

Beyond the COVID-19 horizon

What to Watch in 2020

Wilson Experts Weigh In On the
World During a Global Pandemic





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

- Woodrow Wilson

When our first edition of *On the Horizon* came out last year, I imagined a steady progression of the Center’s excellent work. As you know, we have been rated by our peers as first in regional expertise for three years in a row. But it never crossed my mind that a huge pandemic and protests in American cities over racial injustice would change our world—possibly forever.

Most Center staff have been on enhanced telework for three months, and all our programs are virtual. This has not slowed us down: we’ve had over 80 programs analyzing the COVID-19 pandemic from every region and every angle!

Just as impressive, we’ve kept focus on rising U.S.-China tensions over Taiwan and Hong Kong, unraveling norms across Latin America and Central Europe, constitutional changes in Russia, Africa’s enormous progress with technology, the “infodemic” of misinformation and disinformation, the crumbling Afghan peace deal, and much more.






I have written elsewhere that terrorist organizations and rogue regimes are not biding their time while we confront COVID-19. Neither is the Center.

This second edition displays some of our insights and thought leadership. What we do best is to explain the world to Washington and Washington to the world. See for yourself. And stay safe!

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3 things to watch: **AFRICA**



1

The Pandemic Is Both a Setback and an Opportunity for Free Trade within Africa

The July 1 launch of Africa's continental free trade agreement (AfCFTA) has been postponed for at least six months as the continent grapples with COVID-19. This is a major setback for Africa's trade aspirations; instead of removing barriers, the continent must deal with new virus-related border closures and travel restrictions. However, African trade officials rightly see the crisis as offering a chance for an opportunity. Through the AfCFTA, Africa can strengthen intra-African supply chains for pharmaceuticals, medical equipment, and foodstuffs to reduce its dependence on outsiders and better prepare to fight future pandemics and other crises. An AfCFTA-driven regional approach to developing these internal chains and strengthening digital connectivity would secure Africa's self-reliance in public health, and would also make it more attractive to foreign investors seeking low-cost opportunities for medical facilities, supplies, and medicines. In this way, the AfCFTA can drive Africa's post-pandemic recovery and economic restructuring to boost its resilience against future shocks.

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Confronting Jihadists Amid the Pandemic

Although the COVID-19 pandemic has slowed life and commerce worldwide, militant Islamist groups operating across the Sahel continue to execute deadly attacks. Through mid-April 2020, this fragile region had suffered 1,090 terrorist attacks and 4,020 fatalities. For a region already struggling to counter violent extremism, the pandemic has intensified the challenge. Health-related lockdowns have further isolated at-risk youth and have reduced public trust in government as healthcare systems are overwhelmed and the enforcement of lockdowns leads to excessive interventions by security forces. Moreover, the pandemic has diverted donor support and has constrained international peacekeeping operations. Countering violent extremism (CVE) in the Sahel amid the pandemic requires finding complementarities between CVE efforts and public health responses. For instance, using technology to engage locked-down youth, spending CVE funds on healthcare to retain public trust, and building local governance capacity to withstand a variety of community threats can consolidate scarce resources to serve both security and public health needs.



3

The COVID-19 Pandemic Requires Renewed Vigilance, Using “People Power”

Before the pandemic’s outbreak, a surge of “people power” in Africa saw popular protests in Sudan and Algeria drive leaders from office after decades in power. The pandemic, however, poses a threat to African popular democracy movements as leaders across Africa take strong measures to prevent the virus’s spread. The weakness of the continent’s healthcare systems means that African leaders fighting the pandemic have few tools, with widespread social lockdowns being the most immediate ones. To enforce the lockdowns, many African countries are deploying security forces nationwide and are banning political rallies. While the heavy emphasis African countries place on such preventive measures is understandable, pro-democracy activists in the most authoritarian countries are concerned that these measures may be used by regimes to maintain their grip on power long after the pandemic is over.

3 things to watch: ASIA



1

An Accelerated Shift in Geopolitical Power to Asia

Asia was already undergoing considerable change for several years before the outbreak of COVID-19, and the pandemic has primarily served to accelerate these trends. Economic and political power has been flowing from West to East, but generally more effective COVID-19 responses across the region—especially in Northeast Asia—are likely to limit the pandemic’s social and economic impact, thus putting much of the region in a relatively stronger financial position. For 2020, the IMF [projects](#) a 6 percent contraction for the U.S. economy and a 7.5 percent contraction for the euro area, while it projects that China’s and India’s economies will grow between 1 and 2 percent. Yet the implications of a sharp decrease in demand from the U.S. and Europe for Asian manufactured goods remain unclear. Also unclear is whether the region’s [rapidly growing middle class](#) can pick up the slack in demand. Moreover, China’s central role in the global economy may be undermined in the wake of the pandemic, as the world may seek to develop alternative supply chains that lessen dependence on (and vulnerability to) China. A growing divide is also likely within Asia—between more economically resilient Northeast Asia, which could recover more quickly from the pandemic, and the continent’s emerging markets.

