

On the Horizon



What to Watch in 2020 Wilson Center Experts Weigh In





*“There are many voices of counsel,
but few voices of vision.”*

- Woodrow Wilson

Decoding a World of Change for Washington

In a world marked by complexity, volatility, and a din of competing agendas, the Wilson Center is the nation’s indispensable resource for decoding today’s most pressing foreign policy challenges. Leveraging its global expertise and perspective, award-winning scholarship and analysis, and a fiercely nonpartisan spirit, the Center informs actionable ideas for policymakers across the political spectrum.

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The next generation of policy leaders will also trace its roots to the Wilson Center, as the Foreign Policy Fellowship Program and Cybersecurity and AI Labs connect select Congressional staff with top scholars and practitioners to help prepare them for current and future challenges.

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3 things to watch: AFRICA 2020



1






Confronting Jihadists in the Sahel

Despite multinational political and military efforts, militant Islamist groups are strengthening their foothold across the arid Sahel, particularly in the countries of Mali, Niger, and Burkina Faso. These groups exploit criminal trafficking and local community tensions, making large swathes of territory ungovernable, and stoking violence in this desperately poor region on the Sahara Desert's southern fringe. This threat also extends beyond the Sahel, as concerns grow over terrorism's spread to coastal West Africa, and among migrants surging across the Sahara and Mediterranean. Neither negotiations nor military operations (with over 20,000 international and local troops deployed) have arrested the worsening crisis. Stemming the tide will largely depend on how the international community adjusts its already ample development aid and security assistance to the Sahel, together with how the region's governments meet demands for improved public services, expanded community engagement, stronger governance and counter-corruption efforts, and increased opportunities for the exploding youth population.

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2

The Rise of People Power

In spite of – or perhaps because of – toughening state security tactics and narrowing civic space across much of Africa, popular protests are increasingly driving political change on the continent. Last year alone, two of Africa’s “dinosaur” leaders – Sudan’s 30-year incumbent Omar al-Bashir and Algeria’s 20-year incumbent Abdelaziz Bouteflika – were forced from office by popular protests. And in Zimbabwe, protests over economic collapse and poor governance continue to roil the country as it transitions from the 2017 military-led ouster of 37-year president Robert Mugabe. As we see already in restive Zimbabwe and Algeria, the new leaders of popular-driven transitions can expect short honeymoons. They need to deliver visible economic and political improvements, including addressing the problems of corruption and injustice. Continent-wide, Africans will continue to demand good governance, political accountability, and civic rights.



3

Advancing Free Trade within Africa

Africa’s new continental free trade agreement (AfCFTA) can accelerate its growing economic importance by lowering trade barriers, expanding intra-Africa trade, and stimulating economic diversification. With 54 signatory states comprising 1.2 billion people and a \$3.5 billion GDP, AfCFTA forms the world’s largest single market. Effective implementation will be a major challenge, however. The keys to success include improvements in governance and rule of law, which are necessary for African countries to address persistent non-tariff barriers related to unpredictable trade policies, pervasive corruption, and protectionist mind-sets. Dispute settlement and enforcement measures are also critical, since AfCFTA has the greatest levels of income and development disparity of any continental free trade agreement in the world. Ultimately, successful implementation will require close cooperation among multiple national and regional African actors with differing trade interests, sometimes incompatible supply/demand dynamics, and domestic policies that are poorly aligned with AfCFTA’s premise of open borders and free movement of goods.

3 things to watch: ASIA 2020



1

Alliances in Crisis

In the face of the increasing risk of [North Korean aggression](#) and Chinese assertiveness in 2020, President Trump has reiterated his demand for allies to greatly expand their financial contributions to the United States, and also threatened the withdrawal of U.S. military forces. As regional threats intensify, and Seoul and Tokyo negotiate with Washington about the future of their alliances, questions about the United States and its reliability in coming to the aid of its allies have deepened. How America's allies and partners across the region react to these countervailing geopolitical trends will have deep consequences for the future of the region – and for American power and influence across the Indo-Pacific.

