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The Long, Slow Death of Global Development

by David Oks *and* Henry Williams

The first two decades of the twenty-first century were a period of tremendous optimism about the trajectory of the poor world. If you spent those years as a news consumer in the rich world, it may have been difficult to tell: there were plenty of stories about crisis, decline, and the breakdown of social order. But for all the gloom, it seemed that the bulk of humanity—the 90 percent or so of humans who live outside anglophone North America, Europe, Japan, and a few wealthy outposts—was experiencing brisk and undeniable progress.

Scores of optimistic books and articles were commissioned to remind us that the world was, in the words of the website *Vox*, "getting much, much better"—and quite rapidly, too. Health outcomes were improving; mortality was declining, among both children and adults; literacy was spreading; and, most importantly of all, poverty, especially the $2.15-a-day "extreme poverty" metric promoted by the World Bank, was in speedy decline. Progress was steadily advancing. Bill Gates, the Harvard professor Steven Pinker, and the erstwhile *New York Times* columnist Nicholas Kristof were all notable votaries of this outlook at one point or another; Kristof made a late December custom of declaring the year that had just passed to have been "the best year ever."

Yes, there were problems—in 2017, Kristof cited "warfare in Yemen and Syria, atrocities in Myanmar and a president who may be going cuckoo"—and material suffering was still the condition of the overwhelming mass of humanity. But things really were, as Paul McCartney once said, "getting so much better all the time." The implication of all this

was clear: criticize the structure of the global economy all you want, but clearly something was working; the right lines, after all, were going up.

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And yet, early in the third decade of the twenty-first century, that once-hegemonic view of global development seems to have lost its coherence. The Covid pandemic, supply chain emergencies, agricultural shortages, the war in Ukraine, the emergence of global inflation and energy shocks, monetary tightening in the West, the specter of global recession—all of these have scrambled the optimism of the 2000s and 2010s. Fiscal insolvency has become a live possibility for countless poor governments, and many years' worth of gains in income have been erased. The World Bank announced in October 2022 that progress in reducing extreme poverty had ground to a halt, with the prognosis for the next few years uncertain. The events of the last two years, the Bank's president said, had conspired to "throw development into crisis."

But even in its heyday, the triumphal narrative around global development already had a rather uncertain relationship with reality. Many of its flaws are rooted in statistical issues: troubled calculations around inflation and purchasing power parity (especially when it came to urban-rural price differentials), which served to significantly undercount the ranks of the global poor. Other problems are more subjective; many have criticized the $2.15-a-day threshold (at 2017 purchasing-power-adjusted prices)—designed to reflect who would be poorest in the most impoverished countries, like Mali or Afghanistan, and not in even slightly richer countries like Angola or Pakistan—for being far too low to provide for sustenance or normal human health outcomes, and thus to measure anything meaningful about real graduation from poverty.

And certainly these statistical issues, well discussed by others, are significant. But our intention here is to offer a more ambitious critique of global development. We do not seek to simply make a pessimist's case for why economic development has not occurred, or why various statistical flaws mean that we should disregard undeniable progress in reducing global poverty. Rather, we aim to show why the prognosis for the poor world is much worse than the standard picture—preoccupied with a purely quantitative account, however rigorous, and ignorant of more geographic, historical, and political-economic approaches—has allowed; to explicate the structural changes that have undergirded the perverse trajectory of global development; and to outline a more realistic outlook, married to a new framework, for a return to real development.[1]

The crux of the problem is this: despite attempts to find alternative models of economic development, there is no widely replicable strategy to develop a country—simply put, to turn it from poor to rich—that does not involve an economy becoming highly

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industrialized. But in recent decades, the growth of manufacturing sectors, and thus of economic development more broadly, has been overwhelmingly concentrated in East Asia, particularly in China. Across the bulk of the poor world—here we have in mind Latin America, South Asia, the Middle East, and sub-Saharan Africa—economies have been experiencing a more disturbing trajectory: simultaneous deagrarianization and deindustrialization, especially in the years after 1980.

The result is that industrialization, development, and massive income growth in East Asia has statistically "compensated" for stagnation almost everywhere else—with East Asian industrialization partly responsible for the loss of other countries' manufacturing bases. This has been the case even as incomes have risen in most of the poor world, mainly on account of the 2000–15 commodity supercycle driven in part by the explosive growth in demand from the Chinese market—which, ironically, helped lock emerging markets into low-tech, undiversified export profiles. Asian success, in short, has obscured a bleaker picture in the rest of the world.

Most emerging markets have not found an engine of durable growth comparable to manufacturing—most have indeed grown over the last few decades, but dependence on services and commodities exports has not made them rich. Thus most "developing" countries—we are skeptical of that euphemistic label—are in a worse structural position than they were a few decades ago: less economically complex and more socially unstable, with their developmental coalitions, if they ever existed, badly frayed. For all the intermittent hype around "rising India" or "rising Africa," systemic dynamics—deindustrialization, ecological disruption, demographic headwinds—will pose severe challenges to economic development over the coming decades. New waves of industrialization and meaningful development are unlikely in these parts of the world. From the perspective of poverty statistics, Africa will assume particular importance: by far the continent with the worst economic performance over the last several decades, it is there that the most significant population growth will occur over the next century. The result, pending dramatic change, is a world in which the progress made against poverty over the last forty years will slow, stagnate, or even reverse.

The Manufacturing Path

Our relatively pessimistic assessment of the progress of emerging markets is shaped by a judgment about the fundamental role that manufacturing plays in economic development. The transition from agrarian stasis to industrial growth has been the central feature of many radically divergent theories of development: Marxian schemata of societal progress saw manufacturing as a necessary precondition for the rise of an

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industrial proletariat (industrialization, per Marx, "draws all, even the most barbarian, nations into civilization"). The American-sponsored "modernization theory" of Walt Rostow, laid out in his *Stages of Economic Growth*, valorized industrial "takeoff" as the make-or-break moment within a multistage account of economic development (ironically so for a book subtitled *A Non-Communist Manifesto*). Nicholas Kaldor and Raúl Prebisch, whose work enjoyed great popularity in developing countries during the middle decades of the last century, also emphasized industrially oriented national developmentalism.[2]

What is so special about manufacturing? Kaldor, and later the development economist Dani Rodrik, offered sets of "stylized facts" sketching out the manufacturing sector's growth-pulling qualities. Three are of particular note. First, manufacturing has productivity dynamics that other sectors do not—unlike agriculture or services, formal manufacturing firms exhibit increasing returns on each marginal unit of labor and an "unconditional" convergence in labor productivity between rich and poor nations. Second, while the expansion of services is self-limiting and ecological factors impose natural restraints on the expansion of primary commodities, the tradability of manufactured goods means that there are no such automatic limits to manufacturing growth. Third, manufacturing is able to absorb large amounts of labor, including relatively unskilled labor, into high-productivity work—something that services and agriculture, or other high-productivity sectors like finance and mining, have never been able to do.[3]

An even greater testament to the centrality of industrialization to development can be found in the historical experiences of countries that have successfully developed. Very few economies have gone from poor to rich without achieving a large manufacturing share as a percentage of both employment and GDP. About 95 percent of economies that have achieved high-income status passed through such a period of high manufacturing concentration: as one study of high-income countries' historical trajectories found, "achieving a manufacturing employment share of 18–20 [percent] has been almost sufficient and absolutely necessary . . . for achieving high-income status."[4] Justin Yifu Lin, the World Bank's former chief economist, offers a decisive verdict: "except for a few oil-exporting countries, no countries have ever gotten rich without industrialization first." And those oil-exporting countries, like Norway or Saudi Arabia and other Persian Gulf autocracies, were quite exceptional; the resource path to development offers far more failures (Iraq, Mozambique, the Congo) than Norwegian-style triumphs, or even middling success stories like Gabon or Botswana. For most of the world, there is no real path to development that does not run through manufacturing.