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Reinforced Indo-Pacific Perceptions of China

Rather than catalyzing a uniformly negative shift in how the Indo-Pacific region's countries view China, the pandemic has so far hardened preexisting perceptions of China across the region. For countries that are already [deeply skeptical](#) of China—such as Australia, Japan, South Korea, and India—Beijing's handling of the outbreak has reinforced perceptions of China's leaders as self-serving, irresponsible, exploitative, and dangerous. These concerns have been further exacerbated by China's own actions and rhetoric in the wake of the COVID-19 pandemic, including a marked increase in [opportunistic assertiveness](#) in the [South China Sea](#), in the [East China Sea](#), and with [Taiwan](#). Yet several countries that had a [more positive view](#) of China before the pandemic or were already within China's geopolitical orbit—such as Cambodia, Pakistan, and some European nations like Italy, Slovakia, Hungary, and Serbia—have been far more positive in their assessment of China's response. So far, instead of broadly isolating China, the pandemic has primarily deepened geopolitical polarization.

3

Uncertainty about the U.S. Role Driving toward Strategic Atomization

A surprising aspect of Asian geopolitics during the COVID-19 pandemic has been the absence of robust American leadership. The United States has for decades been the only country with the power, resources, and credibility to drive regional responses to past emergencies, including North Korea's invasion of South Korea in 1950, the 1997 Asian financial crisis, and multiple natural disasters. In the wake of the pandemic across the Indo-Pacific region, [few countries](#) beyond those that already had close ties to Beijing have been eager to accept Chinese leadership and dominance. Yet what many regard as a [lack of U.S. leadership](#) in driving an international pandemic response, along with deepening concerns about the [reliability of American power](#), may drive some Indo-Pacific countries to believe they cannot look to the U.S. as a credible alternative to China. Lack of U.S. leadership has been apparent not only politically but also on the scientific front at a time when researchers worldwide are cooperating more closely in a race for a COVID-19 vaccine as well as a cure. Taken together, hardening skepticism about China and growing uncertainty about the United States have the potential to drive the region toward strategic atomization, whereby countries will attempt to find independent paths that reduce their dependency on both Beijing and Washington. Unless corrected, these trends could lead to a broad regional withdrawal from globalized markets and supply chains, dramatically higher levels of tension and instability across the region, and a greater possibility of nuclear proliferation.

things to watch: **BRAZIL**



1

The Unraveling of Democratic Norms

Brazilian democracy is resilient, yet faces mounting challenges. The spread of COVID-19 in Brazil has, in many respects, amplified the tensions that existed before the health crisis between the president and the other branches of government. President Bolsonaro's clashes with the National Congress and state governors and his use of misinformation, along with his repeated support for proauthoritarian protests, raise serious concerns about his commitment to democratic governance. Yet at the same time, congress, the courts, and state governments have taken a more active role in countering presidential power during this crisis, suggesting that the system of checks and balances that undergirds Brazilian democracy is still working. Nonetheless, policymakers must continue monitoring the situation for women, Afro-Brazilians, indigenous peoples, the LGBTQ+ community, and the country's other marginalized groups—along with what may be a slow chipping away at fundamental human, civil, and press freedoms and rights.

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The Economy at Stake

The Brazilian economy is now forecast to contract 5 percent or more in 2020—fallout from the economic shutdown and social-distancing measures required to flatten the coronavirus curve—and much-needed economic reforms are on hold while policymakers focus on saving lives. Whether Brazil will be able to return to growth in 2021 remains to be seen. Much depends on the government's ability to prevent deeper, long-term damage to the economy during the COVID-19 crisis by providing fiscal and monetary stimulus, including assistance to vulnerable Brazilians and companies. Moreover, 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 the October 2020 municipal elections could serve as an important referendum on the administration's efforts.



3

Environmental Protection under Pressure

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 both internal and global scrutiny over rising deforestation rates and the high number of fires in the Amazon Rainforest. Experts warn that the Amazon's 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. The expected economic fallout from COVID-19 has only reinforced concerns that the Bolsonaro government may double down on the Amazon's development as part of its strategy for economic growth.

3 things to watch: CANADA 20

1

Canada's Pandemic Pall

As the COVID-19 pandemic spread, Canada was already experiencing negative growth in the fourth quarter of 2019. The federal public health guidance led provincial governments to impose stay-at-home restrictions and bans on business activity that pushed the economy into recession, even as the Trudeau government secured parliamentary approval for the United States–Mexico–Canada Agreement (USMCA) that replaced NAFTA. Canada's healthcare system has encouraged Canadians to come forward for testing, but high utilization rates of hospital bed capacity (generally above 92 percent) mean that the system is vulnerable if there is a surge in new cases. Reviving the Canadian economy will be a challenge, requiring provincial premiers and the prime minister to cooperate across party lines. Meanwhile, whatever the United States does—or does not do—will be key to future Canadian economic prospects.

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HUAWEI

2

China Syndrome

Canada arrested Huawei chief financial officer Meng Wanzhou on a U.S. warrant on December 1, 2018. Since then, Canada has borne the brunt of Chinese economic retaliation and diplomatic hostility while courts consider Meng's extradition to the United States. On May 27, the British Columbia Supreme Court rejected a motion from Meng's lawyers to dismiss the case. The U.S. Phase One deal to resolve trade tensions commits China to purchase \$250 billion in goods from the United States, but U.S. restrictions on the sale of sensitive technologies to China force the Chinese to purchase commodities, from energy to soybeans and even soft-wood lumber, to meet their quota, and these are all things Canada also hopes to sell to China. As Washington and Beijing clash, Ottawa's concerns continue to be unheeded in both capitals.

