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ETHE WORLD IN 2020: Ten issues that will shape the global agenda

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The world in 2020 will feel *disoriented* due to a lack of stable reference points. It will be also a *desynchronised* world, socially and globally, and *unequal* in many ways, between countries but above all within societies. Ten issues will shape the global agenda:

Protests and responses. There will be reactions of opposite sign to the outbreak of political and social conflict.

The politicisation of climate. Right-wing populism will try to exploit the fear of losers in the fight against climate change.

The UN at 75: retirement or reinvention. Anniversary in full questioning of multilateralism.

A drifting economy. More heterodox voices and higher pressure on digital taxation.

Technology as a new frontier of power. There will be tensions between countries, between governments and corporations, and between digital activists and repressive forces.

China: forced to choose? China's empowerment divides, creates new dependencies in Latin America and accentuates competition between EU countries.

Elections in the United States. Trump will use the foreign agenda to consolidate an image of strong leadership and to gain supports.

A geopolitical Europe: anything more than a slogan? The new European Commission will need resources and allies to project itself to the world as the regulatory power it is.

Afro-optimism and Afro-realism. Africa will generate a global geopolitical competition.

Mediterranean: cooperation and conflict. 25th anniversary of the launch of the Barcelona Process in a hostile context.

As well as immediate challenges, 2020 will encourage us to think about those in the medium and long term. A new year begins and so does a new decade. We leave 2019 behind with public protests on half of the world's streets, with the economic crisis so many have warned of still to surface, new examples of Donald Trump's erratic foreign policy at the helm of what remains the leading global power and growing awareness of the climate emergency and gender gap.

So what will the world look like in 2020? Which major challenges will shape the decade that is just beginning? It may be summed up as *disoriented*, *unequal* and *desynchronised*. The world we face is *disoriented* by a lack of stable reference points: institutions that are failing or contested often prove unable to channel the frustrations of wide swathes of the population, to alleviate their fears and buttress their hopes. This disorientation causes perplexity, or even, an inability to take timely decisions.

This is also an *unequal* world in more ways than one: inequality exists between countries but above all within societies, between the few that have a lot and the many who have little. There is a huge gender gap, about which awareness and mobilisation levels are

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rising, but progress is too slow and hampered by the rise of regressive political or social forces. Inequality is also territorial, whether that be within a single city or between the parts of a country that are well connected and those that have been forgotten. The fifth inequality is generational, which is not only material but also one of expectations.

As a result of these inequalities and accelerating technological changes, we will have a world that is *out of sync*, one that advances at very different speeds. There is global and social desynchronisation. A new form of inequality may even be spoken of between those who are prepared for the acceleration and those who fear being left behind and feel terrified by the absence of a safety net to soften the blow.

Like every year, this exercise places the spotlight on ten issues where the global agenda is particularly charged, either for reasons of timetabling – the US elections are the clearest example of this – or due to signs that the forces of change are likely to be stronger or more visible this year.

Protests and responses

The second half of 2019 has been especially intense in terms of citizen protests – from the *gilets jaunes* to Hong Kong, via the Catalan independence movement, the persistent peaceful marches in Algeria, the anti-sectarian movements in Iraq and Lebanon, the marches for and against Brexit, and the anti-government protests in Guinea and Zimbabwe. Although this is a phenomenon with global reach, it is in Latin America where the cycle of protests grew most strongly: Venezuela, Nicaragua, Ecuador, Chile, Bolivia and, finally, Colombia.

In 2020 we will continue to discuss what unites these protests and where they differ. In terms of differences, in some cases those mobilised seek to change the entire system and the establishment that runs it, while others reflect pre-existing social or territorial divisions. Among the shared elements are processes of emulation and learning that will grow stronger in 2020. Frustration and anger are shared, as is the inability of institutions – democratic or otherwise – to channel that or even to assess it properly before making decisions that unleash social anger. And it is not only government institutions that are failing, so too are opposition political forces in what constitutes a clear crisis of representation. The third factor is generational:

for those born at the turn of the century, these protests have formative value and may shape their political and social commitment.