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Appropriately, then, it was the part of the world that has seen the most industrialization in the last fifty years, East Asia, that has also contributed by far the most to global economic development. For all the optimism around "global" poverty reduction in the twenty-first century, in fact, it is striking how much progress has come from a single powerhouse—the People's Republic of China. In the decades since 1980, it has been there, and in smaller East Asian economies like South Korea, Taiwan, Singapore, and Hong Kong, that the lion's share of actual economic development and poverty reduction has occurred.

That China, of all places, was so central to this era of global economic development would have seemed strange to someone looking ahead from the year 1970. Compared to India, Brazil, Indonesia, or Russia, China was an unlikely choice to join the ranks of developed, complex, technologically advanced economies. Its political leadership was bombastically self-destructive: its Icarian attempt at rapid rural industrialization had produced a famine that killed tens of millions, perhaps the single most calamitous anthropogenic catastrophe of the postwar era; its fanatical project of ideological purification resulted in a yearslong suspension of national life, traumatizing huge swathes of the population and marginalizing the most pragmatic and competent elites in favor of radical Maoists. To be sure, China was far healthier, more equal, and more educated in 1980 than it had been in 1950, and because of Maoist policies quite advanced for its level of income: Mao had enshrined de jure equal rights for women while eliminating traditional rentiers like the hated rural landlord class, and in 1980 China had a life expectancy equal to that of Mexico, where per capita GDP was about five times higher. But the country was, by any measure, a remarkably poor place.[5] Per capita GDP was among the lowest in the world, on par with Cameroon, and lower than Haiti, Lesotho, and Zimbabwe.[6] Though China was the most populous nation on earth, its entire economy was smaller than those of Spain or Australia; the vast majority of its population qualified as "extremely poor" under World Bank metrics.[7]

From such humble beginnings, China has, since the beginning of Deng Xiaoping's premiership, recorded the most significant period of economic growth in human history, with a manufacturing miracle whose scale dwarfs the industrializations seen in Europe or North America. So sudden and significant was this growth miracle that per capita GDP grew sixfold between 1981 and 2018, vaulting it solidly into middle-income status; only Mongolia and Equatorial Guinea, both entirely dependent on resource extraction, reported larger increases in per capita GDP during the period. The most impressive period of expansion, occurring roughly between 1984 and 2007, was, as Albert O.

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Hirschman would predict, remarkably unbalanced: almost everyone grew wealthier, but an extraordinary amount accrued to the very top.[8] Yet as growth slowed in the 2010s, the Chinese state was able to engineer a campaign of redistribution and poverty reduction that saw inequality fall, gains shared more equally, and "extreme poverty" practically disappear. In 1981, 99.93 percent of the Chinese population earned less than five dollars a day; by 2008, about 55 percent; by 2019, less than 12 percent. During those four decades, the proportion earning under the extreme poverty threshold of $2.15 a day decreased from 92 percent to just 0.14 percent.[9]

To say that China's contributions to global poverty reduction statistics are outsized would be an understatement. China's gains have contributed about 45 percent of the total reduction in the "extreme poverty" metric since 1981. But at higher levels of income—ones more representative of durable entrance into actual middle-income status—Chinese contributions are even stronger. At $5 a day, China is responsible for nearly 60 percent of total gains. At $10 a day, several dollars above the threshold of poverty for upper-middle-income countries—but still translating to an annual income of just $3,650—China is responsible for a full 70 percent of global poverty reduction since 1981.[10]

This growth has been far more impressive than any other country on earth, even those who have received praise for their progress. Median income statistics illustrate how impressive Chinese poverty reduction has been. In 1981, median income for China's rural population was just $27 a month, and $54 a month in the cities. By 2019, median monthly income had increased to $243 for rural Chinese and $400 for urban Chinese—respective increases of ninefold and sevenfold. In other "developing" countries, the gains were far more meager. Consider India: between 1983 and 2019, rural median income doubled, and urban median income grew 80 percent—a positive trend, but at rates far outpaced by China. Bangladeshi median income, which is not disaggregated on rural-urban lines, grew just 45 percent from 1983 to 2016; Peruvian median income grew by a paltry 15 percent from 1985 to 2019, before falling below its 1985 levels during the coronavirus pandemic. In some countries, like Kenya, Argentina, or the Ivory Coast, median income has declined since World Bank measurement began.[11] The positive outliers for truly strong growth in median incomes can be found in Southeast Asia, especially Vietnam and Indonesia. Vietnam's growth is particularly strong thanks to its own manufacturing miracle, and comes close to that in China. But even these cases are weaker than what was seen in China.

Income growth in the poor world outside of China appears weaker still when one considers how much was the result of the 2000–15 commodities boom—and thus,

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indirectly, of Chinese growth. Hot commodities markets in those years allowed Latin American, Southeast Asian, and some African nations to increase incomes and reduce poverty. But those income gains, dependent as they were on the knock-on effects of Chinese growth, masked a more disturbing trend: the structural weakening of these countries' development potential. Incomes are higher and poverty is lower today than in the past. But the type of development takeoff seen in China is more out of reach for poor countries now than it was a few decades ago.

The Golden Age

Why, then, have the structural economic positions of most of the world's nations worsened over the last few decades? To explain, we must leave the World Bank statistics behind, enlightening as they may be, and embrace a more holistic approach—a look at the economic history of the non–East Asian poor world, and the changes in the world economy that have altered these regions' postwar trajectories for the worse.

Ironically enough, it was the period lasting roughly from 1950 to 1980—when measures of poverty, hunger, and all varieties of misery were far higher than they are today—that stands in retrospect as a golden age for the cause of global economic development. While the capitalist West experienced its *trente glorieuses* and the Soviet bloc enjoyed relative peace and consumer surplus, the global economy underwent an economic boom of an intensity and duration never seen before or after. For the countries of the poor world, this meant three decades of vigorous growth, with rapid industrial expansion underwritten by an upswing in the commodities supercycle. An international financial regime built on the Bretton Woods model placed limits on capital mobility, and allowed a degree of financial stability that helped emerging markets pursue aggressive economic development strategies without the boom-bust dynamics that would later become so common. It is now hard to recall the optimism of that period: as Rodrik has written, in a large number of developing countries—including Brazil, Ecuador, Mexico, Iran, Pakistan, Tunisia, the Ivory Coast, and Kenya—average economic growth exceeded 2.5 percent per capita per year during the 1945–75 period, translating to a doubling of incomes roughly every three decades.[12] An optimistic, state-centered national developmentalism was in vogue, represented by charismatic figures like Indonesia's Sukarno, Egypt's Nasser, Ghana's Nkrumah, and India's Nehru. Combining Western aesthetics and outlooks with Third World aspirations, they sought not just to match the West, but in many ways to exceed it.

For the relatively richer economies of the poor world, like Brazil or Mexico, growth was so strong as to place them on trajectories of rapid convergence with Europe and the

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United States. Had Brazil's per capita GDP continued to grow at its 1970–75 average rate for twenty-five more years, it would have been richer than France and the United Kingdom by the year 2000.[13] With the ineluctable march of progress and growth so evident, everything seemed to be going according to plan. It was these strong performances that allowed the modernization theorist Rostow to predict, as he did to John F. Kennedy in 1961, that nations like Argentina, Brazil, Colombia, Venezuela, India, the Philippines, Taiwan, Turkey, and Greece would "attain self-sustaining growth by 1970," along with "possibly" Egypt, Iran, Iraq, and Pakistan.[14] Almost anything seemed possible.