3

Oil Patch Paradox

When Russia broke with an OPEC+ agreement on oil production, and Saudi Arabia responded by increasing its production, world oil prices briefly went negative, hurting U.S. producers and most others around the world. Canada was insulated from the oil price shock, but Canadian producers wish it had not been. The lack of infrastructure to connect Canadian oil to world markets has been a decades-long problem, and a U.S. court ruling in Montana has again cast doubt on TC Energy's Keystone XL pipeline to the Gulf of Mexico. Recent progress on Enbridge Line 3 and Line 5, as well as the capacity upgrade to the Transmountain Pipeline connecting to the Pacific, all offer hope on the horizon. But for now, the Trudeau government must contend with rising anger in Alberta and Saskatchewan over Ottawa's perceived indifference to their suffering and a backlash against the carbon taxes that have added to many Canadians' cost of living.

3 things to watch: **CHINA**



1

The Costs of Deeper Decoupling






The coronavirus has accelerated the disintegration of Sino-U.S. supply chains, financial systems, technologies, civil interactions, and, most ominously, information and knowledge systems. In all these realms, China and the United States increasingly see interoperability as a threat to security. But there is no road map for decoupling—no coherent vision for a bifurcated world. If the two great powers build separate commercial, economic, and technical systems—if their universities, innovation systems, and traditional and social media operate in separate spheres, guided by disparate values—both nations will face crippling costs and profound social and diplomatic challenges. With the costs of rivalry so high, the strategic assumptions of both nations must be continually questioned.

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2

Rhetoric versus Reality

Since COVID-19 struck the United States, the rhetoric of Chinese and American leaders, media, and expert communities has become more bellicose and accusatory. Yet despite rancor between the political classes and increasingly negative mutual public perceptions, the two nations' scholars, corporations, and subnational governments continue to cooperate—to their mutual benefit. To date, though some Chinese and American leaders use threats against the other to win support of domestic constituents, they nevertheless continue to allow bilateral efforts that rarely make national headlines. Both nations' ability to engage in a global competition, furthermore, will be hampered by the domestic and global economic recessions resulting from the coronavirus. How serious each nation is about decoupling and rivalry will be revealed not in Beijing's and Washington's rhetoric—destructive as that has been—but in the strategies that each nation finances and pursues over the long run. Analyzing the articulated and enacted foreign policies of both countries therefore remains a focus of the Kissinger Institute's work.



3

Global Responses to U.S.-China Competition

China and the United States are constrained from full bore pursuit of hostile competition by their daunting domestic agendas and by the actions of other countries that hesitate to side fully with either of the great powers. The EU has labeled China a "systemic rival," but still seeks commercial collaboration. Southeast Asian nations are wary of Chinese geostrategic ambitions, but are eager to increase access to China's markets. The nations of Africa, South America, and Central Asia need the investment that China can provide, but they might opt for non-Chinese resources if they were to become available. U.S.-China relations are therefore being shaped at least as much by international as by bilateral factors. The Kissinger Institute works closely with other Wilson Center programs, and with a growing list of international partners, to analyze the global dimensions of U.S.-China relations.

things to watch: ENVIRONMENTAL CHANGE AND SECURITY



1

Providing Safe Water Is Central to Stopping the Pandemic's Spread

A lack of access to safe, clean, and affordable drinking water and sanitation is widely recognized as a threat to human health; it also hinders economic prosperity, political stability, and even access to education. Today, 2.2 billion people are without access to safely managed drinking water, and 4.2 billion people lack sanitation services. Put another way, every third person on the planet lacks safe drinking water, and half the world's population does not have access to safe sanitation. And this already-urgent crisis of water insecurity has taken on new meaning in the era of COVID-19. Simply put, the pandemic cannot be stopped without a global effort to provide safe water to the world's most vulnerable populations. This requires more than the proverbial "taps and toilets," however. Many of the world's most insecure people are living in conflict-affected situations, or have been displaced by violence. They lack access to basic infrastructure, stable health systems, and other life-saving resources. And increasingly, their water supplies are being leveraged as a weapon of war. COVID-19 highlights the importance of protecting water services as well as other essential services for the most vulnerable people in the world.

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2

This Coronavirus Will Not Be the Last One

The COVID-19 pandemic has brought into stark reality the deep connections between wildlife, the environment, public health, and human security. And yet, despite the fact that much of the global population has been left stunned by this swift-moving and devastating pandemic, to some, what the world is experiencing today comes as little surprise. In fact, experts have been trying to sound the pandemic alarm for decades. As recently as a few years ago, epidemiologists at the World Health Organization coined the term “Disease X” as a descriptor for a COVID-19-like pandemic. In 2008, the National Intelligence Council’s *Global Trends 2025* report included an eerily similar description of how a pandemic would likely start. Experts in these communities know that the threats posed by animal-borne infectious diseases to global health, security, and economic well-being are accelerating. Approximately 70 percent of these diseases originate with wildlife trade; but increasingly, these zoonotic diseases are linked to environmental change, human behavior, and demographic changes, like rapid urbanization and population growth. Understanding the underlying risks that created the conditions for COVID-19 to emerge—and the failures of public health, governance, and social systems to prevent and properly mitigate the spread of the virus—are critical to both addressing the current crisis and ensuring that it does not happen again.