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2

Deepening Uncertainties in Asia's Economy

As China's economy slows and the U.S.-China trade war continues to fester, nations across the Indo-Pacific will need to adjust to the new normal of continued economic uncertainty in 2020. The region [will less likely be united](#) by a shared commitment to economic stability and faith in export-led growth. Instead, political calculations may well overshadow economic interests in the year ahead. [Rivalry between Japan and South Korea](#) is expected to continue to hurt trade relations between two of the region's most advanced economies, while growing political divides among Southeast Asian nations may undermine the economic ambitions of a more integrated ASEAN. Asia has spent the past year adjusting to the shift in U.S. strategic interests in the region, but 2020 will be defined by how competing visions for growth can take root.



3

The Threat of War in South Asia

India and Pakistan will arguably enter 2020 at greater risk of going to war than at any time in over a decade. The year 2019 saw the launch of the [first Indian air strike](#) inside Pakistan since 1971, as well as [India's decision](#) to revoke the autonomy of Jammu and Kashmir. A single trigger in the coming year – such as a mass-casualty attack in Kashmir that New Delhi blames on Islamabad, or an Indian provocation in the part of Kashmir administered by Pakistan – could well [spark a conflict](#). Washington has a strong interest in reduced tensions on the Subcontinent. In 2020, it will need to decide how to manage and mediate tensions between the nuclear-armed nemeses.

3 things to watch: BRAZIL 20



1

Unraveling of Democratic Norms

Brazilian democracy remains resilient, yet faces new challenges. Deep polarization and political strife – aggravated by former President Luiz Inácio Lula da Silva’s recent release from jail – will make it more difficult for the current President Jair Bolsonaro to maintain his already weakened political influence and to enact his conservative agenda. The administration’s priorities have caused alarm among advocates for [the rights of women](#), Afro-Brazilians, indigenous peoples, the LGBTQ+ community, and other marginalized groups. Bolsonaro’s tough-on-crime agenda has contributed to [high incarceration rates](#) among black and *pardo* youth, and to growing police violence. The government’s revocation of [the land demarcation process](#) and disinterest in curbing illegal mining and deforestation threatens the safety of constitutionally-protected indigenous and *quilombola* territories. Brazil’s institutions are unlikely to fail, but we are closely monitoring what may be a slow chipping away at fundamental human, civil, and press freedoms and rights.

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2

The Economy at Stake

The Brazilian government predicts the economy will grow 2.3 percent in 2020, encouraged by new economic policies and the historic passage of a constitutional amendment to the country's [pension system](#). However, a number of politically difficult structural and economic reforms still lie ahead: tax reform, administrative reform to modernize the Brazilian state, and new policies to encourage trade and investment. The political fate of the current administration depends heavily on its ability to restore economic growth and reduce unemployment – and October 2020 municipal elections, the first major election cycle since Bolsonaro was elected in 2018, will serve as an important referendum on the administration's efforts in this area.



3

Pressure for Environmental Protection

Over the last 25 years, Brazil gained significant credibility and space in global debates on climate policy and sustainability – but that is changing. In 2019, President Bolsonaro confronted [internal and global scrutiny](#) over rising deforestation rates and the high number of fires in the Amazon Rainforest. Experts warn Amazon deforestation is approaching [a tipping point](#) that could have dire effects on the world's climate system. It remains to be seen whether external forces (such as the European Union or China) or domestic forces such as [Brazilian agribusiness](#) (which is keenly aware of the potential for sanctions and boycotts of Brazilian exports) will persuade the Bolsonaro administration to reconsider its environmental stance and resume leadership in this arena in 2020. However, nongovernmental actors from both the private and civil sectors are increasingly taking leadership on climate change and sustainability in Brazil, and we expect this trend to continue.

3 things to watch: CANADA



1

USMCA on the Brink of Approval






In a change from last year, both political parties in the United States now approve of the passage of the United States-Mexico-Canada-Agreement ([USMCA](#)). End of year agreements in the United States put USMCA on track for ratification in the House and Senate leaders have promised to vote on USMCA in early 2020. Meanwhile in Canada, the [federal election](#) in October reduced a Liberal majority to a [Liberal minority](#), promising more internal negotiations, challenges, and surprises for Canada's Parliament. However, both the Liberal government and the opposing Conservatives have supported this partnership for decades and have signaled their support for passing the agreement. When Canada and the United States do manage to ratify USMCA, side letters and USMCA's implementation, often more important than the agreement itself, will be critical aspects in how USMCA shapes North America's future economy.

