



CARIBBEAN 2030

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Introduction

The Caribbean basin is one the most regionally, culturally and linguistically diverse regions of the world. While the broader Caribbean basin includes island nations and territories as well as countries on the mainland, including Mexico and parts of Central and South America, this study focuses primarily on the sovereign island nations of the Caribbean, as well as the members of the Caribbean Community. Therefore, for the purposes of this study, the term the Caribbean Basin is meant to include 16 sovereign countries: the Spanish-speaking nations of Cuba and the Dominican Republic; Creole-speaking Haiti; the former Dutch colony of Suriname; and the twelve former British colonies of Antigua and Barbuda, the Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago. There are also an array of Dutch, French and British controlled islands as well. These countries vary by language, colonial history, regime-type (Cuba is autocratic/totalitarian, the others are in varying degrees democratic—the former British colonies are parliamentary systems, the Dominican Republic is a presidential system and Haiti is a semi-presidential republic with a prime minister and president.)

Despite the diversity of the region, there are some commonalities. First, most countries depend heavily on tourism for their economies. Second, for this reason and the general lack of natural resources, most countries suffer from rates of economic growth below the average in Latin America and are vulnerable economically; the Dominican Republic, which has grown at rates averaging around 5 percent in recent years, is an exception. With the recent discovery of oil (in territory contested by Venezuela), Guyana's rate of GDP growth is expected to accelerate. Third, many countries in the Caribbean Basin (with exceptions such as Cuba) are challenged by crime and violence and increasingly by narcotics trafficking. The Bahamas, Belize, the Dominican Republic, Haiti, and Jamaica were singled out by the Department of State among the 22 countries worldwide identified as "major illicit drug producing and/or drug transit countries."¹ The designation does not necessarily signify a lack of cooperation with the U.S. in counter narcotics efforts, but rather an inability to cope with the growing problem—a problem that is likely to grow should the U.S. and its partners in Central America succeed in reducing drug trafficking through the isthmus and Mexico. The Dominican Republic is cited as "the top transshipment hub for cocaine passing through the Caribbean," accounting for "approxi-

mately six percent of the [total] cocaine bound for Europe and North America."² Fourth, because of the legacy of sugar production and slavery and indentured servitude (in the case of citizens of the region of South Asian descent), the Caribbean remains racially diverse and in some cases stratified by race. Fifth is the shared threat of extreme weather on these islands and coastal nations. Hurricanes, tropical storms, and rising waters—among other issues—represent not just a threat to these countries' tourism or agriculture-based economies but existential threats to their cities and infrastructure.

To better understand and analyze these issues, their inter-relationships and likely impact in the future, we have untangled them into five separate themes: 1) transnational security; 2) institutional capacity; 3) economic growth; 4) demography; and 5) technology and communications. In addition, we discuss two cross-cutting themes: the likely impact of extreme weather and the growing influence of extra-hemispheric actors.

Transnational Security Challenges

Several countries across the region face extremely high rates of violent crime, to the extent that it has been deemed "comparable to countries in armed conflict."³ These rates have continued to rise in recent years and pose a major challenge to the domestic stability and economic growth of these countries. For example, in Jamaica, the murder rate climbed for the third consecutive year in 2017, forcing the government to declare a state of emergency in the country's main international tourist destinations.

One of the biggest missing pieces of the transnational crime puzzle in the Caribbean Basin is the future of Cuba. For now, the island nation remains largely separate from the region's narcotics trade—though it remains aware and even supportive of many activities in other countries. Nevertheless, Cuba has not become a hub for transnational narcotics trafficking and money laundering. But given its geographic proximity to the United States and its areas of ungoverned space along its keys and northern coastline, how Cuba's political change occurs and affects the control over its territory over the next 12 years may shape U.S. concerns and policies regarding transnational narcotics trafficking and crime.

Institutional Capacity

State capacity and strength vary across the Carib-

1. International Narcotics Control Strategy Report, Vol. I, March 2018, p. 5.

2. *Ibid.*, p. 147.

3. Yagoub, Mimi, "Caribbean Has 'Violence Problems,' not Crime problems," *Insight Crime*, May 23, 2017.

bean Basin. All of the countries in the region remain democracies, except Cuba. Popular support for democracy remains relatively strong in the 10 countries covered in Vanderbilt University's biannual survey, averaging 59.8 percent in Antigua and Barbuda, Dominica, the Dominican Republic, Grenada, Guyana, Haiti (the lowest at 50 percent support for democracy), Jamaica, St. Kitts and Nevis, and St. Lucia.

Given the small size and territorial limits and clear boundaries of the small island nations—Antigua and Barbuda, Bahamas, Barbados, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines—state capacity is relatively robust in comparison to the rest of the region. Nevertheless, there are a number of countries hobbled by weak bureaucratic and security effectiveness. First there is Guyana. Marked by intense inter-party competition and with an overlay of a coming oil windfall on an already polarized, patronage-driven political system, state capacity will likely be strained in upcoming years. The Dominican Republic also struggles with a politicized bureaucracy after 12 years under the same party (Partido de Liberación Dominicana—PLD) and credible allegations of state corruption. Haiti also remains one of the weakest states in the Western Hemisphere. It continues to struggle with poverty, a near-broken electoral system, an ineffective police force, and a bureaucracy weakened by decades of corruption, natural disasters, political polarization and donor policies that have atrophied the Haitian state by its reliance on international actors and civil society. Natural disasters have also taken their toll on the poor island nation. About 17 percent of Haiti's civil servants were killed in the 2010 earthquake. Many government buildings were also destroyed and public records lost.

The World Bank maintains a Governance Index that measures political stability and absence of violence, voice and accountability, government effectiveness, regulatory quality, rule of law, and control of corruption. It scores each of those variables individually and combines them on a scale of 0 to 100 percent with average scores closer to 100 percent marking better levels of governance. As discussed above, the smaller island nations score well on average. (Individual numbers for each country are below.) But the basin is diverse; while the Bahamas scores 72.2 percent on the World Bank's measures, Belize scores 49.2 percent, the Dominican Republic scores 45.6 percent, Haiti scores 13.6 percent, and Jamaica scores 51.9 percent. In short, in matters of violence, voice and accountability, the effectiveness of the government, regulatory

effectiveness, the rule of law and corruption, these three countries remain at the bottom of the Caribbean Basin in these measures. And across the World Bank's percentile rankings, several countries remain close to the bottom, including the Dominican Republic (22.6 percentile in global rankings), Haiti (the lowest at 7.2 percentile global ranking) and Jamaica (51.9 percentile global ranking).

Another proxy measurement for institutional capacity and corruption is tax avoidance. By far the highest rate of tax avoidance, as measured as a percent of GDP, is in Guyana at 8.5 percent of GDP in 2016, followed by St. Lucia (4.4 percent), St. Kitts and Nevis (4.2 percent), Haiti (2.7 percent), and the Dominican Republic (2.3 percent).

Corruption also remains a problem. According to Transparency International's 2017 Corruption Perception Index, which ranks 180 countries globally by perceived levels of corruption on a score of 0 to 100 (with a 0 ranking representing highly corrupt and 100 very clean) Haiti scored 22; the Dominican Republic 29 and Guyana 38. In terms of country rankings, Haiti ranks well below the median ranking of countries at 157th out of 179 countries, and the Dominican Republic ranks 135th.

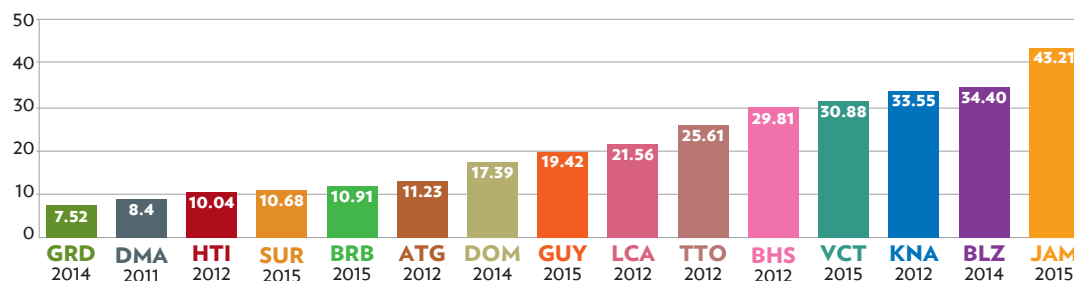
In Jamaica and other English-speaking countries, police forces are inadequately trained and supplied and undermined by corruption. Joint anti-crime efforts were institutionalized by the sub-regional grouping Caribbean Community (CARICOM) when IMPACS (Implementing Agency for Crime and Security) was established in 2006. Among many other initiatives, it created a regional intelligence fusion center to support crime detection and prevention.⁴ However, high levels of crime will continue to buffet a number of Caribbean societies, leading to declining confidence in governments and discouraging foreign investors and visitors. Given the lack of institutional capacity and continued economic volatility, high rates of violent crime are likely to remain a troubling feature in several Caribbean states for the foreseeable future. See Figure 1.

In the Dominican Republic, drug lords have grown powerful, conspiring with Dominican emigre gangs in the United States. National military and police officers have been corrupted by traffickers and, despite efforts to apprehend and prosecute offenders, the problem will likely persist. In 2015, anti-narcotics police officers were accused of stealing over a ton of cocaine.⁵ Furthermore, Dominican officials repor-

4. For more information, please see: <https://caricom.org> (Last accessed 9/29/19.)

5. Clavel, Tristan, "Trafficking Routes Up for Grabs After Fall of Top Caribbean Drug Kingpin," *Insight Crime Analysis*, August 17, 2017.

