**US**

# Geopolitical Forecast Report
United States — 2025-2030

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RESEARCH DOCUMENT — FOR ANALYTICAL USE

# Executive Summary

By 2030, the United States will still be the world's largest economy and pre-eminent military power, yet the fiscal, demographic, and institutional pressures building inside the country will have become more acute. Interest on the federal debt is projected to absorb an ever-larger share of budget outlays, steadily crowding out discretionary spending on everything from infrastructure to basic research. At the same time, the labour force will be shrinking, knocking almost a full percentage point off trend GDP growth, which is expected to settle around 1 % per annum. Political polarisation is likely to remain entrenched, keeping legislative responses incremental and delaying systemic reforms. Against this backdrop, the most probable scenario is a protracted "muddling through." Formal default is not anticipated, and outright institutional collapse remains unlikely, but living standards will diverge further as inequality widens, climate-related costs arrive in volatile bursts, and constitutional brinkmanship becomes a recurring feature of budget and debt-ceiling negotiations. The clearest tail risks to this baseline are a fiercely contested 2028 presidential election or a sudden disruption in Treasury markets; either event could push the country toward authoritarian consolidation or, conversely, trigger a sweeping constitutional reset.

# Forecast Analysis

This forecast was generated using historical data from 2000 to 2025, incorporating 47 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 produced on 4 January 2026 by synthesising evidence gathered from 2000-2025. The system draws on 47 sources spanning political, economic, social and security domains, converting that evidence into a small set of competing scenarios and measurable quantitative calls. The executive summary is anchored on the most likely scenario, labelled "Muddle-Through Stagnation" (55 % probability), with alternative scenarios capturing upside and downside paths. Quantitative forecasts are expressed as ranges with an explicit confidence label and are justified by scenario-conditioned rationales. For example, real GDP growth is projected to average 1.0 %–1.8 % annually from 2025-2030, federal gross debt is expected to reach 125 %–140 % of GDP by 2030, and the 10-year Treasury yield is forecast to stand at 4.2 %–6.0 % by 2030. Stability is assessed as deteriorating, driven primarily by a debt-service spiral, a contested 2028 election and climate-driven migration. A low-probability, high-impact tail risk ("black swan") is included to stress-test the scenario set and make second-order consequences explicit.

## Scenario Landscape

### Muddle-Through Stagnation (55% probability)

Debt ceiling hikes, last-minute continuing resolutions, and Fed yield-curve control keep payments flowing. Real GDP growth averages 1.2 %; debt/GDP plateaus near 135 %. Climate disasters cost 1.2 % GDP annually. Political violence stays stochastic but sub-lethal. The dollar's reserve share slips to 55 % by 2030 but no credible alternative emerges.

Key Drivers

• chronic fiscal standoffs

• Fed back-stop

• climate shocks

• demographic drag

• polarization without secession

### Technocratic Reset (25% probability)

A 2027 market sell-off (10-yr yield >6 %) forces a bipartisan panel that legislates a VAT, retirement-age hike, and defense caps. Debt/GDP stabilizes at 125 %. Growth rebounds to 2 % 2029-30 as AI diffusion lifts productivity 0.4 pp/yr. Social unrest peaks in 2028 then subsides.

Key Drivers

• bond-market vigilantes

• centrist coalition

• entitlement reform

• AI productivity wave

• post-crisis legitimacy

## Democratic Erosion (20% probability)

After a razor-thin 2028 election, a Conservative trifecta nullifies key swing-state slates. Mass protests meet paramilitary violence; 500-1 000 deaths. Executive emergency powers freeze federal prosecutions and expand partisan control of agencies. Capital flight and sanctions shave 3 % off GDP in 2029; per-capita income falls 4 %. Debt/GDP still rises to 140 % as revenues collapse.

Key Drivers

• contested election

• executive overreach

• political violence

• judicial capture

• external sanctions

## Key Quantitative Forecasts

| Indicator | Range | Confidence |
|---|---|---|
| Real GDP Growth (Annual Avg 2025-30) | 1.0 % – 1.8 % | Medium |
| Federal Gross Debt / GDP (2030) | 125 % – 140 % | High |
| 10-Year Treasury Yield (2030) | 4.2 % – 6.0 % | Medium |
| Median Real Household Income Change (2024-30) | • 1 % to +4 % cumulative | Low |
| Reserve Share of Global FX (USD, 2030) | 54 % – 60 % | Medium |

**Real GDP Growth (Annual Avg 2025-30) — Rationale**

Labor-force growth ~0.2 %, productivity 0.8-1.1 %; downside from debt overhang, upside from AI diffusion in Reset scenario.

**Federal Gross Debt / GDP (2030) — Rationale**

Mandatory spending plus higher interest (5 % avg rate) outpaces nominal GDP (4 %). Only Technocratic Reset keeps ratio ≤125 %.

**10-Year Treasury Yield (2030) — Rationale**

Risk premium rises with debt path; Fed QE caps upside in Muddle-Through; spike >6 % triggers Reset reforms.

**Median Real Household Income Change (2024-30) — Rationale**

Wage gains offset by rent & energy inflation; inequality widens top 10 % share to 75 % of wealth.

**Reserve Share of Global FX (USD, 2030) — Rationale**

Slow diversification into EUR, CNY, gold; no rapid dump due to network externalities.

## Stability & Risk Outlook

Trend: deteriorating

Risk Factors

• debt-service spiral

• contested 2028 election

• climate-driven migration

• AI labor displacement

• erosion of electoral legitimacy

## Black Swan Stress Test

Event: Successful cyber-attack on FedWire-Treasury auction system that freezes $ 2 trn in coupon settlements for >5 days, forcing an emergency G7 currency swap and a 3-week bank holiday.

Impact: Immediate 6 % GDP contraction, 12 % unemployment, 30 % equity drawdown; dollar reserve share drops 10 pp within 12 months; triggers either rapid fiscal consolidation or monetary monetization spiral.

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