3

It Is Time to Recalibrate U.S. National Security

The cascading effects of COVID-19 on human health, national economies, and society have elevated the pandemic to not just a public health crisis but also a national security threat. At the same time, extreme weather events and rising temperatures are increasingly recognized as a growing threat to both the United States and global stability. The link between climate change and the spread of infectious diseases is well established, as disease vectors for dengue fever and other maladies spread to new territories. The landscape of risks is changing, and so must the U.S. national security apparatus. Topics like climate change, land use, ocean health, and biodiversity need to be core national security concerns instead of sideshows left for future decision makers. Security dialogues need to include experts such as epidemiologists, ecologists, and climate scientists in order to establish a climate-smart, ecologically informed national security strategy. And decision-support tools must be expanded and informed by enhanced cross-sector and interagency efforts to coordinate on the development of predictive capabilities—the tools and policies that can help build pre-event resilience, and can help improve efforts during event onset and intensification, and post-event recovery.

things to watch: **GLOBAL EUROPE**



1

Meanwhile—Brexit Continues

Virtual trade negotiations have continued through the COVID-19 crisis. Calls for extensions or delays have met with strong resistance from Conservative MPs in general and the Government in particular. The “Get Brexit Done” mantra of Prime Minister Johnson’s election campaign is a strong message. While Brexit has slipped down the agenda per se, deep worries about the economy are at the top of the list for business and for the part of the population furloughed and fearful for their jobs. Suggestions that the Government wants to bury a no-deal Brexit in the economic hit the country will face as a result of COVID-19, have surfaced. Described as an Australia-style deal to give comfort presumably from the benign sound of that, it would mean trading on WTO terms. This means the return of tariffs and border checks, adding to disrupted supply chains. Nissan has already warned that a no-deal Brexit would make its plant in the North East no longer viable (incidentally the first part of the country to declare for Brexit in 2016). The hope is that this is all tactics—on both sides—and a deal that will give business good access will be found. Unless the UK seeks, this month, an extension to the current transition phase—and that looks increasingly unlikely—a deal must be concluded by October in order to be implemented by the end of the year, when transition ends.

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2

European Union—the Financial Stimulus

Expectations vary, inevitably at this stage, but European exports could fall by a third and the EU economy contract by 7.5 percent. The impact on individual members of the 27-strong body will be challenging. However much they will look to support their own businesses and support economic growth, they will look to Brussels for the kind of economic stimulus that the European Commission has recently announced. The EU is, above all else, a coalition of nations who know what economic integration means. The Commission proposes making over 750 billion euros available to Member States, of which 500 billion euros will form a Recovery and Resilience Facility of grants. They will seek detailed plans from countries, aiming to get the money committed by 2022 and paid out thereafter. For some, sending plans for Brussels to approve might not be their first choice, but the amounts involved are substantial. Italy, Spain, France and Poland are likely to be the largest recipients. But the North-South divide is in evidence with the “Frugal Four” of Austria, the Netherlands, Denmark and Sweden wanting to see the grants converted instead to loans. For some that doesn’t work—they already carry substantial debt and fear to take on more. The Commission wants the focus of this, and the future budget of potentially over 1 trillion euros, to be green, digital, social—with a more resilient EU as the goal. For hard-pressed industries, perhaps especially services, it offers a chance to rethink the future.

3

COVID-19—the European Challenge

Every death is one too many, but some countries in Europe have faced bigger challenges than most. The UK has the highest number of deaths in Europe, while Belgium has the highest officially-recorded rate of deaths in its population. Spain and Italy follow close behind. There will be many discussions about the speed and type of action that governments took, and much for the future to consider about how to deal with potential pandemics of the future. People have a taste of just what it means, whether through tragedy and the loss of a loved one, separation from families and friends, or the impact on their working life especially in health and social care, and the myriad of problems that have, and will, arise from lockdowns. They will expect better preparations and planning in the future, not least for children and schools. Meanwhile, Europe as a whole contemplates how to save its travel industry with air bridges a major part of the UK strategy to get people moving again. Fundamentals like the stockpiles of PPE available to protect frontline workers, test and trace systems, and ultimately vaccinations will dominate the agenda for the immediate future. But every European nation will need to reflect on its social care systems, health care preparedness and the broader questions of support for the elderly in the future: a debate long overdue for a solution.

things to watch: KOREA



1

Moon's Progressive Mandate, Interrupted, in South Korea

After successfully and safely holding a national parliamentary election in the middle of the COVID-19 pandemic, South Korean president Moon Jae-in is enjoying [high approval ratings](#) as the country's citizens show their support for his [government's coordinated and organized handling](#) of the COVID-19 crisis. With the elections having significantly expanded his party's legislative majority, Moon is seeking to pursue an ambitious progressive agenda for the second half of his term while also [addressing the economic crisis](#) created by the pandemic. Yet these policy mandates are likely to [contradict one another](#), both substantively and in terms of simple bandwidth: An economic recovery for South Korea would likely require significant support from South Korea's powerful megacorporations, the chaebol. Yet one of Moon's top pre-pandemic priorities was to reform South Korea's economy to reform the chaebol system by reducing the conglomerates' influence. While the Blue House will likely seek to accomplish all its goals simultaneously, immediate political demands for a rapid economic recovery will probably force Moon to limit his ambitions for domestic economic reform.