Even the poorer nations of the Third World were remarkably ambitious during this developmental golden age. Places like the Democratic Republic of the Congo (then Zaire), Libya, and Zambia were growing rapidly thanks to demand for their natural resources, and seemed intent on using the proceeds to support speedy catch-up modernization, symbolized by novel infrastructure like Mobutu's TRICO nuclear reactor or Gaddafi's "Great Man-Made River." The Ivory Coast, of all places, was considered a poster child for economic development, the namesake of the now-forgotten "Ivorian miracle." High prices for its agricultural commodities, like coffee, cotton, and cocoa, powered strong economic growth—an average of 9 percent per year in the 1960s and 7 percent per year between 1970 and 1975—which, as one study noted, "earned for the Ivory Coast the prestige of a 'development miracle' along with Brazil, South Korea, and even Indonesia."[15] So optimistic were Western observers of this "development miracle" that Lyndon Johnson declared at a White House function honoring the Ivorian president Félix Houphouët-Boigny in 1967: "To those that tell us that the developing countries are really doomed, to those Cassandras, Mr. President, we have a very simple answer. We say to them: look at the Ivory Coast."[16]

After Us, the Deluge

Readers of the *Oresteia* might remember that it was Cassandra, and not her doubters, whom fate ultimately proved correct. Indeed, this period of tremendous development had relied on a system of managing global economic flows that, by the 1970s, was coming under serious strain. First came the effective death of Bretton Woods in the 1971–72 period; then the energy crises of 1973 and 1979, which contributed to the "Great Inflation" of the 1970s even as their effects in poor countries were uneven (certainly petroleum exporters were not badly hurt); then the long economic doldrums experienced in the West as the decade wore on—finally punctuated by the Federal Reserve's interest-rate hikes of 1979–81, the so-called Volcker shock.

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In the rich world, the post-Volcker moment meant lower inflation, severe recession, and a jump in unemployment, with a concomitant decline in commodity prices. Between 1979 and 1982, the average price for lumber fell by 40 percent, copper by 25 percent, coffee by more than 20 percent, and sugar by about 10 percent.[17] But the pain in the poor world was arguably much greater. The booming commodity cycle met its chaotic death, and dozens of economies screeched to a halt; expansionary fiscal programs that had been built on the assumption of strong growth soon found themselves in crisis, while higher borrowing rates significantly increased the cost of servicing dollar-denominated debts. Brazil is paradigmatic: while from 1960 to 1980 real per capita GDP increased by more than 140 percent, from 1980 to 2000 it grew by less than 20 percent.[18] Similar decelerations, recessions, or depressions occurred all over the poor world, leaving lasting damage. Guatemala's per capita GDP in 2018 was only 20 percent higher than its 1978 level; the Ivory Coast's only 16 percent higher. Some places never recovered. In the Democratic Republic of the Congo, Haiti, Niger, Liberia, Sierra Leone, and the Central African Republic, per capita output was significantly lower in 2018 than it had been forty years earlier.

The twenty years that the Volcker shock inaugurated can be summarized as two lost decades for development, with incessant crisis replacing stable growth. Across the poor world, deep recessions led to fiscal insolvency, social and political collapse, and massive bloodletting. In the Western Hemisphere, the events of the period include the Latin American *década perdida* ("lost decade"), ushering in prolonged stagnation in Mexico, Brazil, and Argentina; the severe economic crisis in Peru, contributing to the rise of the Shining Path insurgency; the civil wars in Nicaragua, Guatemala, and El Salvador; and the escalating internal conflict in Colombia between drug cartels, leftist insurgents, and the Colombian state. Meanwhile, postcommunist states like Russia were, with Western guidance, subjected to a traumatic "shock therapy," immiserating huge swathes of people and destroying much of the Soviet industrial legacy while enabling a flood of cheap weapons into the poor world, further exacerbating conflicts. Less developed postcommunist countries like Mongolia experienced what Erik Reinert termed economic "primitivization": many industries ceased operation, and industrial workers returned to traditional activities like herding. In the Great Lakes region of Africa, a metastasizing martial saga unfolded, whose subplots include the Ugandan Bush War, the genocide in Rwanda, the collapse of Mobutu's state in the Congo, and the subsequent "Great War of Africa." A simultaneous crisis occurred in West Africa, revolving around wars in Liberia and Sierra Leone, while AIDS arrived in southern Africa, leading to huge decreases in life expectancy in Botswana, Eswatini, Lesotho, Malawi, South Africa, Zambia, and Zimbabwe. Bloody conflicts also arose in newly decolonized states like Angola and Mozambique. Few regions were spared from sanguinary wars, like that between Iran and

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Iraq or the Soviet Union and Afghanistan, as well as the sharpening of interreligious communalist violence in India and Sri Lanka.[19] Latin America, the Middle East, and much of Asia suffered greatly. But it was Africa that was hit worst by these rolling series of crises, with a death toll stretching well into the millions. Giovanni Arrighi dubbed it "the African Tragedy."[20]

Most poor states emerged from those two decades severely weakened. The bold national developmentalism of earlier decades, whether anticolonial, as with Sukarno, or Western-aligned, as with Houphouët-Boigny, had been discredited by economic contraction and declining living standards. Expansionary fiscal regimes were withdrawn, and internal conflicts moved the foci of government activity elsewhere. The "structural adjustment" programs that the IMF required for debt relief, or which were advocated independently by enthusiastic liberalizers like Hernando de Soto, further diminished state capacity through privatizations, deregulation, and government layoffs. In desperation, many poor-world governments began to liberalize their capital accounts in order to spur foreign investment, increasing volatility and culminating in a series of financial crises—in Mexico in 1994, in various Asian economies in 1997, and in Russia in 1998. Yet all these "reforms," despite the support they received from Western economists or foreign acolytes like de Soto or Anatoly Chubais, did little to improve growth fundamentals. Instead, they gave the poor world the hollowed-out states with which they would enter the new century. Many public sectors had been so desiccated by the chaos that they were simply unable to manage the societies over which they presided; in the worst-hit places—like Somalia, where state collapse in the 1990s led to the return of customary law—what little remained can be termed, in the words of the Nigerien historian Rahmane Idrissa, "government by means of the aid industry," with exenterated states surrendering core governmental functions to the organs of the international humanitarian complex.[21]

Deindustrialization and Deagrarianization

However horrific these crises were, the central structural transformation of the 1980–2000 period would ultimately be of a deeper and more damaging nature: the unexpected arrival of deindustrialization in the poor world. The successive waves of deindustrialization that swept the world after the 1970s crashed most famously on Western shores, in the Rust Belt of the United States, in northern England and Scotland, and in northern France. But deindustrialization was a *global* phenomenon, touching nearly every economy on earth. In fact, after 1980, poor countries suffered a process of relative deindustrialization just as intense as that experienced in more advanced economies—and often more so—due to the same primary cause: the emergence of the Chinese industrial behemoth, which displaced Mexican and Iranian workers as fiercely as

it did American or French ones.

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Deindustrialization thus swept across countries that had previously seemed to be rapidly scaling the development ladder. Brazil reached its peak level of manufacturing employment in 1986, India in 2002, Colombia in 1970, Mexico in 1980, Peru in 1971, Indonesia in 2001, Ghana in 1978, and Nigeria in 1982—all at rates of manufacturing employment and per capita GDP significantly below those of Western nations in their peak years of manufacturing.[22] (Manufacturing employment is typically a more useful measure of industrialization than output.[23]) Latin American countries were hit most severely, with nearly no floor for industrial decline, while in many Asian countries the situation was more akin to a long plateau. Many African countries lost their manufacturing bases at such a low level of industrialization that they can hardly be said to have industrialized at all.[24]

Rodrik, the economist, dubs this phenomenon "premature deindustrialization." Its occurrence was totally contrary to what the economists of the golden age of development, and not just the more hubristic ones like Rostow, had predicted: it was as though fruit was rotting before it even ripened. In the Western countries, deindustrialization could at least be slotted into a convenient narrative of evolution into affluence—a necessary part of transitioning to a higher stage of development, in which skilled, cosmopolitan "knowledge workers" would populate a comfortable "mature economy." But no such narrative could be furnished for places like Brazil or India, where deindustrialization coexisted with a still overwhelming degree of backwardness and poverty. As it left the poor world, industrialization's historical task was still undone.

