

Europe in the world in 2022: The transatlantic comeback?

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ACKNOWLEDGEMENT / DISCLAIMER

Teamwork makes the dream work. This paper would not be possible without the dedication of the Europe in the World team, past and present. Janis A. Emmanouilidis, Emi Vergels and Rebecca Castermans provided useful feedback and editorial support. Much gratitude also goes to the EPC Management team for supporting innovative ideas and fostering experimentation in policy analysis. Final updates to this paper were made on 19 January 2022.

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List of abbreviations

AI	artificial intelligence
AKP	Justice and Development Party
AU	African Union
AUKUS	Australia, UK and US security pact
BRI	Belt and Road Initiative
CAI	Comprehensive Agreement on Investment
CCP	Chinese Communist Party
COVAX	COVID-19 Vaccines Global Access
EaP	Eastern Partnership
EEA	European Economic Area
EEZ	exclusive economic zone
EiW	Europe in the World
EPC	European Policy Centre
FTA	free trade agreement
G20	Group of Twenty
G7	Group of Seven
MENA	Middle East and North Africa
MEP	Member of European Parliament
Quad	Quadrilateral Security Dialogue
TTC	Trade and Technology Council
TPLF	Tigray People's Liberation Front
UAE	United Arab Emirates
WHO	World Health Organization
WTO	World Trade Organization

Executive summary

2022 will likely be a turbulent year for the European Union. As it continues to strengthen its freedom and capacity to act in foreign affairs, it must also adapt to profound **structural changes within global geopolitics**, such as the shifting nature of power, the return of strongman politics, growing involvement from non-state actors and the waning separation between domestic and external policies. **Global trends** like climate change, digitalisation, changing demographics, and a worldwide decline in democracy and freedom complicate matters further and will have a major influence on EU policymaking.

In our first Outlook Paper, a new format launched the same year the EPC celebrates its 25th anniversary, we serve a comprehensive overview of the main developments on the global stage in 2022, analyse and highlight how these will impact the EU's role in the world and, finally, outline what the EU and member states can do to hold their own and wield their power more effectively in an increasingly complex and hostile environment.

This is what Europe may expect to happen in a number of strategic regions and countries around the world, and in its relationship with key global actors:

- ▶ 2022 is a crucial year for **transatlantic relations**. After a few years apart, the EU and US are back in a relationship – albeit an ‘open’ one.
- ▶ **The Indo-Pacific region** is a recent addition to the EU's foreign policy vocabulary. It is high on the EU's 2022 agenda, as the Union sets to roll out its new strategy for the region.
- ▶ The *modus vivendi* with **China** is likely to be the *status quo*. Despite Beijing's opposition, the EU will maintain a multifaceted approach to the rising power: systemic rival, competitor and partner.
- ▶ **Russia** will remain a significant security threat for Europe. An improvement of relations between Russia and the transatlantic partners is unlikely.
- ▶ **Ukraine** has begun the year locked in an ongoing confrontation with Russia. Russian aggression – conventional and non-conventional – is likely to continue in 2022. Avoiding a further escalation or fully-fledged invasion will be a priority.
- ▶ **Turkey** is likely to be engulfed by political uncertainty and rising domestic tensions. In the event of snap elections leading to the opposition coming to power, a major change in dynamic and reset in relations with the transatlantic partners could be expected.
- ▶ **The Middle East and North Africa (MENA)** is likely to be shaped by post-pandemic recovery and increased intraregional dialogues or growing unrest.

- ▶ **Africa** is likely to have a more prominent role in the EU's foreign policy agenda. Pandemic permitting, 2022 will likely see the 6th European Union–African Union summit and progress in the EU's proposed new partnership with Africa, a priority for the French presidency of the Council of the EU.
- ▶ **The growing rivalry between China and the US** will be a key geostrategic feature of 2022. It is likely to continue influencing global events in the coming year and will have implications for EU policies and decision-making.

- ▶ **Human rights** will continue to look dire around the world. The COVID-19 pandemic measures facilitate a sustained attack on democratic principles and human rights.

There are also a number of internal challenges and developments to watch out for:

- ▶ 2022 will be a defining year for **EU security and defence** as internal and external challenges mount. A European defence summit and the adoption of the Strategic Compass are set to happen in the first half of 2022.
- ▶ 2022 will be a key year for **EU trade policy**, particularly for strengthening the multilateral WTO framework for international trade while also re-enforcing the EU's autonomous trade toolbox to tackle unfair trade practices.
- ▶ **The Eastern Partnership (EaP)** will continue to be shaped by ‘geopoliticisation’ and policy inertia. Even though the EU is trying to be more assertive, its approach to the EaP will likely be defined by a lack of strategic vision and common will.

The EU should take the following **actions** to deal with a more challenging international context in 2022:

- ▶ **Launch a review of the 2016 EU Global Strategy** to better define the union's global role towards 2030. Continue strengthening its freedom and capacity to act with partners, or alone when necessary.
- ▶ **Set strategic goals** for the coming decade and consider how to achieve them. In a world of limited resources, priorities and trade-offs should be considered.
- ▶ **Foster better coordination** between the European External Action Service, and the European Commission and its Directorates-General. The continued policy ‘siloesation’ within the EU undermines its overall ability to project power and influence.
- ▶ Identify the tools and processes that can be mobilised within the current EU Treaties to **build up its capacity and freedom to act**, as well as its executive power in global affairs.

- ▶ **Continue building partnerships with like-minded countries** to achieve common goals.
- ▶ **Back up the Indo-Pacific strategy with adequate political and economic resources** to make it fully operational and viable in a competitive global context. Recent initiatives like the Global Gateway should be leveraged to boost EU member states' interests in the region.
- ▶ **Foster and maintain high-level political dialogue processes with Beijing** to reverse its countersanctions against European researchers and Members of the European Parliament and avoid a further deterioration of the EU–China relationship.
- ▶ **Speak with one voice on Russia** by adapting a credible and proactive policy towards the Kremlin that enables the EU to respond to challenges from Moscow, both internally (i.e. hybrid threats) and in its immediate neighbourhood.
- ▶ **Develop a forward-looking strategy towards Turkey.** This should include strengthening cooperation and dialogue in areas of mutual interest, including migration and climate change, and in foreign and security policy which cover the Black Sea, Afghanistan and South Caucasus.
- ▶ **Strengthen EU–Ukraine cooperation**, providing further assistance in energy security, judicial legislation and the rule of law, the professionalisation of public administration; and strengthening resilience to internal and external threats.
- ▶ **Increase high-level dialogues and engagement with countries in the MENA region.** Explore cooperation avenues in areas like green energy, maritime security and infrastructure.
- ▶ **Invest political and diplomatic capital in strengthening EU partnerships with Africa.** Prioritise addressing the persistent COVID-19 vaccine inequity in the continent through the COVID-19 Vaccines Global Access initiative and other international mechanisms.
- ▶ **Develop an EU security and defence policy that fosters a common European strategic culture** and is inclusive of member states' threat perceptions.
- ▶ **Use the Strategic Compass to upgrade strategic foresight capabilities and situational awareness**, to better understand change and emerging risks in its eastern and southern neighbourhoods and beyond.
- ▶ **Align and coordinate the EU defence policy with NATO** and enhance member states' interoperable defence capabilities.
- ▶ **Cooperate and coordinate more on climate-related security threats with NATO** and adopt a comprehensive and operational approach towards climate security.
- ▶ In the face of greater regional challenges to peace and stability, **reinvigorate the EaP** and set a clear, long-term and visionary strategy based on the realities on the ground.
- ▶ **Increase the EaP region's resilience** against hybrid threats via the Strategic Compass and set up a framework for cooperation on defence and security between the EU and EaP countries.
- ▶ Continue to **strengthen the multilateral World Trade Organization framework** for international trade while also **re-enforcing the Commission's autonomous trade toolbox** to combat unfair trade practices.
- ▶ **As democracy backslides globally, expand its Global Human Rights Sanctions Regime** to include more countries, companies and individuals that commit severe human rights violations. Include corruption in the Regime as a human rights offence.
- ▶ **Build a common and comprehensive framework for data protection across the digital space**, with human rights at its centre, to regulate Big Tech.