But what comes after the protests? That will be the great question of 2020. The outbreak of political and social conflict has put institutions under pressure and will generate opposition. States that feel strong will set up mechanisms of accommodation and try to take advantage of the fatigue factor among the protesters themselves and in society as a whole. On the other hand, where states feel weak and there is significant social fragmentation, the risk of violence will grow. One of the unwanted consequences of this cycle of protests will be the desire among non-mobilised parts of the population for order, particularly when the protests have taken violent turns. Learning processes also apply to repression and we will see security forces being empowered and acting in an increasingly uninhibited way. This will reinforce pre-existing militarisation and securitisation trends, especially in some Latin American and Arab countries.

Along with these localised but simultaneous protests, in 2020 another type of mobilisation that is transnational in nature will continue to take shape and be articulated around feminism and the climate emergency. These protests also have a strong generational component and stand out for their proactive nature. Rather than provoking institutional reactions, they pressure institutions to respond.

The politicisation of climate

Greta Thunberg's was one of the faces of 2019; the representative par excellence of Generation Z (those born after 1997) and of the social mobilisation to stop global warming. In 2019, rhetorical and social movements began to reflect the urgency scientists have been insisting on for years. Online example of the debate's growing penetration is that the Oxford English Dictionary's word of the year for 2019 was "climate emergency". The young Swedish activist will continue to make headlines in 2020 but real success for this movement will lie in its depersonalisation and, above all, its ability to jolt consciences, change habits and increase social pressure on companies and governments. The latest report by the United Nations Environment Programme leaves no room for doubt: it is imperative that in 2020 action against climate change is accelerated. Over the next ten years, the planet's environmental health will be decided based on whether global warming is mitigated or accelerated.

In 2020, the Paris Agreement comes into operation. Its Article 2 sets the goal of keeping the global average temperature rise well below 2°C above pre-industrial levels, and to continue efforts to limit this increase in temperature to 1.5°C. This year, all states – with the exception of the US, the only country in the world in the process of abandoning the agreement – will have to submit their new voluntary national plans for achieving the shared goal. Along with US withdrawal, the other national package with greatest significance will come from China, the world's largest greenhouse gas emitter, which is also announcing new coal plants. The Paris Agreement is based on transparency mechanisms, which should make it easier to exert social pressure on defaulters or states that deliver plans with low levels of ambition. In principle, the agreement favours greater politicisation, although in practice that does not always mean moving in the same direction or with a shared tone.

At the moment, for example, the social movements calling for more action on climate change are much stronger in urban areas than rural and remain very weak in most developing countries, even if they are those that suffer most from the extreme effects of environmental degradation. On the other hand, the pacifist #FridaysForFuture (FFF) will share prominence with more radical expressions such as Extinction Rebellion (XR). While climate movements will shape social and political agendas and in some cases the environmental may become a space for opposing authoritarian regimes, we will also see the contrary reaction: forces that embrace

climate denialism or that disregard the urgency of the challenge as a concern of rich globalist urbanites. This evolution is especially visible in the right-wing populist movements on both sides of the Atlantic, which alternate between anti-immigration discourse and global warming denialism or criticism of the measures for addressing it.

The fight against climate change will produce winners, losers and transition costs. That is where right-wing populism will try to exploit the fears of part of the population or of certain territories that still depend on highly polluting productive activities. That is why the success of initiatives such as the European Green Deal, the EU's aim of achieving climate neutrality by 2050, and the discussions on environmental taxation depends not only on their ambition and ability to carry them out, but also on managing to calm the fears of those who feel like losers in this new reality. Alongside this dynamic we will also see changes in business behaviour: industry, especially in Europe, will increasingly invest in decarbonisation technologies but there will also be companies that choose to delay their investment plans while waiting to verify the depth of the transformation of consumption habits, the implementation of new technologies and the regulatory framework. At the

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micro level, the same is taking place among citizens. Three particularly sensitive sectors currently stand out: cars, plastics and food. However, if Black Friday 2020 continues to break consumption records and air traffic keeps growing, we must ask ourselves why such a gap exists between the prevailing discourse and day-to-day activities.