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2

Kim Jong Un's Strategic Balancing Act in North Korea

North Korea's actions in 2020 will be primarily driven by how Kim Jong Un balances strategic and domestic political imperatives. Despite diplomacy's [failure to achieve tangible progress](#) toward North Korea's denuclearization and the fact that international sanctions continue to plague North Korea's economy, Kim likely believes that his strategic position is broadly favorable. North Korea has been able to [continue to build ballistic missiles and nuclear weapons](#) while demonstrating [increasingly sophisticated short-range strike capabilities](#). Meanwhile President Trump repeatedly [dismisses North Korea's short-range missiles tests](#) and [praises](#) his "good relationship" with Kim while also establishing a rather [permissive approach to North Korea's human rights violations](#). Kim likely believes that President Trump can tacitly accept a nuclear North Korea, and can even tolerate the likely ongoing development of intercontinental ballistic missiles (ICBMs) and nuclear weapons, as long as he can continue to point to North Korea [as a foreign policy achievement](#). Yet Kim may also see Trump's declaration of success before achieving success with North Korea as opening a political vulnerability that can be exploited with major provocations—such as an ICBM or a nuclear test—that would demonstrate the true lack of progress toward denuclearization that has been accomplished. Despite this potential opportunity for leverage, Kim will likely calculate that the relatively permissive and stable environment North Korea enjoys today is preferable to the tremendous risks of retaliation associated with a major provocation. Moreover, Kim may look ahead to the possibility of a new U.S. administration coming into office in 2021, and he may determine that a major provocation would be unlikely to set positive conditions for North Korea's interests. Still, one cannot be certain that these strategic considerations will outweigh Kim's domestic political calculations. If Kim perceives his domestic position to be vulnerable, he may conclude that major provocations could buttress his power at home by demonstrating strength and resolve while potentially coercing some sanctions relief from China or from the broader international community. Because [North Korea may be in the midst of a major outbreak of COVID-19](#) and may as a result be suffering a significant human and economic toll, the potential for Kim to see himself in an uncertain political position may be higher than normal.

things to watch: **LATIN AMERICA**



1

Latin America Is Sliding

In the 2000s, buoyed by eye-popping demand for regional commodities such as copper, iron ore, and soybeans, Latin America sharply reduced poverty and made inroads against inequality, but it could not sustain momentum. Since 2014, it has logged sluggish growth and has seen its debt burden rise. Anguished by this reversal of fortune, Latin Americans, many of them members of a new but precarious middle class, erupted last year, torching subways in Santiago and chasing Ecuador's president from Quito. Surprisingly, given its devastating economic effects, the COVID-19 pandemic has quieted the up-roar. Lockdowns emptied public squares. In many countries—including Argentina, Chile, Colombia, and Peru—strict public health measures boosted support for leaders. But this is an artificial calm. According to the World Bank, COVID-19 is expected to shrink gross domestic product by 5.2 percent. The UN says unemployment will rise to 11.5 percent and poverty will increase almost 5 percent. As leaders confront the virus's economic wreckage, they will once again face key social and political challenges.

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2

El Salvador and Nicaragua

Moves by the government of President Nayib Bukele to weaken democratic institutions in El Salvador are deepening concern that he is moving the country toward authoritarianism. On February 9, Bukele alarmed lawmakers and others by entering El Salvador's legislative chamber flanked by armed soldiers and police in an effort to force through his budget request. They fear the president is reversing decades of political progress since the 1992 peace accords ended the country's civil war. His involuntary detention of hundreds of people in "containment centers" to prevent the spread of COVID-19, use of social media to intimidate critics and the media, refusal to abide by Supreme Court decisions, and calls for the use of lethal force against suspected gang members have heightened concerns about his intentions, despite his domestic popularity. And his moves have faced little pushback from the Trump administration, apparently because of his compliance with the return of migrant deportees. But he faces growing criticism from members of the U.S. Congress and from opposition parties in El Salvador. Meanwhile, Nicaragua's authoritarian president, Daniel Ortega, has dismissed the threat posed by the coronavirus, encouraging large gatherings that threaten to cause an uncontrollable outbreak in one of Latin America's poorest countries.

3

Venezuela

The COVID-19 pandemic made even more evident the depth of Venezuela's humanitarian crisis and ongoing political stalemate. The global collapse of oil prices in March–April 2020, punishing U.S. sanctions, and years of corruption and mismanagement by Venezuelan officials sent the economy into further catastrophic decline—an additional 10 percent drop this year, according to the IMF, on top of the two-thirds contraction since Nicolás Maduro came to power in 2013. The regime sent the military and police into the streets to enforce a strict quarantine in March. Food scarcity and the lack of basic sanitation, including running water, in health facilities added to the miseries of the Venezuelan population. Maduro's grip on the armed forces, the bastion of his internal support, tightened further in the wake of a disastrous, ill-planned military raid by exile forces in early May, in which two former U.S. Special Forces soldiers were captured. Interim president Juan Guaidó is recognized by close to 60 countries, but he has struggled to maintain the opposition's momentum. Meanwhile, the flood of refugees fleeing Venezuela in search of food, medicine, and physical safety has reached almost 5 million. More than 80 percent remain in Latin America and the Caribbean, with close to 40 percent in Colombia alone, despite coronavirus-induced border closings. The strain on public health and education systems and on social safety nets continues to worsen.

