

# Trends Shaping Asia by 2030

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## Question

*A mapping of key literature outlining trends affecting Asia between now and 2030, with a focus on Afghanistan, Bangladesh, Myanmar, Kyrgyzstan, Tajikistan, China, India, Nepal, and Pakistan.*

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## 1. Overview

The majority of published material speculating on trends shaping Asia by 2030 comes either from the development perspective or the perspective of national security (usually the USA's national security). Therefore, traditional developmental and security issues are the focus of many of these pieces: from demographics to economic productivity to assessments of geopolitics.

Beyond this, trends were identified around urbanisation, development finance and regional cooperation, sustainability and climate change, and technological innovation. Some trends, such as those around gender, emerged across sources but were not the primary topic of any particular source.

The demographic trends being experienced in Asia and this report's focus countries is expected to have many impacts – primarily on prospects for economic growth, but also on immigration and

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migration patterns, requirements for health care and elderly care, and impacts for how urbanisation may proceed. These trends interact to have complex implications for food security and health care: for example economic growth and urbanisation have combined to reduce levels of absolute poverty across the focus countries, but have increased inequalities such that people who continue to live in poverty face food insecurity while other groups are experiencing more obesity related health problems such as diabetes.

Several sources identified the fact that as populations grow in these focus countries, they are becoming more male. This will have increasing spill-over effects on other development challenges as women continue to face additional levels of precarity – from social and economic exclusion to a disproportionate reliance on ecosystem services which face mounting pressures from climate change.

Technological innovation is routinely invoked as an important source of hope for addressing the challenges of economic development, demographic change, geopolitical tensions, mitigating and adapting for climate change, and realising the sustainable development goals by 2030. However, as most sources point out, technologies have the potential for constructive as well as destructive impacts on all of these challenges. Outcomes from each of these trends is highly uncertain, but they will be determined in large part by policy choices at local, national, regional, and global levels. Fortunately, even as uncertainty has increase around traditional global institutions, there are important trends across the target countries for strengthening governance mechanisms and linkages – through city networks, through ASEAN and institutions for regional cooperation, and through a spate of new development banks that are pursuing greater economic and policy integration as well as shared prosperity.

## 2. General trends

### **Contemporary demographic transformations in China, India and Indonesia.**

(Guilmoto and Jones, 2016)

This book breaks down demographic trends affecting three major countries in Asia with very large populations – China, India, and Indonesia – into five thematic areas: mortality, fertility, education, migration, and aging. For each of these themes, a chapter is presented for each country along with another chapter that synthesizes the findings across the three countries with comparisons between them.

A ‘demographic transition’ is what happens when historical high mortality rates and high fertility rates start to change. Lower mortality rates tend to be achieved first, and while fertility rates remain high, populations grow rapidly. China and India have taken unique steps over their recent histories to reduce fertility rates as their mortality rates have declined, but both are still experiencing the ‘population momentum’ through which populations continue to increase.

The introductory chapter points out that the states within China and India are roughly comparable to other countries within Asia in terms of population sizes; and demographic trends across states within China and India vary about as much as variations across the other national borders.

Within India, differences in population growth rates between states are mostly due to differences in birth rates, whilst within China, differences across provinces are largely due to trends in internal migration. All regions of India are set to have population increases over the next 15

years, whilst a large region in central China is experiencing a declining population as internal migrants move to the large coastal cities that are experiencing rapid population growth.

The editors of this book emphasise that as mortality rate decreases stabilise and fertility rates decline, the 'natural increase' will decline as well, with the important effect that population dynamics will be increasingly shaped by economic factors and the relationship with migration and urbanisation rather than the traditional birth/death demographic features.

At the same time, the number of workers in the economy per dependent in China has become similar to the more developed Asian countries, meaning that, like more developed countries, the next 20 to 30 years will see dramatic growth in the aged (and retired) population. Meanwhile India is only beginning to experience its 'demographic dividend' – the phenomenon where the increased working age population results in greater numbers of workers per dependent, and thus a boost to economic production.

### **Asian megatrends**

(Biswas, 2016)

This book summarises the demographic trends across Asia with emphasis on how these intersect with greater urbanization, greater development finance alternatives coming from China and the other BRICS countries, and changing geopolitics of the region, including a look at the likely impacts of climate change. This book provides a good general overview with helpful nuances.