Introduction: A transition within a decade of transition

The EU is entering a new decade that will be one of transition for not only Europe but the world more generally. The last decade was a period of upheaval and the undoing of central features of the global order built after World War II – a process accelerated and sharpened by the ongoing COVID-19 pandemic (see Figure 1). Meanwhile, in the 2020s, Europe should build the foundations to be better prepared to master the challenges of the 2030s – from the green and digital transitions to increased geopolitical competition and attacks on liberal democracy.

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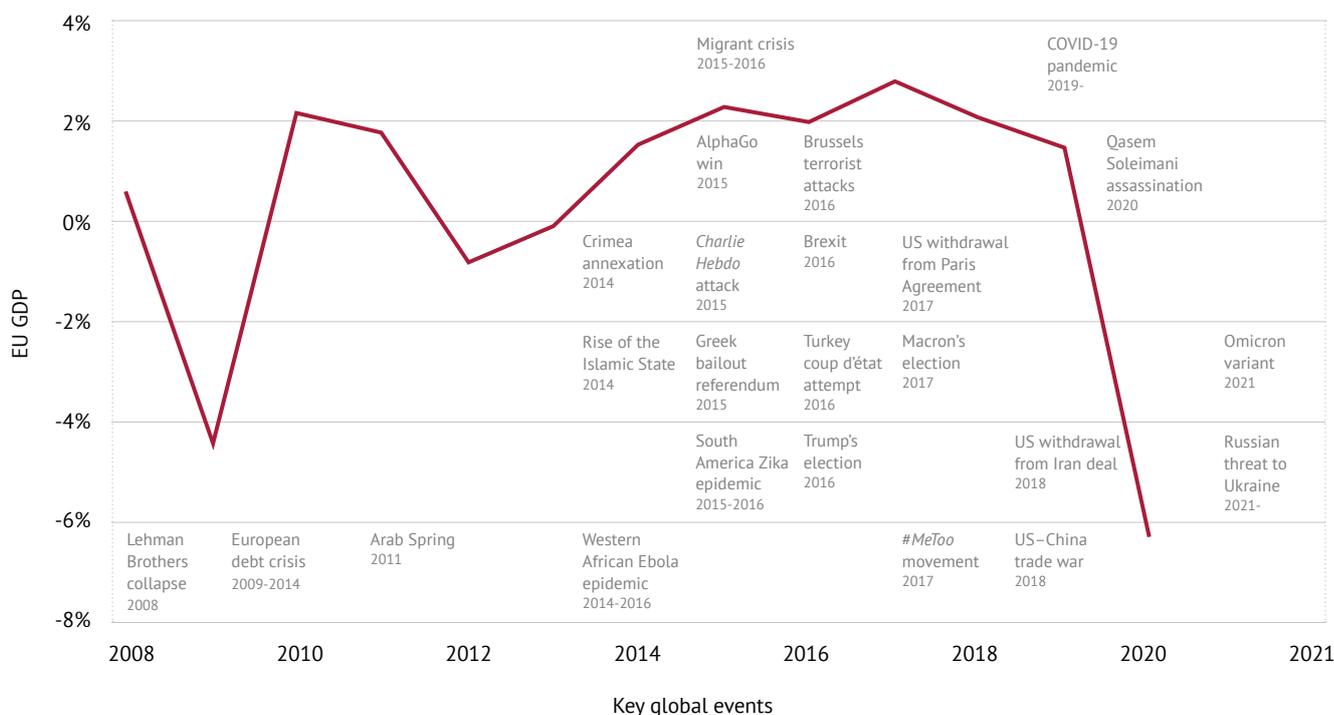
2022 is likely to be a turbulent year for the Union as it continues to strengthen its capacity to act – autonomously if necessary. The crash course on geopolitics initiated in 2021 is set to continue.¹

This Outlook Paper is a navigation guide for 2022, focusing on key global actors and regions and emerging policy challenges for the EU. After briefly looking at **structural changes** to the international order in the past years and **global trends** that impact EU policymaking, the paper anticipates developments in select EU global relationships and policies for the coming year as the world continues to battle the COVID-19 pandemic.²

Transatlantic relations are the central theme of the 2022 edition. As the EU and the US mend their relationship, the year ahead is fraught with challenges, from key elections on both sides (e.g. French presidential election, US midterm elections) to policy disagreements (e.g. how to deal with China, data sharing). While there is now more – and better – cooperation than with the

Fig. 1

EUROPE IN AN ERA OF GLOBAL PERMACRISIS (2010-20)



Source: Authors, based on World Bank³

Trump administration, the White House's decisions in 2021 (e.g. the botched withdrawal from Afghanistan; the AUKUS security pact between Australia, the UK and US) show that the relations can be upended easily by lack of diplomacy and bad choices.

While there is now more – and better – cooperation than with the Trump administration, the White House's decisions in 2021 show that the relations can be upended easily by lack of diplomacy and bad choices.

After studying the central issues that may shape the transatlantic relationship in 2022 and beyond, the Outlook Paper delves into the regions and actors that are likely to shape the EU's international relations in 2022: the **Indo-Pacific**, a recent addition to the EU's foreign policy vocabulary; **China**, with whom relations are likely to be challenging and difficult; **Russia**, likely to remain a significant security threat for Europe; **Ukraine**, facing an aggressive Russia and set to be plagued by domestic politics issues; **Turkey**, looking to be engulfed by political uncertainty and rising domestic tensions; **the Middle East and Northern Africa** (MENA) and its post-pandemic recovery and regional (dis)agreements; and, finally, **Africa**, likely to have a more prominent role in the EU's foreign policy agenda (if the pandemic permits it).

Besides these key global actors, several policies and emerging challenges also deserve special attention. The growing rivalry between China and the US, along

with the tensions caused by Russia to re-write Europe's security architecture, are likely to be pivotal geopolitical features of 2022.

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The Outlook Paper focuses on four policy areas that will be crucial for the Union in the coming year: (i) **security and defence policy**, as the EU will hold a European defence summit and adopt the Strategic Compass, an initiative that aims to provide more coherence and guidance for the Union's security and defence policy, in the first half of the year; (ii) **trade policy**, particularly implementing the European Commission's trade policy review; (iii) **the Eastern Partnership** (EaP), which will continue to be shaped by geopolitical competition and policy inertia; and (iv) **human rights policy**, as the pandemic is not only a global health crisis but also a sustained attack on democratic principles and human rights in some parts of the world.

Besides these actors and policies, the Outlook Paper also zooms into potential security flashpoints for the EU (e.g. the Gulf of Guinea, the Sahel, the Black Sea) and humanitarian crises (e.g. Afghanistan, Venezuela). The paper concludes with **recommendations** for the EU policymaking community and points to consider *beyond 2022*.

1. Structural changes and key trends

Long-term structural changes to the international system, and particular global trends, influence Europe's role in international affairs, set the stage for the EU's long-term relations with other world actors, and impact policy areas and emerging strategic issues fundamental for the Union.

Because of these features, the world is more complex and unpredictable. It is harder for both Europe and the US to navigate through it and cooperate. This year will be no different.

The structural changes have been long in the making, but their consequences for Europe's role are enduring and will shape the Union's interaction with other international players and policies (see Infobox 1).

In addition to these structural changes, key global trends are driving the ongoing transition into a new global order⁴ and have a particular impact on Europe, its relationships and external policies. The EU must consider **seven interconnected trends** that will greatly affect its future and have been accelerated and highlighted by the COVID-19 pandemic (see Infobox 2).

INFOBOX 1. STRUCTURAL CHANGES IN THE WORLD

The nature of power has changed. Traditional elements of power – population size, territory, GDP, military might – are no longer sufficient to wield influence. Relationships, connectivity, technology and soft power are equally important in the 21st century.

The number of international 'players' has increased. Non-state actors (malicious or not), private foundations, civil society, networks, cities and regions, and influential individuals have joined nation-states, international organisations and multinational corporations on the world stage, making it more complex.

The pace of change is accelerating. The speed of the tech and digital revolution is increasing – a trend further bolstered by the COVID-19 pandemic.

The separation between the 'internal' and 'external' has eroded. In an interdependent and connected world, how we live, think, govern, work, produce, fight and consume has consequences beyond national and regional borders.

INFOBOX 2. SEVEN INTERCONNECTED GLOBAL TRENDS

 **Climate change** will influence policy and politics in this century and beyond. The global temperature is expected to increase by 1.5°C by 2040, or even earlier, if emissions are not drastically cut in the coming years.⁵ This will likely accelerate the intensity and frequency of extreme weather, floods, droughts, forest fires and biodiversity loss, with important implications for everything from food (in)security to the displacement of populations.