3 things to watch: **MATERNAL HEALTH**



1

COVID-19 and the Healthcare Workforce

The World Health Organization has declared 2020 as the International Year of the Nurse and the Midwife. Globally, 27.9 million nurses and 2 million midwives work at the front lines of health care systems and currently work side-by-side with other first responders to battle the spread of COVID-19. Nurses and midwives make up 59 percent of the global health workforce. The health sector uniquely employs more women than any other sector—in fact, approximately 70 percent of the global health workforce and 90 percent of nurses are women. As such, nursing remains a highly gendered profession, with associated biases. Nurses and midwives have demanded proper personal protection equipment and resources in their fight against the novel coronavirus. Some health providers lost their jobs because they demanded safe working conditions before treating patients, while others lost their lives because they did not.

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2

COVID-19: Magnifying the World's Inequities and Gender Dimensions

Early reports described COVID-19 as “the Great Equalizer,” spreading around the globe and infecting everyone in its path, regardless of income, race, or gender. Current reporting, however, points to a different reality: COVID-19 disproportionately infects and kills African Americans and Latinx populations in the United States and immigrants worldwide, while women and girls suffer not only from the infection itself but also from the elevated risks of gender-based violence and restrictive social norms associated with the response. Experts predict that women’s independence will be a silent victim to COVID-19, possibly putting women’s achievements and advancements back decades. Girls are out of school and, for some, returning will be nearly impossible as their families come to rely on their domestic contributions and as adolescent pregnancy rates increase. As the total number of COVID-19 cases continues to climb, policymakers are faced with a devastating number of possible outcomes. One outcome that history has proven time and again to be certain is that the hardest hit will be the world’s women and girls and those populations already affected by racism and discrimination. In response, policymakers are undertaking a comprehensive analysis of impact, to ensure marginalized populations are central in responses efforts.



3

Reproductive, Maternal, and Newborn Health Outcomes of COVID-19

The emergency response to the COVID-19 pandemic ultimately means that resources and services previously allocated to reproductive, maternal, and newborn health services will be diverted to slow the spread of COVID-19. As a result, there will be more maternal and newborn deaths, more unmet needs for contraception, more unsafe abortions, and more sexually transmitted infections. Access to family planning and other sexual and reproductive health commodities are central to women’s health, empowerment, and sustainable development. Pregnant women with COVID-19 must be prioritized, especially those with respiratory illnesses or existing non-communicable diseases, and their newborns should be monitored. The implications of COVID-19 for pregnant women and newborns remain greatly unknown, making it essential to obtain accurate and up-to-date data and engage in research efforts to save the lives of women and newborns.

3 things to watch: MEXICO



1

Mexico and Foreign Investment

Even as the economic consequences of the COVID-19 pandemic began to take shape in Mexico, the government added fuel to the fire by canceling the permit for a brewery in the country's north that was the subject of a dispute over water rights. President López Obrador relied on the results of a hastily and questionably organized local referendum on the issue; the brewing company, Constellation Brands, had already invested over \$900 million of the \$1.4 billion project. The reaction from investors and from national business leaders was swift and damning, with the Mexican peso dropping in value by 40 percent. Though the peso has since recovered some those losses, the government has further angered investors with moves against the renewable energy sector. Despite the negative international reaction and the calamitous economic news coming out of Mexico, the president appears unwilling to alter his stance.

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2

Public Opinion

Although the first year of López Obrador's presidency was remarkable for his elevated public approval numbers, which were in the high 70s, 2020 brought a rapid collapse in his popularity. Though still registering above 50 percent in most polls, the downward trend in his polling numbers suggested a growing disenchantment among Mexicans with the so-called 4th Transformation, as the president calls his administration's mission. The country's disappointing economic performance and rising violence have undermined the president's support, and his increasingly aggressive posture versus the business community has not helped. However, [the pandemic may be helping the president stabilize his support](#), at least in the short term. Recent polls undertaken by *El Financiero* and *Buendía y Laredo* have shown that the Mexican public for now supports the president's handling of the crisis but the situation is finely balanced. These numbers matter a great deal as the political clock ticks down toward midterm elections in 2021.



3

North American Supply Chains and Tension with the U.S.

Despite the signing and ratification of the United States–Mexico–Canada Agreement, the pandemic has severely disrupted [vital supply chains in North America](#). As the United States attempted to keep vital industries open (for example, in the medical supply business), companies ran into problems [as components from closed Mexican factories have become hard to find](#). In late April, pressure began to mount from both U.S. firms and the State Department on López Obrador's government to declare certain factories "essential," even though the components they produce are not needed within Mexico. The Mexican government's delays in reopening those plants caused tensions within the bilateral relationship and further soured U.S. investors' opinions of López Obrador's government. As the U.S. and Mexican governments look to post-COVID-19 scenarios, these questions will color [attempts to strengthen cooperation](#). Concerns remain that the human toll of reopening factories in Mexico before the pandemic is under control will result in a political backlash.

things to watch: **MIDDLE EAST**



1

Economic Reforms and Workforce Development Are More Urgent with COVID-19

The combined effects of COVID-19-induced lockdowns and steep oil price declines will transform the regional economic balance. Budget forecasts of oil- and gas-producing countries will show major shortfalls, and investment will turn from growth and diversification to mitigating the impact on enterprises and citizens. Non-oil countries in the Levant and North Africa will not be spared, as remittances from diaspora communities have declined, small and medium-sized businesses have contracted, and fewer infusions of the Gulf region's capital can be expected to stabilize its countries' economies. Unemployment rates will further increase in a region already facing high youth unemployment. Women are estimated to lose more than 700,000 jobs as a result of this crisis—further pushing down female labor participation. These economic factors make resetting the workforce development formula ever more pertinent. This crisis may be the last chance for the region to invest in education and skills, to implement political and economic reforms and to capitalize on the potential of educated youth to move away from resource dependency.

