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107 FIFTEEN TRENDS FOR 2015

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* This *Nota Internacional* is the fruit of the collective reflection of the CIDOB research team. Coordinated and drafted by **Eduard Soler i Lecha**, this document presents 15 trends that are the result of contributions from **Anna Ayuso, Jordi Bacaria, Anna Bardolet, Moussa Bourekba, Luigi Carafa, Paula de Castro, Carmen Claudín, Anna Estrada, Francesc Fàbregues Marc Gafarot, Francis Ghilès, Oriol Farrès, Yolanda Onghena, Nicolás de Pedro, Elena Sánchez, Héctor Sánchez, Elina Viilup, Santiago Villar** y **Eckart Woertz**.

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Without a crystal ball, daring to imagine the future and putting it in writing is playing with fire. Making predictions about the immediate future is even riskier than doing so at two decades' distance. A look at the recent past, at the wave of protests that shook the Arab world from December 2010 to March 2011, for example, reminds us that it is one thing to identify the existence of conditions that are ripe for the breakout of a crisis and quite another to guess when it will happen and what the detonator will be. Even after detonation, whether a crisis escalates or not depends on the decisions made by the various actors involved. Other elements -such as pandemics, terrorist attacks and natural disasters- are unpredictable by their very nature. As a result of intense discussion among CIDOB researchers, we have identified fifteen trends that began to take hold months or years ago, but which will emerge with particular intensity in 2015. The primary purpose of an exercise like this is to identify vulnerable areas in need of special attention and even to prompt action; the second purpose, which is no less important, is to identify trends that are difficult to reverse, on the basis of which scenarios and policies in the medium or long term may be articulated.

1. **The European economic recovery will be fragile and the European crisis will be increasingly political**
2. **Security will rise up the European agenda.**
3. **Terrorism and xenophobia are a threat to social cohesion in Europe**
4. **The TTIP negotiations will continue to advance but opposition to the treaty will also grow stronger**
5. **A defiant Russia will try to break European unity**
6. **Conflict, frustration and succession will dominate in North Africa and the Middle East**
   Conflicto, frustración y sucesiones dominarán en el Norte de África y Oriente Medio
7. **Latin American societies will continue to be mobilised by day-to-day insecurity, perceived inequalities and political freedoms**
8. **Regional cooperation and alliance-forming in the Americas will be characterised by pragmatism and flexibility.**
9. **The Asian powers face a period of readjustment.**
10. **There are two sides to the African upturn**
11. **Emerging countries will be the victims of their own contradictions.**
12. **Those who try to boycott a nuclear agreement with Iran will do so because of political and geopolitical calculations that have nothing to do with the negotiation agenda.**
13. **Oil prices will not return to early-2014 levels: the losers will be clear, the winners less so.**
14. **If a climate agreement is reached in Paris it will be enough to save face but not to save the planet.**
15. **We will still be unable to anticipate many of the issues that will fill December's reviews of what happened in 2015.**

1. The European economic recovery will be fragile and the European crisis will be increasingly political

Although European leaders would like to reach the end of 2015 declaring that the economic crisis is well and truly buried, the perception of European citizens, especially in the south of Europe, will be very different, even if they grow more quickly than the other euro zone countries. Above all, this is because they will be told that new sacrifices in terms of fiscal or social protection are necessary in order to support the recovery. The difficulties between debtors and creditors will remain in place but, as the result of years of crisis and the processes of the socialisation of losses, the conflict of interests will move from the private sphere to the public.

In 2015 the political dimension of the crisis in Europe will be increasingly accentuated. The first phase of the major European crisis was markedly economic in character and had political repercussions: the vast majority of European leaders (with the exception of Angela Merkel) were replaced by their electorates and in cases such as Italy were even replaced by technocratic governments. In spite of the rise of the Eurosceptic powers and the far-right, the European Parliament elections in 2014 did not substantially alter the domination of the traditional political forces (socialists, Christian democrats, conservatives and liberals) in the main European institutions. On the other hand, the 2015 elections in Greece and Spain could produce shocks. Attention must also be given to the Portuguese elections in October, although such scenario is less probable. In southern Europe we will see that the erosion of the traditional political forces is due not only to the economic crisis, but also to a political and institutional one. By the same token, we will have to be attentive to the capacity for mobilisation of the independence movement in Catalonia, where elections are foreseen for the 27th of September.

2015 will see neither a Grexit nor a Brexit, but it is likely that people will speculate about them in search of benefit in the markets or the political arena.