FIGURE 1
Homicides per 100,000



SOURCE: United Nations Office on Drugs and Crime. 2018. UNODC Statistics. New York, NY: United Nations.

tedly received bribes from the Brazilian construction firm, Odebrecht (currently at the center of a multi-billion dollar bribery scandal in Brazil), amounting to \$92 million. The Dominican official responsible for investigating the corruption was also implicated in the corruption scandal.⁶

Economic Growth

Economically, the Caribbean remains a highly volatile region with large inequalities between countries. Real per capita incomes vary widely across the region, from a high of about \$28,750 per person in Trinidad and Tobago to less than \$2,000 per person in Haiti. These wide differences in income reflect access to natural resources, population size, politics and political stability, ties to the U.S. or European economies, efforts to diversify economies, and historical factors. See Figure 2.

Despite the differences among countries, the economies of the Caribbean are typically reliant on a small range of agricultural exports and tourism as their primary economic drivers. This means that the Caribbean economies are highly dependent on evolving global conditions, and many are large food staple importers. The risks of tourism and mono-cultural primary-product-based economies can be seen in the volatile economic growth rates (and declines) over the past decade. To see the extent to which many countries in the basin depend on tourism, please see Figure 3.

Tourism revenues are vulnerable to changing external conditions and to the effects of natural disasters. Many Caribbean economies were hurt in the wake of the global financial crisis in 2008-2009 and the

resulting decline in global tourism. And extreme weather events have consistently damaged tourism infrastructure and crop productivity.

As a result, poverty remains a stubborn problem for some countries in the region. See Figure 4.

The Dominican Republic has enjoyed higher growth rates in the past decade and is likely to see growth remain consistent. The increasingly diversified economy is one of the most resilient in the region, with the service industry now the dominant source of revenue. Annual growth rates have been robust for more than 20 years, only once falling below the rate of population growth.⁷ The large Dominican diaspora in the U.S. provides nearly \$5 billion annually in remittances, equaling 7 percent of GDP in 2016.⁸ Trade with the United States has significantly expanded since the Dominican Republic-Central American Free Trade Agreement came into force in 2007. Nevertheless, immigration restrictions and tone in U.S. concerning immigration could well serve as a crimp both on remittances and pro-U.S. sentiment and economic orientation, especially since the May 2018 decision to recognize China, which presents an alternative market and source of investment.

Conversely, Haiti's fragile economy has been battered by natural disasters—the earthquake in 2010, hurricanes, droughts, and flooding made worse by deforestation—and crippling political paralysis. After the earthquake, a cholera epidemic claimed more than 9,500 lives. Many Haitians—about 81 percent of the population—are believed to go hungry.⁹ Yet, some progress has been made. A U.S. Department of State

5. Clavel, Tristan, Trafficking Routes Up for Grabs After Fall of Top Caribbean Drug Kingpin, Insight Crime Analysis, August 17, 2017.
6. Goi, Leonardo, Top Dominican Republic Officials Imprisoned Pending Odebrecht Trial, Insight Crime, June 8, 2017.
7. Seelke, Clare Ribando, "Dominican Republic Background and U.S. Relations," Congressional Research Service, November 6, 2012, p. 6.
8. Orozco, Manuel, "Remittances to Latin America and the Caribbean in 2016," Inter-American Dialogue, February 10, 2017, p. 4.
9. "Rural Haitian Children Starving," Associated Press, November 21, 2008.

FIGURE 2
Projected Gross Domestic Product Annual Growth Rates, 2018-2023¹⁰

COUNTRY	2018	2019	2020	2021	2022	2023
Antigua and Barbuda	3.5	3	2.5	2	2	2
Bahamas	2.5	2.2	1.6	1.5	1.5	1.5
Barbados	0.5	0.8	1	1	1	1
Belize	1.8	2	1.7	1.7	1.7	1.7
Cuba	N/A	N/A	N/A	N/A	N/A	N/A
Dominica	-16.3	12.2	7.1	3.5	2.5	1.5
Dominican Republic	5.5	5	5	5	5	5
Grenada	3.6	3.6	2.9	2.7	2.7	2.7
Guyana	3.5	3.7	29.2	21.7	11.1	27.8
Haiti	2	3	3	3	3	2
Jamaica	1.5	1.8	2	2.1	2.2	2.4
St. Kitts and Nevis	3.5	3.2	3	2.7	2.7	2.7
St. Lucia	2.5	2.3	2.2	2.1	1.8	1.6
St. Vincent and Grenadines	2.1	2.5	2.8	3	3	2.8
Suriname	1.4	2	2.8	3	3.1	3
Trinidad and Tobago	0.2	0.2	1.8	3.9	2.4	1.9

SOURCE: International Monetary Fund. 2018. World Economic Outlook Database, April 2018. Washington, DC: International Monetary Fund.

report reveals that nearly all those displaced after the earthquake have been resettled from camps, and significant progress has been made in public health. Thousands of jobs have been created in the growing export apparel sector, and since 2011 there has been positive annual growth. Nevertheless, even after the flawed elections of November 2016, the impoverished island nation's economy remains hobbled by political paralysis and polarization. As a result, prospects for growth strong enough to lift impoverished Haitians (58.5 percent of the population) out of poverty remain dim. An annual sustained growth rate of 7 to 8 percent would be necessary for the economy to keep up with population expansion—a rate that is unlikely given current political and structural challenges.

Only a few countries in the sub-region are energy producers or have the resources to become so. Among the lucky few is Trinidad and Tobago. The small nation of about 1.37 million people exports oil and natural gas

while accumulating foreign reserves and investing in a sovereign wealth fund. With the largest natural gas processing center in the Western Hemisphere, the energy sector accounts for 40 percent of GDP. In 2017, large off-shore gas fields were discovered that should offset recent declines in Trinidad and Tobago's oil and gas production and bolster the economy until 2030 and beyond. While Guyana is among the poorer Caribbean states, that may soon change. Large offshore oil reserves of two billion barrels were confirmed in 2016. At least five additional promising tracts are slated to be drilled. Guyana could be producing 120,000 barrels a day by 2020.¹¹

The rest of the region depends on imported energy. Ninety percent of the region's energy needs are met by imported petroleum and the region spends about 13 percent of GDP on imported oil.¹² The regional dependence on external energy sources (save Trinidad and Tobago and, soon, Guyana) has left the region open

11. "Will Oil Corrupt a Small Caribbean State?" The Economist, June 29, 2017.

12. Glickhouse, Rachel, Explainer: "What is Petrocaribe?", Americas Society/Council of the Americas, May 10, 2013.

FIGURE 3
Tourism as a Percent of GDP

COUNTRY	Tourism as % of GDP (2017)
Antigua and Barbuda	51.80%
Bahamas	47.80%
Barbados	40.60%
Belize	41.30%
Cuba	10.70%
Dominica	37.60%
Dominican Republic	17.20%
Grenada	23.30%
Guyana	7.00%
Haiti	9.70%
Jamaica	32.90%
St. Kitts and Nevis	26.80%
St. Lucia	41.80%
St. Vincent and Grenadines	23.40%
Suriname	2.70%
Trinidad and Tobago	7.70%

SOURCE: World Bank. 2018. International Tourism, Percent of GDP. Washington, DC: World Bank.

to petroleum-based patronage by the governments of Hugo Chávez and Nicolás Maduro in Venezuela. That pipeline of Venezuelan crude at cut-rate prices and loans—through a program called PetroCaribe—has helped Venezuela avoid regional, multilateral scrutiny of its human rights and the erosion of democracy through the Organization of American States and the Summit of the Americas. The result has enabled the economic and political implosion of the country and criminalization of its state in ways that is now having massive effects on the region’s security and weakened its multilateral institutions.

As the numbers in Figure 5 reveal, Venezuelan largesse has been in decline since 2015, and has continued to decline since. Many expect PetroCaribe shipments to end entirely soon, given the country’s plummeting production from 3 million of barrels per day at peak production to approximately 1.2 million barrels today,

FIGURE 4
Percent of Population Living Below the Poverty Line

COUNTRY	Population below poverty line
Antigua and Barbuda	N/A
Bahamas	9.30%
Barbados	N/A
Belize	41%
Cuba	N/A
Dominica	29%
Dominican Republic	30.50%
Grenada	38%
Guyana	35%
Haiti	58.50%
Jamaica	17.10%
St. Kitts and Nevis	N/A
St. Lucia	N/A
St. Vincent and Grenadines	N/A
Suriname	70%
Trinidad and Tobago	20%

SOURCE: CIA World Factbook Estimates (Other data was missing the vast majority of Caribbean countries)

which, combined with a severe currency crunch, have left Venezuela in default on its international loans and its economy reeling. Whether the declining promise of indefinite cheap oil or the un-deniability of the humanitarian, political and economic crisis in Venezuela, the once-solid Caribbean bloc has started to split in regional votes. In an Organization of American States (OAS) Permanent Council convened on June 23, 2016 by Secretary General Luis Almagro, four members of the once-solid bloc of Petro-Caribe countries broke ranks and voted in favor of an agenda to hold a discussion on the deteriorating human rights and democratic situation in Venezuela. They were: Bahamas, Belize, Guyana, Jamaica, and Suriname. St. Lucia and Trinidad and Tobago abstained, while the other Caribbean Basin/Petro-Caribe participating countries— Antigua and Barbuda, Dominica, the Dominican Republic, Grenada, Haiti, St. Kitts and Nevis, and St. Vincent—voted against the

13. Global Americans, “Liberal or Rogue: Rogues or Enablers: Latin American Foreign Policy and Human Rights” <https://theglobalamericans.org/reports/liberal-rogue-latin-american-foreign-policy-human-rights/> (Last accessed 9/24/18).