The main conclusions are that, in large part because of demographic trends, China's economy is likely to shift away from manufacturing and exports toward more domestic consumption whilst India and elsewhere in South Asia have opportunities to dramatically boost economic growth through manufacturing and increased trade. ASEAN will facilitate this trade liberalisation, and development financing institutions such as the BRICS's New Development Bank, China's Asian Infrastructure Investment Bank (AIIB), and the Silk Road Fund will provide additional and alternative sources of finance beyond the IMF/World Bank. However, growing geopolitical tensions between India and Pakistan as well as around the growing economic and military dominance of China have the potential to undermine these opportunities for growing interconnected regional prosperity.

### **Global Trends: Paradox of Progress**

(National Intelligence Council (U.S.), 2017)

Produced by the USA's National Intelligence Council and written from the American perspective on global trends, this document nevertheless highlights many trends happening around the world and emphasises the important role that trends shaping Asia will have global impact. The main conclusions of this document are that:

- (1) Global technological, demographic, and political trends are leading towards greater tensions within and between states at the same time they are eroding global norms of cooperation and conflict resolution; and that
- (2) These same trends that are likely to increase risks and uncertainty hold the potential for equally transformative advances – hence the 'paradox of progress'.

The report notes the following key global trends:

- The rich are aging, the poor are not.
- The global economy is shifting.
- Technology is accelerating progress but causing discontinuities.
- Ideas and Identities are driving a wave of exclusion.
- Governing is getting harder.
- The nature of conflict is changing.
- Climate change, environment, and health issues will demand attention.
- The bottom line: These trends will converge at an unprecedented pace to make governing and cooperation harder and to change the nature of power—fundamentally altering the global landscape. Economic, technological and security trends, especially, will expand the number of states, organizations, and individuals able to act in consequential ways. Within states, political order will remain elusive and tensions high until societies and governments renegotiate their expectations of one another. Between states, the post-Cold War, unipolar moment has passed and the post-1945 rules based international order may be fading too. Some major powers and regional aggressors will seek to assert interests through force but will find results fleeting as they discover traditional, material forms of power less able to secure and sustain outcomes in a context of proliferating veto players.

The second half of the document systematically examines trends across different regions of the world over the next five years, followed by trends related to global challenges for all regions over the next 20 years.

Key trends for East and Southeast Asia over the next five years include:

- The region is likely to grow in global economic importance, increase regional economic cooperation, and at the same time increase regional geopolitical competition.
- China's economic and urbanisation boom is likely to end, and its economy is likely to shift away from export-driven manufacturing towards more domestic consumption.
- As a result of weakening economic clout, China may decide its 'window of strategic opportunity' is closing and become more aggressive in establishing geopolitical dominance in the region.
- Climate change is likely to disproportionately impact Southeast Asian countries whose populations are clustered along vulnerable coastlines. This is likely to intensify the simultaneous stresses due to changing demographics, urbanisation, and ethno-religious tensions.

Key trends for South Asia over the next five years include:

- Whereas China is experiencing an aging population, India, Pakistan, Afghanistan, and Burma are likely to continue experiencing numbers of people in the working-age population. This will be a double-edged sword: creating opportunities for greater economic growth and production, but increasing tensions as people demand jobs and opportunities for social advancement.
- India will likely lead the trend toward greater regional economic cooperation, even as geopolitical tensions with Pakistan and others persist.
- *'South Asia also will face continuing challenges from political turmoil—particularly Pakistan's struggle to maintain stability—as well as violent extremism, sectarian*

*divisions, governance shortfalls, terrorism, identity politics, mounting environmental concerns, weak health systems, gender inequality, and demographic pressures.*' (p.103)

- The region is likely to have 3 of the 10 biggest cities in the world and 10 of the 50 biggest. Urbanisation, increased pollution and an increased demand for energy and other services will put severe strain on the environment, which will put strain on societies in turn.
- Climate change is likely to have a large impact on the region – increasing the frequency and severity of extreme-weather events such as floods and droughts as well as dramatically changing weather and rainfall patterns. These changes will have spill over effects by creating conditions for new or resurgent diseases. One dramatic consequence may be that, if Himalayan glacial melt patterns change, large portions of Afghanistan, Pakistan, India, Nepal, and China may face extreme challenges cooperating over and co-managing this important shared water resource.

See also (National Intelligence Council, 2012).

