

Synthesis and analysis of the IEES *Panorama of geopolitical trends Horizon 2040*

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Introduction:

Synthesis and analysis of the work *Panorama of geopolitical trends Horizon 2040*¹ prepared by the IEEES (Instituto Español de Estudios Estratégicos - Spanish Institute for Strategic Studies).

Presentation

The work “*Panorama of Geopolitical Trends; 2040 horizon* “ prepared by the IEEES provides a prospective look that gathers possible global geopolitical trends and scenarios for the period 2020-2040 (even with subsequent long-term forecasts).

For the preparation of these documents, 200 experts from different Spanish civil and military organizations from the Armed Forces, companies and universities have been consulted.

It's a prospective analysis work on the current world and its possible evolution until the year 2040 and beyond. For this, five macro-factors have been defined: the physical factor, the human factor, the economic factor, the socio-political factor and the military factor.

In turn, each of these factors groups the individual study of eighteen thematic areas separately, although they are related to each other to a greater or lesser degree.

Thus, the physical factor groups: climate change, global common spaces, the space sector and cyberspace. For its part, the human factor encompasses: demographics, gender inequality, religions and education. The economic factor unites non-energy resources, energy, geoeconomics and the objectives of sustainable development. Regarding the sociopolitical factor, it frames communication, globalization, and sociopolitical foundations (culture, beliefs, and ideas). Finally, the military factor analyzes the information age, technology, conflict and defense.

Each of the eighteen areas ends with security implications at the global, regional and national levels.

¹ Full online version in English:

http://www.ieee.es/Galerias/fichero/OtrasPublicaciones/Nacional/2019/panorama_of_geopolitical_trends_horizon_2040.pdf

Geostrategic trends forecast

The physical factor

- **The global commons**

In this section, under the codes of a classical geopolitical vision, a prospective concern is expressed about possible future geo-strategic tensions in the presence of emerging non-western powers (such as China, India and Russia) as well as non-state actors in geographic transition zones, choke points, competition for natural resources, pressure on the common areas through which these resources are move, and the implications of climate change on the global chessboard.

Taking into account these scenarios, China's BRI initiative stands out as a strategy to have alternative access routes in the event of a possible maritime tension that may involve it.

In retrospect taking into account previous historical stages, this prospective vision presents us with a future period of competition between great powers (*In a scenario tending towards order multipolar perhaps?*)

- **The space sector**

This section analyzes the possible future scenarios that involve greater space activity (which due to technological improvement would economically reduce the cost of exploiting outer space) of the great powers that would range from activities already known as the increased presence of satellites, as well as new: exploitation of space resources, space tourism. The continued activities of these actors would also imply possible new tensions in this recent geopolitical environment, such as disputes over orbits, exploitation zones, space debris.

“Space systems will become critical infrastructures for economic and social development and, therefore, valuable targets for States and terrorist-criminal organizations. They will also be vital to the armed forces and security forces corps of the most developed nations. The possibility of deploying weapons systems and the need to protect assets in orbit will lead to a progressive militarization of space, despite the ambiguous restrictions of existing international treaties and principles, and the new international cooperation and governance structures that could be developed.”

- **Cyberspace**

The pillars of the new cyber revolution today - that will have important implications for the future - are: cloud computing (The Cloud), Big Data (BD), and internet of things (IOT), Blockchain, Artificial Intelligence (AI) and 5G. It's also mentioned how technological dependency will require cyber security systems according to the threats that may violate the computing infrastructure.

On the other hand, laws and regulations on consumer data protection and liability will be increasingly necessary to safeguard the possible risks involved in the storage and massive use of by governments and large corporations that could use it for their own benefits.

International cooperation (for example through regional blocks) on cybersecurity issues will be essential.

- **Climate change**

It is an unequivocal global change and will bring great implications, although these manifest themselves from different degrees to different levels (such as local and regional), involving great tensions. This latter trend will imply an increase in natural disasters (extreme heat or cold waves, extreme rainfall, forest fires). Developing countries (those with the least impact on climate change) will suffer the most of it.

The impact on populations is also related to their political, economic and social situation, by increasing existing inequalities and increasing factors of tension and insecurity.