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2

The United States-Canada-China Triangle

With a weaker U.S.-Canada alliance and the continuing trade negotiations between China and the United States, Canada has found itself caught between two of the world's great powers. The fallout for Canada after its arrest of Huawei's CFO Meng Wanzhou in 2018, on behalf of the United States, included Chinese bans on important Canadian agricultural exports, the detainment of two Canadians in China, and no effective backup from the United States. The second half of the decade also saw Canada push to forge new alliances and allow for easier market access in Europe, Asia, and the Americas. Maintaining trade with the United States and increasingly China is significant for Canada's economic stability. Navigating the [U.S.-Canada-China triangle](#) also will remain a priority in 2020, especially on issues including [Arctic security and trade](#), [intelligence gathering](#), communications infrastructure, [energy independence](#), [space initiatives](#), and [critical minerals](#) markets.



3

Canada-U.S. Border Flow

Canada and the United States are looking at how to approach future traffic demands at their borders. Both the corporate and public sectors are concerned with how to increase the [flow of goods](#) and people without compromising the Canada-U.S. border's efficiency and security. In 2019, the two countries' governments expanded their partnership with the implementation of the latest version of the Canada-U.S. Preclearance Agreement – an agreement that dates back to 2001. On the private side, pressure to improve border security and efficiency has normally come from large exporters whose businesses depend on steady and secure cross-border flows. With the emergence of E-commerce however, an increasing number of small and medium exporters are demanding smarter border solutions. To address arising issues, industry created the [Beyond-Preclearance](#) Coalition, and, in 2020, Canadian and American stakeholders alike are set to focus on solving and implementing solutions at the border that scale and are predictable and flexible.

3 things to watch: **CHINA**



1

Sino-U.S. Economic and Great Power Relations: Beyond the Trade War

Economic relations will continue to dominate U.S.-China headlines in 2020. Stock markets will continue to respond irrationally to every statement and rumor that issues from Beijing and Washington. The important story is not whether the two superpowers reach a short-term “deal,” but how they readjust their relations in light of long-term historic dynamics. One question is whether the U.S. can find ways to trade with (and invest in) China that are fair, reciprocal, and guaranteed under Chinese law. And Beijing must resolve the domestic tension between forces that seek to legitimize the country’s mercantilist practices worldwide, and forces that seek continued reforms that integrate China more closely with the evolving global system. 2020 will not bring a resolution to these issues. But Americans can hope that the costs of cooperating and competing with China are better understood in the year ahead, and that the next administration might craft policies to set Sino-U.S. trade on a mutually beneficial track.

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2

China's Restless Periphery: Implications for Beijing's Global Leadership

After four decades of unprecedented development, China's aspiration to global leadership is not surprising. Beijing believes that its economic success – along with U.S. failures and retreat into protectionism – prove its model of governance worthy of study beyond its borders. Yet China's model is widely rejected on the periphery of the People's Republic itself, and in the nearby Western Pacific. The Hong Kong Special Administrative region has been subject to Beijing's leadership for twenty-two years, but millions vote and march against Beijing's dominance. Xinjiang, like Tibet, has had seventy years to adjust to China's leadership, yet dissatisfaction is so high that at least a million Xinjiang residents are now imprisoned. The people of Taiwan, the young in particular, reject China's *One Country-Two Systems* formula for unification. Disaffection on China's periphery will keep a spotlight on China's human rights record and on international concerns over Chinese influence in 2020.



3

The U.S.-China Technology & Soft Power Competitions

Over the past 40 years, technology had a straightforward role in U.S.-China relations. Despite continual American concern about China's theft of intellectual property, technology relations have been a mutually beneficial exchange of American tech for Chinese talent. Yet as China's power and ambition have increased, China has come to see technology as a way to advance national power. Its announcement of *Made in China 2025*, its military buildup, its emergence as a surveillance state, and a realization that Chinese companies like Huawei have become formidable global leaders have made Chinese tech companies and most forms of U.S.-China cooperation highly suspect in Washington. These frictions have moved to the center of bilateral diplomacy, security policy, competition policy, and commercial competition. They also shape global soft power competition. Scientific and cultural cooperation hold tremendous promise, but few American politicians advocate for it anymore – and Chinese leaders welcome it only on their own narrow terms.