2015 will be a year in which further speculation will be made on the future of the European integration, with Greece once again in focus. Although Syriza has taken the reins of government with the priority of restructuring the debt and it is disposed to enter hard negotiations with its creditors, this will not translate to a Greek exit from the euro zone. Leaving the euro without leaving the EU would mean treaties had to be revised and the costs for all parties would be greater than those incurred in attempting to reach a reasonable agreement. Greece's citizens would lose out and so would its creditors, who would have difficulty recovering what was invested in the country. That said, although the Grexit is highly unlikely, some voices will speculate about it. Something similar will also happen in the United Kingdom. It is expected that the Eurosceptics of UKIP could get a good result in the general elections, which will revive the debate on the Brexit before and after the elections. In other words, 2015 will see neither a Grexit nor a Brexit, but some people most likely will speculate about them in search of benefit in the markets or the political arena.

2. Security, security, security

The great debate in Europe over the last five years has turned around the problematic relationship between austerity and growth. After the attacks in Paris in January, another classic dichotomy joins the debate: security vs liberty. How much intrusion into their privacy and how many exceptional circumstances are European citizens prepared to tolerate in order to maintain or increase their security or their perception of it? And how much money will they want to invest in security budgets? The fight against terrorism will not only provide arguments to the security and defence industries, but also to those who defend the need to introduce control mechanisms on information flows. It will be used as an excuse to revive the institutional bickering between the European Commission and Parliament on the Passenger Name Record (PNR) as well as to legitimate legislation discussed or approved prior to the Paris attacks, such as the Organic Law on the Protection of Citizen's Security in Spain (which its critics call a gag law).

One of the controversial points of this law is that, according to the opposition, legal coverage is given to what is known as "hot returns" of irregular immigrants at the borders of Ceuta and Melilla. In 2015, the desire to seal the southern borders of the EU will be a recurrent subject in European debate and even more so if the constant trickle is augmented by the arrival of hundreds or even thousands of people at once through the same entrance (by sea or land). In addition, there will still be confusion between irregular immigrants and refugees, and debate will resurface on the need to seal the borders as a way of preventing the entry (or return) to Europe of potential terrorists. This kind of attitude could soften, above all in terms of detention conditions and rescue programmes, if political changes occur in the south of Europe or if, unfortunately, the Mediterranean once again becomes the scene of a tragedy of the magnitude of that in Lampedusa in October 2013, which pushed Italy to put in place the Mare Nostrum programme. In parallel to the debate on the external borders of the EU, 2015 will be a year in which more intense discussions will take place on the EU's relations with its neighbours. The multiplication of conflicts and threats among the EU's southern and eastern neighbours will colour the predicted discussions in 2015 on the necessary reform of the European Neighbourhood Policy. A more acute perception of the risks at internal and external levels will condition any efforts to revise the European Security Strategy.

Finally, Schengen will also be in the spotlight. That is to say, the idea of increasing control of European borders will not be restricted to external frontiers but proposals will be made to apply them to interior borders too. Though some governments may propose it, revision of the agreement is unlikely. On the other hand, we will probably see regulatory developments that place emphasis on the application or access to social rights, such as the amount of time intra-community migrants can stay in other member states. And, in all certainty, the recourse to exceptional circumstances for establishing temporary controls at the internal borders of the EU will go further.

3. Terrorism and xenophobia as a threat to social cohesion in Europe

United in diversity. That is the motto on which the European integration project is based. Diversity among the states that make it up but also diversity within each one of them. The brutal attacks in Paris in January 2015 represent not only a threat to the continent's security but are also a torpedo below the waterline of social cohesion in Europe. This is as much because of the targets of the attack (the editorial staff of a magazine, the police and a kosher supermarket) as because of the profile of the terrorists: three young men who claimed to be members of Al Qaeda in Yemen and Islamic State but who were born in France and were French nationals. In 2015 the debate in Europe on the role of Islam in the old continent will intensify, as it will on anti-Semitism and on how to fight the phenomenon of (self)radicalisation.

It is nothing new for far-right parties to exploit fears of a migrant invasion and proclaim apocalyptic scenarios of a future Europe dominated by Islam. In 2015, as well as pressing for a halt to immigration, such groups will attempt to stigmatise a part of European society as an "enemy within". A dangerous drift may result if the discourse of fear with regard to Islam ceases to be the sole preserve of the extreme right and politicians and opinion leaders of other sensibilities take advantage in more or less explicit ways and with nuances- of the discourse that Islam poses a security problem and that it is a religion that is incompatible with the European way of life. But just as important as this type of discourse is the reaction that it provokes in the rest of society. On the one hand, European Muslims will continue to distance themselves from terrorism and insist that they are European citizens. On the other, we will see those same citizens, along with other sections of society, raising their voices against xenophobic and discriminatory attitudes, above all if attacks on people, places of worship and the symbols of Islam and Judaism in Europe increase. Although this is not a new phenomenon, discussion on the extent of anti-Semitism in Europe and how to confront it will continue in Europe and will become more intense if there are more terrorist acts against the Jewish community.