At the same time, another structural change began to make itself felt: an accelerating process of deagrarianization in the years after 1980. The rural share of populations had been declining everywhere since the end of the Second World War, due in large part to increases in agricultural productivity owing to various agrarian reform programs—land reform in some countries, the implementation of capital-intensive Green Revolution techniques in others.[25] Still, until late in the twentieth century, farming remained the occupation of most of the world's population, with especially large populations in poor countries: in 1970, 80 percent of Indians and 83 percent of Indonesians lived in rural areas. But a series of transformations beginning in the 1970s would make life increasingly difficult for the smallholders and farmers of the poor world. The increased capital intensity of post–Green Revolution farming—demanding inputs like artificial fertilizer that many could not afford—put particular pressure on many small-time agriculturalists. Around the same time, increased exposure of national agricultural economies to global markets led to a rewiring of poor-world agriculture toward specialization, with self-

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sufficient national agricultures challenged by a new emphasis on the comparative advantage in cash crops. The withdrawal of state agricultural subsidies and tariffs during the crises of the 1980–2000 period added further strain, as did desertification and soil degradation due to poor land management in places like Southeast Africa and Haiti.[26] These trends placed ever-greater pressure on small farmers. Many were forced to go into insurmountable debt, leading to an epidemic of suicide among Indian farmers; others had to take seasonal jobs in cities to supplement their incomes from farming. The ultimate result was an accelerated process of deagrarianization and mass migration into urban centers.[27] The speed of this urbanization is remarkable. Between 1980 and 2010, the urban population of East Asia and the Pacific increased by 24 percent (720 million people), South Asia by 9 percent (300 million), Latin America and the Caribbean by 14 percent (230 million), the Middle East and North Africa by 13 percent (150 million), and sub-Saharan Africa by 14 percent (225 million). China was the single biggest contributor to global deagrarianization, but about 75 percent of global urbanization during the period took place elsewhere.[28]

With rural migrants flooding in as national populations boomed, the cities of the poor world grew massively during the post-1970 period. Lagos grew from 1.4 million in 1970 to 13.9 million in 2022; Dhaka from 1.4 million to 22.5 million; São Paulo from 7.6 million to 22.4 million. Even minor cities grew rapidly: Uíge, a provincial capital in northwestern Angola, grew from 3,200 people in 1950 to nearly 600,000 seventy-two years later; Uyo, in southern Nigeria, grew from 5,800 people to more than 1.2 million.[29] Almost all of this growth, however, was concentrated in ever-growing slum belts around urban peripheries, housing vast numbers of impoverished people: Mumbai's Dharavi, which hosts a population the size of Stockholm's in one square mile; Cairo's Manshiet Nasr; the favelas of Brazil; the notorious Cité Soleil in Port-au-Prince—these are only a few outposts of the "planet of slums" that the late Mike Davis bleakly diagnosed as a colossal "triage of humanity" in 2005.[30]

Simultaneous deagrarianization and deindustrialization left a void in poor-world economies. The "response"—never planned by states, which found themselves increasingly unable to control what was going on—was the creation of economies trapped between commodity-export dependence on the one side and low-skill service work on the other.

With industry and agriculture both in relative decline, many postindustrial economies reverted into raw commodity exports, especially after global commodity demand began to pick up again in the mid-1990s with the Chinese takeoff. Brazil is, as usual, illustrative: as the country deindustrialized, higher-end products like vehicle parts, machinery, and

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electronics took diminished roles in the country's export portfolio, and were gradually replaced by a surging trade in iron and oil. While in 1995 iron ore constituted 3.8 percent of Brazilian exports and petroleum crude just 0.1 percent, by 2020 they constituted 10.8 percent and 8.1 percent, respectively; industrial machinery exports declined from 7.1 percent to 3 percent.[31] Oil rents rose from 0.1 percent of GDP in 1970 to 2.4 percent by 2008; mineral rents contributed another 1.9 percent, up from 0.5 percent.[32] This resulted in a speedy decomplexification of the Brazilian economy, with extractive rentierism becoming increasingly central. In the year 2000, Brazil was assessed as the twenty-sixth most economically complex nation in the world, near Poland and Mexico; twenty years later, it had fallen to sixtieth—lower than Kyrgyzstan and North Macedonia.[33] The same process of decomplexification and export reprimarization occurred in other prematurely deindustrializing economies, like Ukraine, Ecuador, Argentina, Mongolia, and Kazakhstan.

In boom periods, like the 2000–15 commodities cycle, this extractive model could prove hugely lucrative. Because of Chinese growth, resource exporters in Latin America, like Ecuador, Bolivia, or Brazil, were able to support "Pink Tide" governments marrying resource extraction and economic redistribution, significantly reducing poverty and building out basic infrastructure; Russians, meanwhile, enjoyed several years of relative prosperity due to the country's booming natural resource sector, with life expectancy finally exceeding its 1988 level in 2011. In less functional regimes, like Nigeria or Angola, revenue from resource exports was absorbed almost entirely by corrupt rentier elites—such that about a fifth of Nigeria's daily OPEC quota of 1.8 million barrels is stolen every day at various stages of production—and siphoned out of the country.[34] At its most extreme, this situation of endemic capital flight results in spectacles as grotesque as that seen in Portugal in the 2010s, when the elites of Angola's ruling party—the ostensibly socialist "Popular Movement for the Liberation of Angola," famous for its role in winning independence from Portugal—began buying up luxury Lisbon real estate to launder embezzled funds.[35]

But when the commodity cycle turned—as it did in 2014–15, with Chinese growth slowing and oil prices tumbling as American fracking surged—the extractive model proved its fragility, with economic crises leading to a wave of global political instability. The Pink Tide era in Latin America came to a chaotic end, with extractive-redistributive regimes being replaced in Argentina, Brazil, and Ecuador while being deeply challenged in Venezuela; in poorer commodity exporters, like Iraq or Nigeria, severe budget crises crimped governments' abilities to battle destructive Islamist insurgencies. Strategies based on commodity extraction had been able to boost incomes (or at least GDP figures) when there was strong global demand. But the 2014–16 crises of the developing

world, and the continued weakness of poverty reduction in the years after—such that the Brazilian poverty rate was higher in 2019 than it had been in 2014—proved that they were not durable ways to develop national economies.[36]

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Underemployed Masses

Of course, though they played outsized roles in their respective economies, companies like Petrobras, Gazprom, or Nigeria's NNPC Limited have never been able to absorb a significant chunk of their countries' labor forces. Commodities could never take the place of manufacturing in terms of absorbing large numbers of both low- and high-skilled workers at decent wages, especially less-skilled ones. Thus even during the commodities boom, simultaneous deindustrialization and deagrarianization—occurring in the context of massive population growth—produced a plethora of unoccupied laborers, concentrated in massive slum-cities like Karachi, Lima, Jakarta, Lagos, and Cairo.