3 things to watch: ENVIRONMENTAL CHANGE AND SECURITY



1

Transboundary Water Diplomacy






To date, countries have not gone to war over water, but [will the future look like the past?](#) More often than not, water breeds cooperation rather than competition, but a changing climate, rapid population growth in vulnerable geographies, and high levels of pollution make evolving transboundary hydrological risks loom larger than ever. Between countries, water is increasingly being used to wield power – such as conflicts between India and Pakistan over the Indus River Basin, or tensions between Egypt, Ethiopia, and Sudan over the [construction of the Grand Ethiopian Renaissance Dam](#). Unilateral decisions and policies made at the state and regional levels also have unseen trickle-down effects. In Turkey, the [construction and operation of the Ilisu dam](#) will displace thousands of people, jeopardize endangered species, and erase architectural and cultural heritage. To prevent future conflicts, diplomatic, development, and defense tools that prevent such frictions must be placed in the hands of key decision-makers.

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2

Countering the Security Risks Posed by a Changing Climate

Evidence that extreme weather, water, and climate events pose critical [security risks](#) to the United States has mounted in recent years. From [destabilizing droughts](#) in Africa to devastating hurricanes and [flooding in the United States](#), not only is the frequency and severity of these events increasing, but also their physical, social, and economic impacts. How do we turn foresight into action for these extreme events? High-level quantitative and qualitative assessments and predictive information are needed. The Wilson Center is [developing a framework to improve predictive capabilities](#) for security risks posed by extreme weather events. The project identified four main tipping points: ecosystem vulnerabilities; transnational trends; political instability; and scale (from the local to international). Cross-coordination to prepare for weather- and water-security related risks requires alignment and sustained engagement across the U.S. government, increased and better coordination between decision-makers, researchers, and practitioners, and a comprehensive understanding and early warning of the risks facing a region.



3

Women, Peace, and Security

In a rapidly changing global landscape, a country can only move towards sustainable and durable peace and security if women are a part of the journey. The first political order, the *sexual* political order, demonstrates how a nation-states' relationship between men and women is linked critically to the overall status of its women. Gender inequality [produces instability, insecurity, and violent extremism](#). Barriers to women's participation in security-decision making, such as lack of access to reproductive health services, contribute to high fertility rates and undemocratic outcomes. When women are involved in security decision-making, [the likelihood of conflict decreases, and peace negotiations last longer](#). Investments in empowering women [are essential to promoting the growth and stability of a nation](#). Multisector and integrated approaches that are inclusive of women are preconditions to curbing trends that promote insecurity, and discussions about national and international security [that ignore the situation, status, and security of women](#) will be increasingly recognized as counter-productive.

things to watch: KOREA



Deepening Peace or a Return to 'Fire and Fury'?

Will the U.S. and North Korea finally make progress on denuclearization negotiations, or will Pyongyang revert to testing nuclear bombs and long-range ballistic missiles? The year 2020 holds significant weight for Korea. In April, South Korea holds general elections that could bring political change to Seoul. In June, Koreans on both sides of the DMZ mark the 70th anniversary of the start of the Korean War. And in October, North Korea celebrates the 75th anniversary of the Korean Workers' Party. With threats and rhetoric rising from both sides, fears of a return to the "fire and fury" of 2017 are palpable. In 2020, we'll be watching whether the standoff will culminate in provocations and responses that send the Korean Peninsula back to destabilizing tensions – or whether Kim and President Trump will draw on their personal relationship and return to nuclear negotiations.

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HISTORY AND PUBLIC POLICY



Those Who Do Not Learn from History...

The year ahead in U.S. foreign policy and world affairs presents daunting challenges. Opportunities for progress, too, abound. In helping the policy community prepare, the Wilson Center relies on one of its great strengths – the ability to help leverage lessons from the past. The History and Public Policy Program will continue to expand and study its remarkable [collection of archival materials](#) – from previously unpublished diplomatic correspondence on nuclear crises to primary sources on the Cold War – to better inform analysis and decisions today.