In 2015, as well as pressing for a halt to immigration, some voices will attempt to stigmatise a part of European society as an "enemy within".

Another debate will be how to confront the phenomenon of radicalisation of one extremely small though highly dangerous minority of European citizens. In 2015 it will become clear that this is a shared challenge that requires local-level policies but also European answers. If, as many fear, the Paris attack was not the last in 2015, this issue could become the year's top priority. The presence of thousands of European combatants in Syria and Iraq is a security problem with legal repercussions. Could and should citizenship be stripped from a person who joins a terrorist group and potentially poses a threat to European security? What strategy should be followed with regard to those who are fighting in Syria and Iraq: prevent their return or work to reintegrate them into society? And how do we avoid more Europeans entering a spiral of radicalisation? The response will depend on how the situation in the Middle East evolves but also on the strategies of anti-radicalisation or de-radicalisation that European countries may put in place and which, necessarily, must combined social responses and security measures.

4. The TTIP negotiations will continue to advance but opposition to the treaty will also grow stronger

Although negotiations began in 2013, it was not until 2014 that many Europeans discovered what TTIP stood for. The Transatlantic Trade and Investment Partnership is a free trade treaty the objective of which is not only to eliminate trade barriers but also regulatory ones between the United States and the European Union. If approved, it would have consequences of global reach as, de facto, it would establish trading standards after years of blockage in the World Trade Organisation. The supporters of the TTIP argue that it would translate into economic growth and claim that its approval is better than the alternative: that other blocs and agreements such as the Trans-Pacific Partnership (also under negotiation) will end up setting global commercial norms. The agreement's detractors question the growth estimates made and have focussed their criticism on issues of process (denouncing secrecy in the mandate and the course of the negotiations) and content (above all in relation to guarantees to investors and on regulatory matters).

In 2015 the movements opposing the TTIP, which are increasingly better organised and have broader social bases, will continue to have an impact on European debate. Also, the TTIP will be one of the few issues on the agenda to have a pan-European effect, penetrating national political and social debates in many, if not all, EU member states. All this will oblige European institutions to redouble their efforts to amend the lack of initial transparency, but will not change either the scope or the rhythm of the negotiations at a technical level.

It is one thing for the negotiations to move forward; approval and ratification by both parties is quite another. That is not on the cards in 2015, but further down the line. The way agreement is reached will have an effect on time schedules, particularly on the European side, where it remains to be seen whether approval is to be made only at EU level or whether it must pass through each and every national parliament, as various member states have requested. If it is the latter, the process could be long and obstacle-ridden. In the United States there will also be those who work to highlight failures in Obama's foreign agenda before the presidential elections in November 2016. In this landscape of negotiation inertia, social mobilisation and political uncertainty, the option of revitalising the WTO as a way out of potential deadlock may be dusted off. It is something in which not only the EU and US will be interested but some emerging economies as well.

5. A defiant Russia that tries to break European unity

2015 is the 40th anniversary of the Helsinki Accords. In the Finnish capital, 35 countries, including those of the Soviet bloc, signed a document to establish that Europe's borders could not be changed by force and to put in place mechanisms for the supervision of human rights and civil liberties in the continent. The principles of Helsinki were the basis of the European order from then until 2014, when they were blown up by the annexation of Crimea by Russia. In the same way, Moscow's surreptitious, though documented, military intervention in Ukraine questions the validity of those principles without giving a clear hint of a new frame of reference. The symbolic weight of this anniversary will prompt new attempts to update and fix the principles that should govern the European order. It is expected that we will see efforts of this kind as well as attempts to dissociate this conflict from other issues of common interest on the agenda such as the negotiations on the Iranian nuclear programme or jihadist terrorism. Nevertheless, in the areas that Moscow considers part of its "natural and exclusive" sphere of influence the rivalry with the EU will be maintained. The uncertainties that surround the Eurasian Union will continue, aggravated by the conflict with Ukraine. The project will continue to provoke internal tensions among current and prospective members (Belarus, Kazakhstan, Armenia and Kyrgyzstan) as well as between those countries upon which the evolution of the project will have direct repercussions (Georgia, Moldova, Tajikistan and Uzbekistan).