The UN at 75: retirement or reinvention

In 2020, the seventy-fifth anniversary of the entry into force of the Charter of the United Nations signed in San Francisco in 1945 will be commemorated. A notable anniversary at a time when multilateralism is being questioned along with what has come to be called the liberal global order, even by those who contributed to building it. In June 2019, the United Nations General Assembly adopted resolution 73/299, which establishes the 75th anniversary as a moment of reflection. The commemoration will take place on September 21st 2020 with a high-level meeting that includes the partic-

ipation of heads of state and government. An explicit motto has developed: “The Future We Want, the UN We Need: Reaffirming our Collective Commitment to Multilateralism”. But in 2020 it will not only be the United Nation’s (UN) future that will be discussed. So too will those of other multilateral frameworks such as the World Trade Organization (WTO), with the ongoing crisis over the dispute settlement mechanism, and the G-20, whose rotating presidency will fall to Saudi Arabia, enough in itself to generate controversy.

When considering the United Nations, we must dif-

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ferentiate between the UN as a mechanism of global governance and the UN as a generator of collective work agendas. On the first point the dysfunctions are more visible and the risk of obsolescence is higher. The necessary reform of the Security Council clearly shows this: its current composition does not reflect the new distribution of world power. There is consensus about the need to update it but not on how to do it, largely because those who have the power to reform it are those with most to lose from a change. While waiting for someone to discover a magical formula to convince the permanent members, council meetings end up being a stage on which the main global actors reaffirm their power through their rights of veto rather than a space for articulating collective security responses.

This coincides with an acute funding problem, with contributions that either do not arrive or arrive late. Antonio Guterres, UN Secretary-General, wrote to members of the organisation in early 2019 warning that states owed \$2 billion for peacekeeping alone. A third of this debt is owed by the United States. As the year progressed, the situation only worsened, exposing the organisation to its worst liquidity crisis in a decade, with 64 states still failing to make their contributions. Although the General Secretariat will try to take advantage of the symbolism of the 75th anniversary to reverse this situation, the lack of commitment is not something that can be solved with a commemoration. What is more, this resource crisis is doubly worrisome because the emergencies that the United Nations and its specialised agencies face are both increasingly acute and recurrent. According to the UN, in 2020 over 168 million people worldwide will need humanitarian aid, the highest number in decades, and a figure that is forecast to continue growing considerably in coming years.

By 2020, the humanitarian priority will be centred on Yemen, South Sudan, Syria, Venezuela and, to a lesser extent, Afghanistan, Burundi, Haiti, Sudan, Iraq and the Central African Republic. Attention to childhood will once again be a priority for UN agencies, as over 59 million children will need assisting in more than 60 countries worldwide, tripling the funding needs of a decade ago.

This situation of impotence contrasts with the mobilising effect of international agendas, with the Sustainable Development Goals (SDGs) and the 2030 Agenda points of reference. A decisive decade is beginning and discussion about what has been achieved over the previous five years and what remains to be done will intensify. The SDGs have been said to be a much more inclusive process than the previous Millennium Goals and it is true that there is greater appropriation by public administrations at all levels as well as by civil society. The challenge is to transfer this dynamism into compliance with the goals through effective measures. Otherwise, the SDGs run the risk of being merely a brand, a logo and an image and future initiatives will be compromised. The same could be said of other agendas such as the climate, urban issues, and women, peace and security. With resolution 1325 also turning 20, the latter will gain prominence and a boost via the adoption of national action plans is anticipated.

A drifting economy

We began 2019 with an acute sense of economic risk with many potential triggers: the trade war between the United States and China, the economic slowdown in Europe, particularly centred around the German engine, Brexit and Italian debt, and doubts about emerging economies. None of these concerns has dissipated at the start of 2020. Another recurring theme in 2019, which will remain on everyone’s lips, is the debate over whether the necessary lessons have been drawn from the previous crisis and whether enough tools exist to deal with a new financial or growth crisis. Added to these concerns are others with longer histories: the future of capitalism, the impact of digitalisation and automation on the labour and fiscal sphere and on the increase of all kinds of inequalities, and the dynamics of social precariousness, especially in developed economies. In this area, justice will play a leading role. The rulings made throughout 2020 in Europe, Latin America and the United States on the phenomenon of delivery riders, for example, will help address the model’s sustainability collectively, along with its implications for inequality and dignity among workers.