### **Strategy 2020: The long-term strategic framework of the Asian Development Bank 2008-2020**

(Asian Development Bank, 2008)

The main purpose of this document is to lay out the strategy of the ADB up to 2020, but in doing so, it outlines the major trends impacting the region which the strategy is meant to address. The following trends are noted:

- Poverty remains the central challenge facing the region
  - In spite of strong economic growth in many of countries targeted for this report, over 600 million people still live in absolute poverty (defined here as less than \$1 per day) and over half the world's poor live in South Asia.
  - In the coming years, the poorest people within these countries will likely continue to face exclusions and obstacles to accessing the benefits of economic growth.
- Disparities in well-being are widening within and between developing member countries [members of the ADB].
  - Economic and non-income inequalities are increasing, and the ADB suggests that if nothing is done to address this trend, there is a growing risk of social instability.
- Demographic changes will have profound implications for development.
  - *'Population growth will require the creation of 420 million jobs by 2030 in a region where at least 500 million of the existing labour force of 1.7 billion workers are already unemployed or underemployed.'* (p.7)
- Rapid economic growth is putting severe strains on the environment.
  - Across the region, environmental degradation and resource depletion are impacting development and quality of life. The share of global CO<sup>2</sup> emissions from the countries targeted for this report is rising, and the region is likely to face disproportionate disruptions due to climate change.
- An infrastructure deficit is constraining market-led growth and access to social services in many countries.
  - The document points out, for example, that lack of sufficient infrastructure in rural India is impeding agricultural productivity.
- More regional cooperation and integration is needed to address [developing member countries'] challenges and opportunities.
  - The ADB suggests that strengthening trading ties, exploring areas for cooperation on the production of energy, strengthening supply chains, and

- building stronger financial links between member countries will lead help address development challenges.
- Asia's financial systems are not intermediating the region's pool of savings efficiently to meet its growing needs.
    - The ADB suggests that creating better standards for risk management, credit, and access to finance can shore up an increasingly globalised capital market that is currently dominated by private entities. Stronger financial systems driven by governments and regional bodies can ensure that the benefits of development are distributed more widely and equitably.
  - [Developing member countries] need more emphasis on innovation, technology development, and higher education.
    - The future of economic competitiveness will be determined by the extent to which companies and workers can use new tools to create products of higher value – including the extent to which the poor will be able to attain necessary skills for more productive jobs.
  - Weak governance may prevent many [developing member countries] from exploiting economic opportunities.
    - The ADB expects to assist governments in the region in developing their governance capacities, gender equity, and access to finance in order to increase the likelihood of addressing development challenges.

### **Population 2030: Demographic challenges and opportunities for sustainable development planning**

(United Nations, Department of Economic and Social Affairs, Population Division, 2015)

This report presents an analysis of population and demographic trends in relation to the challenges of achieving the Sustainable Development Goals. The report predicts that global population will rise from 7.3 billion (in 2015) to 8.5 billion people by 2030, with most of the growth occurring within Africa and Asia. Asia will increase its population from 4.4 billion to about 4.9 billion by 2030.

A range of demographic findings are presented, such as the fact that the percentage of global child deaths occurring in Asia is likely to decrease from 43% to 35% by 2030. The report explores the implications of the rising global population by considering how to prepare for 2 billion new babies, 2 billion new school age children, and 2 billion additional adolescents and youth. In Asia, many of these additional babies, children, and youth will grow up in South Asian countries such as India and Pakistan, and this will provide both opportunities and challenges for realising the SDGs in those countries.

The report also considers how to prepare for an additional 1 billion city dwellers around the world. About 60% of this growth in global population living in cities will take place in Asia. The share of the Asian population residing in urban areas will increase from 48% to 56% by 2030, but urbanisation is likely to be most rapid in countries that are currently less urbanised.

This will have implications for economic growth and climate change as well. In the decade leading up to 2015, CO<sub>2</sub> emissions rose about four times as quickly as the population across Asia. While having relatively low per capita CO<sub>2</sub> emissions, China and India are currently the worlds 1<sup>st</sup> and 3<sup>rd</sup> largest emitters in absolute terms. As economic growth continues across developing Asia, these trends will have a dramatic impact on climate change.



### 3. Cities and urbanisation

#### Leveraging urbanization in South Asia

(Ellis and Roberts, 2015)

This World Bank publication examines the opportunities and challenges of urbanisation in South Asia. It echoes the trends mentioned elsewhere that the region is rapidly urbanising, but rather than focusing on the implications of demographic issues, it lays out a framework for ‘leveraging’ urbanisation.