 **Connectivity's** central relevance is best exemplified by the spread of the new coronavirus: what happens in a food market in China matters to the rest of the world, with devastating consequences (i.e. loss of life; pressures on the global economy, healthcare systems and public trust). The drive for connectivity – physical and digital – grows stronger, with projections estimating that the number of globally connected devices could reach 200 billion by 2030.⁶

 **The global economy** is changing its face. It is projected that by 2030, the EU will become the world's third economic power after China and the US⁷ and that the centre of economic gravity will shift to the East.

 **The return of strongman power politics** is testing the international, rules-based multilateral order, resulting in a more challenging environment for the EU.

As there are no power vacuums in international politics, the 'take back control' and 'my country first' movements best exemplified by Brexit or Trump also helped foster the ongoing competition among different governance models that vie for global supremacy.

 The pandemic is accelerating **digitalisation** and the tech revolution. Digital tech is now an integral part of how many Europeans work, learn, consume, socialise, relax and access services. The tech revolution is increasingly shaping geopolitics, too. The ongoing global race for dominance in artificial intelligence (AI), robotics, 5G, semiconductor chips, biotechnology, quantum and other disruptive technologies has profound consequences for Europe and its position in the world.

 **Demographic patterns** within Europe are mixed, but overall, the EU population will decrease and age.⁸ Conversely, Europe's neighbourhood, especially to the south, is witnessing demographic growth and has younger populations. Africa's population is set to double by mid-century and quadruple by 2100.⁹

 Until 2005, **democracy and freedom** were on the rise worldwide. But for the last 15 years, adherence to fundamental rights; freedom of expression, religion, and the press; and the rule of law has been declining steadily. COVID-19 has made matters worse. Democratic backsliding is also spreading in Europe.¹⁰

2. Key regions and players

Besides global trends and developments, the EU's relationship with the US – the chief architect of the transitioning global order – has also evolved over the last years. 2022 will be a defining year for Brussels and Washington, as both sides deal with the changes and trends and continue to mend their severed ties. In fact, transatlantic relations will be central for the future of Europe, and this year could be a make-or-break moment.

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Besides transatlantic relations, the Outlook Paper also delves into a few regions and actors likely to shape the EU's international relations in 2022. Starting from the Indo-Pacific and China, the focus will then turn west to Russia, Ukraine and Turkey, and finally the Middle East and Africa. This selection reflects the EPC's vision of what and who will be most relevant for EU foreign policy and diplomacy in 2022.

2.1. THE US: A DEFINING YEAR FOR TRANSATLANTIC RELATIONS

2022 is a crucial year for transatlantic relations. After a few years 'apart', the EU and the US are reunited. But it is still an 'open' relationship, and this year will be of great importance for Brussels and Washington, what with the presidential election in France and midterm elections in the US, and policy disagreements on China, trade and tech.

The Biden administration is returning to multilateral fora and reaffirmed its commitment to alliances like NATO, the rules-based international order and democracy as guiding principles of global engagement. It reversed decisions of the Trump era, returning to the Paris Agreement, re-joining the World Health Organization (WHO) and spearheading global tax reform with the EU's support.

Shortly after taking office, transatlantic exchanges and visits multiplied, culminating with President Joe Biden's successful June 2021 visit to Europe. He attended the Group of Seven (G7) summit in Cornwall, the NATO and EU-US summits in Brussels, and the Biden-Putin summit in Geneva under the banner "America is back."¹¹

However, while transatlantic relations improved in 2021, the lack of diplomacy, communication and trust led to mistakes that undermined the solidity of the ties and left Europeans wondering whether Trumpism was still reigning in Washington.

The US' and NATO's botched withdrawal of troops from Afghanistan shook Euro-Atlantic relations, while the AUKUS defence pact brought relations between Paris and Washington close to a break.¹² This new low point blistered the broader transatlantic relationship, even jeopardising the EU-US Trade and Technology Council (TTC).¹³ The first meeting eventually took place at the end of September 2021, but many in Europe were left wondering if America had really 'returned'.

Building on the positive atmospherics of the TTC, President Biden corrected course once more, attending the Group of Twenty (G20) summit in Rome and the UN Climate Change Conference in Glasgow in late 2021. In meetings with European leaders, particularly the aggrieved French President Emmanuel Macron, President Biden reiterated Washington's commitment to Europe and admitted that AUKUS was handled poorly. A series of confidence-building initiatives were launched to mend Franco-US ties; from the Bilateral Clean Energy Partnership to cooperation on tech and space issues.

Areas of potential disagreement between Brussels and Washington remain, and its strategic implications should not be underestimated, especially considering the upcoming relevant elections on both sides of the Atlantic.

The ups and downs that marked transatlantic relations over the past years are likely to continue in 2022. Areas of potential disagreement (see Table 1, page 12) between Brussels and Washington remain, and its strategic implications should not be underestimated, especially considering the upcoming relevant elections on both sides of the Atlantic. The litmus tests for the solidity of transatlantic relations will be the success – or failure – of the many EU-US and Franco-US initiatives launched during 2021; how the US handles the current crisis between Russia and Ukraine which could escalate further; and whether the EU and its member states are left out of any potential decisions that Washington and Moscow may take on Europe's security architecture.¹⁴

The following areas should be monitored carefully in 2022:

Domestic politics. Europe's political landscape is changing. After 16 years, Chancellor Angela Merkel left office, and the new traffic-light coalition government in Germany will take time to get up to speed and set the tone for the EU.¹⁵ Paris takes the helm of the Council of the EU in January 2022 and is holding a presidential election in April. Populist firebrands Marine Le Pen and Éric Zemmour are likely to challenge President Macron on every front. The AUKUS incident may also resurface, reigniting traditional anti-Americanism and growing animosity towards London. Macron must reassert France's place in the world and not be seen as weak or dancing to Washington's tune. At the EU level, France will push forward 'strategic autonomy' and further steps to strengthen Europe's common defence and security. Macron may push this agenda too far and/or too fast and undermine the cohesion of the transatlantic alliance, as well as EU unity.

Domestic politics will also dominate the US' attention in the coming year. Washington will be focused on the worryingly unpredictable midterm elections in November 2022. A defeat of the Democratic Party could potentially undermine its cooperation with the EU on key policies like climate change or trade. This would reinforce the EU's perception that the US is increasingly an unreliable partner, irrespective of the party in charge. This could drive the transatlantic partners to disengage and undermine recent improvements regarding many of the 'irritants' that still hinder EU-US relations.

Strategic realignments. The withdrawal from Afghanistan and the AUKUS pact further consolidated the US' pivot to Asia, initiated under the Obama administration. This geopolitical reordering could spell trouble for the transatlantic relationship. In fact, the allies' strategic interests may be diverging to the point of no return. From the EU's purely geopolitical standpoint, its neighbourhoods to the east and south are far more important for its security and stability, as the situation in Belarus and at the Russia-Ukraine border illustrates, than the distant Chinese threat that Washington perceives.

The US' decision to exclude the EU, especially France, from its strategic considerations in the Indo-Pacific was a short-sighted mistake that plays into Beijing's hands.

But the US' decision to exclude the EU, especially France, from its strategic considerations in the Indo-Pacific was a short-sighted mistake that plays into Beijing's hands. Instead of using diplomacy and persuasion to assuage European concerns and bring the EU along, the US has

been unwilling to invest more political and diplomatic capital in building a stronger coalition based on common interests, including China.

Recently launched high-level dialogues on China and Russia may address this issue, but 2022 will further test their sustainability: the ongoing security crisis with Russia should make clear whether these forums serve their purpose. As the EU rolls out its Indo-Pacific strategy and relations with China continue to look unlikely to improve, the transatlantic partners should take 2022 as an opportunity to coordinate their positions in relevant geostrategic issues further.