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2

More Protests to Come after COVID-19 / Unfinished Business for Protesters after Lockdown

Last fall, mass protest movements already made their mark on Sudan, Algeria, Lebanon, Iran, and Iraq, and they continued right up to the beginning of the COVID-19 response. While most movements had largely receded in the first weeks of the lockdown, protests driven by deteriorating economic conditions and socioeconomic inequalities—further exposed by COVID-19—were renewed in Lebanon and Iraq. In Israel, the lockdown did not deter demonstrators from organizing a socially distanced protest against government corruption and Prime Minister Netanyahu’s right to rule while he is under criminal indictment. As the region’s economic upheaval adversely affects public spending, public services will continue to disintegrate and countries already facing popular unrest may need to deal with an even more powerful challenge to ruling elites as the pandemic phases out.


3

COVID-19 Uplifts Netanyahu as He Vows More West Bank Annexation

As Israel begins to gradually open up its economy after having brought COVID-19 under control, Prime Minister Netanyahu has emerged triumphant and has received popular recognition for successfully navigating the crisis. A fourth round of elections has thus far been averted, and Netanyahu has been cleared by the Supreme Court to form a government, even though his indictment on corruption charges continues to put his political future in question. With a renewed—if temporary—grasp on leadership, Netanyahu appears willing to fulfill his promise to annex more parts of the West Bank, which will likely be approved by the Trump administration, as suggested by David Friedman, the U.S. ambassador to Israel. Such a move will seriously diminish hope of any Palestinian approval for the Trump peace plan, or the so-called deal of the century. Further, West Bank annexation will jeopardize Israel’s 25-year peace treaty with Jordan and may set back improved relations with the Arab Gulf states.

things to watch: **RUSSIA & UKRAINE**



1

Russia's COVID-19 Crisis

Russia's response to the COVID-19 pandemic started slowly. Though its borders with China were closed in February, the Kremlin only began to enact nationwide measures, such as one week of paid federal holidays, at the end of March to encourage social distancing. Individual regions and cities, including Moscow, that were hit hardest by the pandemic imposed their own sets of strict self-isolation measures on residents. The Kremlin has been conservative in enacting a large-scale stimulus package to support citizens in light of an impending financial crisis, despite its large rainy day fund. The pandemic is also challenging Russia's notoriously centralized system, as the Kremlin is informally transferring decision-making authority to weak regional governors. While cases in Russia continue to increase, it is clear that the pandemic will force the Kremlin to revisit its domestic policies related to social welfare and regional governance, as problems related to transparency and its weak healthcare infrastructure are revealed.

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2

Putin Moves Forward with Constitutional Amendment Vote

After weeks of speculation, President Putin has announced that a public vote (or plebiscite) on several constitutional amendments will occur on July 1, 2020. These changes, which were approved by Russia's legislature and regional parliaments earlier this year—and upheld by the Constitutional Court—will allow Putin to potentially stay in power until 2036 and will further consolidate the Kremlin's authority. Additionally, the voting will be spread out over one week starting June 25—the day after Moscow's Victory Day parade—and may feature in-home and online voting in select regions, the details of which are being finalized by the Central Election Commission. Sources close to the administration have internally set a goal of 55 percent voter turnout, and a simple majority is necessary for the new rules to come into force. While authorities argue that alternative voting methods are meant to slow the spread of the coronavirus, turnout among those who support the amendments will most certainly increase. It remains to be seen whether public opinion or the virus will affect the adoption of these changes, but all the signs point to their approval on July 1.



3

In Ukraine, President Zelensky's Reforms and COVID-19

Although Ukrainian president Volodymyr Zelensky rode into 2020 on high hopes for his ability as a reformer, a series of missteps both before and during the COVID-19 crisis have diminished his reputation. Although his government issued orders to prepare for the pandemic in February, before Ukraine had any documented cases, the divisions in his government crippled the Ukrainian response. Zelensky has, however, shown signs of a course correction, signing a historic land privatization bill, pursuing banking reform, and getting back on track with the IMF. Still, as the one-year anniversary of Zelensky's election arrived toward the end of April, it appeared that the bloom had gone off the reformer's rose as his approval ratings declined. Whether Zelensky will realize his potential as a reformer or disappoint will be decided in coming months as the pandemic plays out.