Despite the fact that sanctions and the fall in the price of oil leave Russia in a weaker position than before the start of the crisis, there is no reason to hope that this will translate into a more conciliatory position on the part of the Kremlin. The increase in the supply of arms to the pro-Russia insurgents suggests a probable escalation in a conflict that is ever more entrenched. What is more, Russia will seek agreement not by revising its positions but by betting that it can exploit the EU's internal divisions and working for questioning voices on Ukraine to emerge from within European and Western politics. So, despite its diminishing budgets, it will continue its campaign to win allies in Europe, as much among governments of countries harmed by the sanctions as among political forces at both extremes of the parliamentary spectrum.

The level of support that surrounds President Putin will be another of the significant issues to follow in 2015. The popularity of the Russian president remains high and far above that of the other European leaders, but his power structure, with the United Russia party at the head, is far from solid. Economic prosperity, political stability and national pride are the main pillars of the social and political consensus around Putin. If the worst predictions for the Russian economy come true, we will see an exponential growth of critical voices inside and outside the regime.

Russia will be in a weaker position but this will not translate into a more conciliatory position.

6. Conflict, frustration and succession in North Africa and the Middle East

Three countries in the Middle East (Syria, Iraq and Yemen) and one from North Africa (Libya) will be the scene of violence and of manoeuvres made by various regional actors to support one of the parties in conflict. At the end of 2015, the number of refugees and internally displaced persons will be even higher than the previous year and the resources for facing this emergency will be insufficient. These conflict situations are alike in their weak or collapsed states, powerful militias, external interventions, porous borders, risks of contagion to neighbouring countries and forced displacements of the population. In 2015 diplomatic attempts will be made to try to rectify situations which have deteriorated in some cases more than in others. But, in general terms, the level of conflict will have reached such intensity and the actors fighting will be so diverse that, even if one of these diplomatic efforts succeeds, one or other group prepared to continue the armed fight will always appear. This brings us to the actor who burst onto the scene with most force in 2014: the organisation Islamic State, also known as Daesh or ISIS. In 2015 its economic capacity will be reduced because of various factors: falling oil prices, the decline of agricultural production in its territory where the already-plundered populations are stretched to breaking point and because the Gulf states and Western countries will be paying close attention to its means of financing. Economic asphyxiation will produce as many, if not more, problems for the organisation as the bombardments of the coalition, but that does not necessarily mean that it will be any less dangerous.

In terms of the Arab-Israeli conflict, attention will be on the Israeli elections of the 17th of March, on the possibility that a third intifada will break out and on the efforts of the Palestinian authorities to internationalise the conflict. The Israeli right (whether secular or religious, linked to the interests of the settlers or to the ultra-orthodox) will continue to condition the governance of Israel and, as a consequence, the elections will not radically alter the dynamic of the conflict. At most, they may accelerate or moderate it. As for the Palestinian camp, the breakout of an intifada is, by nature, unpredictable, as a spontaneous uprising of a frustrated population. The conditions that may produce it are in place, as they were in 2014. But with or without intifada, the Palestinian authorities will do everything possible to internationalise their claims, particularly in the International Criminal Court. The reaction of the new Israeli government to all such moves may swell the ranks of those committed to unilateral recognition of Palestine as a state.

In the populations of the rest of the countries in the region two trends will dominate and collide. The first of these is the frustration of those who entertained hopes of change in 2011: this includes not only the activists in the capitals, but also the parts of the population in peripheral regions and deprived neighbourhoods. The second is a conservative reaction based on the fear that a movement for change could bring their country to the abyss in which Syrians and Libyans are currently trapped. It calls for stability, for which it is prepared to embrace partial top-down reforms, such as those introduced in Morocco. In March, Egypt is holding legislative elections and faces four big challenges: to provide expectations of economic development, to manage the predicted reduction in aid from the Gulf, and to guarantee security and begin healing wounds after three years of extremely hard political and social confrontation. And if a new wave of protests breaks they will be repressed with the approval of those who seek security at any price. Tunisia may continue to present itself as a counter-example, but only to the extent that the inclusive nature of the transition is maintained and international support shores up the economy. In other countries, the succession of their leaders will set the political agenda. The death of the king of Saudi Arabia in January has not produced successional dispute because not only was his heir designated (Salman, in delicate health) but a replacement to that successor was too (Muqrin, the last of the sons of Abdulaziz). The scenario in Algeria is much more open, where the president, Abdelaziz Buteflika, is unwell and has no designated successor. In countries with opaque, diffuse power structures (like Saudi Arabia and Algeria) the moment of succession may be used by very different groups both inside and outside the regime to take greater power, creating situations of tension or uncertainty, to say the least.

Syria, Iraq, Yemen and Libya will be the scene of violence and of manoeuvres made by various regional actors to support one of the parties in conflict.