Security and defence. 2022 will be the year of European defence. The Union is set to adopt its Strategic Compass, and the French will convene a European defence summit during their Council presidency. The US has warmed to the idea of a more credible and robust European defence that complements NATO. A recently announced US-EU Dialogue on Security and Defence is scheduled to take place in early 2022 and is a sign of progress. However, spoilers abound, from the US' industrial-military complex that wants a share of the EU's defence spending cake, to reluctant Eastern Europeans fearful that any European autonomisation process would undermine Washington's NATO security guarantee. NATO will adopt a new strategic concept in 2022, and the US will continue to pressure the alliance to up its game regarding the 'Chinese threat'. Under the shadow of Russia's ongoing threat to European security, many in Europe will tread this process carefully to avoid a further deterioration of relations between Brussels, Beijing and several European capitals.

Trade. The second TTC meeting is scheduled for before summer 2022 and will be held under the French Council presidency. It will be an opportunity to take stock of the progress of several working groups and continue pursuing alignment on numerous areas, from green tech to AI. So far, the 'functionalist' approach to transatlantic relations seems to have made a positive start. Nevertheless, its continuation may be marred by irritants such as data flows, carbon pricing or export controls (see Table 1, page 12).

Brexit. The EU-UK Trade and Cooperation Agreement omits cooperation on foreign, security and defence issues. London prefers to keep its autonomy to engage on a case-by-case basis with the EU or individual European countries to best serve its 'Global Britain' ambitions. The UK's fundamental security interests remain informed by geopolitics, implying some alignment of interests between both sides of the Channel.¹⁶ However, the AUKUS pact also suggests that the UK will seize any opportunity to play up its value in the 'special relationship' it enjoys with the US, even if this means undermining its most solid defence partner in Europe – France. Washington will be weary of a deterioration of relations between the EU and the UK as it undercuts strong transatlantic ties.

Table 1. Issues likely to shape the transatlantic relations in 2022

Key issues	Areas of cooperation	Main irritants and areas of disagreement
Climate change	<ul style="list-style-type: none"> • Paris Agreement • US–EU High-Level Climate Action Group • US–EU Energy Council • Transatlantic Green Technology Alliance 	<ul style="list-style-type: none"> • Carbon Border Adjustment Mechanism
COVID-19 vaccine cooperation	<ul style="list-style-type: none"> • WHO • COVAX¹⁷ 	<ul style="list-style-type: none"> • US vaccine nationalism¹⁸ • Vaccine patent waivers¹⁹
Trade, investments, technology and data	<ul style="list-style-type: none"> • EU–US Trade and Technology Council²⁰ • Global arrangement to address carbon intensity and steel overcapacity 	<ul style="list-style-type: none"> • WTO disputes • Data transfers and privacy issues²¹ • Digital Markets Act and Digital Services Act²²
Geopolitics and security	<ul style="list-style-type: none"> • EU–US dialogue on China • EU–US high-level dialogue on Russia • EU–US dialogue on security and defence 	<ul style="list-style-type: none"> • US withdrawal from Afghanistan • EU strategic autonomy ambitions • Dealing with China
Russia	<ul style="list-style-type: none"> • Sanctions coordination²³ • EU–US high-level dialogue on Russia 	<ul style="list-style-type: none"> • Nord Stream 2²⁴

2.2. INDO-PACIFIC: NEW REGION ON THE BLOCK

As a geographic area that stretches from the east coast of Africa to the Pacific Island states, the Indo-Pacific is a recent addition to the EU’s foreign policy vocabulary. But its geostrategic importance is set to persist in the coming years, becoming a permanently contested and complex area of international relations.²⁵

The recent EU Strategy for Cooperation in the Indo-Pacific aims to strengthen the Union’s presence and engagement with this region through policies ranging from enhancing cooperation with like-minded countries, to preserving the rules-based international order. Nevertheless, it is still too early to assess the real political intentions and economic firepower behind the strategy, which could turn out to be limited in scope and overly optimistic. Thus, 2022 will see an intermittent EU presence in the area led by single member states, namely France, Germany, and the Netherlands, which have deeper economic, political and historical ties with the region.²⁶

Disagreements and fractures between the EU and its closest ally, the US, are likely to hamper any meaningful joint political action. The implications of the recent AUKUS security and defence partnership confirm the absence of transatlantic coordination on issues of strategic importance. The Indo-Pacific will likely be a test bench assessing the health of transatlantic and regional alliances in 2022.

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A new security and economic architecture is emerging in the Indo-Pacific. None of the major current sources of uncertainty are set to diminish, but open military clashes and confrontations will likely be avoided, despite the potential likelihood of some small-scale naval and plane incidents threatening the freedom of navigation and overflight, especially in an area where seas and airspace are increasingly contested.

In 2022, competition – whether economic or political – is likely to intensify in the Indo-Pacific. The US will start the groundwork for potential members to join an Indo-Pacific economic framework. A more assertive China could exacerbate divisions between Washington and Brussels, as some of their objectives and means to achieve them may diverge in the region. Beijing’s attempt to undermine EU–US ties will likely push China to play up diverging interests among EU member states through political pressure as well as economic coercion and/or incentives.

It is too early to say whether the Indo-Pacific will become a mere landscape of bipolar geopolitical disputes. The growing rivalry between the US and China makes clear that a battle for dominance in the region will persist and make any concrete possibility of mutual accommodation increasingly difficult to find. Countries in the region may well need to adapt to a permanent state of tension.

The Indo-Pacific strategies adopted by several governments and organisations worldwide stress the importance of an inclusive approach that considers the interests of *all* countries in the region. However, for some players, there is an evident risk of making ‘security’ the main driver of any tangible engagement with the region. US relations with Japan, India and Australia (i.e. the Quad) will likely become stronger in response to China’s economic and military rise. At the same time, Indo-Pacific countries will hesitate to take sides and avoid pledging their allegiance to the US or China. They will more likely prefer the multifaceted engagement the EU and its member states have adopted vis-à-vis Beijing: a blend of competition, cooperation and rivalry.

In 2022, the EU’s most pressing task is to explain the new Indo-Pacific strategy and its meaning to the region and start implementing it.

In 2022, the EU’s most pressing task is to explain the new strategy and its meaning to the region and start implementing it. In a region characterised by diverse types of states and governments, the EU’s value-based approach is likely to be scrutinised in the Indo-Pacific, whereas in Europe, it will probably contribute to a broader discussion on whether the Union can really find like-minded countries in the Indo-Pacific which serve its interests.

2.3. CHINA: THE *MODUS VIVENDI* IS THE *STATUS QUO*

China will feature at the top of the EU’s 2022 agenda. Despite Beijing’s opposition, the EU is expected to demonstrate a more united front on China by maintaining a multifaceted approach to the rising power: systemic rival, competitor and partner.

The EU’s policy will continue to be one of strategic ambivalence. In 2022, the *modus vivendi* will be the *status quo*. Too big to ignore for the EU, any interruption of dialogue with China is highly improbable, if not impossible. However, EU–China economic and political relations are likely to deteriorate further.

The future of the Comprehensive Agreement on Investment (CAI) hangs in the balance. With the departure of Chancellor Merkel – the main promoter of the deal during the German Council presidency –, the investment agreement will likely remain on ice. One can assume that this will not change until EU–China relations stabilise and the sanctions on Members of the European Parliament (MEPs) and European institutions and think tanks are lifted.

China’s economy will still be the principal factor driving the bilateral cooperation, despite several persisting trade irritants and China’s recent policies (e.g. the dual circulation strategy, Anti-Foreign Sanctions Law) which raise growing concerns, including within the European business community.²⁷ However, (over)dependence on China will likely make some countries highly susceptible and vulnerable to episodes of economic coercion, especially in the EU’s neighbourhood.²⁸

Some Central and Eastern European (CEE) countries may reconsider their links to China, fearing that the economic benefits they are getting will be politically instrumentalised by Beijing. For this reason, they will probably give the EU more room for action. A case in point is China downgrading Lithuania’s diplomatic status after the latter allowed Taiwan to set up a *de facto* embassy in Vilnius. Despite its limits, the 16+1 is likely to live on. Still, the recent cooling of CEE relations with China could transform the 16+1 into an ‘x+1’ format, where countries can join and, more importantly, leave easily, in accordance with their shifting and unpredictable relations with Beijing.

2022 will be a busy year for China and its leadership. Two events stand out: the Beijing Winter Olympics and the 20th National Congress of the Chinese Communist Party (CCP). Although most foreign spectators are barred from attending the Winter Olympics, the international community will be watching with great interest. China will use the opportunity to showcase its economic and political achievements and capacity to manage the pandemic via its zero-COVID policy. Debates on human rights abuses in China and potential boycotts of the Games are expected to influence worldwide public discourse and perceptions regarding China.