The number of urban dwellers in South Asia is likely to increase by between 250 and 300 million people by 2030, depending on whether one considers cities explicitly defined or urban settlements. Attention is drawn to historical trends in the region in which urbanisation has been poorly planned for, resisted, messy and hidden. Urbanisation in the region has been ‘messy’ in that it has resulted (and is likely to continue to result) in widespread informal settlements and urban sprawl. It has been ‘hidden’ in that it has resulted in settlements that have an urban character but lack official status as cities (and therefore also lack sufficient governance and infrastructure).

One of the main arguments is that South Asia has failed to ‘leverage’ its urbanisation for prosperity and economic growth as well as East and Southeast Asia have. The authors use the concepts of agglomeration and congestion to analyse the benefits and costs of urbanisation, respectively. They point out that governments across the region have recently created policies to attempt to maximise the benefits of urbanisation whilst minimizing the costs. India, Pakistan, Bangladesh, and Nepal have each drafted policies attempting to transform their cities into effective drivers of progress and growth.

The authors identify urbanisation trends and patterns across the region, and outline four key policy areas that will determine the impacts of urbanisation in the region over the next 15 years.

The policy areas are:

- Governance and finance
- Connectivity and planning
- Land and housing; and
- Resilience to natural disaster and the effects of climate change (p. 11).

In order to put South Asia on the same development trajectory as other urbanising developing countries, the authors argue that governments will need to implement effective policies in each of these areas to leverage the processes of urbanisation for greater prosperity and livability.

#### Towards a sustainable, inclusive and resilient urban future for Asia and the Pacific

(Economic and Social Commission for Asia and the Pacific, 2015)

This note by the secretariat of the Economic and Social Commission for Asia and the Pacific draws attention to urbanisation trends for Asia. The region currently has about half of the world’s urban dwellers, and this is likely to rise to 64% by 2050. The region also has a disproportionate number of the world’s megacities. Nevertheless, as the region continues to urbanise, most of the new urban residents are likely to live in smaller cities, which will have fewer resources and institutional capacities to adequately plan for and cope with that growth.

Increasing urbanisation in Asia will create economic growth, but the benefits of this growth will be unequally distributed, exacerbating inequalities and disparities within cities. While absolute poverty is decreasing, inequalities are increasing, and this poses a difficult challenge for creating cities with opportunities for social advancement. Further, cities in the region face growing challenges of environmental degradation and growing vulnerabilities to the effects of climate change. Continued unplanned or poorly planned urbanisation will exacerbate these trends, but these challenges also offer an opportunity to change the direction of urbanisation to create more resilient and prosperous cities.

See also:

(United Nations, Department of Economic and Social Affairs, Population Division, 2014a, 2014b)

(Smith, 2017)

## 4. Trends in development finance and organisations for regional cooperation

### **AIIB Development: Forecast and Implications**

(Lee and Kim, 2016)

The Asian Infrastructure Investment Bank (AIIB) is one of several financial institutions spearheaded by China that will impact Asia by 2030. Others include the New Development Bank created by the BRICS countries, the Silk Road Fund, and the proposed Shanghai Cooperation Organization (SCO) Development Bank.

The AIIB has approved \$509 million in financing for infrastructure projects in Pakistan, Tajikistan, Indonesia, and Bangladesh. Going forward, the AIIB is likely to target lending to infrastructure projects in the region, including Myanmar, India, Iran, Pakistan, and other countries in Central Asia. It is also set to partner with more established banks such as the Asian Development Bank, the European Bank for Reconstruction and Development, and the World Bank, which will strengthen the credibility and viability of the AIIB. The AIIB and the other China-led lending institutions are taken by many to represent and reinforce China's growing economic and geopolitical strength.

For additional insights into the economic and geopolitical implications of the AIIB, see (Weiss, 2017).

### **ASEAN 2030: Toward a borderless economic community**

(Asian Development Bank Institute, 2014a, 2014b)

This study explores the trends, opportunities, and challenges related to the ASEAN economic community. The first section of the study sets out some aspirations for the region, including to become resilient, inclusive, competitive, and harmonious (RICH) by 2030. They expect these to be achieved through greater economic integration; the reduction of barriers between countries;



and strengthened institutions to effectively regulate, harmonize, and finance economic activities between countries.

This study describes some additional trends that will enable ASEAN to become more integrated and prosperous. ASEAN will become more connected through land, sea, and air transport as well as through communications infrastructure. Human capital will be strengthened across the region as citizens become wealthier and better educated, which will stimulate demand for more effective governance. Successful economic integration and growth will further strengthen the institutional architecture of ASEAN, which will in turn further strengthen regional prosperity.