7. Latin American societies will continue to be mobilised by day-to-day insecurity, perceived inequalities and political freedoms

Compared to other regions of the world, in the last decade the trajectory of Latin America has been hopeful in terms of reductions in levels of poverty and democratic consolidation. 2015 will not be a turning point, but it will be a year in which social tensions resurface and in which Latin American citizens will make their voices heard. In 2014, a year of highly intense electoral activity, we also witnessed significant waves of protest, such as the demonstrations in Brazil before the football World Cup, the mobilisation in Mexico after the Iguala kidnappings and the opposition protests in Venezuela, to give three separate examples.

The lack of public security will continue to be one of the main causes of discontent. It will felt hard in the region's largest cities, but most severely of all in Central America where murder rates are way above those in other regions of the world. Guns, drug trafficking and day-to-day crime are an explosive cocktail to which should be added the unease caused by police structures that are inefficient, when not in actual connivance with organised crime networks. Mexico continues to be mobilised and, although the attention is on the state of Guerrero, the problem is countrywide. This mobilisation will not put a halt to the reforms enacted by Peña Nieto, in fact they will oblige him to go further. Colombian society has also been suffering from violence for decades, not only due to drug trafficking but also because of the conflict between the state and FARC. 2015, a year of regional and local elections, could be key to bringing this conflict into a phase of definitive and irreversible resolution as all the actors with capacity to bring about agreement seem interested in doing so.

Inequality or, better said, perceived inequality, will be the other breeding ground for popular mobilisation. Especially if a change of cycle is consolidated and some economies (such as the Brazilian or, in the most extreme case, the Venezuelan) have weak or negative growth, it could breathe life into new movements of popular discontent. Inequality (and, above all, extreme poverty) has fallen in Latin America, but the perception of it could grow. Inequality is better tolerated when it seems that everyone is better off, even the rich benefit more quickly. When the deterioration of economic prospects coincides with political fracture and planned elections, the situation is especially sensitive. In December 2014, growth predictions for Argentina -where elections are to be held on October 25th- were revised downwards. But the most extreme case is that of Venezuela, the Latin American country most adversely affected by the fall in oil prices. As parliamentary elections approach, the socially-motivated protests that will take place in the first part of 2015 will become more political and bring the risk, further down the line, of unleashing a new, disproportionate police response that will increase social divisions.

8. Regional cooperation and alliance-forming in the Americas will be characterised by pragmatism and flexibility

In 2015, great leaps in the regional integration of the Americas are not expected, but there is no doubt that alliances will be redefined at three levels: Latin American, hemispherical and bi-regional. A number of important dates are in the calendar, such as the summit of the Community of Latin-American and Caribbean States (CELAC) on the 28th and 29th of January, that of the Americas on April 10th and 11th and the CELAC-EU summit on June 10th and 11th. From 2015 onwards, competition between cooperation blocs and rival regional integration will be eased. CELAC will emerge as prime beneficiary, as it may come to be the main reference point in relations between Latin America and the rest of the world, notwithstanding the fact that the Panama summit will witness a moment of hemispheric importance as a result of the thawing of relations between Cuba and the United States.

Flexibility and pragmatism will be the two guiding principles in regional cooperation dynamics in 2015. The changes in Brazil's ministry of external relations, the return of Michelle Bachelet to the Chilean presidency, the desire of Colombia and Mexico to take more active roles, the political change that will follow the Argentinian elections on October 25th, and, above all, the consequences of the end of Cuba's isolation are some of the factors that favour the articulation of regional cooperation through flexible alliances in which ideology will continue to lose weight as complementarity between distinct organisations is sought. There are already signs of East-West rapprochement in relations between the Pacific Alliance and Mercosur, as well as North-South within the CELAC framework.

2015 will see the United States paying more attention to Latin America which will increase its importance in Washington's agenda, above all by taking advantage of the Panama summit. Although the US presidential elections are a long way off (November 2016), the attempt to attract and mobilise the Hispanic vote is a palpable reality that will only be strengthened as 2015 progresses.

In Venezuela, the deterioration of economic prospects coincides with political fracture and planned elections.