Almost by default, this surplus labor was absorbed into a nebulous economic stratum which economists categorize, quite euphemistically, as part of the "service sector." In the public imagination, the standard archetypes of these service workers are the call-center workers and IT professionals of Bangalore or Manila. It is this variety of outsourced, globalized labor that led some economists to optimistically sketch a "services-led development" model for countries like India in the 1990s and 2000s.[37] But far more common than this relatively skilled labor pool is a different, more plebeian variety: the low-productivity work, overwhelmingly informal, casual, and irregular, that has come to define the social landscapes of poor-world cities. The Dutch sociologist Jan Breman, in his study of employment in southern Gujarat, calls the workers of this informal sector "wage hunters and gatherers": the unlicensed taxi drivers, roadside fruit peddlers, freelance porters, squeegee men and women, *bidi* rollers, beggars, rag pickers, clothing resellers, small-time scammers and thieves, bazaar porters, and general-purpose unskilled jobbers who constitute the majority of the populations of cities everywhere from Kabul to Kabinda to Managua.[38] These low-skill service workers are far more numerous than their high-skill, formalized counterparts: about 90 percent of the hundreds of millions of jobs created in India since its liberalization process began in 1991, for instance, have been in the "informal sector," not in the much-vaunted IT industry.[39]

Contrary to the boosterism sometimes attached to these "micro-entrepreneurs"—a tack pioneered by de Soto, in his celebrations of informal work as an "invisible revolution" against bureaucracy, and picked up after 2000 by the evangelists of microloans as a silver bullet for poverty—this informal work is effectively a dead end for surplus workers. The casual work ubiquitous in the poor world does not represent a cure to mass

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unemployment, but instead a mass *underemployment*: the line between a casually employed jobber and an unemployed person is a very thin one, even if statistics distinguish between the two. Poor-world economies are thus afflicted by a remarkable superfluity of labor, with too many workers and far too few good jobs to put them in. It is this abundance of cheap labor that leads to unproductive uses of that resource: it is what allows middle-class Pakistani families, for instance, to routinely afford several domestic servants, or what leads to the ubiquitous presence of the listless youth termed, in Arabic, *hayateen*—“the men who lean against walls.”[40] The desperation for formal employment is everywhere in these societies, leading to incredibly fierce competition even for entry-level positions: in 2015, the state of Uttar Pradesh in northern India put out a notice to fill 368 clerical jobs, and received 2.3 million applications.[41] Tales of the horrific job market in India, in particular, are legion: screenings for jobs with companies like Qatar Airways regularly attract thousands of applicants, who form huge throngs outside the interview center before being sent home en masse without having been seen.[42]

The means of subsistence for these informal workers are grim. With the development of financialized credit in many poor economies, debt has become a means of survival. In Brazil, the household debt-to-income ratio rose from 18 percent in 2004 to 60 percent by late 2021.[43] This “premature financialization” of poor-world economies often takes on a highly predatory character: pyramid schemes have enjoyed remarkable growth in African and Asian countries in recent years, with unemployed and underemployed youth a perfect target. One 2017 study found that 70 percent of Nigerian students had bought into at least one pyramid scheme.[44] The popularity of cryptocurrencies like Bitcoin and Ethereum in these countries is a product of the same dysfunction: early Bitcoin adoption in Africa, in fact, was driven by the pyramid scheme company MMM—which had first found large numbers of victims in Russia during the agonies of the 1990s.[45]

It is not just that this work is especially demeaning or unprofitable; much the same could be said about the sweatshop jobs that defined the early industrializations of China or South Korea. Rather, the service work that has come to define these nonindustrial or postindustrial poor societies offers little path for countries to become richer. Most service work offers none of the growth-pulling and productivity-enhancing features of industrialization. The “services-led development” model associated with India simply has not achieved the rapid takeoff dynamics seen in East Asian economies, even in leading cities like Hyderabad or Bangalore, where tech sectors have proven unable to absorb labor (especially less-skilled labor) at the scale of manufacturing and agriculture. The similar services-based model pursued by Rwanda—“leapfrogging” over manufacturing and straight to services, with grandiose promises to become, for instance, “Africa’s

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leading hub for artificial intelligence and digital technology"—has indeed resulted in better growth than in its East African neighbors, in no small part thanks to the benefits of authoritarian stability and sustained interest from aid donors, but it has shown no ability to turn the country—whose per capita GDP in 2021 was lower than those of Haiti or Vanuatu—into a meaningfully developed economy.[46] As one study of Rwanda's leapfrogging model concluded, "there is no automatic 'trickle-down' from 'modern' service growth."[47]

Jobber, Migrant, Soldier

Thrown off by agriculture and industry, never fully occupied by service work, the economic problem of superfluous labor soon becomes a social one. Unoccupied and discontented, *hayateen* are the ideal destabilizers of Third World societies. The link between "youth bulges," high youth unemployment, and social unrest has been studied for decades, and only those societies that have significantly reduced youth unemployment have managed to avoid it. At the problem's extreme, these discontented youth became foot soldiers for a variety of criminal or insurgent groups competing with the state for sovereignty: MS-13 in El Salvador or Honduras, the *narco* groups of Mexico or Colombia, G-9 and other gangs in Haiti, Islamist groups like Boko Haram or the Islamic State in the Muslim world. (The name of Somalia's al-Shabaab—"the youth"—is representative.) More mundanely, these unemployed and underemployed youth provide the manpower for criminal violence and urban rioting, from the *sozaboy* subcultures of northern Nigeria to South Africa's "Zuma riots" or the occasional spates of communalist slaughter in Indian cities. Other destabilizing factors, like the flood of high-caliber weaponry into poor countries after the collapse of the Soviet Union (and again after the fall of the Gaddafi's Libya in 2011), and the arrival of a novel informational modernity through cellphones and the internet, have only heightened the destabilizing potential of these new forces—especially when pitted against increasingly emaciated states, hardly able to govern their own territories.

But the main "release valve" for the worsening economic situations of poor countries has been migration to better shores. Much of the time, this migration is internal and seasonal—as with many rural Indians, increasingly unable to support themselves through agriculture alone, who periodically come to urban areas to work as informal laborers in the construction industry. But increasingly, especially as national prospects dimmed, migration took an international character. The period after 1980 in particular was an age of accelerating global migration, with populations moving in larger numbers than ever before. Between 1980 and 2000, international migrant numbers swelled by 83 percent (compared to 30 percent between 1960 and 1980), to a remarkable 172 million people.

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This acceleration did not stop after the year 2000: by 2015, the total number of international migrants had reached nearly 250 million.[48] While the most popular destinations for these economic migrants were, as expected, the wealthy European nations, the United States, and Russia, much of the migration has been into countries that are well-off relative only to their dysfunctional neighbors: thus the migration of Haitians to the Dominican Republic, Afghans to Iran, Burkinabés to the Ivory Coast, and Zimbabweans and Mozambicans to South Africa.

The "new migration" of the post-1980 period also meant a transformation of the places that migrants were leaving. As expatriate workers went abroad for higher wages, the remittances they sent back home became lifelines for entire economies. In 1976, El Salvador received about 0.5 percent of its GDP from remittance flows; by 2020, that number had grown to 24.1 percent, overwhelmingly from the large Salvadoran diaspora in the United States. The same process occurred in southern Indian states like Kerala—by most measures of health and wellness, India's most advanced state—whose economic model now depends largely on exporting its young men to indentured servitude in the Persian Gulf. (This population transfer means that the Gulf monarchies, like Kuwait, Bahrain, and Qatar, have the most heavily male populations in the world, while Kerala is the only large state in India with more women than men.) Other countries—including the Philippines, Nepal, Uzbekistan, Guatemala, Jamaica, and Kosovo—have also seen remittances from abroad constitute large and growing shares of their economies.[49]

Better Late Than Never?