Another uncertainty must be added to this list: after a decade of reducing interest rates and applying budgetary austerity measures – in Europe as well as in developing countries – the economy is not picking up or at least not at the necessary rates. Three types of reaction may be anticipated if orthodox economic remedies do not produce the expected results. First, the feeling of disorientation will increase as the obsolescence of our responses to this type of crisis becomes apparent. Second, given the questioning of orthodox approaches, more heterodox visions, especially in matters of monetary policy will gain weight and adherents. Criticism of the orthodoxy is also entering the business world, with a strand arguing that achieving higher profits cannot be the sole objective but must be accompanied by greater social and environmental responsibility and higher investment in workers. And, thirdly, it will be asked whether the measurement indicators are failing, revitalising the debate on the growth model and the need to incorporate other criteria when, for example, designing budgets. New Zealand has pioneered this in 2019.

When discussing a growth model, Europe will have to look backwards. At the height of the last crisis, the EU adopted the 2020 Strategy with the idea of promoting smart, sustainable and inclusive growth. A series of objectives were set, such as investing 3% of GDP in R&D, and reducing the number of people living below the poverty line or at risk of social exclusion by 20 million, to give two examples. A series of emblematic initiatives in youth, digital and industrial policy were also approved. The time has come to assess what has and (more importantly) has not been achieved and to ask why. It will also be the moment to articulate a 2030 strategy that is likely to focus on sustainability issues.

It is at the intersection between inequality, technological disruption and the growth model where one of the main issues of 2020 and of the decade now beginning emerges: taxation. One of the 2019's controversies was the so called "Google tax". Despite the initial agreement between France and the United States at the G-7 in Biarritz to push forward with the design of a global tax so that digital companies pay taxes where they generate their profits, the year ended with new tariff threats from Washington to those EU countries ready to tax digital services, affecting US technology giants. . Changing consumer habits – for example, online shopping and subscription to digital content platforms – have increased the importance of the phenomenon for the fiscal health of developed economies. The OECD is responsible for preparing technical work and throughout 2020 we will verify whether or not progress has been made in this field.

Technology as a new frontier of power

2020 will be the year of 5G and the decade begins in which we will see great advances in the fields of artificial intelligence and quantum computing, which may radically alter the economic system, security policies and power relations. What is new generates hope but also confusion, especially among those who feel they may figure among the possible losers of this revolution. The frequency with which we speak of digital nationalism, digital sovereignty and technological hegemony is a clear indicator of this. Classical geopolitical concepts

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and visions are recovered, although they are adapted to a competition that does not focus so much on competition for territory but for virtual spaces. This year, but also beyond, three types of tensions will become even more visible: between states, between states and corporations, and between digital activists and repressive forces.

In terms of competition between states, the main tension will continue to be between China and the United States. At the business level, what we see is the consolidation of a kind of technological G2 and the resurgence of old Cold War reflexes. In 2020, one of the main battlegrounds will be the extension of 5G technology, an area in which China leads. The United States leads the countries that see it as a security threat. This technological bipolarity will create new dependencies and spheres of influence. But it will also cause reactions among those who are lagging behind and are still confident of recovering positions and perhaps allying with each other. The recent EU rapprochement with Japan in terms of connectivity is a step in that direction. India will also attempt to enter the fray, especially in quantum computing. To reduce tensions, the conception of a multilateral initiative to replicate in the technological field what has been done in terms of trade, disarmament and the fight against climate change is desirable. Perhaps the idea of a global technological regime will end up taking shape at some point in this decade but this year unilateralism and competition will continue to prevail.

To say that data is the new oil has become a commonplace: it is the most valuable resource, competition for access to it is fierce, and whoever monopolises most establishes a position of strength over the rest of the players in the system. The difference being that it is not usually states that control this resource, nourished by the

data of their citizens, but large digital empires that end up knowing populations better than their governments and that have developed an extraordinary ability to escape their control. Although China is the exception. In 2020, “surveillance capitalism” will be strengthened as a business model of extraction, commercialisation and prediction based on private data and behaviour.

One of the great challenges at the start of this decade is digital empowerment – how citizens can regain control over the information they have generated and how to conceive an alternative model for a data economy that

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reduces the current asymmetry between the information large platforms have on their users and the lack of transparency about their business models and algorithms for processing and exploiting this data. Hence, in the debate on digital sovereignty more and more voices insist that citizens rather than governments should be able to exercise their “digital sovereignty”.