9. The readjustment of the Asian powers

In 2015, China will have to adjust to the prospect of more moderate growth (though still high by any global standard), which will be accompanied by economic reforms to make it more sustainable and more dependent on internal consumption. The sustainability or deceleration of the Chinese economy is not only a domestic preoccupation but also affects economic evolution at a global level, with especially intense influence on sinodependent economies such as Thailand. Xi Jinping will try to consolidate his leadership via his "Chinese Dream" and the fight against corruption, which, in 2015, will probably target new senior officials in the party. 2015 will confirm that the economy is the main but not the only matter of concern for China's leaders. Xinjiang will continue to be a flashpoint and the Chinese government will persist with what it presents as a triple fight against extremism, terrorism and separatism. The maritime disputes between China and its neighbours will not end, but the tension may drop thanks to the establishment of codes of conduct and the fall in oil prices. On the other hand, Taiwan will rise up the Asian agenda. Following the electoral meltdown of the Kuomintang in the Taiwanese local elections in 2014 and with an eye on the presidential elections in 2016, it is probable that the nationalists of the Democratic Progressive Party (DPP) will raise the tone, making reference to the protests in Hong Kong and the frustration of the democratic movement.

In Japan, the economic reform known as Abenomics, to which the prime minister has given his name, was compromised when the country entered recession. But the electoral backing given to Abe in 2014 has given him a little more time to try to find the right road. If, by the end of 2015, no results are shown, the unhappiness of the volatile Japanese electorate will rear its head. Abe will also continue in his push to "reinterpret" the constitution without reforming it, and will give the self-defence forces greater operational capacities with one eye perhaps on Beijing but with its main focus on Pyongyang, the most unpredictable actor on the continent.

For its part, India will continue its strong commitment to increasing its regional influence and to being recognised as a global actor. Good economic prospects and Modi's leadership will make 2015 a year in which India's flourishing will be a recurrent subject in debates on the future of Asia and of the emerging economies. From this position it will strengthen its relations with the United States while also allowing itself be courted by other actors such as China and Russia. The possibility of India (along with Pakistan) joining the Shanghai Cooperation Organisation (SCO) at the summit in Ufa (Russia) in July will be another significant issue on the Indian agenda. If it decides to sign up, the geopolitical importance of the decision will be profound for Delhi and for Moscow, but most of all for Beijing, whose leadership role in the Asian continental space will be confirmed.

The international aspirations of Delhi will continue, nevertheless, to be greatly conditioned by the evolution of its relationship with a Pakistan that faces an increasingly complicated internal landscape marked by the difficult economic situation and the rise of terrorism and sectarian violence. Pakistan will keep its prominent place on the international security agenda. The local and regional impact of the definitive retreat of NATO and of the bulk of US troops in Afghanistan will be another of 2015's key issues. Afghanistan will be the main venue for the Indo-Pakistan rivalry along with Kashmir, where new violent episodes that put the diplomatic capacities of the Modi government to the test are likely. Finally, another of India's neighbours, Myanmar, will hold elections in October that will put its level of political openness to the test.

10. The two sides of the African upturn

Africa is no longer the forgotten continent. The sustained growth that many African economies have experienced, the disembarkation there of the emerging economies (especially China) and the growth of a new middle class are three of the pillars on which the discourse of the African miracle has been built. Africa's demographics are powerful, and are based not only on high birth rates but also on significant reductions in mortality rates, including infant mortality. This demographic growth is an opportunity but also a factor for instability if sufficient jobs are not created. Although African economies continue to be based on the production of primary materials, they are increasingly diversifying their economic structures, as much in terms of manufactured goods as in services. But, in contrast to this narrative of the "new Africa", the other reality is that African countries still prop up the Human Development Index, that Africa has a large number of weak or even failed states and that it is a continent that drives out but also receives an extremely high number of refugees and internally displaced persons.

In 2014, the Ebola pandemic and the Boko Haram terrorist group embodied African vulnerability in international public opinion and were reminders that these types of threats are not limited only to one state but are cross-border in their nature. Those two subjects continue to be reasons for concern in 2015, and the pressure on African governments and the institutions of regional cooperation to contain and reduce these and other threats will grow. Other scenes of crisis such as South Sudan and the Central African Republic remain blind spots and may deteriorate in 2015. Another trend that could become more acute in 2015 is the interconnection in terms of (in)security of the Sahel and the Maghreb. It may also be a year in which the traditional controversy on the waters of the Nile will affect the relations between Cairo and Addis Ababa. The fact that the Egyptian president, Mr. Sisi, planned a five-day visit to Ethiopia for the beginning of January is a clear sign that Egypt is also looking south.

2015 is also a year of highly intense electoral activity. The above-mentioned Nigerian elections will bring the largest number of African citizens to the ballot boxes. But two others will also be of great importance: the whole electoral cycle that Burkina Faso must go through and which is crucial to the transition following the fall of President Compaoré and the first general elections in South Sudan since independence.