The countries of the poor world thus find themselves today in a situation markedly different from those of successful late-industrializers of the past. The global economic situation has changed: the classic "flying geese" model of industrialization, which posits that manufacturing will spread to any labor-abundant economy where goods can be made more cheaply—implying an international "queue" for industrialization—may no longer hold. As Rodrik and others have pointed out, each wave of industrialization has been weaker than the last: possible factors include heightened global competition, with contemporary countries having less control over their home markets than did successful industrializers, from America in the nineteenth century to Japan in the 1950s or China in the 1990s; global shifts in demand, linked to the secular decline in global growth, wealth inequality, and demographic changes in rich-world countries leading to a smaller consumer demand impulse; and, perhaps most importantly, the decline of manufacturing labor intensity due to labor-saving automations, which may accelerate in coming years if entrepreneurs are successful in their pursuit of "sewbots" and other machines.

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But poor societies today are also quite different from previous late industrializers. South Korea in 1960 or China in 1980 were largely agrarian societies, with vast peasantries ("full of potential energy, waiting to be released," as Perry Anderson has written) under uncontested rule by flawed but coherent coalitions of developmental elites. Their initial success was a product of high state capacity even at low levels of income, itself the product of a variety of factors: these countries enjoyed state autonomy from rentier interests, owing to the displacement of rural landlords, as well as strong state monopolies on violence, founded on durable social fabrics; national elites could coordinate effectively between state and enterprise, able not just to subsidize firms but to discipline them as well; their workforces were relatively skilled and healthy, due to successful education and public health policies, and included an abundance of cheap workers who could flood into manufacturing. That the East Asian industrializers were able to sustain this success even as conditions changed, with the tactics of their industrial policies shifting—a change not seen in Latin America when import-substitution began to falter—reflects highly pragmatic and strategic developmental coalitions.

Can these conditions be replicated in the poor world today? Ultimately this is a question not just of economics, but of political economy: whether countries can replicate the elite coalitions seen in cases of rapid movement into high-income status—coalitions that can negotiate the sort of intertemporal bargains needed to make necessary investments, and thus sacrifices, for durable economic development.

In the relative bright spots of the global development picture—Southeast Asian economies like Vietnam, Malaysia, Thailand, Indonesia, perhaps Bangladesh with its emergence as a garment exporter par excellence, and possibly even an unexpected place like Uzbekistan with its reformist pivot of recent years—such a leap either is possible or, as in Vietnam, has already been partly accomplished. Vietnam in particular is worth studying as a successful example of transition to middle-income status with a sophisticated manufacturing base, as much as China or Poland: it has exhibited extremely strong manufacturing-led growth, nearly matching the Chinese miracle, under a developmental regime that has overseen income gains as significant as those in China and with less corruption and gross inequality than was witnessed in the latter's Jiang Zemin and Hu Jintao years. In other hopeful economies, the picture is positive but more mixed. Bangladesh has been remarkably successful in exporting ready-made garments, but its manufacturing remains dominated by small, informal firms—where unconditional productivity convergence usually does *not* apply—which was not the case in China or South Korea.[50] Meanwhile, diversification into higher-value-added goods has proven elusive. In 2019, just 2 percent of Bangladesh's manufactured exports were classified as medium- or high-tech, compared to 28 percent in China in 1990 or 21 percent for

Vietnam in 2000.[51]

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The challenge, for these relative success stories, or potential future ones like Bangladesh, is not necessarily impoverishment, but the middle-income trap associated with once-thriving economies like Argentina or Turkey. Malaysia, Thailand, and Indonesia in particular are all vulnerable to it: the 1997 Asian financial crisis knocked them off course after being roughly on par with Chinese growth, and they have experienced premature deindustrialization of varying degrees of intensity. Escaping the trap will require a change of approach similar to that shown in the 1980s and '90s by Korean elites, who shifted from low-skill sweatshop manufacturing to high-skill, high-tech manufacturing while guiding "national champion" companies like Hyundai and Samsung to world-leading status. Because this pivot requires cultivating more skilled workforces and challenging the original developmental coalitions that helped initially vault countries into the middle-income stratum, it is a difficult transition; most countries do not succeed.

For those economies that never escaped middle-income status, like Mexico, Brazil, Egypt, and Russia, the situation is darker. In these countries, the emergence of new developmental coalitions seems unlikely; long sojourns in the middle-income trap have led to the entrenchment of large firms or elite groups oriented around unproductive rent-seeking—actors with little real interest in development. Their states no longer show much autonomy from these rentier elites, and little power over them regardless. Their economic trajectories converge on what Alex Hochuli has called "Brazilianization," a state of being "modern but not modern enough": relative stagnation at a middling level of income, with rising informality, rentierism, and inequality, a decomplexifying economy dependent on commodities, and an elite increasingly sequestered away from its own population.[52] India, with its high degree of decentralization (endemic to a vast country far more diverse, in terms of culture and language, than China) and the continued power of local and national rentiers, from large rural landowners to the real estate–oriented urban regime that dominates Mumbai—as well as other issues, like an unbalanced human capital mix and poor coordination between state and market—faces a similar trajectory, with higher growth but at a much lower level of income.[53]

In countries that are poorer still, like Nigeria or other African states, the situation is even worse: in most there is essentially no challenge to the hegemonic rule of extractive rentiers, whose control over the state is practically total, and thus no incentive to meaningfully develop the economy or foster any type of industrialization. Despite their low wages and large populations of young people, these countries are ill equipped to build significant manufacturing sectors. Indeed, labor cost per worker is higher in nearly every African nation than in Bangladesh, even at much lower levels of per capita GDP.

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Of viable competitors, only Ethiopia came close—though the study of African labor costs, issued in 2017, wisely warned that "political unrest" could "derail industrialization" there.[54] Even if the circumstances were better, the odds of industrialization in these low-income countries would still be low.

This picture is darkened further by evidence of weakening state capacity and, in many places, a faltering state monopoly on violence. Most poor countries have shown no ability to challenge growing crime and violence: in the worst cases, like Haiti, governments have outright lost sovereignty to gangs, militias, and warlords, and are now structurally incapable of political governance. Partly this is a product of sharp and often perverse processes of social modernization in the decades after 1950: slum societies, deprived of the social self-regulation provided by traditional communities, often prove ungovernable in a way that peasant societies were not. Gone are the days when the writer Edmund Wilson, visiting Port-au-Prince in 1949, could describe it as reminiscent "of an Italian town," with "no filth, no bad smells, no disgusting sights," or when an American living in Kinshasa in 1970 could compare it favorably to the Bronx, where "there was much, much more talk there about muggings, robbery and crime in the streets than you ever hear anymore in Kinshasa."[55] The degradation of social order and state legitimacy over the last decades in these societies is obvious to any observer.