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things to watch: LATIN AMERICA



1

Mass Protests in the Region

Mass protests in Latin America during the last months of 2019 collectively brought millions of demonstrators into the streets in Bolivia, Chile, Colombia, Ecuador, and Haiti. Slowing economies, the high cost of living, corruption, and deep dissatisfaction with democratic governance played differing roles in each case. The coming year will see efforts at dialogue, constitutional reform, and new elections, but instability is likely to remain high. However, the country with the most severe crisis, Venezuela, seems oddly stable. The deeply unpopular Nicolás Maduro has weathered the country's deep economic, humanitarian, and political crises with backing from the armed forces and security and economic support from Russia, Cuba, Turkey, China, and India. Deployment of potent diplomatic weapons by the U.S. (recognizing opposition figure Juan Guaidó as president, imposing sanctions, promoting a military uprising) failed to catalyze a political transition. A political dialogue mediated by Norway collapsed in September.

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2

The Regional Migration Crisis

By November 2019, Venezuela’s meltdown had led to the exodus of over 4.6 million people in search of food, medicine, and physical safety. Of those, more than 80 percent remain in Latin America and the Caribbean, with 40 percent in Colombia alone. At a time of meager growth in the region, the sheer number of refugees has overwhelmed health and education systems. Border crackdowns in Peru, Chile, and Ecuador have placed a disproportionate burden on Colombia, and the strong presence of illegal armed groups in border regions has heightened risks for Venezuelan refugees. The international response also has not been commensurate with the magnitude of the crisis, with international donors providing barely 52 percent of needed funds for the UN-overseen Regional Refugee and Migrant Response Plan. The challenge in 2020 will be to deliver assistance through international and non-governmental organizations inside Venezuela, and to increase support for a huge and growing number of vulnerable civilians fleeing the country.



3

Central America

U.S. Customs and Border Protection apprehended a record 62,748 unaccompanied minors from Honduras, El Salvador, and Guatemala in fiscal year 2019, in addition to 545,026 other travelers from those countries. This compares with 223,244 total arrivals in fiscal year 2018. A suspension of U.S. assistance to these “Northern Triangle” governments over migrant flows was partially reversed, and “safe-third-country” agreements were negotiated with these nations. But local conditions (including crime, poverty, and climate insecurity) likely will continue to spur emigration toward Mexico and the United States. One regional leader to watch is El Salvador’s new president, Nayib Bukele, who was elected by a wide margin in early 2019, but has also drawn criticism for his closed style of decision-making and populist approach. China’s pursuit of a 100-year lease in El Salvador for a logistics facility on a 1,076-square-mile tract may portend growing geopolitical competition on the isthmus.

3 things to watch: MATERAL HEALTH



1

Year of the Nurse and the Midwife

The World Health Organization designated 2020 as the “[Year of the Nurse and the Midwife](#),” in honor of nursing pioneer Florence Nightingale. Nurses and midwives make up [nearly half of the global health workforce](#), and by 2030, estimates state that [the world will need 9 million more](#). Midwives also play a crucial, but highly unrecognized, role in maternal health. The WHO estimates that [83 percent of all maternal deaths, stillbirths, and newborn deaths](#) could be averted with full midwifery care. Yet a global scarcity of healthcare providers remains. In the U.S., [rural and urban areas have seen an increase in hospital and maternity unit closures](#). Achievement of universal health coverage and the Sustainable Development Goals (SDGs) requires an [investment in nurses and midwives](#). Well-trained midwives can deliver [87 percent of all essential sexual, reproductive, maternal, and newborn health services](#), leading to [improved outcomes for women, their newborns, and their families](#).

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2

Maternal Health in Humanitarian Settings and Among Vulnerable Populations

Each day, [810 women around the globe die from pregnancy or childbirth-related causes](#). Vulnerable populations, including indigenous women and girls, as well as those affected by conflict and crisis, face a heightening threat of maternal mortality and morbidity. [American Indian and Alaska Native women are 2.5 times more likely to die during pregnancy, delivery, and the postpartum period than white women](#) with the same education and socioeconomic status. Poor maternal health and birth outcomes for indigenous women and girls are linked to barriers created by discrimination, exclusion, poverty, and distance. Sixty percent of maternal deaths occur in conflict, displacement, or natural disaster zones. In 2018, [136 million people needed humanitarian aid, and 34 million were women and girls of reproductive age, and 5 million were pregnant. Family planning needs do not disappear during a crisis](#). Yet women and girls facing crisis and conflict are disproportionately affected by gender-based violence, exploitation, rape, and dangerous birth conditions.



