

Global Trends 2030: Alternative Worlds

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Office of the Director of National Intelligence
National Intelligence Council



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“Megatrends” (Relative Certainties)

Individual Empowerment

Majority of world’s population won’t be impoverished. Middle classes will expand in most countries. As individuals move into the middle class, values will shift including possible strengthening of religious, ethnic and national identities. But middle classes won’t feel secure: one billion workers from developing countries will be added to global labor pool, putting additional pressure on low-skilled labor.

Demography

Rapid extensions of life expectancy likely: global deaths from communicable diseases projected to drop by more than 40 percent. Some countries, particularly in Sub-Saharan Africa and South Asia, will still have youthful populations, but demographic arc of instability will narrow on both east and west flanks. “Aging” countries face the possibility of decline in economic growth. Increased migration will spread to emerging powers. Urbanization set to grow to almost 60 percent.

Diffusion of Power

Asia is set to surpass North America and Europe in global economic power, but there will not be any hegemonic power. The power of other non-Western or middle-tier states will rise.

This middle tier as a group will surpass Europe, Japan, and Russia. China’s economy will be 140-percent larger than Japan; India’s will be 16 times larger than Pakistan’s. Technology will be a great leveler, shifting the balance of power towards multifaceted networks.

Growing Nexus Among Energy, Water, and Food

Demand for resources will increase owing to an increase in global population from 7.1 billion today to about 8 billion by 2030. Demand for food set to rise 35 percent; energy 50 percent over the next 15-20 years. Nearly half of world population will live in areas with severe water stress. Fragile states most at risk, but China and India are vulnerable to volatility of key resources. Main questions will be whether there will be more effective management, wider technology use, and greater governance mechanisms.



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Critical Game-Changers

1 Will divergences and increased volatility result in more global breakdown? Or will the development of multiple growth centers lead to increased resiliency?

Both developing and developed countries face stiff challenges to achieve a new “normalcy” in the global economy. For much of the West, the challenges involves sustaining growth in the face of rapidly aging populations. For China and India, the main challenge will be to avoid “middle income traps.”

2 Will current forms of governance and international institutions be able to adapt fast enough to harness and channel change instead of being overwhelmed by it?

Potential serious **governance deficits** driven by rapid political and social changes are likely to exist. Countries moving from autocracy to democracy have a proven record of high instability. About 50 countries fall into this major risk group; all of them could grow out of their governance incongruities by 2030 if economic advances continue.

Political landscape will be a lot more complicated: Megacities and regional groupings likely to assume increasing powers.

The characteristics of ICT use—multiple and simultaneous action, near-instantaneous responses, and mass organization across geographical boundaries—increase the potential for more frequent discontinuous change in the international system. On the other hand, ICT will give governments—both authoritarian and democratic—an unprecedented ability to monitor their citizens.

3 Will rapid changes and shifts in power lead to conflicts?

Limited natural resources—such as water and arable land—in many of the same countries that will have disproportionate levels of young men—particularly in Sub-Saharan Africa, South Asia, and parts of the Middle East—**increase the risk of intrastate conflict**. Most intrastate conflicts will remain in form of irregular warfare, but spread of precision weaponry may change the character of some of these conflicts.

A more fragmented international system, spillover from regional conflicts, and resource competition increases potential for **interstate conflict**. The Middle East most

likely will remain the most volatile region, even as it moves toward greater democratization. Any future wars in Asia and the Middle East probably could include a nuclear element. Many of these conflicts, once begun, would not be easily containable and would have global impacts.

4 Will regional instability, especially in the Middle East and South Asia, spill over and create global insecurity?

Middle East and South Asia face a series of internal and external shocks. An increasingly multipolar Asia lacking a well-anchored regional security framework able to arbitrate and mitigate rising tensions constitutes a significant threat. A more inward-focused and less capable Europe would provide a smaller stabilizing force for crises in neighboring regions. Besides Middle East and South Asia, countries in sub-Saharan Africa, Central America and the Caribbean remain vulnerable to state failure.

5 Will technological breakthroughs occur in time to solve the problems caused by rapid urbanization, strain on natural resources, and climate change?

We’ve identified 16 “disruptive” technologies with potential global significance out to 2030. They are grouped around potential energy breakthroughs; food- and water-related innovations; big data and forecasting human behaviors; and enhancement of human mental and physical capabilities and anti-aging. Many will need concerted government efforts to be realized by 2030. An international security environment favoring cooperation is also a “must.”

6 Will the US, as the leading actor on the world stage, be able to reinvent the international system, carving out potential new roles in an expanded world order?

The US most likely will remain *primus inter pares* among the other great powers in 2030 because of the multifaceted nature of its power and legacies of its leadership, but the “unipolar moment” is over. Limited potential for China to replace US as international leader by 2030.

A reinvigorated US economy—spurred by possible US energy independence—would increase the prospects that the growing global and regional challenges would be addressed. **If the US fails to rebound**, a dangerous global power vacuum would be created.