FIGURE 5
Petro Caribe Shipments 2010 to 2015

COUNTRY	2012 thousands of barrels per day	2015 thousands of barrels per day
Antigua and Barbuda	1.3	1.8
Bahamas	N/A	N/A
Belize	0.8	3.2
Cuba	98	95
Dominica	0.4	0.3
Dominican Republic	26.9	7.5
Grenada	0.8	0
Guyana	6.9	4.9
Haiti	14.2	20.7
Jamaica	25.9	20.7
Saint Kitts and Nevis	0.9	0
Saint Lucia	N/A	N/A
Saint Vincent and the Grenadines	0.5	0
Suriname	2.2	1.6

SOURCE: Sistema Económico Latinoamericano y del Caribe. 2015. Evolution of the Petro-Caribe Energy Cooperation Agreement. Caracas: SELA.

agenda.¹³ The next year, on March 28, 2017, the OAS Permanent Council had a special hearing on the controversial decision by the Venezuelan Supreme Court to ignore the duly-elected National Assembly. In all, 14 OAS member countries signed the non-binding letter, including the Bahamas, Barbados, Jamaica, and St. Lucia. At the OAS 47th General Assembly in June 2017, 20 countries signed a resolution—three short of the necessary quorum—calling for Venezuela to release political prisoners and not to convene its controversial constituent assembly to rewrite the constitution. The Bahamas, Belize, Guyana, Jamaica, and St. Lucia signed on. But while St. Kitts and Nevis and St. Vincent and Grenadine voted against the resolution, there was a break in the bloc, with Antigua and Barbados, the Dominican Republic, Haiti, Suriname, and Trinidad and Tobago all abstaining.¹⁴ Then, at the 48th OAS General Assembly in 2018, the gathered foreign ministries finally reached the necessary votes to approve a resolution condemning the deterioration of human rights and democracy in Venezuela

and the humanitarian crisis.¹⁵ On the Caribbean side, this was accomplished with the Dominican Republic joining the yes vote, and with Antigua and Barbuda, Suriname, Haiti, Trinidad and Tobago and St. Kitts and Nevis pointedly abstaining.

Despite these encouraging signs and a slow weaning off of Venezuelan oil, the end of Petro-Caribe will leave many Caribbean economies in the lurch given their dependence on external energy and their use of the surplus to purchase imported food stuffs. As a result, there remains the risk of economic contraction in some countries, despite efforts by the U.S. and Mexico to assist in picking up the slack in oil shipments and renewable energy sources that could replace Venezuelan crude.

Even assuming that the disruption of Venezuela's oil does not induce economic upheaval, the

slow rates of economic growth within the region and the likely unevenness of growth will be insufficient to lift large portions of the basin's population out of poverty. Nor will the projected growth rates—especially given the fragility of the economic base of many countries—be sufficient to pull a significant number out of poverty and improve several countries' severe fiscal deficits. Several countries' percent of public debt to GDP is at dangerously high levels in 2016: Barbados (137 percent of GDP), Belize (95.9 percent of GDP), Jamaica (113.5 percent of GDP) and Grenada (82.1 percent of GDP). On the other hand, the Dominican Republic (35 percent of GDP) and Haiti (50.7 percent of GDP) have relatively sustainable levels of public debt to GDP.

It should also be noted that a significant amount of the region's liquidity and economic growth is fueled by remittances, largely from the United States. In 2016, according to the World Bank, a significant chunk of the GDPs of countries like Haiti and Jamaica

14. Global Americans, "Keeping up Appearances: Empty Promises, Broken Commitments, and Fake Election Monitors," <https://theglobalamericans.org/reports/empty-promises-broken-commitments-fake-election-monitors/> (Last accessed 9/24/18).

15. Global Americans, "Liberal, Rogues and Enablers: The Sequel," <https://theglobalamericans.org/reports/liberals-rogues-enablers-the-sequel/> (Last accessed 9/24/18).

FIGURE 6
Remittance Totals and as Percent GDP 2016¹⁶

COUNTRY	Remittances inflows (2016, U.S. millions)	Remittances of GDP
Antigua and Barbuda	\$29	1.89%
Bahamas	N/A	N/A
Barbados	\$108	2.25%
Belize	\$97	5.28%
Cuba	N/A	N/A
Dominica	\$57	10.13%
Dominican Republic	\$5,509	7.25%
Grenada	\$43	3.84%
Guyana	\$265	7.21%
Haiti	\$2,359	28.06%
Jamaica	\$2,433	16.47%
St. Kitts and Nevis	\$10	1.06%
St. Lucia	\$32	1.87%
St. Vincent and Grenadines	\$42	5.32%
Suriname	\$7	0.21%
Trinidad and Tobago	\$144	0.65%

SOURCE: World Bank. April 2018. Migration and Remittances Data. Washington, DC: World Bank.

depend on remittances from abroad. See Figure 6.

Despite its other differences with its neighbors, Cuba is in many ways in the same boat. While International Monetary Fund (IMF) and World Bank numbers are difficult to come by for Cuba, almost 60 years of a communist, control economy, in which large numbers of younger, better-educated Cubans have fled, have left the island nation in economic stasis. According to Cuban officials, the state-led communist economy needs at least \$2 billion in foreign direct investment (FDI) in order to grow at rates sufficient to sustain the economy. Yet despite changes in the country's FDI laws and select liberalization of some sectors—especially for small private enterprise—the economy has fallen far short of these goals. As a result, the economy remains stagnant, under-modernized, and ill-equipped to compete in the global economy. All of this—discussed below—is complicated by the island's

ossified political system. Despite cosmetic efforts to inject leadership change, the regime and certain elements within the leadership circle remain deeply tied to the half-century-old economic model and fearful of structural changes that would loosen the state's control over the economy and thus over society and the country's political future. Fully addressing the economy's serious bottlenecks and inefficiencies would require wrenching change—such as unifying the country's dual currency system—and opening up the economy to greater market incentives, all of which would likely generate greater inequality, unemployment, and loosen the regime's control over society.

Demography and Urbanization

Although the Caribbean is a relatively small region—with a population around 28.4 million in 2017—the region is extremely dynamic and diverse. It is important to note that the region is highly concentrated in the populations of Cuba, Haiti and the Dominican Republic, each of which has a population of over 10 million. Another 2.9 million reside in Jamaica and 1.4 million in Trinidad and Tobago. The remaining are spread across the region, in which no country has more than a million people.

While populations are anticipated to continue growing across the region, the population growth rates in the region remain modest, with the regional population growing to slightly more than 30 million by 2023. These population growth rates remain relatively low given the region's high rates of immigration to other countries, particularly to the United States. This is particularly true of Guyana, which has one of the highest emigration rates in the world, with 55 percent of Guyanese citizens living abroad. Nearly 90 percent of the Guyanese university-educated population eventually migrates to other countries. See Figure 7.

Dominica, Grenada, St. Kitts and Nevis, and St. Vincent and the Grenadines have developed professional post-graduate schools that attract large

16. Please note, the source for this table—the World Bank—does not have data for Cuba. Estimates on Cuba range as high as \$1 billion per year.

FIGURE 7
Estimated Population by Year, 2016-2023 (in Millions of People)

COUNTRY	2016	2017	2018	2019	2020	2021	2022	2023
Antigua and Barbuda	0.09	0.091	0.092	0.093	0.094	0.095	0.096	0.097
Bahamas	0.368	0.372	0.377	0.381	0.385	0.389	0.394	0.398
Barbados	0.28	0.281	0.282	0.282	0.283	0.283	0.284	0.285
Belize	0.376	0.386	0.396	0.406	0.417	0.428	0.439	0.451
Cuba	11.476	11.485	N/A	N/A	N/A	N/A	N/A	N/A
Dominica	0.071	0.071	0.071	0.071	0.071	0.071	0.071	0.071
Dominican Republic	10.075	10.172	10.27	10.368	10.468	10.568	10.67	10.772
Granada	0.107	0.108	0.108	0.108	0.109	0.109	0.11	0.11
Guyana	0.768	0.77	0.773	0.775	0.777	0.78	0.782	0.784
Haiti	10.848	10.983	11.117	11.248	11.378	11.507	11.634	11.76
Jamaica	2.829	2.844	2.86	2.875	2.892	2.906	2.922	2.938
St. Kitts & Nevis	0.056	0.057	0.058	0.058	0.059	0.06	0.06	0.061
St. Lucia	0.174	0.176	0.177	0.178	0.179	0.18	0.181	0.182
St. Vincent and the Grenadines	0.11	0.11	0.11	0.11	0.111	0.111	0.111	0.111
Suriname	0.575	0.582	0.59	0.597	0.604	0.612	0.619	0.626
Trinidad and Tobago	1.365	1.371	1.378	1.384	1.39	1.397	1.403	1.41

SOURCE: International Monetary Fund. 2018. World Economic Outlook-April 2018. Washington, DC: International Monetary Fund, Source for Cuba data: World Bank. 2018. Population. Washington, DC: World Bank.

foreign enrollments and income. The most prestigious of them, the medical school in Grenada, enrolls 7,700 students. Similarly, Trinidad and Tobago and Guyana are exceptional in that tourism is not king. The Guyana’s government will likely struggle to find qualified personnel to negotiate successfully with the oil companies and manage the expected windfall. This is particularly problematic given challenges of corruption discussed later in this report.