The 20th CCP Congress, at which President Xi Jinping will almost certainly be given a third term, will likely shed light on possible changes to the party leadership. We can expect the current party cadres to be filled with Xi loyalists. By gaining stronger support, President Xi is unlikely to dial down China’s assertive foreign policy. In the run-up to the congress, China will continue to guarantee that there are no large domestic crises within its borders or any mishandling of international crises that may reflect negatively on President Xi. A looming question is how long the country will remain in self-isolation, with strict quarantine measures and border controls to avoid the spread of the coronavirus. This situation has persisted since 2019 and reinforces the new mantra of ‘self-sufficiency’ through the promotion of scientific and technological independence and a more self-reliant domestic economy.²⁹

Under increasing pressure from China over the last years, Taiwan will continue to be targeted by disinformation, cyberattacks, and a growing number of People's Liberation Army incursions into its sea and airspace. Prospects of a potential invasion of Taiwan may be overblown. It is unlikely that President Xi will risk his reappointment as general secretary for a risky 'reunification' with Taiwan. But this will depend on broader geopolitical and geostrategic considerations in Beijing.

2.4. RUSSIA: AN ONGOING TRANSATLANTIC CHALLENGE

Russia's priority for 2022 is to extract concessions from the US/NATO on the European security architecture to achieve a de facto sphere of influence and prevent the further eastern enlargement of the Atlantic Alliance.

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Thus, Russia will remain a significant security threat for Europe. The Union's eastern neighbourhood will continue to be a theatre for confrontation.³⁰ Pushing towards a geopolitical capitulation of Ukraine by derailing the country's Euro-Atlantic course and bringing Kyiv back into the Kremlin's so-called sphere of influence – including the possibility of renewed war – will remain a priority.

Beyond its role in the region's unresolved conflicts (i.e. Donbas, Transnistria, South Ossetia, Abkhazia), which it manipulates to foster instability, Russia is likely to continue its military build-up in the Crimea and the Black Sea.³¹ Further scale-up of troop deployments on its border with Ukraine is highly likely. The Kremlin's enlarged military footprint in Belarus, including via key military infrastructure, will further undermine the regional security of NATO's eastern flank. The widespread use of disinformation and other hybrid tools like cyberattacks and pipelines will continue with force.

The Kremlin will continue to take steps to boost its influence beyond Eastern Europe. This includes Central Asia – the Russian-led Collective Security Treaty Organization played a major role in stamping out the January uprising in Kazakhstan by deploying troops³² –, the Arctic, and in and around the Mediterranean, from the Levant to North Africa.³³ Relations with key regional powers, not least Turkey, will remain important. Getting

Nord Stream 2 online, diversifying economic cooperation and strengthening political and military ties with China will also be prioritised.³⁴

An improvement of relations between Russia and the transatlantic partners in 2022 is unlikely. Renewed Russian aggression in the EU's eastern neighbourhood and other malign activities are extremely likely. Given divisions between the EU's member states over Russia, a comprehensive EU strategy is likely to remain elusive.³⁵ President Vladimir Putin will continue to prioritise ties with individual member states rather than the EU as a whole. Relations between Moscow and Washington also seem set to remain extremely difficult.³⁶

A further priority is to recover from the worst economic downturn in more than a decade due to the COVID-19 pandemic. A repeat of the 2020 recession seems unlikely, but keeping inflation under control will be a challenge. Maintaining fiscal and financial stability will be more important than supporting growth and stable, speedy increases in real incomes.

International sanctions hurt the Russian economy but also pushed the Kremlin to diversify and seek new trade routes. With virtually no debt, President Putin has several mechanisms to keep the economy afloat and offset potential public protest; from lucrative public companies to the deep pockets of its National Wealth Fund, which as of September 2021 stood at some \$190.5 billion.³⁷ This reserve fund is likely to be drawn on over the next three years to help revive economic growth and infrastructure projects. Additional finance flows from the newly announced taxes on metals, coal and fertiliser producers will also help boost the economy. The goal is for the huge spending plans to translate into robust growth in the lead-up to the 2024 presidential election. However, strengthening the economy will become more difficult in the event of new sanctions being implemented as a consequence of Russian aggression.

Fundamental rights and freedoms will remain under attack. The pandemic provided a pretext for the Kremlin to restrict human rights further in many areas and introduce new restrictions, especially over privacy rights and the freedom of assembly. Following a sweeping crackdown on Russian rights groups, independent media and opposition supporters in 2021, freedom of the media and freedom of expression will remain under fire.³⁸ Political prisoners, particularly opposition leader Alexei Navalny, are unlikely to be released in 2022.

Russia will stand firm on its current foreign policy course and therefore remain a challenge for the EU and the US. Despite Western sanctions, the Kremlin has no intention of stepping back and reconciling with the West at the expense of its national interests. No changes from Russia on arms control, the Donbas or the Middle East should be expected. In an era of growing great power competition, Russia will continue to challenge multilateralism and explore opportunities to project its power internationally and present itself as an important global player.

2.5. UKRAINE: A DIFFICULT YEAR AHEAD

As Ukraine enters the ninth year of battling Russian aggression (both conventional and non-conventional, including massive disinformation campaigns and other hybrid threats), Russia will remain a major threat to it and its territorial integrity.

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President Putin's July 2021 essay, "On the Historical Unity of Russians and Ukrainians", reads like a declaration of war against Ukrainian statehood.³⁹ Russian military build-ups near its border with Ukraine between March-April and November-December 2021 are likely to continue in 2022.⁴⁰ Avoiding a full-fledged escalation or Russian invasion in Eastern Ukraine will be Kyiv's top priority.

Ukraine rebooting an economy which has been battered by the COVID-19 pandemic, improving the investment in climate and energy security, and increasing the standard of living and the healthcare system's resilience will also be crucial. President Volodymyr Zelensky's flagship Big Construction programme, which aims to upgrade infrastructure dramatically (i.e. national road and highway network), is one of the top issues in the 2022 budget.⁴¹ Other key areas are strengthening Ukraine's defence capability, digitalisation, green transition and regional development, including building a network of industrial parks.⁴²

Attracting more foreign investment into the country will also be a top focus. Corruption, absence of trust in the courts and market monopolies (i.e. state capture by a few private business owners) continue to be obstacles.⁴³ As such, Kyiv will continue to cite anti-corruption and 'de-oligarchisation' efforts as urgent. Yet despite some progress, opposition from vested interests remains challenging, particularly when it comes to the long-awaited judicial reform. The new anti-oligarch bill remains far from being effective.⁴⁴ Strengthening antitrust laws and authorities, reforming corporate governance in the public sector, eliminating tax benefits for big business and enhancing transparency in media funding will also require further efforts. Political infighting remains another major challenge.

Euro-Atlantic integration will remain a strategic goal for Ukraine, including in the military sphere. The EU expects Ukraine to speed up important political and economic reforms and fully implement those already approved by its parliament. Financial assistance, including from the International Monetary Fund and European Bank for

Reconstruction and Development, will remain tied to key reforms, including anti-corruption.

Despite being two years away, developments in 2022 will also be influenced by the country's March 2024 presidential election. With support for President Zelensky and his ruling Servant of the People party waning, populist policies and rhetoric could increase while the appetite for painful reforms diminishes.

Maintaining and strengthening international support for Ukraine and its territorial integrity will also remain a strategic priority for Kyiv. Despite some tensions and disappointment with the Biden administration, particularly related to Nord Stream 2,⁴⁵ relations with the US will remain crucial. US security and military assistance, including military aid (i.e. combat weaponry), and vocal political support at the highest level for territorial integrity are vital.

Maintaining and strengthening international support for Ukraine and its territorial integrity will remain a strategic priority for Kyiv.

Bilateral relations with other countries like the UK, Canada and Switzerland – all significant financial donors – will continue to be critical. Ties with Turkey and China are likely to intensify as their investments are expected to grow. Kyiv will also strengthen defence cooperation with Turkey, building on the more than 30 defence agreements signed over the last four years. Ukraine will also strengthen trade relations with countries in MENA and the Far East to diversify its trade.

