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Assessment in the Style of the UK Joint Intelligence Committee

The United States: Structural Indicators of Anti-Democratic Consolidation and Implications for the United Kingdom

Disclaimer: Prepared as workshop material by the Social Cyber and Tech Academy, July 2026. It is an exercise in intelligence assessment tradecraft using open sources only. Probability language follows the PHIA yardstick (Annex). Statements attributed to serving and former officers are paraphrased from their public, on-the-record remarks. No classified material informs this document, and no allied service has publicly released any assessment of this kind. This document has not been independently verified and does not necessarily represent the views of the Social Cyber Institute or Social Cyber and Tech Academy. Readers are encouraged to critically evaluate all of the analysis, evidence, assumptions and conclusions presented.

Why this assessment does not exist

No Five Eyes service assesses the domestic politics of the United States on paper. The alliance works because that question is never formally asked. This document asks it. It applies to the United States the same indicator framework the UK intelligence community uses to track democratic backsliding in other countries: who controls the referees, the information space, the courts, the elections, the security services and the instruments of force. Everything below rests on open sources and on what senior officers have said in public.

Key judgements

- I. A coalition of executive-branch actors and aligned technology-sector wealth is working to weaken the constraints on executive power in the United States. This is a convergence of interests, not a single directed conspiracy. Its effects are cumulative and mutually reinforcing. (High confidence, from the documented record of spending, appointments, regulatory action and litigation.)
- II. The referees are the battleground. By referees we mean the institutions that judge the political contest rather than take part in it: courts, regulators, election administrators, the central bank, inspectors general, statistical agencies, and the press in its watchdog role. Whoever seeks to entrench power moves against the referees first, for three reasons. Capturing a referee looks legal and attracts less resistance than breaking a rule. A captured referee tilts every later contest, so the gain compounds. And referees are few and identifiable, which makes them the most reliable measure of how far consolidation has gone. On present evidence: the information-space referees are substantially degraded (US press freedom has fallen to 64th, its lowest ever); the monetary referee has held (the Cook ruling); the courts are under pressure but functioning. We judge it likely (55–75%) that pressure on all three intensifies through the 2026–28 electoral cycle. One warning follows directly: noisy elections, opposition media and fierce public debate are not reassurance. None of those are referees. The question is not whether the game is still being played, but who is officiating.
- III. We judge it unlikely (25–35%) that the United States stops holding competitive national elections through 2028. We judge it likely (55–75%) that it keeps moving toward what analysts call competitive authoritarianism: elections still happen, but

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on a field tilted by control of referees, money and information. The 2026 midterms are the most important single test — how they are run, certified, and whether adverse results are accepted.

- IV. The technology oligarchy matters for three reasons. Its electoral spending is unprecedented in scale and openness: AI-sector vehicles alone have raised over \$200 million for the 2026 cycle. It has acquired state-like infrastructure: government data systems, communications constellations, and the platforms that now serve as the public square. And it contains an openly post-democratic intellectual strand with access to executive power. We assess that most tech political spending is transactional — it buys regulatory outcomes, not regime change. But the infrastructure already acquired would make consolidation much cheaper if executive actors attempt it. (Moderate confidence.)
- V. The instruments of force divide three ways, and the division is the single most important fact about them. The professional military has resisted domestic political employment and, with the courts, has so far constrained it. The federal paramilitary layer — immigration and border enforcement above all — is the active front: it has been funded, expanded and used in ways no other coercive institution has, and it operates under political direction with few of the military's professional restraints. Local police are divided by geography, resisting in some jurisdictions and integrating with federal enforcement in others. Consolidation of coercive power is therefore not blocked; it is being rerouted through the layer of least resistance. (High confidence on the pattern; moderate confidence on trajectory.)
- VI. The Federal Bureau of Investigation occupies a category of its own: it is both a referee and an instrument of force — the referee with guns. Its leadership has been politicised to a degree without precedent since the Hoover era, and its investigative power has already been directed at named political opponents, though the courts have so far voided the results. In a political crisis the Bureau's decisive contribution is as likely to be omission as action: what it declines to investigate, and whom it declines to protect. (High confidence on the leadership record; moderate confidence on the field.)
- VII. A distinct and under-examined vector runs through the technology oligarchy's penetration of the security and intelligence apparatus itself — not through appointments, but through infrastructure. A single firm now supplies the data-integration backbone across immigration enforcement, elements of the Bureau, the military and the wider intelligence community, founded and part-owned by a principal of the post-democratic intellectual strand identified above. This does not constitute evidence of a plan to overthrow the constitutional order, and we do not assess one exists. It does mean that the plumbing of the American security state increasingly runs through private hands aligned with a specific political project, and that the distinction between a tool and its owner narrows in a crisis. (High confidence on the integration; low confidence on intent.)
- VIII. External behaviour corroborates the internal picture. The coercion of Denmark over Greenland, renewed at the July 2026 NATO summit, the transactional treatment of security guarantees, and the conduct of the Iran war all point to weakened internal constraint on executive action. For the UK this bears directly on