Haiti’s current population of 11.1 million will expand to 12.5 million by 2030, and an estimated 14 million by 2050. The median age in 2030 will be 27.2, and 33 in 2050. In 2013, only 200,000 people had formal jobs, in an available work force of 4.2 million.¹⁷ In October 2017, President Moïse petitioned the Trump administration to extend Temporary Protected Status (TPS) for Haitians residing in the U.S. It appears,

however, that the exemption will be terminated in July 2019. If so, as many as 50,000 Haitians will be repatriated and remittances—\$2.2 billion, accounting for 21 percent of GDP—will diminish, causing extreme poverty to increase.

Technology and Communications

Internet usage in the Caribbean region ranges from lows of 12 percent of the population in Haiti, 36 percent in Guyana, 38.8 percent in Cuba, and 45 percent in Belize, Jamaica, and Suriname, to countries such as Barbados and the Bahamas, where upwards of 80 percent of the population is connected.¹⁸ Cuba’s number of internet users has increased in recent years thanks to a limited opening by the government and the engagement of U.S. internet companies such as Google. The result has been the increased, but limited, connectivity through public Wi-Fi hotspots.

17. Taft-Morales, Moreen, “Haiti Under President Martelly: Current Conditions and Congressional Concerns,” Congressional Research Service, December 23, 2015, p. 12.

18. ICT Development Index 2017, <http://www.itu.int/net4/ITU-D/idi/2017/index.html> (Last accessed 9/25/18).

FIGURE 8
Urban Population and Percent of General Population in Low-Elevation Coastal Zones

COUNTRY	Percent Of General Population, 2000	Urban Population, 2000	Percent Of General Population, 2030	Urban Population, 2030
Barbados	6.08%	6,055	8.19%	13,919
Cuba	10.49%	69,626	10.16%	77,645
Dominican Republic	3.35%	35,724	2.80%	105,943
Haiti	5.29%	68,102	6.32%	449,699
Jamaica	8.57%	49,101	8.49%	76,313

SOURCE: International Monetary Fund. 2018. World Economic Outlook-April 2018. Washington, DC: International Monetary Fund, Source for Cuba data: World Bank. 2018. Population. Washington, DC: World Bank.

As in Central America and South America, the use of social media within the Caribbean to organize political protests has been limited—though internet connectivity did help to mobilize international philanthropy after Haiti’s devastating earthquake. There is no evidence that social media use in the Caribbean democracies has dramatically impacted political dynamics. Unlike in a few of the Central American countries, there are no known instances of Caribbean populations using social media to organize political protests, but as internet availability extends to larger segments of the populations, especially in the poorer countries of the region, the political impact of connectedness will likely increase.

The Cuban government maintains strict controls over the web, blocking sites considered unfriendly to the regime. In March 2018, Cuba and Russia agreed on measures to increase Russia Today (RT) broadcasts in Spanish for radio and television on the island.¹⁹ With considerable fanfare, Havana announced a month later that five million cell phone connections had been established by the state telecommunications agency. As in wealthier countries, Cuba experienced rapid growth in cell phone usage, rising from 43,000 in 2003, and 223,000 in 2008.²⁰ But usage is expensive and connectivity is spotty or lacking, especially in the provinces.

Outliers

There are two outliers that will affect political, economic and security stability in the region. These are: the risk of extreme weather on local economies and

infrastructure and the growing role of extra-hemispheric actors. We talk about each individually before delving into the individual factors likely to affect the region and the country-by-country analysis for worst case and best case scenarios and the potential opportunities and risks for each.

Climate Change/Extreme Weather

For many countries in the Caribbean Basin, extreme weather, in part stemming from climate change, is not just a destructive economic risk, it is an existential threat. It is also a risk to the U.S. economy given the level of exposure faced by U.S. insurance companies. As destruction from hurricanes, flooding, rising waters and mudslides worsens, these companies will become increasingly unable to make insurance payouts. Moody’s Investor Services announced that climate change will heighten U.S. exposure to economic loss, placing short- and long-term credit pressure on U.S. states and local governments.²¹

Last year’s hurricane season was a reminder of how the risks are escalating. Hurricanes Irma and Maria thrashed the British and U.S. Virgin Islands and Puerto Rico, causing unprecedented infrastructural damage and death and putting a serious dent in their tourism industries for years to come. And it will only get worse. In Figure 8 above are the urban populations and percentages of the overall population residing in low lying areas at risk of rising waters and tropical storms.

As we have seen in the cases of the Virgin Island and Puerto Rico, extreme weather can have severe consequences for the tourism on which many of

19. “La televisora rusa RT quiere ampliar sus transmisiones en Cuba,” EFE, March 24, 2018.

20. “Llega Cuba a cinco millones de líneas móviles activas,” Granma, April 12, 2018.

21. Moody’s <https://www.moody.com/research/Moodys-Climate-change-is-forecast-to-heighten-US-exposure-to-PR-376056>

the countries in the basin depend for a significant portion of their economies (see Figure 3 above). From the disruption caused by the rising waters and weather and the economic effects, extreme weather in the Caribbean Basin will increase pressures for out-migration from a region that already has a high rate of migration.

There is also the subtler, long-term threat to tourism caused by warming seas: the blight of Saragassum weed washing up on once-pristine beaches. While wealthier tourist destinations such as Cancun can afford massive clean-up operations, smaller destinations are watching their tourism dry up as beaches are rendered smelly and unusable because of Saragassum weed.

As a result, popular concerns over the risks of climate change remain high in the Caribbean Basin. Across 10 countries in the Caribbean, on average 73.3 percent of citizens express concern about climate change.²²

Extra-Hemispheric Actors RUSSIA

In recent years, Russia has extended its influence in several Caribbean countries but, with the exception of Cuba, this increase has been from a base of previously minuscule levels of engagement. Its diplomatic profile and economic presence have increased partly due to growing numbers of Russian tourists visiting the region. Russian companies have been seeking investment opportunities in Jamaican bauxite mines and in tourism properties across the Eastern Caribbean. As noted above, tourism is an important element of the economies of several Caribbean states, making Russian investment and travel particularly important to the region. For example, for several years prior to 2014, Russian tourists were Jamaica's fastest growing segment of the economy. However, with the decline of the Russian economy under Western sanctions, Russian tourism to Jamaica dropped by 67 percent.²³ This highlights the vulnerability of the region to global geopolitical trends (as well as Russia's own economic fragility). It is also troubling to note that Russian oligarchs are reportedly investing in some of the small countries in order to acquire local passports.

Guyana, ruled since 1966 mostly by socialist governments, has been of particular interest to Moscow. Russia cancelled Guyana's debt and has offered police training and scholarships. It is also seeking opportunities for port calls by Russian naval vessels. It is likely that gradual increases of Russian involvement

in several Caribbean countries will continue into the near future.

Cuba was a dependable ally of the Soviet Union for 30 years and remains Russia's main interest in the Caribbean. During a 2014 visit to Havana, Russian President Vladimir Putin signed ten bilateral economic and commercial accords with Raúl Castro's government. Russia forgave Cuba's approximately \$35 billion debt and indicated interest in investing in energy and offshore oil exploration. Additionally, a Russian company has built power generating facilities and a truck assembly factory on the island. Other more ambitious projects have not gone beyond planning or rhetorical stages. In 2014, Russia's defense minister ruminated about the need to establish distant military bases, including in Cuba. In 2017, Kremlin legislators echoed this sentiment, saying that "the deployment of a Russian military base in Cuba would help the security interests" of both Russia and Cuba. However, Raúl Castro's government did not consent to the establishment of Russian military bases on the island and his successor, Miguel Díaz-Canel, is also unlikely to agree to a large permanent Russian military presence—likely because of the low returns from the Russians for doing so weighed against the reaction of the United States.

It has been alleged that Russia may have had a hand in the so-called sonic attacks against U.S. diplomats that started in 2016. Several theories have been put forward—none of them yet proven—that what caused the sickness of more than 20 U.S. diplomats posted in Havana was either a form of spyware that went awry or was a targeted sonic attack intended to harm the diplomats and sour U.S.-Cuban relations. In either of those scenarios there has been speculation over whether the Cuban government—or a hardline faction within the government—was involved or aware of the activities. Unfortunately, given competing theories over what could have provoked hearing loss, dizziness and even concussion-like symptoms among the victims, even among medical professionals, we may never know the source, or the intentions, of the attacks. What does appear clear is that it would be in Russia's interest to knock off course any rapprochement between Cuba and the United States, given its interests in the country and in disrupting U.S. influence. Indeed, U.S. government officials involved in the secret negotiations to re-establish relations between the countries were spied on at several occasions by the Russians.²⁴

22. These are unweighted averages for the following countries: Antigua and Barbuda; Dominica; Dominican Republic; Grenada; Guyana; Haiti; Jamaica; St. Kitts and Nevis; St. Lucia; St. Vincent and Grenadine.

23. "Russia and the Caribbean," The Caribbean Council, March 24, 2015.