3

The CODE BLUE of Non-communicable Diseases

Non-communicable diseases (NCDs) account for [2 of every 3 deaths](#) among women globally. In 2018, [73 percent of deaths among women were due to NCDs, amounting to 18 million women of reproductive age each year](#). The rise and gravity of NCDs pose a growing (and often overlooked) challenge to global maternal health worldwide. Cardiovascular disease, diabetes, hypertension, thyroid disease, cancer, multiple sclerosis, and mental health are the [seven NCDs most threatening to maternal health](#). And while hemorrhage and infection are still recognized as leading causes of maternal mortality, a global [obstetric transition](#) includes more indirect causes of maternal death, including NCDs. The Wilson Center is [bringing to light and investigating these alarming statistics](#). To achieve the [2030 Sustainable Development Goals](#) of reducing the global maternal mortality ratio and decreasing NCD-related deaths by one-third, the direct and indirect effects of NCDs must continue to be at the forefront of discussions.

3 things to watch: MEXICO 2020



1

Depressed Economic Growth




When he assumed office in December 2018, Mexican President Andrés Manuel López Obrador (AMLO) promised the Mexican electorate that he would produce 4 percent growth in his first year. The actual results have been deeply disappointing. By the end of the third quarter, it was clear that the economy had entered into recession, once revisions to earlier data from the national statistical institute, INEGI, had been factored in. The prospects for 2020 do not look much better, despite the very positive progress on ratifying the USMCA. Mexico’s central bank, Banxico, has lowered its estimate to 0.8-1.8 percent from earlier predictions of 1.5-2.5 percent. The Mexican government has stuck to its number of 2.5 percent and has based its budgetary calculations on that figure, which may cause problems with fiscal revenue if the economy fails to meet the administration’s expectations. The bigger problem for the AMLO government will come as the Mexican public’s faith in the President’s promises to provide growth and prosperity begins to subside.

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2

Violence and Organized Crime

2019 was once again a terrible year for public security in Mexico. Homicides have hit a record level with over 38,000 predicted by the end of the year. Two high profile cases, one involving the sons of imprisoned drug lord Joaquin El Chapo Guzman, the other a Mormon family in Chihuahua, severely damaged the Mexican government's public image on security. However, the ongoing public security challenges and Trump's attention to the issue may drive a more focused approach from the Mexican government. The failure to delineate a detailed security strategy has been recognized and criticized on many sides in Mexico, and now there will be serious pressure on Public Security Secretary Alfonso Durazo to produce results. If he cannot do so, the Mexican public has already indicated that their evaluation of the government will drop further.



3

U.S.-Mexico Relations in an Election Year

In 2019, the relationship suffered many blows, including tariff threats and suggestions from President Trump of military intervention to solve drug trafficking and violence, but proved incredibly resilient. Ongoing institutional contacts and active diplomacy on both sides managed to not only continue existing cooperation but also to secure a final agreement on the new USMCA, allowing for U.S. ratification in 2020. However, 2020 is an election year in the United States and we should expect that there will be renewed tensions due to public statements on the campaign trail, not only from President Trump as he tries to secure re-election, but also potentially from Democratic candidates critical of free trade and Mexico's role in drug trafficking. Although we should not underestimate the testing nature of these statements, existing institutional cooperation will no doubt survive, and there may even be an opening for more ambitious collaboration on both the economy and public security.

things to watch: MIDDLE EAST



1

A New Wave of Arab Protests

In 2019, protesters across the MENA region decried government corruption and economic dysfunction. In 2020, new leaders will struggle to pick up the pieces. In Sudan, a civilian government under Prime Minister Abdalla Hamdok will oversee a three-year transition to democracy that aims to remove Sudan from the U.S. list of state sponsors of terrorism and allow access to IMF and World Bank funding. In Algeria, citizens will continue to dispute the government's legitimacy, as only acolytes of former leader Abdelaziz Bouteflika were put forth by the government for December's presidential election. Protests in Lebanon and Iraq have been particularly deadly, as citizens unite across religious and ethnic divides to compel change. As these protests inspire others in the region, the prominent role of women – not only in the streets, but at the heart of grassroots organizing – is important to note. They represent a beacon of hope in a region that suffers from a deficit in women's leadership.