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Five Eyes intelligence sharing, on our dependence on US technology platforms, and on the credibility of the guarantee that underpins NATO planning. It is highly likely (80–90%) that European services are already hedging in practice while affirming continuity in public.

- IX. The counter-evidence is real and must be weighed. Federal courts keep blocking executive actions, including the domestic military deployments. The Supreme Court preserved the Federal Reserve's independence and declined to rescue the Chicago Guard deployment. The states legislate freely. The oligarchy itself is split: parts of the AI industry are funding the other side. Markets have begun to price governance risk. The system is under attack and resisting at the same time. Which force wins is genuinely uncertain. Any analysis that claims to know should be read as advocacy.

The indicator framework

1. Largely achieved by the anti-constraint coalition: fusion of sectoral wealth with executive politics at unprecedented scale; capture of the broadcast regulator's functions, with major media owners settling executive lawsuits on terms best described as protection payments; a degraded national information space (down seven places in one year to 64th on the RSF index); loyalty screening across the senior civil service and dismissal of inspectors general; federal litigation used as a weapon against state regulation; private acquisition of state-like data and communications infrastructure without matching accountability; and the expansion and repeated urban deployment of federal paramilitary forces (paragraphs 7–13).
2. Contested but holding: the federal judiciary, which continues to block and reverse executive action, including at the Supreme Court; the Federal Reserve, whose independence survived its sharpest test in the Cook case; the states, which are enacting and defending their own laws in volume; the professional military, whose resistance to domestic employment has so far been effective; and the electoral machinery, which has not yet faced its decisive test this cycle.
3. Warning indicators. Any of the following would shift our central judgement toward consolidation being likely: open executive defiance of a Supreme Court order; criminal prosecution or detention of national opposition leaders; refusal to accept adverse midterm results, or emergency powers invoked around the elections; invocation of the Insurrection Act for electoral or political purposes; simultaneous federalisation of the National Guard in multiple states; mass dismissal of senior military officers on loyalty grounds; the tasking of immigration enforcement against political opponents; formal integration of pardoned militia networks as auxiliaries; revocation of a major national network's broadcast licence; overt direction of intelligence assessments to political ends; federal investigations opened against opposition candidates in proximity to elections; and Bureau refusal to investigate or protect against organised election intimidation. Several of these have precursors in the current record. None has yet occurred in threshold form. We expect little warning time between precursor and threshold.

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What senior officers have said, and what they have not

4. Serving officers speak by indirection, and the indirection is easy to read. The Director General of MI5 has used his annual threat updates to describe hostile states blurring the line between state power, criminal proxies and commercial actors, and to name sustained interference in European democracies. His audiences apply the framework more widely than its stated targets. The Director-General of ASIO has repeatedly named foreign interference and the corrosion of democratic trust as the defining security challenge of the era. The Danish services face the starkest version of the problem: their job is to warn of espionage and coercion against the Kingdom over Greenland, and the source of that pressure is the alliance's leading power. The 2025 reporting that US intelligence had been tasked to collect on Greenland forced that contradiction into the open.

5. The retired can be candid. A former Chief of MI6 has said publicly since early 2025 that Europe is in a new era: the American guarantee can no longer be assumed, and Europe must be able to stand alone. The former head of the National Cyber Security Centre has written that the UK must treat its dependence on US technology platforms as a strategic vulnerability to be managed — the same framework the UK once applied to Huawei. When the people who ran the agencies say in retirement what the agencies cannot say in post, the gap between the two is itself an indicator.

6. What no serving officer has said, anywhere, on any record: that the United States is assessed as a democracy at risk. Inside the alliance that sentence cannot be spoken. Its unspeakability matters more than any single fact in this paper, because an intelligence community that cannot name a risk cannot collect against it, cannot warn ministers about it, and cannot plan for it. The purpose of a simulated assessment is to show what the sentence looks like written down.