24. Woody, Christopher, "Russian sends message to Obama administration over Cuba thaw" in Business Insider, July 3, 2018: <https://www.businessinsider.com/russia-sends-message-to-obama-administration-over-cuba-thaw-2018-7> (Last accessed 9/10/18).

CHINA

China has much more to offer the Caribbean than Russia. Although its trade and investment in Caribbean countries pales in comparison to its dealings with Mexico and South American countries, China has become an important actor in the Caribbean Basin. This has been particularly true in terms of the role that China is playing economically in the region.

China's presence in the Caribbean is also partially driven by China's diplomatic efforts to isolate Taiwan and promote the "One China Policy." Of the 17 countries (including the Vatican) that recognize Taipei as the seat of the Chinese government, five are located in the Caribbean Basin: Belize, Haiti, Saint Kitts and Nevis, Saint Lucia, and Saint Vincent and the Grenadines. This makes the Caribbean a region of particular strategic importance to the Chinese government. In May 2018, the Dominican Republic switched its status of diplomatic relations from Taipei to Beijing. China was already the country's second largest source of imports after the United States. Grenada established diplomatic ties with Beijing in 2005 and, soon after, China began construction of a \$40 million soccer stadium with more than 300 imported Chinese workers. This provides a clear example of China's "checkbook" diplomatic efforts to ensure recognition over Taiwan. Given these recent changes in the diplomatic positions of several Caribbean nations as well as China's continuing efforts to isolate Taiwan, it is likely that we will continue to see China exert its growing diplomatic and economic pressure on the remaining five Caribbean countries that recognize Taiwan until these countries switch their position to recognizing Beijing as the seat of the Chinese government.

China has also become an important provider of aid and investment to the Caribbean region. During a visit to Trinidad and Tobago in 2013, Chinese President Xi Jinping reportedly promised ten Caribbean countries \$3 billion in loans. A major tourist resort is under construction with Chinese funding and laborers in the Bahamas. While the amount of aid that China is providing to the Caribbean pales in comparison to the growing volume of aid to other parts of Latin America, it remains an important source of development finance to several countries in the region. Additional Chinese investment, loans, and construction projects, as well as diplomatic gains, are likely through 2030.

This increased diplomatic and investment/donor activity with China comes with two primary risks.

The first is that as China courts Caribbean allies, it builds its soft power in multilateral institutions and support for its policies to undermine democracy and human rights norms and institutions worldwide. The second is the fear of a repeat of Sri Lanka's experience with a Chinese-built port financed by Chinese state loans.²⁵ In the case of Sri Lanka, Chinese loans to the government of then-Prime Minister Mahinda Rajapaksa to build a port so indebted the country that the Chinese government eventually took over control of the port and now runs the facility. That has become a warning sign for Latin American and Caribbean countries; easy money for infrastructure investment and debt financing may come at a cost to national sovereignty.

Factors Affecting Stability in the Region:

Racial and ethnic tensions remain a factor in the Caribbean, though not an overriding concern for regional stability. Politics in Guyana remain riven between the rivalry between Indo-descendant and Afro-descendant based political parties. Racial tensions in the Dominican Republic, particularly over Dominicans of Haitian descent (or of alleged Haitian descent) remain. Even in Cuba—which has long claimed to be a racially integrated, egalitarian society—remittance flows, the effects of the government's limited market reforms and dislocations that will come with economic structural reforms raise the specter of economic inequality broken along racial lines with those of African descent falling behind their more Euro-descendant fellow citizens—let alone the Cuban-American diaspora across the 90-mile Florida Straits.

In the past decade, a number of Muslim citizens from Trinidad and Tobago and Guyana have travelled to Syria to join Islamic State of Iraq and Syria (ISIS) forces. One of the concerns will be whether these fighters will return and how radicalized they will be. Given the proximity and easy immigration flows to the U.S. states, these radicalized Islamic extremists may present a threat to U.S. security interests. Trinidad and Tobago, Guyana, and Suriname have small minority Muslim populations that include both recent converts and descendants of East Asians. About 7 percent of the Guyanese population and about 14 percent of the Surinamese population are Muslim, but few, if any, Muslims in either country have been attracted to radical Islam. However, while only 5 to 9 percent of Trinidadians are Muslim, the appeal of radical Islam continues to pose security challenges that will endure at least through 2030.

25. Ordoñez, Franco, "Chinese investments in Latin America irk U.S." in Miami Herald, September 10, 2018: <https://www.miamiherald.com/latest-news/article218057220.html>. (Last accessed 9/10/18).

26. Cottee, Simon "ISIS in the Caribbean," The Atlantic, December 8, 2016.

27. Ellis, Evan, "Gangs, Guns and Islamic Foreign Fighters: Security Challenges in Trinidad and Tobago," The Global Americans, September 8, 2017.

In 1990 Trinidad became the only country in the Americas ever to suffer from an Islamist insurrection. Muslim members of the Jamaat al Muslimeen (JAM) attacked Parliament in an attempt to overthrow the government. They shot the prime minister and took cabinet members hostage before surrendering six days later.²⁶ JAM militants are typically poor Afro-Trinidadian youths who have converted to Islam, some with criminal records. After the failed 1990 insurrection, the JAM movement devolved into multiple youth gangs.²⁷

In recent years, between 150 and 175 Trinidadians traveled to Syria and Iraq to fight for ISIS in its self-declared caliphate. Some reportedly rose to leadership positions, including Abu Sa'd at-Trinidad, who was featured in an ISIS online magazine. Sixty percent of those who went to fight are believed to have been from Muslim households, while the rest were recent converts. As a percentage of the population, more Trinidadians became jihadists than citizens of any other country. Most were radicalized as members of Afro-Muslim gangs that spun off from the 1990 JAM revolutionaries. Several mosques that appeal to different ethnic and racial sectors have functioned as recruitment centers for ISIS. Some survivors of the caliphate have by now undoubtedly returned home to the island. Trinidad and Tobago's democratic traditions have made prosecutions of radical imams who preach violence difficult to sustain. Intelligence and law enforcement will face the continuing threat of isolated terrorism in the country.

Criminal gangs and Muslim converts have also converged in Jamaica where a small, radical Islamist threat has emerged. In September 2017, a Jamaican Islamist cleric, Sheik Abdullah el-Faisal, was indicted in absentia in New York City for fomenting terrorism. He was arrested in Jamaica and is pending extradition. Prosecutors said that Sheik Abdullah el-Faisal "has dedicated his life to terror recruitment" . . . inciting "untold numbers of people around the world to take up the cause of jihad."²⁸ El-Faisal served a prison term in Britain before being deported to Jamaica in 2007, where he endeavored to convert and recruit jihadists. It is not known how successful he may have been among members of the approximately dozen Jamaican mosques.

The greatest unknown factors affecting stability in the Caribbean Basin security are transnational crime and the future of Cuba. The presence of criminal

gangs and narcotics trafficking organizations have increased in recent years as Colombian cocaine production has reached record levels and producers route more of their product through the Caribbean. Dominican counter-narcotics capabilities have improved with U.S. training and equipment, the collaboration of Dominican military units with civilian police to reinforce stability in crime-ravaged urban areas,²⁹ and the 2009 purchase of Brazilian-made aircraft (itself a major corruption scandal.) However, these improvements are insufficient to deal with the accelerating problem. Narcotics-related crime has risen to relatively high levels, fueled in part by the local affiliates of Dominican gangs in New York.

In Jamaica, "government and law enforcement authorities are committed to combating narcotics trafficking," according to the State Department. However, their efforts have been only "moderately effective" because of entrenched corruption, inadequate resources, and the deficiencies of the criminal justice system.³⁰ As many as 258 criminal gangs operate in the country, many of which are engaged in narcotics trafficking.³¹ The gangs and drug traffickers are known to collaborate with criminal members of the Jamaican diaspora within the United States.

Haiti is also a major transit point for cocaine traffickers who take advantage of its deficient maritime interdiction and law enforcement capabilities. The land border with the Dominican Republic is also largely uncontrolled. Seizures of drugs declined in 2017 and, looking ahead, are likely to remain low given existing gaps in Haitian interdiction capabilities—and feared corruption in Dominican security forces.

SOCIAL, DEMOGRAPHIC FACTORS

- **Urbanization;**
- **Popular attitudes;**
- **Race/ethnic divisions in some countries;**
- **Returning migrants.**

SECURITY FACTORS

- **Poorly trained and corrupt police/security forces;**
- **Limited civilian control over the military;**
- **High crime and murder rates;**
- **Weak state;**
- **Ungoverned spaces;**
- **Transnational criminal networks;**
- **Corruption among political elites;**
- **Local gangs.**

28. Moore, Jack, "Jihad in Jamaica: How a Radical Cleric's arrest Reveals a Link Between ISIS and the Caribbean," *Newsweek*, September 1, 2017.

29. Ellis, Evan, "Defense and Security Challenges in the Dominican Republic," *IndraStra*, February 13, 2018

30. International Narcotics Control Strategy Report, Vol. I, Department of State, March 2017.

31. Goi, Leonardo, "Jamaica Gangs Follow Regional Pattern of Recruiting from Schools", *Insight Crime*, April 24, 2017.

ECONOMIC FACTORS

- Poverty;
- Declining remittances;
- End of Petro-Caribe;
- Rising food and energy costs;
- Inequality.

The diverse Caribbean Basin area faces a number of challenges, stemming from both its countries' shared economic constraints and its proximity to the U.S. as a drug market. Racial, ethnic and religious risks remain. All of these require more professional, effective police forces and better coordination with U.S. intelligence and defense, including—within limits—with the Cuban military and intelligence services to better monitor commerce, illicit activities and terrorism.