Many governments are also concerned about the destabilising capacity of disinformation, accelerated by technological changes that are advancing much faster than any attempt to regulate them. In a US electoral year everything related to fake news and political misinformation will gain importance. The digital transformation is also one of the priorities of the new European Commission of Ursula von der Leyen and by the end of 2020 the Digital Services Act (DSA) should be presented. This new European framework aims to legislate and regulate illegal content, disinformation and advertising transparency on the internet. The commission is determined to set limits on this era of technological giants regulating themselves. The new position of Commissioner Margrethe Vestager, who also occupies one of the executive vice presidencies, is a sign of the priority given to this issue. But the Silicon Valley titans have already begun a legal and influence battle that may establish the DSA as the new battlefield between European technology policy and large global platforms.

Technology is also the new frontier of activism and, of course, repression. Heated discussions will take place on the ethical dilemmas posed by new applications of artificial intelligence and how algorithms, surveillance mechanisms and recognition technologies may perpetuate or accentuate gender inequalities and racial discrimination. While this technological acceleration causes perplexity among broad swathes of the population, it also increases interest in mastering it. Dystopias will continue to loom large in literary and audiovisual consumption and it is the awareness of the dangers on

the horizon that may generate a defensive reaction in the most mobilised or best-informed sectors of society, as well as among certain governments that continue to think that privacy and freedom must be protected.

China: forced to choose?

China’s re-emergence as a global power divides those who perceive it as a risk from those who see it as an opportunity. The former are concerned about losing relative power and the new dependencies and vassal states. The latter may be attracted by diversifying relations with global powers and many see Beijing as a reliable partner, a committed investor, a strategic ally or their only option. These differences arise between countries but also within them, where relations with China enter general public debate.

Issues that have been prominent in the last months of 2019 like the protests in Hong Kong and the repression of the Uighurs will continue to figure on the international agenda in 2020. Shameful silences will persist, such as that of the vast majority of Muslim countries about the persecution of the Muslim minority in the Xinjiang region, and many Western democracies’ timorous expressions of concern about Hong Kong.

In places where China has gained most clout, the debate on the new dependencies in terms of debt, development aid and exports will grow. Thus far, Africa has been the most visible case, but Latin America has begun to figure strongly in this dynamic. The context of political polarisation – from Venezuela to Bolivia via Brazil and Nicaragua – and economic crisis – mainly due to falling commodities prices – will increase the political and social division around relations with Beijing.

The European Union is the other place divisions are opening up over what China’s empowerment means. The union has not yet defined a common position and the debate will intensify in 2020. In the institutions and capitals of some states – especially Berlin and Paris – China is beginning to be described as a systemic rival. On the other hand, smaller countries from Portugal and Greece to many central and eastern European countries and Italy see China as an enticing partner, sovereign debt holder and a key investor, especially in relation to the Belt and Road Initiative (BRI) infrastructure mega-project.

Another focus will be the desire and capacity of other Asian powers to act as counterweights to the rise of China. The alignment between India and Japan is central, as is the construction of a new geopolitical imaginary that changes the focus from Asia-Pacific to the Indo-Pacific. Finally, in Asia there will be those who

try to take advantage of the growing rivalry between the United States and China. Even when a mini deal is reached between the two leading global powers that allows the trade hatchet to be buried for a while, both parties tend to see it as ephemeral, like a kind of truce. Faced with this situation, other emerging economies such as Vietnam, Indonesia and the Philippines will look to attract industrial investment from those seeking to reduce their exposure to China or who fear US reprisals if the confrontation is resumed.

Elections in the United States

US citizens will elect their president on November 3rd. International interest will not be restricted to the electoral campaign; the process of nominating the two main parties' candidates, and the outcome of the impeachment process against President Trump that began at the end of 2019 will also draw attention. Trump's outlandish behaviour and erratic decisions have shaped the international agenda over the past three years and will remain one of the main sources of global uncertainty and perplexity in 2020.

Although the electoral campaign (and the primaries) will centre on domestic and even personal issues, the international dimension will enter the debate. On the one hand, that is because the impeachment process begins with the accusation that Trump withheld almost \$400 million in military aid approved by Congress in order to pressure the new president of Ukraine to open an investigation into Joe Biden – one of his possible democratic rivals in 2020 – and his son. But other links to the international agenda are also visible. Trump has made great fanfare of reversing Obama's foreign policy decisions. The nuclear agreement with Iran is the clearest example but we must also add the withdrawal from Syria and from the Paris Climate Change Agreement. He has also presented himself as an aggressive negotiator able to secure the best deals, with China the main focus of attention. Immigration, an issue halfway between the domestic and international, will once again have a prominent place in these elections.

