# GLOBAL TRENDS 2025: A TRANSFORMED WORLD: EXECUTIVE SUMMARY, U.S. NATIONAL INTELLIGENCE COUNCIL

## ARTICLE SUMMARY

In this executive summary, the U.S. National Intelligence Council presents possible global trends that will occur over the next decade and up to 2025, including the growth of emerging economic powers, a reduction in U.S. relative strength, the creation of a new transnational agenda, continuing concerns about terrorism and nuclear proliferation, and the increasing complexities of a new international system.

## Growth of Emerging Economic Powers

Growth projections for Brazil, Russia, India, and China indicate they will match the original G-7's (e.g., US, France, West Germany, Japan, United Kingdom, Canada, and Italy) share of global GDP by 2040 –2050. By 2025 China will have the world's second-largest economy that will be a leading military power. India will continue to enjoy rapid economic growth will strive for a multipolar world in which New Delhi is one of the polls. China, India, and Russia are not following the Western liberal model for self-development but are using a different model, "state capitalism." It is a loose term used to describe a system of economic management that gives a prominent role to the state. South Korea, Taiwan, and Singapore—used state capitalism to develop their economies (e.g., engaged in land reform).

## U.S. Less Dominant

Advances by others in science and technology, expanded adoption of irregular warfare tactics by both state and non-state actors, percolation of long – range precision weapons, and growing use of cyber war attacks will constrict US freedom of action.

## Creation of a New Transnational Agenda

Unprecedented global economic growth —will continue to put pressure on a number of highly strategic resources: energy, food, and water, and demand is projected to have outstripped supply over the next decade. New technologies could provide solutions, such as alternatives to fossil fuels are means to overcome food and water constraints. . . . In the energy sector, a recent study found that it takes on average of 25 years for new production technology to become widely adopted.

## Terrorism and Nuclear Proliferation Concerns

Terrorism is unlikely to disappear by 2025, but its appeal could diminish if economic growth continues and youth unemployment is mitigated in the Middle East. Economic opportunities for youth and greater political pluralism probably would dissuade some from joining terrorist ranks…. Greatest concern continues to be terrorists or other malevolent groups acquiring and employing biological agents, or less likely, nuclear device. The force of ideology is likely to be strongest in the Muslim world — particularly the Arab core. In those countries that are likely to struggle with youth bulges and weak economic underpinnings—such as Pakistan, Afghanistan, Nigeria, and Yemen – the radical Salafi trend of Islam is likely to gain traction

**A More Complex International System**

Rising BRIC powers are likely to challenge international system as did Germany and Japan in 19th and 20th centuries, but because of their growing geopolitical and economic clout, will have a high degree of freedom to customize their political and economic policies rather than fully adopting Western norms. Existing multilateral institutions — which are large and cumbersome and designed for different geopolitical order — will have difficulty adapting quickly to undertake new missions, comedy changing memberships, and augment the resources. Nongovernmental organizations (NGOs) increasingly will be a part of the landscape but are likely to be limited in their ability to affect change in absence of concerted efforts by multilateral institutions or governments. Greater Asian regionalism — possible by 2025 — where global implications sparking or reinforcing a trend toward free trade and financial clusters that could become quasi-– blocks: North America, Europe, and East Asia.

# THE NEW GEOPOLITICS OF FOOD, LESTER R. BROWN

## ARTICLE SUMMARY

Food prices have continued to climb, affecting the world’s poor in particular. The upward trend in food prices is being driven by factors that make it more difficult to increase production, including an expanding world population and demand, climate change, and water scarcity due to the depletion of aquifers. With the most agriculturally advanced countries nearing the limits of production, and with other countries restricting exports, wealthier countries have turned to land acquisitions in poor countries.

**Rising Food Prices**

Prices are climbing that impact is not being felt equally. For the planet's poorest 2 billion people, who spend 50 to 70% of their income on food, soaring prices mean going from two meals a day to one. Today's price hikes are driven by trends that are both elevating demand and make it more difficult to increase production: a rapidly expanding population, crop – withering temperature increases, and irrigation wells running dry. Each night there are 219,000 additional people to feed at the global dinner table. "Get ready, farmers and foreign ministers alike, for new era in which world food scarcity increasingly shapes global politics. The doubling of world grain prices since early 2007 has been driven primarily by two factors: accelerating growth in demand and increasing difficulty of rapidly expanding production.

**Expanding World Population**

Each year world's farmers must feed 80 million additional people, nearly all of them in developing countries. World population has nearly doubled since 1970 and is headed toward 9 billion by midcentury. Some 3 billion people are trying to move up the food chain, consuming more meat, milk, and eggs. As more families in China and to the middle class, they expect to eat better. The US is converting massive quantities of grain into fuel for cars, even as world grain conception, which are is a ready up to roughly 2 point billion metric tons per year, is growing at an accelerating rate. The rate at which United States is converting grain into ethanol has grown. In 2010, United States harvested nearly 400 million tons of grain, of which 126 million tons went to ethanol fuel distilleries (up from 16 million tons in 2000). Shis massive capacity to convert grain to fuel means that the price of grain is not tied to the price of oil. So if oil goes up $250 per barrel or more, the price of grain will follow it upward as it becomes ever more profitable to convert grain into oil substitutes.

**Climate Change**—

the rule among crop ecologists is that for every 1°C rise in temperature above the growing season optimum, farmers can expect a 10% decline in grain yields. This relationship was born out dramatically during the 2010 heat wave in Russia, which reduce the country's grain harvest by nearly 40%.

Water scarcity-- what temperatures are rising, water tables are falling as farmers over pump for irrigation. This artificially inflates food production in the short run, creating a food bubble that burst when aquifers are depleted and pumping is necessarily reduced to the rate of recharge. Arid Saudi Arabia irrigation had enabled the country to be self-sufficient in wheat more than 20 years: now, wheat production is collapsing because the non-– replenishable aquifer the country uses for irrigation is largely depleted. The Saudi's soon will be importing all their grain. Altogether more than half the world's people live in countries where water tables are falling. Grain production is going down and in Syran and Iraq may soon declining Yemen. But the largest food bubbles are in India and China. In India, where farmers have drilled some 20 million irrigation wells, water tables are falling and the wells are starting to go dry. World Bank reports that 175 million Indians are being fed with grain produced by over pumping. How will these countries make up for the inevitable shortfalls when aquifers are depleted?

**Land Acquisitions in Poor Countries—**

With exporting countries restricting exports in 2007 2008, importing countries panicked. Countries took the step of trying to negotiate long – term grain supply agreements with exporting countries. The Philippines negotiated a three – year agreement with Vietnam for 1.5 million tons of rice per year. Saudi Arabia, South Korea, China in 2008 bought or leased land in other countries on which to grow grain for themselves. Most of these land acquisitions are in Africa, were some governments lease cropland for less than one dollar per acre per year. The principal destinations were Ethiopia and Sudan, countries where millions of people are being sustained with food from UN World Food Program. The 2010 World Bank analysis of these "land grabs" reported that a total of nearly 140 million acres were involved — area that exceeds cropland devoted to corn and wheat combined in United States. Land grabs affect water extracted from the upper Nile River to irrigate crops, will now not reach Egypt, upbending delicate water politics of the Nile by adding new countries with which Egypt must negotiate. As land and water become scarcer, as Earth’s temperature rises, and as world food security deteriorates, a dangerous geopolitics of food scarcity is emerging. Land grab, water grabbing, and buying grain directly from farmers in exporting countries are now integral parts of a global power struggle for food security.