More than a set of individual variables, the above-listed factors should be seen in combination—at the worst a vicious circle of weak state capacity; persistent socioeconomic disparities and patterns of exclusion; growing political frustration; and endemic, or even rising, crime and violence. Added to them should be the real and immediate threat of climate change on these at-risk Caribbean islands and coastal countries (in the case of Guyana, Suriname and Belize). The effects of hurricanes, rising ocean levels and the other attendant manifestations will be lower economic growth, the destruction of critical infrastructure—including major cities—displacement, and migration.

Below is a country-by-country analysis of the principal challenges and opportunities for the future and a projection of what the region will look like in 2030. In it we include the World Bank's Governance Index that scores six variables: 1) voice and accountability; 2) political stability and absence of violence/terrorism; 3) government effectiveness; 4) regulatory quality; 5) rule of law; and 6) control of corruption, on a percentile rank from 0 to 100, with 100 being the highest/best score. In addition, we include the index scores of the Fund for Peace and Foreign Policy magazine's State Fragility Index. The index compiles 12 indicators, combined with pre-existing quantitative data sets from organizations like the UN, World Bank, and WHO and a qualitative review from a team of social science researchers. The index scores up to 120, with the higher numbers representing greater state fragility, and then ranks countries by score with those at the top of the ranking the most at-risk or fragile. (By way of comparison, Libya scores as 94.6 in the index and ranks 25th among all the countries in index, meaning it is the 25th most fragile state in the 178 countries studied.)

Country by Country

CUBA							
Electoral	N/A						
Support for Democracy	N/A		State Fragility Index	62.9 out of 120 with a country ranking 119 out of 178			
Number of Homicides per 100,000	8.4						
World Bank Governance Indicators	Voice and Accountability	Political Stability and Absence of Violence/Terrorism	Government Effectiveness	Regulatory Quality	Rule of Law	Control of Corruption	Average
	6.4	66.19	50	6.73	35.1	60.58	37.5

	Most Likely Scenario by 2030	Opportunities	Challenges	Best Case Scenario	Worst Case Scenario
Security	Cuba's days of international adventurism have long faded. While it assists the Venezuelan government, Cuba remains isolated from narco-corruption and terrorism. That may change as it courts China and Russia and struggles to sustain itself. Its economic troubles and discontent could bring a risk of a collapsed state that could bring crime and mass migration.	The Obama-era opening brought tentative efforts of collaboration on matters of security, including port security, anti-terrorism and anti-narcotics. Those could be deepened and improved, while still mindful of and vocal about the regime's internal policies of repression.	Lack of political will for opening among Cuba's political ruling class and a push for a zero-sum solution among elements in the U.S. risk a complete state collapse in Cuba. Such an outcome could result in a failed state that would provide an open field for illicit non-state actors.	Newly-appointed president Miguel Díaz-Canel expands Cuba's engagement and cooperation with U.S. security forces in areas of anti-terrorism and anti-narcotics. Exchange remains free and constructive and leads to better communication among the security forces across the Florida Straits.	Cuba's repressive machinery fails to keep a lid on crime and violence, turning a state 90 miles off the coast of the U.S. into a haven for illicit actors. Closer relations with Russia and China will prolong the regime's lifespan and open up opportunity for intelligence gathering and increased influence in Venezuela and Nicaragua.
Institutional Capacity	There is no meaningful change in the political direction of the regime and the state remains an instrument of control, rather than an independent, effective and accountable manager of public policy and reform. As a result, change is stifled, undermining state effectiveness, technocratic capacity, and adaptability.	A process of controlled, limited transition may allow for improved engagement with multilateral organizations that could overcome the country's technocratic deficits. Educational exchanges with universities in economics, public policy, and the social sciences will help build technocratic capacity.	The Cuban state remains firmly under the control of the Cuban Communist party, by both practice and constitution. This condition limits the meritocratic, professionalization of the Cuban state and has led to corruption and party-driven patronage that have weakened state capacity.	Economic and social pressure force Díaz-Canel to create a coalition transition government that includes a technocratic group including economists from local universities and from multilateral agencies to improve economic efficiency and open economic and political space.	The state refuses to implement the sort of meritocratic/technocratic reforms necessary. While the country's repressive machinery remains in place, the policymaking elements of the state will struggle to design and implement much-needed economic reforms.
Economic Growth	For reasons of maintaining social control and the revolutionary legacy, the current government has little inclination to tackle the tough market and structural reforms necessary to induce higher rates of economic growth and foreign investment. If it doesn't, the economy will maintain low, insufficient levels of economic growth.	Should the government decide to tackle much-needed reforms like currency unification and liberalizing markets and private property, U.S. technical advice and investment can help to open those spaces to separate citizens from state economic control. Multilateral institutions can also assist in the design of reforms.	The government's tepid reforms and uncertain foreign direct investment laws have not generated the growth and investment needed. At the same time, income inequality is growing. Hardliners will oppose any further loosening of controls or deeper reforms.	Facing growing popular discontent over inequality and opportunity, Díaz-Canel decides to change course and engage in deeper structural reforms. He creates a coalition government with an emerging opposition, lifts political restrictions and reaches out for international technical assistance.	Facing the need for some reforms, the government engages in half-hearted structural reforms, such as currency unification and modest market opening, without the necessary institutional capacity. Inequality grows along racial lines and social upheaval results, leading to a brutal crackdown.
Demography and Urbanization	Cuba's population is aging and its most productive sector has left the island. The depleting workforce will make caring for the elderly a significant fiscal burden, further increasing the need for investment and tax revenue. Income inequality grows along racial lines, and Afro-Cubans become increasingly marginalized.	As Cuba's social safety net becomes strained, the regime may be forced to liberalize to allow for investment and expand markets that generate revenue and employ Cuban youth, providing greater economic and political independence. The country is also highly urbanized, with 77% of its population living in cities.	For the first time in recent history, Cuba has experienced a wave of internal migration to cities that has led to shanty-town-type settlements, mostly made up of Afro-Cubans. The regime continues to ignore racial disparity. At the same time, the country's aging population will present serious fiscal strains.	In a rare moment of clarity, the regime recognizes its festering social problems and seeks international technical and financial assistance to shore up social programs and reduce inequality and liberalizes politically to reduce social pressures.	The government ignores growing social pressures, allowing them to fester and further contribute to a possible failed-state scenario that will be difficult to overcome given racial divisions and growing social debt, as Cuban youth continue to flee the island to more promising economic opportunities.
Technology	One of the least-connected countries in the region, with only 38.7% of the population having access to the internet and 35.5% with a mobile phone, Cuba's internet penetration will continue to grow slowly. As a result, Cuba's digital divide with the rest of the global economy will continue to expand.	As during the Obama-era opening, U.S. companies such as Google can begin to invest in and expand internet access. There are now dozens of public Wi-Fi hotspots in the country, though some sites remain blocked by the government. Nevertheless, those hotspots can be expanded with help from international companies.	Cuba remains a small market for any international business. While mobile phone connectivity and internet penetration have increased, allowing for a freer flow of information, that information remains limited and access for reasons of disposable income is highly skewed.	The government decides to open up unfettered internet access in collaboration with private companies, expanding the number of Wi-Fi hotspots and lowering the price for access. The opening also expands opportunities for Cuban programmers and coders and deepens the economy's technological capacity.	Feeling threatened, the government backtracks on the modest internet opening, and shuts down the growing movement of on-line newspapers and blogs, and turns instead to relying on Chinese and Russian technology and companies that will expand surveillance.

Country by Country

DOMINICAN REPUBLIC								
Electoral	Presidential and congressional elections May 17, 2020, with subsequent elections 2024 and 2028, but as yet still unscheduled.							
Support for Democracy	61.8%	State Fragility Index	69.4 out of 120 with a country ranking 104 out of 178					
Number of Homicides per 100,000	15.18							
World Bank Governance Indicators	Voice and Accountability	Political Stability and Absence of Violence/Terrorism		Government Effectiveness	Regulatory Quality	Rule of Law	Control of Corruption	Average
	52.22	57.14		43.75	53.37	44.71	22.6	45.63