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2

Workforce Challenges & Opportunities

Many countries in MENA struggle with an ongoing workforce development challenge, which is both a symptom and consequence of weak governance. A new report by the Wilson Center’s Workforce Development Initiative offered nine key findings and five main policy recommendations to help MENA governments understand and address the issue. Our experts found a severe mismatch between skills taught and skills needed for available jobs; endemically low female labor force participation, despite ever-higher female education levels; and constraints on the creation and growth of small businesses, including start-ups. Countries in the region must reform and realign their education systems to market needs; create institutions that offer financial and technical support to small businesses; and develop policies and norms that encourage women to join the workforce. Expect relatively stable MENA countries like Jordan, Tunisia, and Oman to put greater emphasis on these issues, and serve as a model for countries embroiled in socioeconomic protests.

3

Israeli Elections, Take 3

After Prime Minister Benjamin Netanyahu and his main rival, former military chief Benny Gantz, each failed to build a governing coalition in the Knesset, Israelis will vote again in March for an unprecedented third time in 12 months. Initial polls show Netanyahu’s Likud and Gantz’s Blue and White party remain neck-and-neck, but don’t rule out a shake-up in the first three months of the year. Netanyahu’s December indictment on charges of bribery, fraud, and breach of trust may prevent him from being allowed to form a government. He also faces a political challenge from Gideon Sa’ar, a former minister, over leadership of Likud. Doubts also persist about the viability of President Donald Trump’s Israeli-Palestinian peace plan, and the sense of a window of opportunity closing may compel Netanyahu to take bold action (such as a move to annex West Bank settlements), possibly with President Trump’s encouragement. This may imperil U.S. efforts to bring Israelis and Palestinians together.

3 things to watch: POLAR 2020



1

A Changing Landscape – A New Ocean

The Arctic region is experiencing rapid environmental, social, political, and economic change. Climate change's most pronounced impacts are evident in the Arctic as the region warms more than twice the rate exhibited elsewhere on Earth. Indeed, we are witnessing the opening of a new ocean and the emergence in Alaska of a fourth open and accessible coastline. The eight Arctic nations – the U.S., Russia, Canada, Denmark/Greenland, Iceland, Norway, Sweden, and Finland – face diverse challenges and opportunities: the impacts of eroding coastline and landscapes on local communities; a myriad of homeland security challenges; maritime issues; and the evolution of existing international governance structures to address the political ramifications of this new Arctic landscape. The year ahead will see a quickening in the number of meetings, programs, and activities on all facets of the Arctic to address the many opportunities and challenges presented in a changing landscape.






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2

New Security Imperatives

The United States is an Arctic nation – with all of the inherent national security concerns that come with this status. Although international, consensus-driven frameworks such as the Arctic Council exist to discuss and act on environmental and scientific matters, the realities of today’s global Arctic require increasing attention be given to national security. Several reports and related strategies have been developed by the Department of Defense, the Department of Homeland Security (U.S. Coast Guard), and the Department of Commerce (NOAA), with additional strategies being developed or revised. Growing concern about U.S. capacity to effectively project force in the Far North will lead to greater calls for a “whole-of-government” approach – and a holistic, integrated DoD, Homeland Security, and Commerce (NOAA) strategy to better leverage existing assets and financial resources and counter Russia and China’s growing Arctic presence. The definition of Arctic security will be expanded to include food and water security, as well as environmental security.



3

Great Powers in the Far North

Arctic competition between the United States, Russia, and China will continue to play out in the year ahead. Russian President Vladimir Putin sees his country’s future as inextricably tied to the development of its vast stores of Arctic resources. Russia is also revitalizing and expanding its military assets along the Northern Sea Route. China’s role in the funding and development of the Yamal complex is intended to demonstrate its status as a self-declared “near-Arctic state.” Military cooperation between Russia and China also has increased in the Arctic. In response, NATO conducted one of its largest exercises in years in the North Atlantic and off the coast of Norway, and the U.S. reactivated its 2nd Fleet. Greenland’s key geographic and geopolitical role in the region is also drawing increased attention. China’s offer of infrastructure investments in natural resource development in Greenland has drawn the ire of the United States – and public and private concern from others in the region.