Foreign policy decisions are likely to become more closely linked to the electoral timetable as 2020 progresses, particularly on issues that Trump believes will help him consolidate a certain leadership image or guarantee the support of specific groups that may be key to re-election. In this sense, we can expect a more aggressive stance on Venezuela and Cuba, a hardening of the migration agenda (especially towards Mexico), more signs of support for Israeli expansionism and a trade truce with China that safe-

guards US agricultural interests but which is made from a position of strength. Eyes will also be on Afghanistan as, following on from Syria, Trump wants to withdraw as soon as possible from a country and a war that will have cost US coffers almost a trillion dollars. The Taliban know this and will seek to negotiate from a position of strength.

The main international actors are scrutinising these positions to try and take advantage of the current occupant of the White House's electoral needs. China's interpretation is that Trump would prefer to conclude an

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agreement before the elections and Beijing will use this as a negotiating asset. Russia will also seek out new opportunities, offering support to governments and territories that are targeted by US attacks and filling the power and influence gaps the United States leaves in its wake.

Finally, the US elections will provide two other topics of international debates. The first is what to expect from a second Trump term if, as everything seems to indicate, he is confirmed as Republican candidate. The hypothesis that the exercise of power would act as a moderating factor on him has not been confirmed or perhaps only partially. Although Trump has avoided entering areas of excessive risk and John Bolton's resignation as National Security Advisor has distanced him from more warmongering positions, what has not changed are his unpredictability and impulsiveness as well as the lack of effective counterweights. In a second term, this way of doing politics – at home and abroad – may be accentuated and, therefore, the risks of accident and abrupt change of direction will rise, especially on security matters. On economic matters, protectionism and the destruction of the multilateral trade system will only be halted if the United States suffers from its consequences – and more due to domestic pressure than conviction.

The profile of his opponent will be the second topic of global debate. That is to say, whether the Democratic candidate has an international agenda will be discussed and, if they do, the focus will turn to its likely direction and whether they will seek to rebuild relations with allies. In all likelihood, the United States will continue along the path of polarisation, which will inevitably permeate the election candidates' foreign agendas and the public's perception. So, as November 3rd approaches, we will increasingly wonder which elements of the evolution of the US position in the international system are structural and which depend on who occupies the White House.

A geopolitical Europe: anything more than a slogan?

After a more extensive election process than on other occasions, the new European Commission led by Ursula von der Leyen as President and Josep Borrell as Vice-President and High Representative of the European Union for Foreign Affairs began its journey in December 2019. But 2020 will reveal whether the new leaders are setting a new course and whether the priorities and the ways of doing politics will change. Germany will assume the rotating EU presidency in the sec-

In 2020 we will see whether the geopolitical Europe is more than a slogan and whether Macron's discourse is more than a provocation.

ond half of 2020 and that, along with the approaching 2021 German elections, will increase discussion about Merkel's influence on the European project and the void her departure may leave. One of von der Leyen's promises is to adopt a more geopolitical vision, without clarifying what this implies. This matches a series of statements, speeches and interviews given by French President Emmanuel Macron that were markedly geopolitical and sought to give the thinking and actions of other European colleagues a jolt. In 2020 we will see whether the geopolitical Europe is more than a slogan and whether Macron's discourse is more than a provocation.

What is an undeniable reality is that Russia and Turkey, the EU's main neighbours, *do* act with a geopolitical mindset and their relations with the EU form part of their calculations. For precisely that reason, the contrast seems even greater when we consider some of the decisions made at the end of 2019, such as the refusal to begin accession negotiations with North Macedonia and Albania, the individual, uncoordinated trips European leaders made to China and the EU's timid response to Turkish intervention in northern Syria.

To develop a geopolitical vision, resources and allies are needed. On the former, PESCO (European defence cooperation) is likely to continue progressing but at a pace and with a lack of ambition that will leave countries that would like to go further unsatisfied. Budgets are even more worrying. The new financial projections remain unagreed and the so-called single instrument – meant to rationalise and make the EU's external action more flexible – is not prompting high expectations of change. As for allies, prudence will prevail with the United States until the elections pass. With Turkey, tensions will have to be managed, as the EU has cemented a relationship of dependency and even subordination

on migration issues. With the United Kingdom, we still do not know if it will have left the EU by the end of 2020 and, if so, we will have to see if it is perceived as a reliable ally or a resentful neighbour, as is the case with Turkey.