	Most Likely Scenario by 2030	Opportunities	Challenges	Best Case Scenario	Worst Case Scenario
Security	Should efforts to combat narcotics trafficking in Central America and Mexico be successful, the Dominican Republic will become a more important transshipment point for narcotics bound to the U.S. The country's recent diplomatic opening to China could increase cooperation with the PRC, including on military matters.	Greater opportunities for joint operations with U.S. military, including the Coast Guard, can help reduce the risk of the country becoming a major transshipment point. Police reform can also help reduce the country's high murder and crime rate. In 2016, DOD assistance totaled \$7.9 million.	With a porous border with Haiti, such close proximity to U.S. and a significant diaspora population living in the U.S., the channels for crime and transmission of narcotics remain powerful.	Cooperation and collaboration between the Dominican Republic and U.S. armed forces and DEA are deepened and remain strong on narcotics and transnational crime, blocking out tighter relations between the Chinese and Dominican militaries.	China develops closer military relations with Dominican armed forces, while U.S. immigration policies force criminal elements to return to the island deepening the country's connections to the drug trade and worsening crime and violence.
Institutional Capacity	Concerns about partisan capture of the Dominican state continue. Meanwhile, a tax collection rate of only 13.7% may risk the relatively stable current levels of debt to GDP of 34.99 percent—though they do help make the country's economy's attractive to investors.	As a close trade partner with the U.S. under CAFTA-DR and a USAID recipient (receiving \$5,5824,649 in 2016), the United States should be able to work closely to improve the government's tax collection and public administration capacity, that make it less dependent on remittances (which equaled 7.25% of GDP in 2016).	Despite advances in democracy and democratic competition, partisan capture of the state—drawing from the long-legacy of past authoritarian governments of Trujillo and Balaguer—remains a challenge.	A focused effort on building a meritocratic civil service helps to address the country's poor tax avoidance rates (at 2.29% of GDP) and low tax collection rates allowing it to improve social safety next programs to address the country's 30.5% poverty rate and the second lowest rate of average years of schooling in the region at 7.7.	Despite having one of the lower corruption perception scores in the region according to Transparency International, the possibility of Chinese investment, increasing narcotics trafficking and state capture by parties could erode state capacity and increase corruption and crime.
Economic Growth	GDP growth will continue at 5% per year, high for the region, but still not enough to pull the large percentage of workers toiling in the informal sector (49.5%) into formal jobs or lower the 30.5% poverty rate.	The free-trade agreement with the U.S. serves as an important anchor for the economy. Diplomatic recognition of China—if managed carefully—can serve as a boost for responsible investment and trade.	Despite impressive past and projected economic growth rates, the DR faces structural constraints, such as its low educational levels and dependence on remittances (7.25% of GDP). Changes in U.S. immigration policy may also crimp GDP growth potential. Ultimately the DR risks becoming stuck in the middle income trap.	The government leverages both its integration with the U.S. economy and society and high levels of connectivity to move up the value chain in production while also taking advantages of positive Chinese investment and trade.	Extreme weather disrupts economic productivity, especially given the country's high urbanization rate of 81 percent. A move toward U.S. protectionism also affects CAFTA-DR rules while immigration policies reduce remittances.
Demography and Urbanization	The DR remains one of the most urbanized countries in the Caribbean basin. At the same time its rate of informal employment at 49.5% remains a drag on socioeconomic development. Extreme weather threatens to displace populations and disrupt productivity.	Working through sister-cities programs, the DR can better help prepare for the likely risks of extreme weather. That should include preparing its highly urbanized population centers to be better prepared for flooding as well as avoiding interruptions to its manufacturing centers.	While its trade relations with the U.S. have created a core stability and diversity in its economy, the DR remains vulnerable to a decline in remittances. At the same time, despite impressive levels of growth, almost half of its labor sector exists in the insecure informal sector.	Building collaborative relations with U.S. and Latin American cities, the DR is able to build more secure and sustainable cities for climate change. Rising economic growth also draws more of its youth out of the informal sector into formal employment in manufacturing.	Hit by a series of extreme weather events, the DR struggles to upgrade its economy while address concerns of displacement. Informal sector employment remains at near half the population and the government struggles to integrate new workers to the formal economy.
Technology	With one of the highest rates of internet penetration in the region (61.3%) and mobile phone usage (80.8%) the question remains how the DR will leverage connectivity to improve its global position. The issue is how the government can convert this popular advantage into economic growth and production.	Linked to the U.S. through its free trade agreement and connected through immigration, the Dominican Republic invests heavily with U.S. companies to build up its technical capacity—including improving educational retention—to improve its tech economy.	The Dominican Republic risks becoming stuck in a middle-income trap, in which it remains a steady exporter of basic manufactured goods but struggles to move up the value chain.	Leveraging its diaspora in the U.S. and its ties to the U.S. economy, the DR invests heavily in education, particularly in technology, helping to build solid base of programmers and coders that help establish the country as a tech leader.	Investments in education remain low, as does the country's low average year schooling.

Country by Country

GUYANA							
Electoral	A parliamentary system, next elections are scheduled for 2019, 2023 and 2027.						
Support for Democracy	56.3%	State Fragility Index	70.4 out of 120 with a country ranking 90 out of 178				
Number of Homicides per 100,000	8.4						
World Bank Governance Indicators	Voice and Accountability	Political Stability and Absence of Violence/Terrorism	Government Effectiveness	Regulatory Quality	Rule of Law	Control of Corruption	Average
	56.16	46.19	41.83	36.54	42.31	45.19	45.19
	Most Likely Scenario by 2030	Opportunities	Challenges	Best Case Scenario	Worst Case Scenario		
Security	Bordering on Venezuela places Guyana at risk. Its western neighbor contends that it should own a third of Guyana's land as well as its off-shore oil reserves. The proximity also places the country close to one of the major narcotics transshipment points in the hemisphere.	Guyana should be a bulwark of U.S. and regional support for democracy and sovereignty. The country now only receives \$9.6 million in development assistance, and \$645,000 in military assistance. Given its strategic location and risks, this should be strengthened.	The windfall of oil revenue and the country's proximity to Venezuela all represent challenges. In a desire to stoke nationalist sentiment, it is possible that a chavista government asserts its land claims over Guyana, diplomatically or militarily.	With support from the international community, the country's newly discovered off-shore oil reserves remain uncontested by Venezuela and Guyana collaborates with the U.S. monitoring and tracking narco-trafficking from Venezuela.	Corrupted by its newfound oil windfall, and overrun by narcotics traffickers from Venezuela, Guyana teeters on becoming a failed state.		
Institutional Capacity	Guyana is one of the weakest states in the Caribbean basin, with the highest tax avoidance rate (8.05% of GDP) in the region and only 7% of its roads paved, the likely windfall of oil revenue will be misspent and lead to further corruption.	There is a deep need for improving the public administration of Guyana and reducing the transfer from one party to the next of state/patronage control.	Guyana's government is weak and driven largely from a racially divided party patronage system. Should that remain, the spoils of the country's oil finds may become corrupting and polarizing.	In preparing for its windfall (with GDP expected to grow by more than 20% from 2020 to 2023) the Guyanese government structures its economy and fiscal program to invest in education, diversify the economy and improve public administration.	Given its long-standing pattern of racially-driven politics, oil revenue deepens political divisions and corruption, leading to misspent, politically divisive white elephants.		
Economic Growth	Once Guyana's newly discovered oil is tapped and in production, the country is expected to grow at average rate of 22.2% between 2020 and 2023.	The oil windfall will provide an opportunity for Guyana to not just expand employment in the private sector and its social programs but also to conduct a much-needed improvement to its governance. Expanded U.S. business ties and possible security ties to protect the contested off shore fields will also present themselves.	Given Guyana's history of political ethnic-based patronage and polarization, the oil windfall may well become a curse, making the small-country's economy dependent on oil, corrupting the state and escalating political divisions.	Faced with the prospect that oil revenue could bring negative consequences, political leaders invest in education and economic diversification, while creating transparent channels to invest oil proceeds.	Guyana's already fragile political system and economy become deeply corrupted and dependent on oil revenue and on international hydrocarbon firms that provide the technical know-how and investment.		
Demography and Urbanization	One of the least urbanized countries in the Caribbean Basin (29%) the oil rush will likely bring more urbanization to the capital city, Georgetown, and reduce the country's high unemployment (11.9%). Rising waters and extreme weather will threaten Georgetown and its inhabitants.	The challenges of urbanization and climate change for Georgetown could provide a chance for U.S. engineering and assistance to ensure the capital city's sustainability and integration of new migrants.	Guyana has one of the highest emigration rates in the world, with 55 percent of Guyanese citizens living abroad. Nearly 90 percent of the Guyanese university-educated population eventually migrates to other countries.	Unemployment rates drop and economic growth helps to soothe ethnic tensions. Working with U.S. assistance, the government develops a comprehensive plan to integrate urban migrants and prepare Georgetown for climate change challenges	Rural inhabitants migrate to the city to find work, but there are limited opportunities in the hydrocarbon industry. They are later displaced by rising waters, forcing the entire city of Georgetown to rebuild further inland if not by 2030 then soon after.		
Technology	With one of the second lowest rate of access to the internet at 35.7% (Haiti has the lowest), Guyana is poorly positioned to jump into the technology economy. This is also hampered by its low literacy rate within the region (85.6%).	The low rates of internet penetration and even mobile phone ownership (66.4 people per 100 have mobile phone subscriptions) provide an open field for U.S. assistance and investment in this area.	The low levels of urbanization will hamper effective internet penetration and the low average years of schooling (8.4) will hamper Guyana's leap to a more technology-oriented economy and connected society.	To avoid resource dependence, revenue from oil is plowed into technical education and into connecting Guyana's citizens.	Internet connection rates improve only marginally, and the country's lack of connectivity makes it difficult for the government to alert citizens of extreme weather patterns and lean into a more technical global economy.		