- *The Earth's surface temperature will continue to increase throughout the 21st century. Greenhouse gas (GHG) emissions are expected to increase between 37% and 52% by 2050, which will cause a temperature increase of between 1.7° and 2.4°C.*
- *Climate projections point to an increase in the number and severity of natural disasters in vulnerable and poorly adapted regions (such as the Sahel. MENA and Southeast Asia), which would push some 720 million people into extreme poverty in the period 2010-2050.*
- *For every degree that the planet's surface temperature rises, around 7% of the world's population will experience a minimum 20% reduction in their renewable water resources..*
- *UNHCR estimates that in 2050 there could be between 150 and 1 billion displaced people (climate refugees) as a result of climate change, although the most likely figure is around 200 million.*
- *Global warming will exacerbate problems such as poverty, food insecurity, environmental degradation and the fragility of states.*

The Human factor

Demography

Demographic changes will reduce the influence of the West and consolidate the rise of new powers. Demographic factors will contribute to the emergence of new powers, which will erode the global leadership of the West and will constitute the new polymorphic geometry that is taking shape in the field of international relations.

The demographic growth added to climate change will imply a tension for access to resources; these factors will be the focus of potential disputes.

In 2030, Europe's demographic decline is projected to have begun. At the end of the century, Asia will also begin its demographic decline, although it will continue to contribute more than half of the world population. Africa will continue its unstoppable growth until it constitutes more than a quarter of the world population. By the end of 2050, it is estimated that six African countries (Angola, Burundi, Niger, Somalia, Tanzania and Zambia) will have tripled their population, so the African continent will double the number of current inhabitants.

It is estimated that 50% of world population growth will be concentrated in India and in countries with Muslim majorities such as: Nigeria, Democratic Republic of the Congo, Pakistan, Ethiopia, Tanzania, Uganda and Indonesia.

The lack of integration of immigrants to the EU areas could be a focus of tensions and conflicts.

- **Religion**

Among Christians, the growth of Protestant sects is anticipated in America and Africa. Christians will continue to be the majority in the world until 2100, when Islam is likely to exceed one percentage point (34.9%) if the current demographic parameters are not modified.

The growth and expansion of new radicalized sectors will continue: evangelical Protestantism in the US, Hindutva in India, Salafism and Wahhabi Islamism in the Middle East, Pentecostalism in Africa and Latin America. A common denominator of these new movements will be the deployment of organizations with political potential.

- **Education**

Traditional educational institutions will be progressively replaced by internet-supported learning, where the teacher will be a mediator between students, technology and knowledge.

Workers must update their knowledge during their working life to adapt to permanent technological development.

The cocktail of an increase in migration, better and cheaper access to technology and social networks, educational and academic inequality, under-employment of graduates and strong competition in the labor market pose a scenario prone to social conflicts.

The economic factor

Competition for resources, increasing due to population growth, rapid urbanization and climate change, will cause new tensions, risks and uncertainties in international relations. The growth of the Asian powers transforms raw materials into a geopolitical and security factor.

The exponential growth of China and other Asian powers could make guaranteeing access to vital raw materials a central position in international security, given the growing demand for vital resources (water and productive land), as well as rare earths. This would present a panorama of geostrategic competition for resources.

The Asia-Pacific area will replace the West as the central economic scenario and will gain more weight in the globalization process.

The formation of new economic blocs, still incipient, will shape a new order with more protectionist characteristics.

New financial institutions will emerge and consolidate to respond to the needs of emerging countries, competing with the Western-dominated financial architecture that emerged after the Second World War.

Technological advancement will enable new financial methods based on virtual money or cryptocurrencies, especially in emerging countries, thus avoiding the volatility of the exchange rate and taxes associated with bank credit.

The G7 could see its contribution to the world GDP fall around 20%, while the E7 (China, India, Brazil, Mexico, Russia, Indonesia and Turkey) would increase its participation to almost 50% of it, mainly driven by China and India, who could be the world's largest economies.

The scenario will be a three-speed global economy: Europe and Japan with stagnant growth; China and India, with much higher growth rates, and the US with moderate growth, but seeing its power and influence capacity eroded.

China, thanks to its accelerated growth, will increase its military capacity. Its global positioning will become increasingly assertive, which will cause friction with the countries that share their maritime spaces, as well as with the US and Japan.

The world economy will continue towards a globalized scenario of maximum competitiveness. Only those States capable of innovating and adapting, in an increasingly integrated world, will be able to succeed.

The circular economy will be the cornerstone of sustainable growth.

The health of the population will be one of the great challenges of the 21st century. Globalization, climate change, conflicts, the rise of urbanization and technological progress are risk factors in the appearance of pandemics globally.

- **energetic sector**

The growth in energy demand will take place mainly in emerging countries.

Oil will continue to be, in the short and medium term, the energy resource with the highest consumption and geostrategic impact.

The consequences of climate change could increase the degree of environmental commitment and accelerate the deployment of renewable energy. In any case, the progressive awareness and public pressure will favor, to a greater or lesser extent, renewable energy policies.

The rare earths necessary for new technological developments, with their reserves concentrated in few places in the world will increase their geostrategic importance.