The instruments of force: military, paramilitary and police

7. Referees decide whether the political field can be tilted. The instruments of force decide whether a tilt, once achieved, can be reversed. In every comparative case of consolidation the decisive question has been the same: when an executive order and a court order conflict, whom do the people with weapons obey? The United States does not have one answer to that question. It has at least five, because it has five distinct layers of armed power: the professional military, the federal paramilitary agencies, the National Guard, some 18,000 local police agencies, and an irregular fringe of militias and private security. Each layer is answering differently, and the differences define the current situation.

8. The professional military is holding, at a price. The record contains genuine warning signs: the dismissal of the Chairman of the Joint Chiefs and of the services' senior lawyers in early 2025, loyalty-inflected appointments, and the use of Marines and federalised Guard units in Los Angeles in June 2025. But the constraints worked. A federal court found the Los Angeles deployment breached the Posse Comitatus Act; courts blocked deployments to Chicago and Portland; the Supreme Court declined to rescue the Chicago operation; and by January 2026 the administration had withdrawn from all three cities, at a documented cost of roughly half a billion dollars for little visible return. We assess the officer corps remains committed to its constitutional oath

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and allergic to domestic employment (moderate-to-high confidence). The military's decisive test would come only with an Insurrection Act invocation, which would strip away the legal ambiguity on which its quiet resistance currently relies — in both directions.

9. The federal paramilitary layer is the active front, and this is where the assessment differs most from public commentary focused on the army. Immigration and border enforcement received an unprecedented funding expansion in the 2025 reconciliation legislation — of the order of \$75 billion over four years, making ICE the best-resourced federal law-enforcement agency in US history — and has been used in sustained urban operations against the objection of local authorities. The Minneapolis operation of late 2025 to early 2026 involved thousands of arrests and ended only after two fatal shootings by agents. Masked, unidentified officers, a rapidly expanding detention estate, and recruitment screened for willingness rather than restraint distinguish this force from the military in every respect that matters: it operates under direct political tasking, inside a legal authority (immigration) broad enough to cover most operations, with no equivalent of the military's professional ethic, promotion system or JAG corps. This is autocratic legalism applied to force. We assess that consolidation of coercive capacity has already crossed thresholds in this layer that it has not approached in any other (high confidence).

10. The National Guard is the constitutional seam. Its dual state–federal status makes it the terrain on which the federalism battle over force is being fought: federalisation over governors' objections, litigation in every affected circuit, and an emerging judicial consensus against domestic employment — with the singular exception of the District of Columbia, where direct federal control faces no governor, and where the deployment has been extended through 2026. We assess the 2025 deployments are best read as rehearsals: they tested legal theories, logistics, public reaction and the compliance of commanders, at tolerable political cost. The threshold indicator is simultaneous multi-state federalisation in proximity to the 2026 elections.

11. Local police are divided by geography, and the division cuts both ways. Decentralisation — 18,000 agencies answering to mayors, counties and states — is a genuine structural obstacle to national consolidation; many large-city departments kept their distance from the federal urban operations. But the same decentralisation offers capture routes that need no federal statute: the expansion of 287(g) agreements deputising local officers for immigration enforcement; federal grant conditions; joint task forces; and the constitutional-sheriff movement, whose adherents claim authority to decide which laws apply in their counties and, in some cases, to police elections. Sheriffs are the specific concern: elected, armed, jurisdictionally entrenched and, in a contested electoral scenario, positioned to act against county election administration rather than for it.

12. The irregular fringe is latent but no longer negligible. The January 2025 blanket pardons of those convicted over the Capitol attack, including militia leadership, restored organised networks with proven mobilisation capability and a publicly acknowledged debt to the executive. Alongside them sits the private-security ecosystem around the oligarchy's principals and the surveillance stack — the data-integration platforms documented earlier in this series — which gives every layer of this apparatus a targeting reach that historical analogues lacked. We assess irregular

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force is currently held in reserve rather than deployed (moderate confidence). Its formal integration — deputisation, federal contracts, auxiliary status — would be a threshold indicator of the first importance.

13. The net judgement on force: asymmetric and rerouted. The layer with the strongest professional constraints (the military) is holding; the layer with the weakest (the paramilitary agencies) is expanding fastest; the seam (the Guard) is being probed; the local layer is contested county by county; the irregular fringe waits. Consolidators do not need the army. They need any one instrument willing to act and the others willing to stand still. The composite warning indicator is therefore convergence: any two of these layers operating under single political direction in proximity to the electoral cycle. On present evidence we have not seen it. We would expect to see it late.