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Scenarios

Stalled Engines

The US and Europe are no longer capable or interested in sustained global leadership. Corruption, social unrest, weak financial system and chronically poor infrastructures slow growth rates in developing world. The global governance system is unable to cope with a widespread pandemic: rich countries wall themselves off from many poor countries in Asia, Africa and the Middle East. By disrupting international travel and trade, the severe pandemic helps to stall out, but does not kill globalization.

Fusion

The specter of a spreading conflict in South Asia prompts the US and China to intervene. Washington and Beijing find other issues to collaborate on. Emerging economies grow faster than advanced economies, but GDP growth in advanced economies also accelerates. Technological innovation is critical to the world staying ahead of the rising resource constraints that result from the rapid boost in prosperity.

Gini Out of the Bottle

Inequalities within countries and between rich and poor countries dominate. The world is increasingly defined by two self-reinforcing cycles—one virtuous leading to greater prosperity, the other vicious leading to poverty and instability. Major powers remain at odds; the potential for conflict rises. An increasing number of states fail. Economic growth continues at moderate pace, but the world is less secure.

Nonstate World

New and emerging technologies that favor greater empowerment of individuals, small groups and ad hoc coalition spur the increased power of nonstate actors. This is a patchwork and uneven world. Some global problems get solved because networks manage to coalesce and cooperation exists across state and nonstate divides. Security threats pose an increasing challenge: access to lethal and disruptive technologies expands to terrorists and criminal actors.



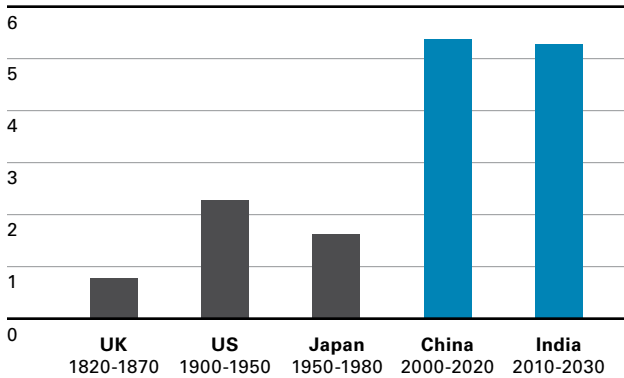
GLOBAL TRENDS 2030: ALTERNATIVE WORLDS

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The world is transforming at an unprecedented rate...

It took **Britain** 155 years to double GDP per capita, with about 9 million people . . . The **US** and **Germany** took between 30 and 60 years with a few tens of million people . . . but **India** and **China** are doing this at a scale and pace not seen below: 100 times the people than Britain and a tenth the time. By 2030 Asia will be well on its way to returning to being the world's powerhouse, just as it was before 1500.

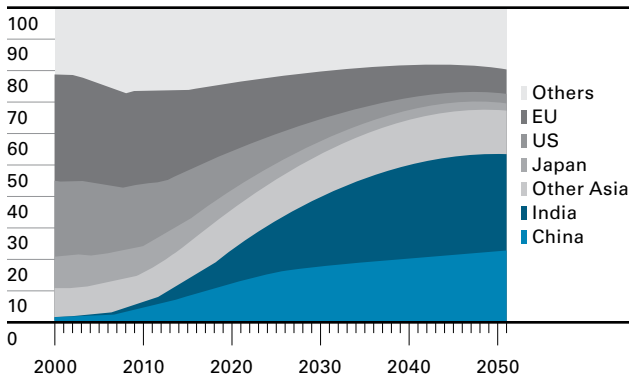
Average increase in percentage point share of global GDP, per decade



...But it is not totally back to the future.

The world has been transformed in other ways. By 2030, majorities in most countries will be middle-class, not poor, which was the condition of most people throughout human history.

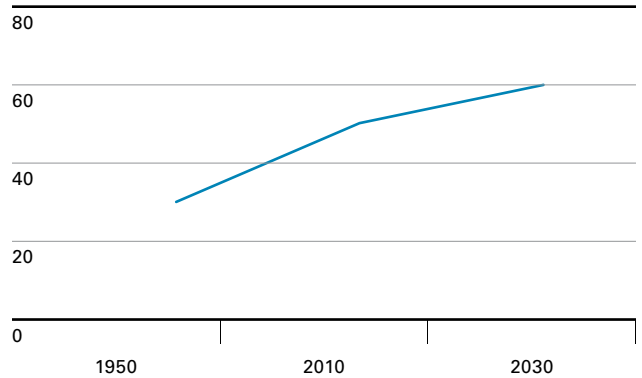
Share of global middle-class consumption, 2000-2050 (percent)



Global population in urban areas

Every year, 65 million people are added to the world's urban population, equivalent to adding seven cities the size of Chicago or five the size of London annually.

Percent urban population



Most countries will be increasingly urban

Regional shares of worldwide urban population growth in five world regions: Sub-Saharan Africa (SSA); North and South America (NSA); Middle East and North Africa (MNA); Asia-Pacific (APC); and Europe (EUR). The graph below compares shares during the past two decades (1990 to 2010) to those projected during the next two decades (2010 to 2030).

Share of urban growth