However corrupt, distasteful, and brutish the regimes of Mobutu, Siad Barre, or Bokassa, countries like the Congo, Somalia, or the Central African Republic were, a few decades ago, politically sovereign and governed by semi-functional regimes. Today they are wards of an array of external institutions, from foreign military forces—the African Union forces that prevent Mogadishu from falling to al-Shabaab, the French troops stationed across the Sahel, the Russian mercenaries of the Wagner Group who intervene across the Central African Republic—to a mélange of unaccountable if well-intentioned humanitarian institutions from the West, forced each year to triage crises that those states are simply too weak to handle themselves. In their gradual loss of state capacity, these states have not been aided by a consensus among Western development experts that, in the historian Idrissa's words, asks "not about how to strengthen the state, but how to further debilitate it," and which focuses inordinately on small-scale interventions—like randomized controlled trials (RCTs) that can be carried out by nongovernmental organizations and academic research teams—rather than more challenging and locally sensitive questions of elite coordination and political economy.[56]

Instability, violence, and the loss of state capacity can poison even the most hopeful attempts at development. If Africa had any true bright spot in the 2010s, it was Ethiopia, which from 2004 to 2018 consistently recorded some of the highest growth rates of any

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country, with a transparent attempt at emulating the Chinese model—a one-party state pursuing export-oriented industrial development while maintaining political stability. The payoff was significant: Ethiopia's real per capita GDP more than doubled between 2005 and 2020, growing at a rate about eleven times faster than that of sub-Saharan Africa as a whole.[57] But Ethiopia's stability had been founded not on the solid foundations of a hegemonic state, as in China or South Korea, but on complex and tenuous bargains between various ethnic elites, overseen by the developmentalist regime of Meles Zenawi.[58] The gradual collapse of this "ethnic federalism" in the years after Meles's death in 2012 culminated in the eruption of a brutal internal conflict in late 2020, most severe in the north but affecting other regions as well. The death of hundreds of thousands of Ethiopians, the destruction of vast amounts of infrastructure, the challenging of state legitimacy, and the end of the elite ethnic bargain over which Meles had presided delivered a sudden quietus to the optimistic tone that had surrounded the prospect of Ethiopia emerging as "the China of Africa."[59]

Our Shrinking World

This, then, is the structural condition that the countries of the poor world find themselves in today. Even before the disruptions of the last few years, it was a far less happy picture than has usually been admitted. But in the coming decades, two headwinds—the first ecological, the second demographic—are likely to worsen the outlook for global development further.

The effect of climate-related disruptions on the poor world has already been significant, especially on agriculture. Consider the recent travails of the Horn of Africa. In the late 2010s, the irregular oscillation in surface temperatures between the western and eastern zones of the Indian Ocean, the so-called Indian Ocean Dipole, had become increasingly pronounced (entering its most positive phase since 1870 by the first half of 2019), leading to a prolonged season of wet weather and flooding in the Arabian Peninsula and East Africa. This resulted in the deposit of vast amounts of water in Saudi Arabia's southern desert, creating huge breeding grounds for desert locusts. These breeding grounds resulted in a massive swarm that spread across Arabia, southward into East Africa, and northward into South Asia—wreaking havoc on agriculture in all those regions as the locusts ate vast amounts of crops, but with particularly severe impacts in countries like Somalia, Ethiopia, and Yemen, where war made mitigation difficult. Millions of hectares of land were infested; one unusually large swarm in Kenya occupied an area of more than nine hundred square miles, about three times larger than the size of New York City. As the locust crisis moderated in 2021 and 2022, repeated occurrences of the eastern Pacific's La Niña phenomenon led to a severe regional drought, with some

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of the driest rainy seasons in decades; famine alerts were issued, with humanitarian organizations claiming that more than fifteen million were at risk. With such climatic events increasing in intensity, the Horn of Africa seems destined to oscillate between rains that are too heavy one year and rains that don't come at all the next.

Other poor regions will be similarly affected by worsening ecological crises. Coastal regions, like the Bay of Bengal littoral, seaside West Africa, or maritime Southeast Asia, may simply be engulfed by waters: much of Bangladesh's territory, largely low-lying and riverine, may be underwater within the coming decades, along with major sections of large cities like Basra, Bangkok, and Mumbai. Floods elsewhere will grow more frequent and extreme; the severe episodes of flooding experienced in Pakistan, Afghanistan, and West Africa in 2022, collectively displacing millions, are indications of what is to come. Other places will face increasingly regular bouts of unlivable heat, rendering many areas—like Delhi, which recorded seventy-eight days of temperatures over 100 degrees Fahrenheit in the spring of 2022—effectively unfit for healthy human habitation. (The number of severe heat waves in India is expected to grow thirtyfold by the end of the century.) By 2100, even under a moderate emissions scenario, large swathes of Indonesia, the Philippines, and Sri Lanka are projected to face more than 350 days of potentially lethal heat per year; virtually the entirety of India and Nigeria will face more than one hundred days of deadly heat.[60]

These ecological disruptions will be hugely destructive to much of the poor world. Increasingly common droughts, floods, and crop failures will imperil national agricultural systems, intensifying deagrarianization and further fueling social instability. Some countries, like Afghanistan or Somalia, are on track to be structurally incapable of feeding their large and growing populations, and thus permanently dependent on foreign generosity. In other places, ecological disruptions will accelerate existing violence. Drought and land erosion have already exacerbated ethnic conflicts in Sudan and East Africa; in Nigeria and the Sahel, farmer-herder conflicts, though often ignored in the West because of their unclear political dimensions, have grown increasingly lethal, fueled by competition between nomadic pastoralists and settled agriculturalists over ever-scarcer land and water resources. In 2018, farmer-herder conflicts killed six times as many Nigerians as did the Boko Haram insurgency.

Our Growing World

The other significant headwind facing global development will be demographic—population decline in rich and middle-income countries, coinciding with massive growth in the very poorest. It is widely known that nearly all wealthy nations

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have transitioned to a low mortality, low fertility equilibrium, leading to declining populations dominated by the elderly: countries like Japan or Italy are already shrinking, while others like Germany or France are staving off decline through large-scale migration. But in recent years, the same demographic transition has spread elsewhere, to countries that have achieved far less developmental success. Demographic decline might thus be added to the list of phenomena that have touched the non-rich world "too early." Brazil fell below replacement in 2004; Lebanon in 2005; Colombia in 2009; Malaysia in 2016; El Salvador in 2018; Turkey in 2020. Bangladesh, which had a fertility rate of 6.9 children per woman in the early 1970s, fell below replacement in 2018, with Mexico, Peru, Argentina, and India on track to follow soon.[61] The consequences of these demographic transitions will be striking: by 2055, Brazil is expected to have a median age equal to that of current-day Germany, and Thailand to be a pensioners' society several years older than present-day Japan and Italy.

With aging populations and few births, many of these countries are on track to shrink rapidly. Thailand will begin declining late in the 2020s, Brazil in the 2040s, and Turkey and Indonesia by the 2050s. The sheer size of China, meanwhile, will lend its decline a remarkable momentum: projected to begin its descent in the early 2030s, the Chinese population will experience a sharp contraction after the century's midpoint. Dropping below a billion by the 2070s, population decline will only accelerate from there, with one hundred million more deaths than births in the 2080s.

The part of the planet where this demographic decline has been least pronounced is also the one where development has been the most absent: sub-Saharan Africa, where significant declines in mortality have been paired with only meager declines in fertility. Mortality, though still quite high, has fallen sharply in nearly every African nation over the last few decades. In Sierra Leone, for instance, the average age of death increased from thirty-two years in 1960 to fifty-five years in 2020. (Only Lesotho, with its endemic AIDS problem, has a lower life expectancy now than in 1980.[62]) But fertility has followed more slowly. Niger moved from 7.8 children per woman in 1980 to 6.7 today; Nigeria, 6.8 to 5.2; Mali, 7.2 to 5.7; Angola, 7.5 to 5.4; Uganda, 7.1 to 4.7; Sudan, 6.8 to 4.3.[63] Because of this particularly stark disequilibrium, African countries have recorded some of the most rapid national population increases in human history: the population of Niger, which numbered only 2.5 million in 1950, had by 2020 grown an astounding tenfold, to 24.3 million.[64] (This was a greater proportional increase in population than that which the United Kingdom registered between the years 1640 and 2000.[65])

In the coming decades, the populations of these impoverished places are expected to balloon further. Niger, for instance, is projected to have a population of 107 million by

