



Conflict in the Gray Zone: A Prevailing Geopolitical Dynamic Through 2030

July 2024

NIE 2024-16734-A

Key Takeaways

Through 2030, great power competition and international relations generally will increasingly feature an array of hostile “gray zone” activities as China, Iran, North Korea, and Russia seek to challenge the United States and gain advantage over other countries through deliberate campaigns, while also trying to avoid direct war. The IC defines the gray zone as a realm of international relations between peaceful interstate diplomacy, economic activity, and people-to-people contact on one end of the spectrum, and direct armed conflict on the other. Gray zone campaigns are likely to increase and diversify because of more enabling technologies, the erosion or absence of accompanying norms, challenges with attribution, and perceptions of their advantages.

- This greater use and diversity of gray zone activities will create both concrete and intangible threats to the United States and its partners, US commitments, and the international order. The IC assesses that raising costs for gray zone activities, improving US and partner resilience, and adapting the rules of accepted state behavior are most likely to counter these threats.
- The IC has moderate confidence in most of the judgments in this NIE because of the volume and consistency of information on the goals and calculations of China, Iran, North Korea, and Russia, the benefits they perceive from gray zone campaigns, and their intent to continue such activities.

Key Judgment 1: *The geopolitical landscape through 2030 is likely to feature more frequent, diverse, and damaging acts of coercion and subversion—particularly by China, Iran, Russia, and North Korea—below what constitutes armed conflict but outside the bounds of historically legitimate statecraft, a realm of international relations known as the gray zone.* Gray zone campaigns are steadily becoming more invasive and tailored as geopolitical opponents of the United States employ well-honed tactics and exploit new domains within which attribution is more difficult and for which norms of behavior and accountability have not been sufficiently established or enforced.

Key Judgment 2: *The threat perceptions of US challengers, their desire to alter international dynamics in their favor, and their preference to avoid a war with the United States will motivate them to expand their gray zone campaigns during the rest of the decade.* Although most current gray zone campaigns are unilateral, a convergence of worldviews and deepening ties among US geopolitical opponents are creating a foundation for more direct collaboration.

Key Judgment 3: *The growing prevalence, diversity, and intensity of gray zone campaigns and activities will pose increasing threats to the US Homeland, US resources and commitments, and the international order.*

Key Judgment 4: *The weakness of established norms and accountability mechanisms for gray zone activities, as well as uncertainty about US actions, provide an opening for the United States, its partners, and non-state actors to deter and mitigate the threat from gray zone campaigns by raising their perceived costs, improving US and partner defenses, and strengthening international rules governing these domains.*