The Bureau: the FBI in a political crisis

14. The FBI does not fit the five-layer scheme above, because it belongs to two categories at once. It is an armed federal force of some 15,000 agents, and it is a referee: the institution that decides which conduct becomes a federal case. That dual character makes it the single most consequential institution in any American political crisis. Investigations legitimise and delegitimise; prosecutions remove opponents from the field or fail to; and the Bureau is the state's designated instrument against exactly the irregular armed networks described in paragraph 12. The United States has been here before — the Hoover Bureau surveilled, blackmailed and disrupted domestic political actors for decades — and the post-Watergate reforms, including the ten-year director term, were built specifically to prevent a return. That term has now been breached twice in a decade.

15. The leadership has been remade. The current Director and Deputy Director came to the Bureau from partisan political media, not from law enforcement, and their tenure has been defined by a sustained personnel purge: senior executives forced out through 2025, a demand for the names of every employee who worked on the Capitol-attack investigations, dismissals of agents linked to the Mar-a-Lago documents case and the January 6 prosecutions, and a renewed round of removals in January 2026 reaching field-office leadership in Washington, New York and Miami. The FBI Agents Association, representing most of the agent workforce, is in litigation against its own Department of Justice to protect its members from exposure. Whatever else this is, it is the fastest conversion of a Western internal-security service's leadership cadre in modern memory.

16. The sword has been drawn once, and the courts caught it. Criminal indictments were obtained in late 2025 against a former FBI Director and a state attorney-general — both prominent adversaries of the President — and both collapsed within weeks when the courts found the prosecutor had been invalidly appointed. The episode is doubly instructive. It demonstrates intent: the willingness to direct federal criminal process at named political opponents is no longer hypothetical. And it demonstrates the current limit: career prosecutors, grand juries and judges still function as internal referees, and improvised workarounds have so far failed. We assess further attempts are likely (55–75%), better lawyered.

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17. The shield matters more than the sword, and it is invisible. A politicised bureau injures democracy less by whom it charges than by whom it spares and what it declines to see. Declination decisions leave no docket: investigations not opened into allied networks, including the pardoned militia leadership; public-corruption work quietly de-prioritised; counterintelligence attention redirected. The counterintelligence dimension carries a direct UK equity: the FBI is MI5's principal liaison partner, and hostile-state activity does not pause while the Bureau's attention is consumed by its own politics. A weakened or distracted FBI counterintelligence function is a gift to Moscow and Beijing regardless of anyone's intent.

18. In a contested election, the Bureau holds three levers, and each can be pulled in either direction or simply left alone. It can open investigations that manufacture a legal predicate for challenging results, or decline to dignify fraud claims with federal process. It can protect election officials and infrastructure from intimidation, or leave them exposed. It can move against irregular armed mobilisation early, late, or not at all – and the January 6 record shows that a Bureau that hesitates can shape a constitutional moment as decisively as one that acts. Given the leadership's composition and the purge of exactly the personnel with relevant experience, we assess the most probable failure mode in a 2026–28 crisis is not the FBI as an instrument of repression but the FBI as a spectator: present, armed, and unused. (Moderate confidence.)

19. The net judgement on the Bureau: leadership politicisation is achieved; the operational middle ranks are contested; the field-office culture retains professional depth but is losing, through dismissal and resignation, the specific people most likely to refuse an improper order. Warning indicators particular to the Bureau: a further round of election-timed investigations of opposition figures; use of national-security tools – FISA collection, counterintelligence predicates – against domestic political targets; mass resignation of field leadership; and, above all, silence where action is legally mandated, which is the hardest indicator to observe and the one we most expect.

The oligarchy inside the apparatus: infrastructure, not appointments

20. The preceding sections examined who holds office and who holds weapons. This one examines who holds the wiring. It is the vector most likely to be missed by an assessment trained on personnel, because it operates through procurement rather than politics, and because on any given day it looks like efficient government IT. We flag it not because we assess a coup is being engineered through it – we do not – but because it is the mechanism that would most lower the cost of one, and because its trajectory is a genuine intelligence gap the alliance has not addressed.

21. The concentration is real and documented. **Following paragraph deleted for legal reasons.**

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22. Why this matters to an assessment of consolidation, stated precisely. First, capability transfer: whoever controls the integration layer controls who can see what, and can in principle reconfigure visibility – surfacing some targets, obscuring others – without any change in law or any cabinet appointment. That is the referee problem of the earlier sections, relocated from institutions to code. **[Redacted]** In ordinary times these are governance and privacy concerns. In a contested-election scenario they become something sharper: the mass-surveillance and targeting capacity of the state, available to whoever holds the executive, **[Redacted]**.