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2070. (If this is borne out, it would mean that Niger will have enjoyed a proportional increase in population of about 4,100 percent over 120 years—greater than the proportional increase of the British population in the entirety of the second millennium.) Mali, which had a population of seven million in 1980, will have about 65 million people; Uganda more than 110 million; Somalia just over 50 million. The very largest countries in the region—Nigeria, Ethiopia, the Democratic Republic of the Congo, and Tanzania—will become some of the most populous nations in the world. By 2070, Nigeria will have about 475 million people, the Democratic Republic of the Congo, 315 million, Ethiopia (which now has more births per year than the United States), nearly 275 million, and Tanzania, about 180 million. The total population of Africa, long underpopulated due to infectious disease, slavery, and colonization—such that in 1950, Africa as a whole had a person-to-land ratio lower than that of today's Russia—only grew to exceed one billion in the late 2000s; by 2070, it will have grown to more than three billion people, nearly a third of the global population.[66]

This rapid population growth will add to a major problem for African states—the huge number of unemployed youth, especially men, who have fueled social and political destabilization. Of course, large populations of young people are not bad in themselves. For rapid industrializers, like China or South Korea, young populations were a boon, with employment a good way to channel youthful energies toward positive ends. Singapore had a lower median age in 1965 than Mozambique did in 2020, and yet weathered it without instability.[67] But for countries with no feasible development trajectory, these lopsided age pyramids are a curse. Large numbers of jobless youth in economies that have seen little real development over the last few decades will only aggravate the recurring political and social crises on the African continent: at its worst, the growing number of *hayateen* will add to the appeal of violent groups like Boko Haram or al-Shabaab, while exacerbating internal conflicts in already fragile countries.

With the global population outside of Africa entering a long era of slow growth or decline, and African population in the midst of a long and spectacular boom, the future of development and poverty reduction will hinge on the future of Africa. In the past, the exceptionally strong performances of East Asian economies have statistically compensated for less impressive results elsewhere, especially among the African economies—many of which, despite improvements in health, cannot be said to be meaningfully richer or more economically developed now than they were in 1980. But as East Asian populations decline, the intercontinental compensation effect in poverty reduction statistics will no longer hold. And because there has been so little real economic progress in sub-Saharan Africa, rapid population growth will spell a grim several decades for "poverty reduction," and for development in general.

Facing the Crisis

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Stagnant development in most of the poor world, ecological crisis, declining populations in the developed world, and growing populations in the worst-off places—what will this explosive mixture yield? With aging populations in the United States and Europe, and the Chinese economy apparently entering a low-growth equilibrium, the prospects for another global commodities boom to rescue poor economies seem distant; we are not about to reenter the world of 2005 or 1965. More likely is an ever-growing phenomenon of mass migration, with the various immigration crises of the 2010s, and the attendant political backlashes to them, only presaging what is to come. New technologies have made movement easier and more attractive, and social and economic transformations have unleashed people from the bonds of traditional communities: for an effectively globalized young denizen of a city like Ibadan or Luanda with no real opportunity for economic advancement, emigration—even when risky—is simply a logical calculation. (For the poorest within these countries, much of the migration is likely to remain internal.) Climate-related harms, with floods in some places and droughts in others, will likely sharpen this grim calculus; the line between "climate refugee" and "economic migrant" is a thin and ultimately subjective one.

In response, the governments of wealthier places—not just Europe, but also richer African nations like South Africa—will continue attempting to reduce the supply of migration opportunities. This future is one of barbed wire, border fences, and migrant detention facilities—though Western regimes, attentive to publicity concerns, will increasingly outsource these programs to less scrupulous "partners," as the European Union has done with Morocco and Niger.[68]

But despite attempts to reduce the supply of migration opportunities for the people of the poor world, there is simply no way to reduce the massive demand for migration opportunities without a return to real global development. If the problem of the twentieth century was the problem of the color line, as Du Bois said, then the problem of the twenty-first century is the problem of the border line. Among elites, the sheer economic logic of mass immigration (rich countries with too few young workers, poor ones with too many) will vie with its deep political unpopularity and the significant social problems it creates. But even successful population transfers—which will occur, in one way or another—will only partially compensate for the failure of the global economic system to meaningfully develop the poorest parts of the world.

What then, given the concurrent necessity and impossibility of industrialization in the poor world, particularly in Africa? The reality is that Western elites do not have an

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answer. They have not forged a new developmentalism that they can offer the poor world in the aftermath of global deindustrialization. In the absence of a new paradigm, they can furnish new RCT studies or occasional colloquia with development experts. But for all their obfuscation, it is the blind who are leading the blind. Indeed, the intellectual exhaustion of the elite "development community" is hard to fathom. In its upper echelons, those who still believe in the hoary orthodoxies of past decades—free trade, democratization, the extraordinary importance of what are nebulously referred to as "inclusive institutions"—coexist uneasily with more humble types who will admit, in private, that they have no real answer at all.

A new framework for development—ambitious and visionary on the one hand, but realistically grounded on the other—is direly needed, with a scope including both the poor world and the rich. This will require much work at national levels in poor countries. At a minimum, it will necessitate the displacement of extractive rentiers by new coalitions of development-oriented elites; conscious attempts to rebuild state capacity and reduce the outsourcing of governance to foreign institutions; land reform and agricultural modernization with an eye toward self-sufficiency in food; and the reestablishment of order, by improving damaged social fabrics and restoring state monopolies on violence, perhaps through symbolic national refoundings. Significant improvement of international transit infrastructure to address geographic hurdles; the improvement of bureaucratic capabilities, which will demand not only organizational reform but also deliberate cultural reformations; mass health and education programs, similar to those that made the Chinese labor pool so potent at the dawn of its industrialization; and the pursuit of conscious and focused industrial policies that improve on past approaches, from multilateral collaborations (perhaps an OPEC for rare earth metals) to the use of resource leverage to industrialize up the value chain, as with Indonesia's stipulation that all nickel exports be processed within the country—all these will be needed too. Certainly, such an agenda would be ambitious; it would require at least a spurning of many Western development experts, and perhaps even a strategic withdrawal from parts of the global system. But however demanding it may seem, it is fundamentally similar to the programs pursued by the great modernizers of the past—from Muhammad Ali Pasha or Bismarck in the nineteenth century to Atatürk and Deng Xiaoping in the twentieth.

Yet even these changes will come to nothing if they occur within the current world order: the core must change, and not just the periphery. Poor-world developmentalists will need to be met by a new commitment to development in the rich parts of the world as well. This, too, may demand new elite coalitions in leading economies: an internal revolution toward production in the United States, to reverse the stagnation and industrial decay of

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recent decades, and toward greater household consumption in China. It may also require a significant reorganization of global economic governance. Most obviously, the infrastructure of global free trade that has limited the scope of national industrial policies—like WTO agreements from TRIPS to TRIMS that ban or limit strategies implemented by successful industrializers of the past—will need to be adjusted. Also necessary will be a reshaping of the IMF's global reserve system and its allocation of special drawing rights to poor economies, as well as the formation of a new and credible Bretton Woods–style framework for regulating international monetary flows, in order to prevent the boom-bust cycles that have scarred many emerging markets and to return some measure of autonomy over economic policy to poor-world policymakers.

Certainly, as crisis adds to crisis, a new golden age of global development seems like a distant prospect. The requisite structural reforms, national and international, may bend the existing arrangements to the point of breaking, and thus prove uncompelling to the wardens of our fissured earth—more comfortable wandering from crisis to crisis, dispensing short-term curatives to prevent the bottom from falling out. If it represents something fanciful and "unrealistic," seeking to redeem a grim assessment of the global situation by grafting a flight of hope onto its tail, then perhaps this is necessary: taking a purely realistic view of the situation, like gazing into the eyes of the Medusa, would simply turn us to stone.

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NOTES

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