Given this situation, the temptation will be to stick to issues where the EU still feels strong and respected. The clearest cases are climate change and trade, as they allow the union to project itself as a regulatory power. In 2020, we will see if trade negotiations are used to try to influence environmental issues, fair trade, mineral

supply chains and labour rights, with a strong emphasis on the fight against child exploitation, as von der Leyen has promised. Success in these areas will require alliances to be established with other international actors, work to be done in multilateral settings such as the WTO and the OECD and, above all, the maximum consensus possi-

ble secured among member states. Another regulatory front the commission will explore is the design of a mechanism of border adjustment for carbon emissions, with the dual objective of fighting climate change within the union without losing competitiveness and encouraging less carbon-intensive industry outside the EU. Emphasising the environment might also allow the EU to develop its own geopolitical vision. On the one hand, the EU will increasingly focus on the geopolitical effects of the energy transition through initiatives such as the European Battery Alliance. On the other hand, desertification, sea-level rise and poor air or drinking water quality may not be classic national security issues, but they are part of the human security agenda, an idea coined twenty five years ago that seems somewhat forgotten. If Europe wants to be geopolitical, it has to enact *human geopolitics*.

In addition to trade and the environment, the other high priority is going to be Africa. Partly because European leaders and the new senior officials have been announcing this for some time, but also for objective reasons related to Africa's proximity and growing weight in the international political and economic system. Those who view China as a strategic rival see Africa as a contested space, and in 2021 the Cotonou Agreement expires, meaning that in 2020 the negotiation of a new framework for relations with the countries of the ACP bloc (Africa-Caribbean-Pacific) should be accelerated.

There is broad consensus that Africa is a priority, but in Europe very different ways of approaching cooperation with the continent coexist. While in African institutions and even in some states, the discourse of Africa as place of opportunity generation has been adopted, for others – especially neighbouring countries and those with strong right-wing xenophobic movements – a securitised approach prevails, with migration control top of

the agenda. Some African countries may be tempted to use the alleged fear of migration to strengthen their positions in bilateral negotiations with the EU or with any member states. That would hinder the development of continent-to-continent cooperation with a transformative agenda.

Afro-optimism and Afro-realism

Africa has gained centrality. Nobody refers to it as a forgotten continent any more. In fact, it's the other way around: Africa attracts a lot of interest, perhaps more than the continent can withstand. This is true above all when this interest is accompanied by geopolitical ambitions that make the continent a preferred space for competition in a global or regional rivalry. In any case, the days of Afro-pessimism have gone and in the decade that now begins the discussion about Africa will oscillate between Afro-optimists, who will describe the continent as a source of vitality and an opportunity generator and Afro-realists, who will acknowledge these positive developments but point out their fragility or add in less promising counterpoints, such as the scale of humanitarian crises or of climate vulnerability.

This will be the case when it comes to development and economic growth. On July 1st 2020, the mechanisms of the African Continental Free Trade Agreement that formally entered into force in 2019 will come into operation. Once all the states that have signed up have been ratified, this will be the largest free trade area in the world by number of countries and there are estimates that, as a result, intra-African trade may rise by 50%. Africa is home to some of the fastest growing economies in the world: it is estimated that Ethiopia will exceed 9% growth, and Rwanda, Senegal, Ghana, Tanzania and Ivory Coast go above 6%. But the weak point behind these figures is that growth is accompanied by higher levels of inequality and greater environmental and urban challenges. What is more, the continent's largest economic and demographic power, Nigeria, has been unable to overcome the 3% annual growth barrier since 2014 and there is no prospect of improvement in the short term. The second-largest economy, South Africa, has even more anaemic growth levels.

Optimism has also reached the political arena. The winds of change in Sudan following the removal of Omar al-Bashir and the leadership of Ethiopian Prime Minister Abiy Ahmed, awarded the Nobel Peace Prize, have raised expectations. Dynamic social and political mobilisations – sometimes called African springs –

have grown and, despite facing many problems, leadership changes in countries like Nigeria and the Democratic Republic of the Congo have taken place without violence. But there are of course counterpoints to this narrative: ongoing transitions are fragile, not least in Sudan; changes of leadership do not necessarily involve a change of system (as with Zimbabwe following Mugabe removal); dictators and their families such as the Obiang and the Bongos continue to cling to power; and even Ethiopia – presented as a model of success and a source of hope – faces major internal tensions with the Oromo and deep-seated social unrest.

