



STRUCTURAL FORCES

Setting the Parameters

Demographic, environmental, economic, and technological developments will shape the contours of the world we will live in during coming decades. These structural forces—both individually and collectively—will offer new benefits and opportunities for individuals, communities, and governments in every region to improve how we live, work, and prosper. In addition, the acceleration and intersection of these trends are fostering new or more intense challenges, straining the capacity of societies and governments to manage and adapt.

After several decades of extraordinary gains in human development, many countries are likely to struggle to build on and even sustain these successes because moving beyond the basics in education and healthcare is harder, especially with larger populations and tighter resources. In addition, the physical effects of more extreme weather events, hotter temperatures, changing precipitation patterns, and rising sea levels will touch all countries but disproportionately will hurt the developing world and poorer regions. The pace and reach of technolog-

ical developments during this period are likely to increase and accelerate, transforming and improving a range of human experiences and capabilities while also creating new tensions and disruptions within and between societies, industries, and states. During the next two decades, several global economic trends, including rising sovereign debt, new employment disruptions, a more complex and fragmented trading environment, and the rise of power-



DEMOGRAPHICS AND HUMAN DEVELOPMENT



ENVIRONMENT



ECONOMICS



TECHNOLOGY

ful companies, are likely to shape conditions within and between states.

These structural drivers may redound in unpredictable ways, affording some countries the opportunity to rise to these challenges and even prosper, while others, burdened by a confluence of less supportive trends, will struggle. Shifting global demographic trends almost certainly will aggravate disparities in economic and political

opportunity within and between countries, strain governance, and fuel pressure for global migration during the next 20 years—a pressure that will increase friction between states. State and nonstate rivals will compete for dominance in science and technology with potentially cascading risks and implications globally for economic, military, diplomatic, and societal security. Many governments may find they have reduced flexibility as they navigate greater debt burdens, diverse trading rules, and a broader range of powerful state and corporate actors exerting influence. Meanwhile, Asian economies appear poised to continue decades of growth, at least through 2030, and are looking to use their economic and population size to influence international institutions and rules.