Country by Country

HAITI							
Electoral	October 2019, the remaining elections are unscheduled.						
Support for Democracy	50%	State Fragility Index	102 out of 120 with a country ranking 12 out of 178				
Number of Homicides per 100,000	10.04						
World Bank Governance Indicators	Voice and Accountability	Political Stability and Absence of Violence/Terrorism	Government Effectiveness	Regulatory Quality	Rule of Law	Control of Corruption	Average
	26.6	22.38	0.96	8.17	16.35	7.21	13.61

	Most Likely Scenario by 2030	Opportunities	Challenges	Best Case Scenario	Worst Case Scenario
Security	Despite years of training under the UN-directed MINUSTAH mission, Haiti's police and security forces remain weak and under-professionalized. This is complicated by the recent decision to downscale the multilateral presence, leaving Haiti's newly reformed and recruited security forces weak.	Past international efforts to strengthen Haiti's security forces have brought advances but have not been sufficient to effectively ensure security. Simultaneously, international donor fatigue leaves waning interest to maintain such efforts. That may change however if narcotics trafficking increases.	Political paralysis, weak state, under-professionalized security forces, and the decrease in international assistance threaten to overwhelm the already strapped force.	The new international security mission focuses on key areas to improve security, realizing that time is running out and patience is running thin.	Haiti struggles to sustain a viable security force without MINUSTAH, at the same time that the country becomes a more central transshipment point for narcotics, to the U.S., Europe and the Dominican Republic.
Institutional Capacity	Haiti remains a fragile state. Faced with political paralysis at the top, a donor-dependent government, and the devastating legacy of the 2010 earthquake, the Haitian government will struggle to provide basic services, including justice, healthcare and education and infrastructure.	U.S. cooperation to assist in public administration and the Haitian diaspora can provide much-needed skills and know-how for organization and governance.	The World Bank's measure of state effectiveness is a tragic 0.93. Unfortunately, most donor assistance has avoided working directly with the government. The resultant void in state capacity has been unsustainably filled by international and local civil society and consulting groups in matters of democratic governance and disaster relief.	Political reconciliation occurs between the leading actors in a "pact for governance" that provides enough cohesion and confidence to direct shrinking donor assistance to the government and support public administration programs.	Frustrated by the lack of progress in Haiti, international donors (assistance from the U.S totaled \$376,739,142 in 2016) wanes, leaving the country struggling to meet the needs of the 58.5% of its poor, and bringing the state to the brink of collapse.
Economic Growth	Haiti's GDP growth will continue to limp along at 2 to 3% for the foreseeable future, insufficient to absorb new entrants into the labor market (with employment in 2016 at 14%) and reduce its 58.5% poverty rate.	Since the election, international efforts have helped to attract light and small manufacturing investment, particularly in textiles and apparel.	With the lowest average years of school (5.2 years) in the region, few natural resources or comparative advantages, a barren island stripped of vegetation and vulnerable to extreme weather including mudslides, and remittances accounting for 28% of GDP, Haiti's economic challenges are multiple.	The international donors and foreign governments and private investors continue to seek investment to boost employment in light manufacturing, while a more consistent, less politically embattled government develops more targeted, effective economic growth policies.	Hit by more natural disasters and the forced return of the 20,000 Haitians living in (and remitting from) the U.S. should the Trump administration revoke temporary protected status, the economy fails to even hit the 2 to 3% growth rate.
Demography and Urbanization	Today's 11.1 million Haitians will grow to at least 12.5 million by 2030, and an estimated 14 million by 2050. The median age in 2030 will be 27.2, and in 2050 an estimated 33. In 2013 only 200,000 people had formal jobs, in an available work force of 4.2 million.	Should Haiti dramatically improve its educational system, its youth bubble could provide a labor pool that could help increase employment and boost its low tax collection rate.	Haiti's birth rate continues to strain an already strapped economy and social safety net. Given its high urbanization rate of 61% underemployed youth could be gathered in cities. Tighter immigration policies in the U.S. could also close off an important safety valve.	International donors and investors recognize the challenge of the youth bubble and seek to develop with the government a comprehensive industrialization and economic growth plan and a coordinated effort to address cities' infrastructural deficits.	Slow economic growth fails to provide sufficient formal jobs for youth while extreme weather affecting rural areas forces even greater urbanization, creating a mix for rising crime and violence—but worse wreaking havoc on the already highly populated urban areas.
Technology	Haiti has the lowest rate of internet penetration in the Caribbean Basin at 12.23 percent. That is unlikely to change unless there is a coordinated push by the government to connect the population, in collaboration with international governments and businesses.	Digitally connecting Haitian society and government could dramatically help improve social service delivery, early warning systems before natural disasters, assist in recovery efforts, and build technological literacy.	With its urban and rural infrastructure still in shambles and low purchasing power, any effort to expand internet and mobile phone connectivity will remain hobbled and likely require charitable/humanitarian efforts. At the same time, the low levels of education are hardly fertile ground for technological adoption.	International donors, investors and the government ban together to connect the country through free Wi-Fi hotspots, skipping entirely the hard infrastructure networks of internet connectivity.	Little changes, with interest on the part of the international community growing dimmer and the possibility of profitability so low that the private sector does not pursue investment.

Country by Country

JAMAICA

Electoral	Elections held every five years, most recently in 2016, and future elections in 2021 and 2026						
Support for Democracy	55.8%	State Fragility Index	63.1 out of 120 with a country ranking 118 out of 178				
Number of Homicides per 100,000	47						
World Bank Governance Indicators	Voice and Accountability	Political Stability and Absence of Violence/Terrorism	Government Effectiveness	Regulatory Quality	Rule of Law	Control of Corruption	Average
	70.44	54.76	68.75	59.62	45.19	51.92	58.4

	Most Likely Scenario by 2030	Opportunities	Challenges	Best Case Scenario	Worst Case Scenario
Security	Jamaica was singled out by the Department of State among the 22 countries worldwide identified as “major illicit drug producing and/or drug transit countries.” Jamaica’s struggles to address a growing problem that includes escalating murder rates will likely continue without closer collaboration with the U.S.	The use of Jamaica for transshipment of narcotics and the growing problem of violence indicates that the government has recognized the gravity of the problem opening up opportunities for greater U.S. cooperation on internal police reform and intelligence sharing.	The Jamaican police force remains weak and in some cases involved in crime itself. Many gangs have ties to political parties and leaders, making rooting out the problem not just a police problem but a political one as well.	Jamaica’s major political parties agree to collectively address the problem by reforming the police and seeking the assistance of outside technical assistance to ensure proper oversight of those programs, reducing internal crime and violence and external connections, including with Jamaican-emigree gangs in the U.S.	Violence and crime not only continue to grow, they become increasingly politicized. At the same time, if positive changes occur in Venezuela and in Central America in addressing narcotics trafficking, then more illicit goods will move through Jamaica.
Institutional Capacity	The police remain weak and corrupt, allowing crime and violence to sustain if not grow. In other areas, however, tax collection rates, tax-take relative to GDP, and percent of roads paved remain relatively strong, but partisan-based government corruption remains.	Increased exchange and assistance to support police reform and improved oversight from the U.S. remain a strong opportunity, especially given the connections between criminal Jamaican networks in the U.S. and in Jamaica.	The political connection between gangs, parties and their governments remains a tough nut to crack and one that will require—even with the best efforts and intentions of police reform at the local level—to be addressed at the upper echelons of the party structures.	Given the government’s robust tax collection rates, political parties agree to engage in more effective, transparent (read non-partisan) ways of delivering social services, diversifying the economy and improving security.	Political corruption linked to crime, violence and gangs persists leading to greater polarization, especially as the risk of narcotics passing through the island increases.
Economic Growth	Jamaica’s GDP is projected to only grow on average between 2% between 2018 and 2023, not enough to address the country’s 12.4% unemployment rate and showing a non-diversified economy.	With a relatively highly educated population (average years in school 9.6) there are some possibilities for seeking out higher-end investment and economic diversification, especially if governments can draw back educated immigrants.	The government’s public debt to GDP ratio stood at 113.9% as of 2016; remittances account for 16.5% of the country’s GDP; and tourism accounts for 32.9% of Jamaica’s GDP. The high debt and reliance on remittances and tourism mean that the government’s fiscal situation remains on a knife’s edge.	The government moves quickly and democratically to address the security problem to continue to bring in tourists and reduces public debt while increasing efforts to diversify economically.	Extreme weather damages critical infrastructure and suppresses much-needed tourism as does growing security concerns on the island, dampening the country’s already-low GDP growth rate.
Demography and Urbanization	Population growth is expected to be modest, projected to be a mere 3% from 2016 to 2023, which will reduce pressures on the country’s high unemployment rate and may provide a respite for rising crime rates.	The level of remittances flowing to Jamaica indicate a well-educated, trained population that if it could be wooed back to the island could provide a labor pool for reformed police forces and new industries.	Slow population growth and immigrant flows may generate a deficit of tax payers to support the elderly population that has remained in Jamaica and the national tax base.	Unemployment will be reduced as the small labor pool is absorbed into formal jobs.	With 8.5% of the country’s urban population residing in low-lying coastal zones subject to extreme weather, hurricanes and rising tides can cause displacement that the government may struggle to address.
Technology	With a surprisingly low internet penetration rate of 45%, Jamaica—given its size and its contrastingly high mobile phone subscription rate of 115.57 subscriptions per 100 people—will grow tech capacity.	The curve of getting Jamaicans connected can likely be sharp, especially through new technical assistance and investment. This could also serve to improve the delivery of social services and alert citizens in times of natural disasters and help in recovery efforts.	The contrast between internet connectivity and mobile phone subscriptions indicates that it may be difficult to increase internet usage. In any event, given the low starting point, it will be difficult for the island to catch up and seriously develop a high-tech economy.	Given the lack of language barriers and the island’s large diaspora population, catch-up becomes easy with targeted U.S.-assistance, especially because it could serve to improve policing and security efforts as well as provide a tech boost to the economy in production and services.	Criminal elements use the digital divide to their advantage, out-flanking the government and facilitating greater narcotics trafficking and penetration of gangs into society.

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