things to watch: **RUSSIA & UKRAINE**



1

Ukraine-Russia Conflict and Prospects for Peace






After six years of conflict, 2020 may finally be the year for substantive peace negotiations in Eastern Ukraine. On October 1, 2019, President Zelenskyy signed onto the Steinmeier Formula – a peace plan for the occupied territories in Eastern Ukraine proposed by the former German Foreign Minister. Ukraine’s agreement to the formula – a move welcomed by the Kremlin – saw a series of troop pullbacks from the frontline on both the Ukrainian and rebel-held side. This progress revived the Normandy Format – constituted by the French, Russian, and Ukrainian Presidents as well as the German Chancellor – with a summit that arrived at a tentative ceasefire on December 9, 2019. While Zelenskyy’s decision to sign onto the Steinmeier Formula opens up the prospect of peace negotiations, thousands took to the streets in Kyiv to protest what they see as ‘capitulation’ to Russia, in the capital’s biggest rallies since the Euromaidan. Can Zelenskyy sell his peace process to Ukraine’s population in 2020?

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2

Ukraine Reforms: Is Zelenskyy For Real?

Since his election in April 2019, President Volodymyr Zelenskyy has proven to be the President of Optimism, leading Ukraine into a new era of hope for improvements in society, politics, and the economy. A Kyiv International Institute of Sociology poll conducted in October showed that Zelenskyy's approval ratings remain high. 2020 will be the year in which we see whether Zelenskyy is able to live up to these hopes. Recent reforms suggest this could be the case. In November 2019, he signed a decree 'On Urgent Measures for Conducting Reforms and Strengthening the State', put his weight behind a controversial land reform bill, and reinstated criminal responsibility for illicit enrichment. The detention of a department chief in his own administration further underscores his anticorruption commitments. However, these reforms also have their downside: the reform decree contains troubling implications for press freedom, and the land reform proposals drew protests by farmers in 13 of Ukraine's 24 oblasts.



3

Russia's Role as a Global Powerbroker

Russia emerged once more as a global powerbroker in 2019, particularly in the Middle East, Africa, and Latin America. President Putin's visit to Saudi Arabia in October and Russia's new defense base in northern Syria (once a U.S. stronghold) demonstrate it is a major player in the MENA region, while the first Russia-Africa Summit, held in Sochi on October 23-24, and the murky activities of the Wagner Group – owned by Putin associate Yevgeny Prigozhin – in the Central African Republic mark new political gambits on that continent. Latin America is also squarely in the Kremlin's sights: Cuban President Miguel Diaz-Canel recently visited Moscow where he and Putin discussed increased economic cooperation, while Russia allegedly shipped \$315 million to Venezuela between May 2018 and April 2019. The Maduro regime has also offered Rosneft new incentives for investing in offshore gas. 2020 may see Russia consolidate its newfound role, or show signs of its incipient overreach.

3 things to watch: SCIENCE AND TECHNOLOGY



1

Disinformation

As we head into a presidential election year, all eyes will be on election-related online influence campaigns focused on particular candidates or wedge issues. But disinformation isn't just an election issue; it is a broader national security issue that needs our attention before and after we go to the polls – as much as on the day when we vote. The online influence campaigns that influence this election will have been built much earlier than the election itself, and will continue after it is over. They know no political party, and whether foreign or domestic in origin, their ultimate goal is to undermine the democratic system. Setting regulations focused on online advertising and microtargeting, user privacy, and malicious online behavior, as well as equipping citizens with digital and media literacy skills, will become more critical as social media become even more ubiquitous.

Featured Experts:

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2

Emerging technologies and geo-competition

New developments in areas including artificial intelligence, 5G, quantum information science and technologies, and the Internet of Things (IoT) will enable a smarter, better-connected society. As these technologies become embedded in our national infrastructure, it will be critical to understand and mitigate security concerns associated with products from players like China's Huawei. Thoughtful trade policy can help mitigate threats. At the same time, America will need to work with our democratic allies to develop and adopt both the standards, and the supporting technologies, that will ultimately be required to ensure that safety and security requirements are met.








3

Critical ethical conversations

The realities of our interconnected digital world challenge traditional norms around privacy, consent, and transparency. Our personal data are constantly collected, integrated, and used, with few policies in place to protect privacy or give consumers meaningful control over their information. Further, the systems that analyze and act on personal data are often automated. They may be biased in certain ways, and often lack transparency regarding the basis on which critical decisions are made. Foreign regulations – such as Europe's GDPR – are pushing conversations about personal privacy to the forefront. In addition, developments like facial recognition technology shine a spotlight on the need for ethical frameworks to shape the development of emerging artificial intelligence and machine learning tools.



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