No major progress is expected in the conflict in Eastern Ukraine. At the end of 2021, the international negotiating formats had not delivered a breakthrough, and talks are in a deadlock. A new location for the negotiations, to replace Minsk, has not been identified. There has been no breakthrough in the Trilateral Contact Group (i.e. Ukraine, Russia, the Organization for Security and Co-operation in Europe), nor is there any prospect for Normandy Format talks. Russia, in particular, is not interested in holding talks at the highest level. Ongoing violations of the ceasefire agreement are to be expected.

2.6. TURKEY: POLITICAL AND ECONOMIC UNCERTAINTY

Turkey will be engulfed by political uncertainty and rising domestic tensions in 2022. National developments will be dominated by the 2023 general election, which mark the centenary of the Turkish republic. Snap elections in 2022 or postponed elections should not be ruled out. A diverse

coalition of opposition parties united around shared interests is preparing to take over from President Recep Tayyip Erdoğan.⁴⁶

With opinion polls consistently indicating that President Erdoğan and his ruling Justice and Development Party (AKP) could lose, all his decisions will be to advance his political agenda and rebuild his popularity from an all-time low in 2021.⁴⁷ The AKP's agenda and narrative is likely to be a mixture of nationalism and religion. Further crackdowns on fundamental rights and freedoms, including restrictions on freedom of the media – especially social media platforms like Twitter – and other alternative media platforms, should be expected. Pressure on the opposition parties, particularly the Kurdish People's Democratic Party, is also likely to intensify. Constitutional amendments, including passing new draft laws aimed at boosting Erdoğan/AKP and the National Movement Party, its partner in the People's Alliance, are possible.

With the economy in dire straits,⁴⁸ stimulating it, including keeping inflation under control, reducing high unemployment rates, and further steps to strengthen the embattled lira, will be priorities. Further government pressure on the Central Bank is likely. Advancing large infrastructure projects will also be a key target.

Foreign policy will remain a crucial tool in President Erdoğan's political survival toolkit. It has become increasingly autonomous and assertive. The strategic calculus of Turkish policymakers will continue to be shaped by the idea of a new multipolar world, where the US plays a much weaker role, and China continues to rise. Turkey will carry on pursuing a larger role in both its neighbourhood and beyond, including Africa and East Asia, balancing cooperative-slash-competitive relations with Russia while trying to maintain ties with traditional transatlantic allies.⁴⁹

Foreign policy will remain a crucial tool in President Erdoğan's political survival toolkit.

Ankara will likely double down on its position in Syria, Iraq and Libya and try to increase its footprint in North Africa more broadly. Turkey will also continue to recalibrate its Middle East policy and rapprochement with several countries in the region, including the United Arab Emirates (UAE), Egypt, Saudi Arabia, and Israel, including as a way to strengthen the economy.

Building up Turkey's defence sector will also be prioritised, including looking for new markets for its Bayraktar drones and developing the aerospace sector, as outlined in the Turkish Space Agency's strategic plan for 2022-26.

Relations with transatlantic partners will remain turbulent and unpredictable. While Turkey will remain a key partner for the EU on issues like migration, energy and counterterrorism cooperation, the ties will remain transactional in nature. It is unlikely that the new positive agenda adopted by the EU and Turkey in October 2020 will bear real fruit due to ongoing concerns over fundamental rights and freedoms in Turkey, the Cyprus problem and some member states' lack of political will.⁵⁰ Turkey and Greece's new cycle of militarisation in the Aegean Sea on a scale not seen for decades is also a risk.⁵¹

The new German chancellor and coalition government's policy on Turkey, and France's forthcoming election and Council presidency will also impact Turkey's relations with Brussels. France's divisive anti-Muslim political discourse are likely to increase during the election campaign, making new clashes between Ankara and Paris probable. New geopolitical quarrels, as France increasingly views Turkey as a geostrategic rival that is expanding its regional influence, especially in the Mediterranean and Africa, challenging its well-entrenched sphere of power,⁵² is also possible and risks spilling over into EU-Turkey ties. Nevertheless, while further crises are likely, particularly pertaining to gas exploration in the East Mediterranean and Turkey's redevelopment of the ghost town of Varosha in Cyprus, a total rupture in ties with the EU seems unlikely.

France increasingly views Turkey as a geopolitical rival that is expanding its regional influence.

Relations with the US are also likely to remain difficult due to a long list of problems, including US support for Syria's Kurdish military force and political factions, its position on the self-exiled Islamic preacher Fethullah Gülen – who many in the Turkish government believe was the architect of the July 2016 failed coup d'état attempt – and concerns over the erosion of democratic norms in Turkey.⁵³ But Turkey's purchase of a Russian S-400 missile defence system remains the most significant problem. If a solution to Ankara's acquisition of the defence system can be found, then relations could improve. However, further arms purchases from Russia or Turkey deploying the defence system would plunge ties into a deeper crisis.

2.7. THE MIDDLE EAST AND NORTH AFRICA: OF AGREEMENTS AND DISAGREEMENTS

The MENA region in 2022 is likely to be shaped by post-pandemic recovery, as well as an increase in intraregional dialogues on the one hand and growing unrest in some 'hotspots' on the other.⁵⁴

The geopolitical competition of external powers seeking to expand their influence in the region is expected to grow, while the EU's presence will still be lacking. The US will continue to recalibrate its engagement with the region by emphasising diplomacy. In the context of the COVID-19 recovery process, the MENA region's green transition will gain importance throughout 2022. Against the backdrop of the rapidly advancing digitalisation process, cybersecurity incidents are also likely to escalate in the region, putting a premium on technological and geopolitical risk.

Recovery processes will feature high in the MENA region in 2022, with increased pressure on governments to undertake sustainable solutions. Implementing green energy projects, finding feasible financing options and looking for regional cooperation opportunities – all in the context of the growing effects of climate change (e.g. rising temperatures, water scarcity, desertification) and the energy transition – will especially be emphasised.

Recovery processes will feature high in the MENA region in 2022, with increased pressure on governments to undertake sustainable solutions.

Cyber incidents and cybercrime in the region will most likely continue to be a growing trend due to an accelerated digitalisation process. Sophisticated attacks to steal data or disrupt critical infrastructure systems (e.g. water systems, ports, energy sector) are likely to continue and even increase.

2022 could continue to see an improving of ties among quarrelling countries in the region. Formats like the August 2021 Baghdad summit to ease regional tensions and discuss regional challenges should not come as a surprise. Further steps towards more dialogue between Iran and Saudi Arabia are likely to be taken. Similarly, efforts to improve relations between Egypt and Turkey, or the UAE and Turkey, are set to continue.

As the US redirects its global strategic realignment towards the Indo-Pacific, following its withdrawal from Afghanistan, regional actors will seek to grow their influence while external powers compete to strengthen their presence. France is likely to have a more prominent role by fostering regional dialogue formats and promoting its economic interests. Russia is also likely to continue being proactive in the region and increase arms sales, including to markets that have traditionally been harder to access, such as the Gulf Cooperation Council countries. In addition, nuclear energy cooperation will continue to be an important instrument in Russia's toolbox, as is the case in relations with Egypt, Jordan or Saudi Arabia.

As MENA countries look for financing for their COVID-19 recovery processes, China will seek to increase its economic footprint in the region, also building on its vaccine diplomacy strategy. China presents an attractive alternative model for the region due to its neutrality regarding existing geopolitical rivalries and its predilection for bilateral relations. Trade, investments in infrastructure projects and diplomatic networking will be hallmarks of China's Middle East strategy.

Iran will continue to feature high on the international and regional agendas of 2022. Negotiations to return to the 2015 nuclear deal will continue slowly. While international pressure will be mounting, reaching a (limited) agreement is a cautiously optimistic scenario. Much to the EU's dismay, any developments regarding a strengthened nuclear deal that includes regional security is unlikely this year. Meanwhile, tensions will continue to persist between Iran and the US.⁵⁵

Iran will continue to feature high on the international and regional agendas of 2022.

The situation in Lebanon will be critical. The country's leadership will continue to face an uphill battle to stem the collapse of the state in the absence of a sustainable roadmap to restructure the economy, secure international aid and loans, and restore basic services. It is unlikely that the new government formed in September 2021 could take significant steps to tackle the crisis, despite international actors exerting pressure. The 2022 general election could be a turning point in Lebanon's responses to its political, economic and social crises.