- **sociopolitical factor**

Globalization is not necessarily a peaceful phenomenon that favors stability, by compressing time and space, increasing interdependence, increasing opportunities, but also increasing vulnerability to the flows and crises that occur globally in the different local realities.

Globalization is a dynamic and Hegelian process of rationalization made on the basis of Western culture but in which its economic weight is shifting towards Asia Pacific. We are going towards multipolarity as two geopolitical masses are being formed and dividing the world in a remarkable way.

Globalization will maintain the trend towards regionalization, in a post-hegemonic western era, where the main poles will continue to be the West and the Asia-Pacific, whose development will continue, altering the geoeconomic balance of the world, forging a new balance of power.

- *In a globalized world liquid societies will coexist with solid societies, with an increasing tension between them*

In the West, a liquid society model will continue to be imposed progressively, as a result of a post-moralist era, which preaches the triumph of a painless ethic that rejects and discredits community commitment..

In other areas of the globe, liquid modernity will be increasingly rejected as decadent. These societies solidly based on beliefs or convictions, religious, ethnic or political, will recover more cohesive and integrative discourses.

- *Audiences (media) democracies and crisis of representation*

In the West, leadership will continue to be measured by the ability to seduce in the short term. Political and reasoning arguments will continue to be subjugated by the predominance of the image (*videopolitica*).

- *A transnational global elite*

A cosmopolitan transnational aristocracy will be consolidated with a growing power of influence that will affect cross-cutting political discourses and agendas. Faced with this strengthening of transnational actors, states will strive to counterbalance their growing influence (cleavage globalism vs. sovereignty).

Military factor

- **Technology**

The ability to integrate the technological factor will be the decisive element of any national defense strategy.

Information warfare, increasingly supported by different technologies, will become progressively more real and decisive. Likewise, cyberspace and outer space will be imposed as new geopolitical dimensions. Technologies such as the Internet of Things would allow to unify all the elements united in a network (human, robotic, remote-controlled units). Automation of weapons systems will involve major ethical dilemmas.

Possibilities of conflict

- an attenuated multipolarity scenario
- The world will have an attenuated multipolar scenario with China and the United States as the main military actors. They will be followed to a lesser extent by other powers, Russia, India and, in the case, a militarily integrated European Union. Only the great powers will be able to develop the full spectrum of military operations and have a competitive military technological development.
- *Hybrid wars the gray zone between war and peace*

Wars will become increasingly hybrid, more diffuse, and more urban, with a combination of conventional and unconventional operations, cyber warfare, and manipulation of foreign and own public opinion.

- *Highly trained and technified small military units*

Armies will be measured by their ability to incorporate technology into their military units in the operational field. Big Data will be a great support element for managers at all levels.

- Cyber defense

Armies with better trained personnel in new technology environments will have an advantage. In this field, technological powers, such as China and the United States, India and Russia, (a militarily integrated EU) will be better positioned.

Conclusion: An era of unrest

Based on the prospective vision that the work *Panorama of geopolitical trends Horizon: 2040* offers us we will live a time of great changes throughout the world that affect all human spheres, changes that pose multiple challenges.

With these changes the consequent uncertainty that they imply, in our capacity for understanding, adaptation and decision about them. To navigate this world, with these scenarios, will require strategic thinking, pragmatic visions of all events and areas, to approach and manage them.

In the geopolitical and international relations sphere, the economic, demographic, socio-political and military changes, we could observe a new order in the balance of power: with a rising Asian continent and the West with declining influence.

This possible new distribution of power (*future power geometry*) could be of an attenuated type of *multipolar order* with the USA and China as its two main actors, followed by continental industrial States such as India, Russia and a European Union (sufficiently cohesive).

A greater variety of poles of global power would imply a more competitive geopolitical order and market, which could be both a challenge as well as an opportunity for the rest of the countries in the world, more relegated in the international system.

More recent areas (such as geopolitical dimensions) will increasingly gain strategic relevance such as cyberspace, outer space, and climate change.

Globalization will continue as a process, but in a more fractional way, with more regionalist nature, new dynamics and institutions that will emerge accordingly.

- • *In a globalized world liquid societies will coexist with solid societies*

In the West it will follow the liquid society model, based on an individualistic and material ethic that rejects community connotations. This ethic could aggravate fragmentation and polarization in western societies.

On the other hand, the model of solid societies, currently more typical of non-western societies, based on identity elements, could have the advantage of

having more resilience, through its more cohesive nature, in the face of a world in constant turmoil.

- The importance of Geotechnology

Technological advance will be increasingly determining as a strategic element of States, not only for economic growth and the development of societies, but also for their security.

Regarding this, the great powers with their great scales in the endowment of these factors (usually *continental industrial States*) will run with advantage.



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