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Regionalism in Africa also seems in ruder health than in the rest of the world. The African Union feels strengthened and demands greater prominence, although as an organisation it is not yet self-sufficient and continues to depend, to a large extent, on the support it receives from non-African actors such as the European Union. Even more extreme is the international dependence on the G5 Sahel Joint Force. But the desire to establish relations with the whole of the African continent has whetted the appetite of many global actors to hold summits and even compete with each other. The first Russia-Africa Summit in October 2019, in addition to those already organised by China, the EU, Turkey and India, demonstrate this trend. According to the same rationale of competition and spheres of influence, in 2020 we will have to be very attentive to the geopolitical dynamics in the Red Sea, the space that connects Africa with the Middle East security complex and through which the Gulf countries also seek to join this contest.

Mediterranean: cooperation and conflict

While Africa has moved from pessimism to optimism, the Mediterranean has gone in the opposite direction. In 2020, the 25th anniversary will be marked of the launch of the Euro-Mediterranean Partnership, also known as the Barcelona Process, after the city where it was founded. The Mediterranean will pose a collective challenge, especially for the EU: because of proximity but also because of the approach a European Union with renewed leadership may take. Other parts of the planet are unlikely to attribute transformative or stabilising capacity to the EU if it is unable to achieve results in its nearest neighbourhood.

Despite the good intentions and the original spirit, it has not been possible over these years to build a space of stability, a dynamic of shared prosperity, and contacts have not been facilitated between the societies on the two shores. What has happened is that the agenda has been expanded to include the environment, youth, employment and refugees, all of which are prominent today. And Europe no longer enjoys the dominant position it had twenty years ago: Russia has re-emerged as a power in the Mediterranean and China is slowly but surely making its presence felt.

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In 2020 the discussion on the Mediterranean will be captured by immigration and refugees. In contrast to 1995, the sea is now mostly viewed as a huge and often unpassable border. Fear among European societies and governments of mass arrivals of refugees or migrants will be used by southern governments to acquire trade-offs or to buy silence. In the north, the discourses of fear will coexist with civil society initiatives that try to de-border this space and propose more friendly policies and discourses. Of all the issues on the table, the way the migration agenda is addressed will set the tone of the relationships.

The Mediterranean is the scenario of several conflicts. The violence will not disappear in Syria or Libya in 2020 and the temperature can rise in Palestine or Lebanon at any time. One of the news events of 2019 was the killing of Abu Bakr al-Baghdadi but in 2020 we will see how rather than disappearing, the threat of the self-proclaimed Islamic State has been transformed. The issue of returnees, especially Europeans and Maghrebis, will also rise on the security and foreign policy agenda.

Given this scenario, the challenge will be to develop a positive agenda on Mediterranean issues. The EU should appreciate the consolidation of the democratic transition in Tunisia and the peaceful nature of the ongoing mobilisations in Algeria. But we must also include background issues such as the empowerment of women, the development of renewable energy, growing cultural hybridisation, environmental mobilisation and the willingness to recover the lost ground in the digitalisation agenda. Co-operative reflexes remain and instruments are available, starting with the Union for the Mediterranean, but also including the entire network of Mediterranean initiatives developed by cities, civil society organisations and economic sectors. 2020 will not be the year the transformative hopes that emerged 25 years ago bear fruit but it is also unlikely to be the year they finally wither.

The Mediterranean encapsulates many of the issues

that will shape 2020. The three trends we announced at the beginning – *inequalities*, *dyssynchrony* and *disorientation* – manifest themselves with particular intensity in this region. Several Mediterranean countries have witnessed protests and we must, therefore, be aware of the responses and learning processes. The Mediterranean will continue to be one of the most vulnerable spaces to climate change and other forms of environmental degradation and a stage on which the strength of the changes to the global balance of power and technological disruption may be verified. The idea of Mediterranean cooperation returns us to the discussion about the delicate health of multilateralism, and if geopolitical Europe wants to be more than a motto, it will have to prove it on its southern border.