Popular and political unrest is expected to grow in Tunisia as the democratic advancements since the 2011 Arab Spring are threatened by President Kais Saied's measures to suspend parliament and shelve parts of the constitution. Economic hardships exacerbated by the pandemic, such as high levels of unemployment and poverty, are likely to deepen. The EU must constantly monitor the situation in Tunisia to avoid the collapse of a promising democratisation process and make sure that the timetable launched in December 2021 by President Saied to revise the constitution and hold elections at the end of the year is implemented.

North Africa will most likely continue to witness tensions in the relations between Algeria and Morocco based on their long-standing regional rivalry and conflict over the Western Sahara, which caused the two countries to cut off diplomatic relations in August 2021.

2.8. AFRICA: PARTNERSHIP OF EQUALS?

In 2022, Africa is likely to have a more prominent role in the EU's foreign policy agenda. In recent years, the EU has taken steps to signal its ambition to renew a "partnership of equals".⁵⁶ Pandemic permitting, 2022 is likely to see the 6th European Union–African Union (AU) summit, progress in the EU's proposed new partnership with Africa, which is a priority for the French presidency of the Council of the EU, and potentially the entry into force of the post-Cotonou Agreement.

Africa's economy is set to weather the negative effects of the pandemic better than expected, thanks to the fast recovery in commodity prices and its strong agricultural growth.⁵⁷ Nevertheless, while many African countries are among the fastest-growing economies with young populations, the continent, especially the Sub-Saharan region, continues to lag in development. This was further impacted by COVID-19, reverting progress in fighting extreme poverty.⁵⁸

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With over 1.5 billion people and large quantities of natural resources, Africa is increasingly subject to 'great powers' vying for influence. Regardless of many previous commitments, the EU's policy towards the continent has been guided largely by the traditional donor-slash-recipient relationship, which is losing appeal in many African countries. The Biden administration is taking steps to recover the fading US–Africa relations, while other players like China and Russia also progressively increase their footprints.

The situation in Africa will remain turbulent in 2022 as the world lags in recovering from the pandemic. COVID-19 has already taken a significant toll on the continent, and with slow vaccination rates, the danger of new variants emerging will continue to haunt the world. The emergence of the Omicron variant at the close of 2021 is a strong reminder of this risk. Hence, a major task for 2022 and beyond will be vaccinating Africa's populations and closing the widening vaccine inequality gap. While 70% and 62% of the EU and US are vaccinated respectively, Africa barely stands at 10% as of early 2022 (see Figure 2, page 19).⁵⁹

A major task for 2022 and beyond will be vaccinating Africa's populations and closing the widening vaccine inequality gap.

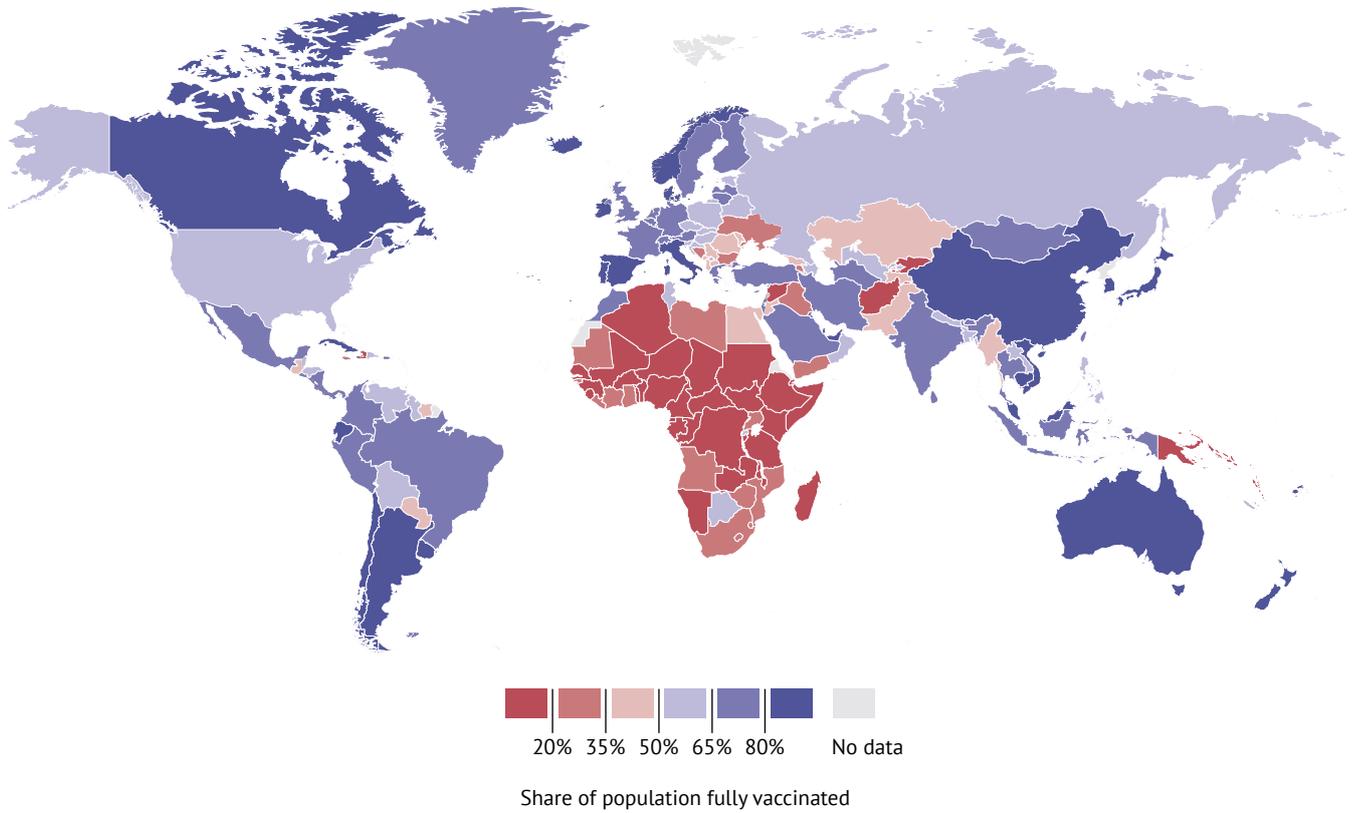
Violence and conflicts in Africa continue to be frequent as new, non-state actors emerge and civil unrests spread. 2021 saw a record number of 32 million Africans forcibly displaced due to political instability, violent conflicts and/or government repression. In some countries, the situation is worsening (e.g. Ethiopia, South Sudan; see Infobox 4, page 26). Conflicts and attacks on civilians have escalated in most parts of Sub-Saharan Africa,⁶⁰ and are likely to continue beyond 2022. A key task for the 2022 EU–AU summit should be to cooperate on conflict prevention and management and tackle the risks of increasing migration.

In addition to armed conflicts, many African countries face cross-border challenges, such as climate change, which will continue to be a crucial issue for the continent as a whole in 2022. Africa contributes to less than 4% of the total planetary warming but is disproportionately affected. Until 2030, \$20 to \$30 billion per year will be needed for climate change adaptation in Africa.⁶¹ According to the 2021 Global Climate Risk Index 2021, five African countries – Mozambique, Zimbabwe, Malawi, South Sudan and Niger – are among the top ten countries worldwide that will be most affected by climate change.⁶²

The EU, in line with its Green Deal, should assist Africa's climate adaptation process, enhance cooperation on energy transitions and help establish circular economies as the first step in implementing the desired "partnership of equals" in 2022.

Besides key global actors and regions for the EU's global engagement in 2022, several policy areas and emerging challenges deserve the EU's special attention in the coming year: **security and defence, trade, the EaP and human rights**. In addition to these policies, this Outlook Paper zooms in on potential security flashpoints for the EU – the Gulf of Guinea, the Sahel and the Black Sea – and humanitarian crises, from Afghanistan to Venezuela.

FULLY VACCINATED AGAINST COVID-19 (AS OF 19 JANUARY 2022)



Source: *The New York Times*⁶³

3. Policies and emerging challenges

2022 marks a decade since the EU was awarded the Nobel Peace Prize “for over six decades contributed to the advancement of peace and reconciliation, democracy and human rights in Europe.”⁶⁴ While the Union’s fundamental goals remain unchanged, today’s world is more complex, contested and even conflictual with increasing number of armed conflicts in some regions, like Africa (see Figure 3). In a world in transition, shaped by ‘permacrisis’⁶⁵ and limited resources, EU partners and rivals alike are increasingly asserting their strategic autonomy and ‘going at it alone.’

