of long-accumulating stresses, whether they be rising authoritarianism, inequality, and polarization, or declining multilateralism. His unpredictability and volatility mean he is also a prolific generator of crisis triggers, likely making US reactions to world events under his leadership more stochastic, uncertain, and extreme.

And finally, Mr. Trump masterfully dissolves the normative and institutional constraints that help stabilize social systems, actively pushing these systems beyond boundaries once taken for granted. In the process, he opens up new opportunities for agency—both positive and malign—while at the same time boosting the likelihood that the systems will suddenly flip from equilibrium into crisis.

In coming years, humanity's collective predicament is likely to worsen regardless of the US election's outcome, because global stresses are rising relentlessly. But just as in the 1920s and '30s, whether we ultimately suffer catastrophe will be determined not just by underlying stresses, the actions of individual leaders, or the outcome of a single election, but also by whether we *choose* to come together or fall apart.

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