



Geopolitical Forecast Report

Korea, Republic of — 2025-2030

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Sources Cited	88 sources

RESEARCH DOCUMENT — FOR ANALYTICAL USE

Executive Summary

By 2030, the Republic of Korea will be a high-tech yet rapidly ageing democracy caught between demographic contraction and persistent external security pressure. GDP growth is projected to decelerate to below 2 % as the workforce contracts by roughly 6 %, but resilient semiconductor and defence exports should keep the current account in surplus. Politically, the country is expected to oscillate between lame-duck presidential administrations and the possibility of snap elections; survey data already show that one in five voters would accept authoritarian shortcuts, a share that rises to one in three should annual growth fall under 1 %. Socially, rights for LGBTQ communities and migrants remain behind OECD averages, yet neither issue is likely to ignite sustained mass unrest. The principal tail-risk is a limited artillery exchange with North Korea that causes fewer than 200 fatalities but triggers a 48-hour lockdown of the capital region and an estimated 22 % plunge in domestic equity markets. Barring such an event, the state is likely to muddle through as a networked, nuclear-capable middle power whose social cohesion gradually erodes amid demographic headwinds and episodic political volatility.

Forecast Analysis

This forecast was generated using historical data from 2000 to 2025, incorporating 88 primary sources across political, economic, social, and security domains. The analysis proceeds by identifying structural drivers, constructing a small number of internally-consistent scenarios, and translating those scenarios into measurable forecast ranges.

Reasoning

This forecast for the 2025-2030 period was finalised on 5 January 2026 by integrating evidence collected from 2000-2025. The analysis draws on 88 sources covering political, economic, social and security developments, distils this material into a concise set of competing narratives, and translates each narrative into quantitative projections. The executive summary reflects the most probable storyline—"Techno-Export Stagnation"—which carries a 45 % likelihood. Alternative scenarios frame plausible upside and downside trajectories. All headline indicators are expressed as ranges accompanied by explicit confidence labels and are underpinned by scenario-specific reasoning. Illustrative calls include: real GDP growth averaging 1.3 %–2.1 % per year over 2025-30; a total fertility rate of 0.55–0.70 by 2030; and defence exports accounting for 4 %–7 % of total goods exports in 2030. Overall stability is judged to be deteriorating. Key drivers are the presidential lame-duck cycle that sets in every 24 months, chronic parliamentary obstruction of budgets and senior appointments, and a growing share of the electorate—estimated at 20-30 %—that views executive rule-by-decree as acceptable. A low-probability, high-impact "black-swan" shock is also modelled to test the robustness of the scenario set and to surface second-order consequences.

Scenario Landscape

Techno-Export Stagnation (45% probability)

Global AI/datacentre capex keeps memory & EV battery demand high; domestic R&D stays >4 % GDP. Workforce decline offsets productivity gains; GDP growth averages 1.6 % 2025-30. Defence exports (tanks, launchers, reactors) rise from 3 % to 5 % of total exports. No major political reform; president survives impeachment but governs by decree on budgets. Public debt climbs from 58 % to 68 % GDP.

Key Drivers

- AI capex cycle
- defence supply-chain diversification
- geriatric labour-force participation 42 %

Democratic Erosion & Populist Reset (35% probability)

A 2027 corruption scandal collapses approval to 18 %; mass protests force early election. New populist coalition (anti-inequality + law-and-order) wins 2028 snap poll, pledging nuclear weapons acquisition and conscription cut to 12 months. Indigenous low-yield nuclear test 2029; U.S. alliance survives but OPCON transfer delayed indefinitely. Constitutional reform keeps presidentialism but adds recall mechanism; press freedom index drops 15 places to 65/180.

Key Drivers

- Authoritarian-alternative support >30 %
- youth unemployment >9 %
- nuclear-weapons super-majority 70 %

Grey Swan Border Clash (20% probability)

Northern neighbour shells western islands Apr 2027 after U.S.-ROK live-fire drill. 180 civilian & military deaths; capital-region evacuated for 36 h. KOSPI -22 %, Won -14 %; central bank intervenes \$ 45 bn. Parliament authorises limited counter-strike; no regime change. Defence budget jumps from 2.6 % to 3.8 % GDP within 24 months; conscription extended back to 24 months. Fertility dips further to 0.55; 2030 GDP level -3 % vs baseline.

Key Drivers

- Northern artillery escalation
- Seoul metro population density
- automated retaliation protocols

Key Quantitative Forecasts

Indicator	Range	Confidence
Real GDP Growth (annual avg 2025-30)	1.3 % – 2.1 %	High
Total Fertility Rate (2030)	0.55 – 0.70	High
Defence Exports (share of total exports, 2030)	4 % – 7 %	Medium
Public Debt (% GDP, 2030)	63 % – 75 %	High
Support for Same-Sex Marriage (18-29 cohort, 2030)	58 % – 68 %	Medium

Real GDP Growth (annual avg 2025-30) — Rationale

Labour input -0.9 %/yr drag offset +2.0 % TFP from semiconductors & AI; investment share stays 34 % GDP

Total Fertility Rate (2030) — Rationale

Even with expanded childcare subsidies, birth recovery stalls; clash scenario pushes lower bound

Defence Exports (share of total exports, 2030) — Rationale

NATO+ demand for K2 tanks, KF-21 jets, small modular reactors; Won depreciation helps price competitiveness

Public Debt (% GDP, 2030) — Rationale

Age-related health spending +2.2 % GDP; defence shock adds 1.4 %; pension fund begins net asset decumulation 2028

Support for Same-Sex Marriage (18-29 cohort, 2030) — Rationale

Generational replacement + court incrementalism; backlash caps ceiling below 70 %

Stability & Risk Outlook

Trend: deteriorating

Risk Factors

- Presidential lame-duck cycles every 24 months
- Parliamentary blockade of budgets & appointments
- Rising tolerance for executive rule-by-decree (20-30 % electorate)
- Northern neighbour food-price shock & refugee flows 2028-29
- U.S. alliance cost-sharing disputes (>\$ 12 bn/yr demand)

Black Swan Stress Test

Event: Uncontrolled conventional escalation after Northern tactical nuclear use (0.3 kt demonstration shot over Yellow Sea)

Impact: Seoul metro evacuation 12 h; global memory-chip supply freeze (45 % of global capacity offline 6 weeks); KOSPI -45 %, Won -35 %; 2029 GDP -8 % vs baseline; 1.2 m outward migration 2029-30

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