See also: (Biswas, 2016), above.

## 5. Sustainability and climate change

### **Shock Waves: Managing the impacts of climate change on poverty**

(Hallegatte et al., 2016)

This report explores the likely impacts of climate change on various aspects of poverty. Based on simulations of development scenarios, predictions are made for levels of poverty in South Asia (along with other regions) by 2030. The main findings are (quoting from p.2):

- *Climate related shocks and stresses, already a major obstacle to poverty reduction, will worsen with climate change.*
- *In the short run, rapid, inclusive, and climate-informed development can prevent most (but not all) consequences of climate change on poverty. Absent such good development, climate change could result in an additional 100 million people living in extreme poverty by 2030.*
- *Immediate mitigation is required to remove the long-term threat that climate change creates for poverty eradication. Mitigation need not threaten short-term progress on poverty reduction provided policies are well designed and international support is available.*

While this report is about the impact of climate change on poverty globally, the point is made that Sub-Saharan Africa and South Asia will face the most climate-related obstacles to poverty reduction. The following predictions apply to both regions: poor people are vulnerable to food insecurity because they are vulnerable to price shocks as well as the impacts of changing climate on agricultural production and ecosystem services. Poor people are more likely to be impacted by natural disasters (as they are more likely to live in more dangerous areas with fewer resources and protections), the risk of which will increase with climate change. Climate change will also have a disproportionate impact on the health of people living in poverty, which will reinforce the challenges of reducing poverty.

For more on the simulated development scenarios, see (Rozenberg and Hallegatte, 2015).

## 6. Technologies

### **Emerging critical technologies and security in the Asia-Pacific**

(Bitzinger, 2016)

This book explores trends related to technological innovation in Asia and the impacts they may have on geopolitics. The book is written from a United States perspective, and is in conversation with the two major foresight documents produced by the USA's National Intelligence Council in recent years (see (National Intelligence Council, 2012; National Intelligence Council (U.S.), 2017)). While the authors analyse the likely trajectories of technological innovations generally, their concern is how those innovations may or may not change military capabilities for nations in the Asia-Pacific region, and therefore alter the global distribution of geopolitical power.

The book makes several important points. Technological innovation is accelerating, and innovation is increasingly essential for driving economic prosperity. This same technological innovation has the potential to disrupt economies and society constructively or destructively, and this will be determined in part through policy choices. Many recent transformative technological innovations have been catalysed by and emerged from government supported research and development with an explicit intention to strengthen military capabilities. This fact reinforces and raises the stakes of the potential for technology to disrupt constructively or destructively.

Important emerging technologies that the authors expect to have important impacts on Asia by 2030 include:

- Information and analytical technologies such as 'big data' and the forms of machine learning that facilitate it
- Cyber technologies, which may be deployed offensively or defensively
- Robotics
- Biomedical engineering technologies such as prosthetics, implants, augmented reality systems, and other devices meant to overcome the physical limitations of the human body; and
- 3D printing.

A final important point made by the authors is that, while major trends in technological innovations that will shape the future can be identified now, the outcomes of these trends are highly uncertain. Not only do these trends have the potential to disrupt Asia and the world constructively or destructively, it is also likely that the innovations that will have the most impact by 2030 either have not yet emerged or have not yet attracted the attention of analysts.

### **Applications of blockchain technology to banking and financial sector in India**

(Institute for Development and Research in Banking Technology, 2017)

This white paper outlines the basic features of blockchain technologies, identifies their emergence as an important trend shaping India (and the wider world). Blockchain (or distributed ledger) technology is currently being adopted within financial and banking institutions. They are being explored extensively by private firms and governments, though the ultimate impact is uncertain.

Blockchain technology is the mechanism that underpins digital cryptocurrencies such as Bitcoin. They function as an alternative to traditional, centralised encryption and security structures. Their distributed structure allows transactions and interactions that do not have to be validated or recorded by a central authority. This creates possibilities for more secure transactions that are simultaneously more transparent and more private; but it also creates the potential to undermine the financial and monetary authority of governments and banks.

While this white paper explores the implications of trends around blockchain technologies for banking and finance in India, it also makes the important point that there will likely be applications (for example smart contracts, which have little to do with currencies per se) for other sectors which are only beginning to be developed.

See also (Kelly et al., 2017; Sommer et al., 2016)

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