11. Emerging countries will be the victims of their own contradictions

Much speculation has been made about the emergence of the BRICS not only as emerging economies but as a factor that alters the distribution of power at a global level. Nevertheless, in 2015 we will continue to see how these five countries (Brazil, Russia, India, China and South Africa), remain in fundamental agreement on what they do not like (the excessive weight Western countries have in global governance and their interference in the domestic affairs of third countries) but they seem incapable of presenting an alternative model, whether in economic terms or on tricky issues such as the perennially-postponed reform of the UN Security Council. The economic situation in which they find themselves will also be increasingly uneven. Of the group of five emerging economies (for which read: countries experiencing rapid sustained growth) the growth predictions for 2015 are either for low levels or even negative growth in the case of Brazil, South Africa and Russia. What is more, in 2015 it is likely that each of the BRICS will have to pay more attention to their immediate surroundings and even to tensions within their own countries.

To all this must be added a new batch of emerging powers also demanding to be recognised as such. In 2013, a new platform call MIKTA was formed (Mexico, Indonesia, South Korea, Turkey and Australia). This consultation framework brings together medium-sized powers who, once again, are all agreed on what they do not want (for everything to be decided between the G8 and the BRICS without consulting them), but who agree less on what to propose. The G20 is the natural framework in which such balances of power are measured, along with the coherence of each of these blocs. But more than a forum for designing long-term solutions, it has become an arena in which remedies (or patches) for urgent crises are discussed.

In 2015, Turkey takes on the presidency of the G20 and, therefore, has the job of organising the next summit in Antalya in November. By then it is highly likely that Mr. Erdoğan will have accumulated more power. The legislative elections in May 2015 bring to an end the extremely intense electoral cycle that began with the municipal elections in 2014 and the presidential ones in August which gave Erdoğan the presidency of the Republic. The Turkish case is a good example of the contradictions and tensions that the emerging powers face. They are actors that want to multiply their influence on global issues but who often find themselves trapped by internal tensions and imbalances that consume all their energies. For Turkey in 2015 the key debates will be the same: the solidity of the economic growth, how to resolve the Kurdish question, their involvement in regional conflicts, and the state of fundamental liberties. To all this we must add the intensity that the subject of Armenia will have, one hundred years after 1915. In 2015, we will see how the hyper-leadership of Erdoğan is reinforced but also how Turkey is worn down by controversies of all kinds.

India's flourishing will be a recurrent subject in debates on the future of Asia and of the emerging economies.

12. Those who try to boycott a nuclear agreement with Iran will do so because of political and geopolitical calculations that have nothing to do with the negotiation agenda

The 30th of June 2015 is the new date for the negotiations between Iran and the P5+1 (the permanent members of the UN Security Council and Germany) to reach a definitive agreement that allows Iran to develop nuclear technology while providing guarantees of their non-military purposes. As a result of a final agreement, the sanctions under which

Iran has suffered for years, and which have been relaxed during the negotiation process, should be lifted. On an issue of these characteristics what is negotiated has an eminently technical dimension. Nevertheless, those who work and will continue to work to make the negotiations fail are not acting in response to technical questions but above all to political calculations of a different nature.

Saudi Arabia and Israel fear the alteration of the pre-existing order that could mean recognising Iran as a large regional power as well as the supposed erosion of the United States' commitment to its traditional allies. If no agreement is reached, the hardliners in the Republican Party will rub their hands and present it as a failure of Obama's foreign policy. Curiously, the most conservative parts of the Iranian regime will act in similar way, motivated by similar calculations, as, if the negotiations are derailed, they will present it as a failure of the openness policy enacted by the Iranian president, Mr. Rouhani. What these four actors have in common is that they will not wait passively for the negotiation process to continue its course. Instead, they will, in their respective areas of power, actively take steps to boycott it.

The emerging countries will have to pay more attention to their immediate surroundings and even to tensions within their own countries.

That there is much more at stake than the future of the Iranian nuclear programme is something that those who will sit down at the negotiation table also know. As a key player in the Middle East, Iran could change the course of the conflict in Syria in one direction or the other. Its influence on Iraqi and Lebanese politics via its local allies is also an asset. In addition, the lifting of sanctions could open up economic opportunities, in the energy sector above all, but also beyond it, as Iran is an attractive market of nearly 80 million people.

13. Oil prices will not return to early-2014 levels: the losers will be clear, the winners less so

The combination of factors such as new energy sources, decelerating emerging countries, excellent Iraqi production figures and Saudi Arabia's geopolitical calculations are all being translated into oversupply in the markets and a downward trend in oil prices. These elements will not disappear in 2015 and, as a consequence, the most likely thing is that prices will remain low. Have they bottomed out? Will they rise as fast as they fell? And when? Most experts predict a slight rebound in prices in the second half of 2015, though without reaching previous levels. They also warn that this phase of low prices is temporary and that within a few years the market will begin to work again and oil prices will reach nearly $100 USD a barrel. What we will see in 2015 is that the fall in prices will pose an existential threat to some (but not all) producers, while for the large buyers, it will give slight respite to their economies but not enough to return growth.