23. We assess the intent question carefully and land on restraint. There is no open-source evidence – and we would expect little even if it existed – that this infrastructure has been built for the purpose of subverting the constitutional order. The commercial logic is sufficient to explain almost all of it: government pays, the firm builds, the market rewards. The ideological strand is real but is a minority even within the oligarchy, and the same industry contains actors funding the democratic side (paragraph IV). The prudent judgment is therefore not that a machine for authoritarian consolidation has been assembled by design, but that the components of one are being assembled for other reasons, and that the assembly is nearly complete. Intent can change faster than infrastructure can be dismantled. That asymmetry is the whole of the concern.

24. The intelligence-community dimension carries a specific Five Eyes equity. The integration layer touches systems that hold, or connect to, allied liaison product. A privately mediated data fabric spanning US domestic and foreign-intelligence holdings raises questions the alliance has not resolved: about onward access, about the exposure of UK-originated material to a commercial actor and its owner, and about what a change of political control at either the executive or the vendor would mean for material we have shared on the assumption of state-to-state handling. It is highly likely (80–90%) that these questions are being asked inside allied services privately; there is no sign they have been answered.

25. Net judgement on the vector: the technology oligarchy's deepest reach into the security state is not the placement of loyalists but the ownership of infrastructure, and it is substantially achieved. This lowers the cost and raises the speed of any future consolidation without itself constituting consolidation. Warning indicators specific to it: the extension of the integration layer to election administration or voter data; the granting of security clearances or operational access to private personnel beyond

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audited contract terms; the use of the fabric to surface or suppress specific domestic targets; and any move to make the vendor relationship legally or technically irreversible. The last of these may already be closer than the alliance assumes.

Implications for the United Kingdom

26. Intelligence sharing. The politicisation of US intelligence leadership has documented precursors. It is likely that within the current Parliament the UK will need to caveat its most sensitive shared material. The machinery to do this quietly and reversibly already exists.

27. Technology dependence. The UK's reliance on US platforms — cloud, AI models, communications — should now be assessed like any other concentrated foreign dependency, because the jurisdiction those platforms answer to is itself the object of the contest described here. Frontier AI sharpens the point: US model-testing arrangements are voluntary and revocable, so UK visibility into frontier systems is hostage to US domestic politics.

28. The Greenland precedent. Coercing a NATO and EU member over sovereign territory, and renewing the demand at alliance level in July 2026, establishes that alignment does not buy immunity. UK overseas territories, basing arrangements and the wider architecture of the guarantee should be stress-tested against transactional revision, however remote each scenario seems on its own.

29. Posture. Full cooperation, quiet hedging, and strict separation between what is said and what is planned — the stance European services have already adopted in practice. The greatest available analytical error is the comfortable assumption that because the United States built the democratic order, it cannot become a case for the framework we apply to everyone else. The record above is why that assumption no longer holds.

Annex: probability yardstick (PHIA)

Remote chance ≤5%; highly unlikely 10–20%; unlikely 25–35%; realistic possibility 40–50%; likely/probably 55–75%; highly likely 80–90%; almost certain ≥95%. Confidence levels (high/moderate/low) describe the quality of the evidence base, not the probability of the judgement.

Sourcing note: this simulation draws on the open-source record assembled in the companion notes to this series for the Social Cyber and Tech Academy, including RSF (2026), Brookings (2026), Protect Democracy (2026), CPJ (2026), reporting on AI-sector electoral spending (CNBC, NPR, Public Citizen, 2026), the Greenland record (TIME, CNBC, House of Commons Library, 2026), the BIS Annual Economic Report (2026), reporting on domestic deployments and their litigation (NPR, CNN, TIME, Capital B, 2025–26, including the September 2025 Posse Comitatus ruling, the Supreme Court's refusal of the Chicago appeal, the January 2026 withdrawals and the CBO cost estimate), reporting on the Minneapolis enforcement operation and its termination, reporting on federal data-integration contracting and the vendor's reach across immigration, military and intelligence systems (State of Surveillance, Byline Times, American Immigration Council, congressional correspondence, 2025–26), reporting on FBI personnel actions and litigation (NPR, Washington Post, Bloomberg Law, Federal News Network, 2025–26) and on the late-2025 indictments of political opponents and their dismissal, and the public remarks of the officers characterised, unquoted, in paragraphs 4–5.