3 things to watch: **SCIENCE AND TECHNOLOGY**



1

Cybersecurity

COVID-19 has pushed the workforce online more than ever before. As employees connect to networks from remote locations, this exponentially increases the number of possible targets for bad actors—both nation-states and criminals. While opportunistic cyberattacks are on the rise during this health crisis, including ransomware against essential service providers like hospitals and spear-phishing for credentials of critical employees in healthcare and research organizations, the next trend policymakers need to consider will be attacks exploiting the cloud. As VMWare Carbon Black's [recent Cyber Crime Report](#) says, “cloud-jacking” is a “stepping stone to penetrate” the real target. Key employees, along with public officials and celebrities, are expected to be targeted using this method. With more cloud users than ever before, this attack vector will become increasingly attractive to adversaries. Policymakers need to assess the risk of this kind of attack for the most vulnerable organizations and offer minimum security standards for devices connecting to cloud infrastructure—including the [Internet of Things](#).

Featured Experts:

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2

Global Health

For many [years before 2020](#), experts within the global health community were ringing the alarm that an outbreak caused by [interactions](#) between humans, animals and the environment could cause chaos in our interconnected world. After the worst of the [COVID-19 pandemic](#), long-term policies across all sectors will be created to fill in gaps spotlighted by the virus. Preparation for global health crises will include [new rules](#) for supply chain management, travel regulations, national security, basic science funding, and countless other disciplines. Viruses have shown everyone that borders are no match for microbes, but this scientific fact can either exacerbate nationalist and insular policies or encourage those that favor and fund international cooperation. Perhaps most consequential is how these policies will impact each [country's pandemic preparedness](#).



3

Science Outreach & Education

The COVID-19 crisis has brought renewed attention to public communication and engagement in science facilitated by innovative technologies. [Serious games](#), games used for pro-social purposes, have been used during the crisis to both [involve the public in the fight to find a cure](#) and educate the public on outbreak response—and many of these initiatives are supported with funding from federal agencies. In the upcoming year, there will be a focus on how to leverage this technology [to create a more resilient response in the future](#), with necessary examinations of the infrastructure (internet, access to technology) and educational technology, both in school and beyond. There will also be a greater examination of tools that can be used to involve the public in the scientific process. For example, crowdsourcing projects have pivoted to collect user-submitted data for COVID-19 disease surveillance, and [“maker” communities](#) have mobilized to develop medical supplies like masks and face shields. These efforts could benefit from increased standardization to increase their impact, but with resources, guidance, and coordination support, they could be an extraordinary input to resilient response to emergencies of all types.

ON THE HORIZON COVID-19 EDITION

AFTERWORD, WITH BRUCE JENTLESON

We hope you have enjoyed this special edition of the Wilson Center's *On the Horizon* publication, which has been updated in response to the global COVID-19 pandemic. Our regional experts have provided insight and analysis that we know you will find useful as you begin to navigate the post-COVID-19 world.

One of the biggest questions to be answered is how the pandemic will affect the international world order. From the world wars to the Cold War to the events of 9-11, major events have led to major changes in the way nations interact. What will change after the pandemic? Will globalization accelerate or find itself in retreat?

Wilson Center Global Fellow Bruce Jentleson was recently interviewed about these and other questions when he appeared as a guest on the Center's NOW program. This partial transcript will provide you with more food for thought as you consider what's on the horizon.

What follows is an excerpt from the [Wilson Center NOW](#) episode, [Will COVID-19 Transform the Global World Order?](#) The interview was conducted on April 30, 2020, by John Milewski, who also edited its transcript (click on the link at the episode's title for the full interview).

WHAT IMPACT WILL THE PANDEMIC HAVE ON POLICY?

We live in a sea of microbes—so it's not just this one. This is a particularly virulent strain. Those of us involved in international relations have great concerns about things like weapons of mass destruction (WMD), and we should continue to focus on them. But now, along with WMD, we need to shift more of our focus to DMD—diseases of mass disruption.

How we address prevention, and not just response, on a sustainable basis, is the challenge. Policymakers will need to elevate global health issues from a relatively small segment of the agenda to a place very close to the top of the international and American lists of priorities.



IS THE PANDEMIC THE END OF GLOBALIZATION AS WE KNOW IT?

What COVID-19 shows is the inherent interconnectedness of the 21st-century world. We still don't fully know its origins, but these things happen because the world is interconnected. Globalization cannot end, period; but we need to strike the balance between what we need to do in each of our countries and what we need to do together internationally. One of the things that Americans have trouble doing, but need to do, is learn from how other countries have dealt with the pandemic in their national policies.

WHAT WILL BE THE IMPACT ON AMERICA'S ROLE IN THE INTERNATIONAL ORDER?




America's role was changing before this crisis. Now, for the United States, it can't simply be a case of follow us, we always know best. But our role as a great convener is still indispensable. We bring a lot to the table, including a certain amount of expertise and innovation that comes through American civil society and the private sector. We should want to help everybody benefit from that, but it's very different from the old notion of a hub around which the entire world revolves.

Some still believe we always know best, we have the power, and we have the capacity, and that everybody else should just take their orders from us. But what's required is a different conception of leadership—one that still acknowledges American power and what's left of our prestige and resources, but one that recognizes that all the best ideas don't come from Washington. That is an ongoing problem, and not just for the current administration. Many in previous administrations came out of the same old Cold War mentality, and that's not where the world is today. The context has changed. We need to change with it. The best leaders know you need different strategies for different situations. It's a new era that will require a new approach to leadership.

Bruce Jentleson is a Professor of Public Policy and Political Science at the Sanford School of Public Policy, Duke University and a Wilson Center Global Fellow.



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