In announcing some of the main trends that we foresee for 2015, we have already noted the internal difficulties that Russia, Venezuela and Iran may face. And although it has been given less attention, Nigeria, a country that is not short on tensions, will also be obliged to revise its budgets for 2015, when legislative and presidential elections are planned. Other large producers such as Saudi Arabia and the United Arab Emirates seem better placed to survive a period of low prices, calculating that, although it will harm them, it will harm their rivals more. In addition, they believe that lower prices will increase other economies' addiction to oil and reduce the attractiveness of alternative sources of energy. They see these losses as an investment for the future. Somewhere in the middle is Algeria. On the one hand, the country has accumulated reserves worth $200bn USD which will cushion the blow, and, more than oil prices, they depend on those of natural gas, which will take longer to fall, but which will fall, nevertheless. On the other hand, in recent years the country has not made the necessary investments to increase production and the memory is still heavy of how the fall in oil prices at the end of the 80s provoked a significant wave of unrest.

Those to emerge as winners are the main energy-importing economies such as the EU, China, India and Japan, those like Turkey for whom energy is a key element in their current account deficit and even Arab countries such as Morocco and Jordan that are not only massive energy importers but are obliged to subsidise it. But for the vast majority of these countries, this fall in prices will have a relative effect. The high prices of crude oil are not the main reason for the economic crisis in Europe and Japan and, therefore, their fall will not bring the EU out of crisis. On the other hand, it might favour the putting in place of expansionary policies as falling oil prices increase the risk of deflation. Morocco and Jordan gain time to reform their subsidy policy, but little more than that.

14. If a climate agreement is reached in Paris it will be enough to save face but not to save the planet

In 2015, environmental issues will be central to the international agenda. Especially in terms of climate change, as the Conference of the Parties (COP) in Paris approaches, but also in terms of sustainable development, with the approval of the new Millennium goals for the 2016-2030 period. These dates are already set in the agenda, but greater attention will be given to environmental questions if a large-scale natural disaster occurs or if the serious problems with pollution continue, especially in certain emerging countries. All of this translates to growing pressure on policy makers to reach agreements but not necessarily for those agreements to be the solution to the planet's problems. At the same time, the context of low oil prices gives an incentive for the final agreements to put a premium on flexibility so that to face the coming decade countries are able to adapt their policies to the fluctuations of the energy markets.

The Paris COP should decide the global governance in terms of post-2020 climate change with the objective, a priori, of limiting global warming to two degrees Celsius. Three main actors are in play: China, the United States and the European Union. China wants an agreement that does not compromise its economic model. The US has radically changed its position from wanting no agreement at all to committing to a soft one that is coherent with its domestic commitments to reducing emissions. The European Union continues to hope for a binding global agreement similar to Kyoto, but it is conscious that it is in a minority.

The precedent of the previous COP in Lima tells us that China and the US share a degree of interest in an agreement being reached and in its being flexible. In China's case, this is explained by domestic tensions, as pollution has become one of its citizens' main preoccupations. The United States' position is due, above all, to the personal initiative of Obama who has his post-presidential legacy in mind. The US president is more involved in the environmental agenda than any of his predecessors and 2015 will be no exception. But the fact that Beijing and Washington want to reach an agreement does not mean that they are willing to go as far as the Europeans. The most probable thing is that all parties will favour a bad agreement over none at all.

The fall in oil prices will pose an existential threat to some producers, while for the large buyers it will give only slight respite to their economies.

15. We will still be unable to anticipate many of the issues that will fill December's reviews of what happened in 2015

The last trend is the element of surprise. As a matter of fact, more than a trend, it is a constant. At the end of 2013, nobody would have predicted the annexation of Crimea, Islamic State's occupation of Mosul or Obama's announcement of the end of the blockade on Cuba. Therefore, there can be little doubt that many of the events that will draw international attention in 2015 are not reflected in this document. The future is unwritten. Nobody can confidently assert who will win the many elections planned for 2015 or how the actions of a wide range of actors, from world leaders to social movements, will affect the assessments made at the year's end on the elements of change and continuity on the global agenda. But accepting that uncertainty and the element of surprise themselves constitute a trend in the international reality necessitates the design of policies that take in all kinds of scenario, that allow priorities to be adaptable to changing contexts and that include mechanisms for rapid response in order to seize opportunities as well as to mitigate and contain risks.