As the world still fights the pernicious COVID-19 pandemic and its new variants, compounded by vaccine resistance in the rich North and vaccine inequity in the developing South, the growing rivalry between China and the US, along with the tensions caused by Russia to re-write Europe’s security architecture, are likely to be pivotal geostrategic features of 2022. These dynamics are likely to continue influencing global events in the coming year and will have implications for EU policies and decision-making.

Beijing is becoming gradually more assertive on the world stages, and Washington is realigning its strategic priorities and coalitions accordingly. The level of interdependence among today’s global players makes this dispute very different from the mid-century Cold War, but it is once again unlikely that the EU can remain on the

side-lines. Competitive interdependence will be the name of the game.

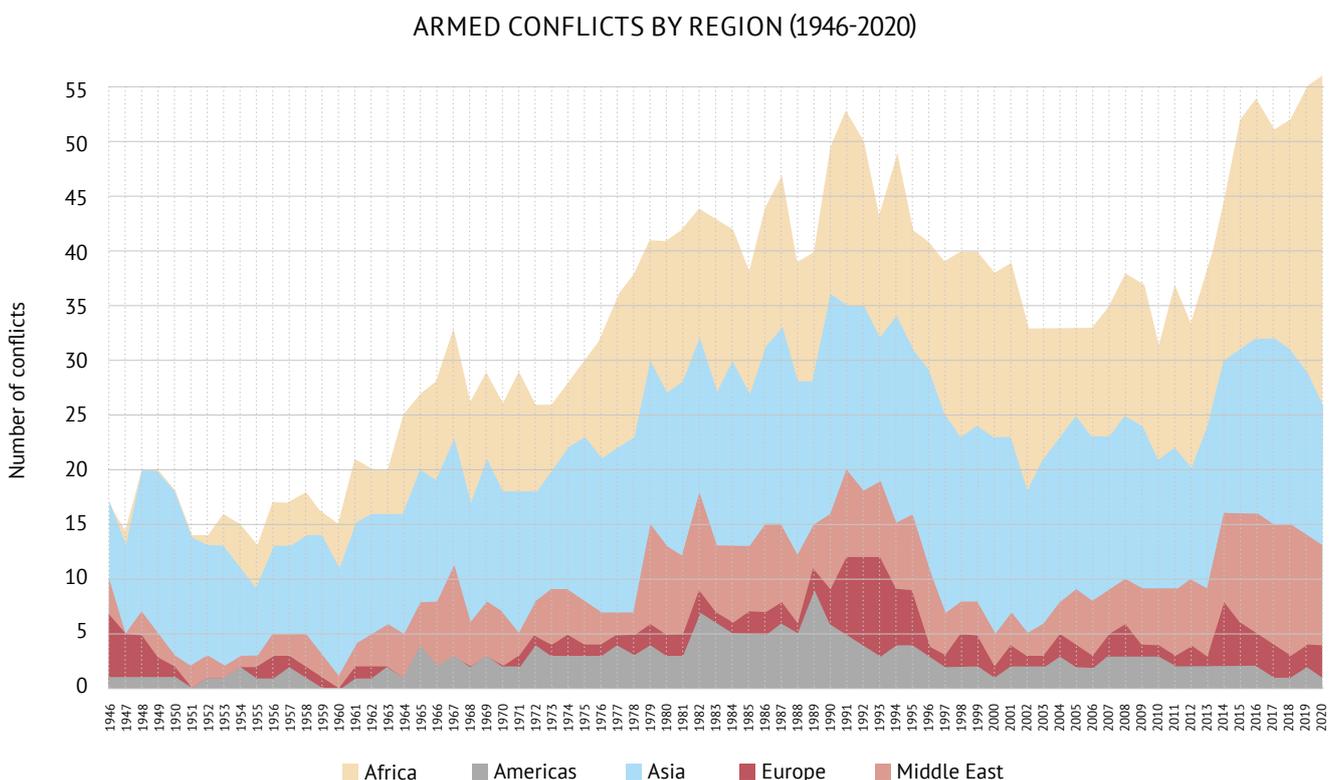
The ‘distant’ Sino-American dispute is compounded by challengers closer to home, such as an aggressive Russia which wants to re-write Europe’s security architecture with or without the use of military force, and Turkey. In a world shaped by rivalry and transactional relations, the EU should simultaneously reduce critical dependencies and vulnerabilities, develop its own capacity and freedom to act in security and defence, and strengthen existing alliances, such as NATO.

The surge in hybrid threats, the malign influence of disinformation within the EU and in neighbouring regions, and the weaponisation of migrants or energy flows are part of this larger geopolitical game. The EU will likely continue dealing with this multifaceted and challenging environment in 2022.

3.1. 2022: THE YEAR OF EUROPEAN DEFENCE?

2022 is likely to be a defining year for EU security and defence as both internal and external challenges mount, particularly in the East. The EU will continue building its security and defence policy. However, internal disagreements between member states on the specific steps that the EU should take to strengthen its defence

Fig. 3



Source: Petterson et al. (2021)⁶⁶

pillar are likely to persist. The recovery from COVID-19 is likely to hamper further defence spending by member states, as the immediate priority is to mitigate the negative socio-economic effects of the ongoing pandemic.

Despite internal debates on the EU's role in defence and the consequences for NATO, the adoption of the Strategic Compass in spring 2022 might bring more coherence to EU security and defence policy and a shared perspective on the complex security threats that the Union faces. It might also raise awareness among member states on the importance of increasing security and defence cooperation and interoperability within the EU. The development of initiatives set out in the Strategic Compass, such as the EU Rapid Deployment Capacity, a new EU hybrid toolbox, the EU Cyber Defence Policy, the Coordinated Maritime Presences and the EU Space Programme will take a centre stage.

In the wake of the US' botched withdrawal from Afghanistan,⁶⁷ a key issue in 2022 and beyond will be developing the Rapid Deployment Capacity to respond to crises that require urgent action. Beyond institutional, financial and technical capabilities to plan and conduct emergency crises operations, the main obstacle is the lack of political will to develop new EU tools and instruments. US opposition to these efforts may be fading, but it is too soon to know how President Biden's support for "a stronger and more capable European defense that contributes positively to global and transatlantic security and is complementary to NATO" will play out in 2022.⁶⁸ The role that the US defence industry will play in the development of EU defence initiatives will be decisive for Washington's support.

NATO will remain the main security umbrella for the Euro-Atlantic space in 2022, but this will not be without challenges. The political cohesion of the Alliance will continue to be tested by internal tensions and by the alliance's adaptation to a new global security landscape. Although the adoption of NATO's new Strategic Concept at the Madrid summit will take centre stage in 2022, in-house divergences – from burden-sharing to reaching a common approach to China – will persist. NATO must find the political will to address these internal challenges and simultaneously deal with its various external threats, especially an increasingly aggressive Russia.⁶⁹

NATO will remain the main security umbrella for the Euro-Atlantic space in 2022, but this will not be without challenges.

Cooperation between the EU and NATO will remain vital for the security of the Euro-Atlantic area. The adoption of the EU's Strategic Compass and NATO's Strategic

Concept in 2022 could bring important synergies and cooperation between both institutions: military mobility, resilience-building, defence industry cooperation, and adaptation to disruptive and emerging technologies. There are numerous opportunities for collaboration, synchronisation and harmonisation in EU-NATO relations, and none should be missed.

Climate security and the Arctic region will gain further relevance in 2022. As environmental degradation intensifies worldwide, climate security will become even more important for the EU. Besides the irreversible natural consequences, the world will have to deal with the political and socio-economic effects of climate change. From water scarcity to climate migration, intercommunal tensions to extreme weather conditions, food insecurity to vulnerable critical infrastructures, there is no doubt that climate change is a security threat and risk multiplier that should be tackled.

The EU should consider the cascading effects of climate change more systematically and include them into its security and defence action plans, strategies and policies. The need to establish a comprehensive approach to climate security and outline a coherent vision to address this emerging security challenge will become even more pressing. Foresight and anticipation, early warning systems, prevention and mitigation mechanisms will be key for the EU to become resilient and adapt to climate change.

The EU should consider the cascading effects of climate change more systematically and include them into its security and defence action plans, strategies and policies.

Besides environmental changes, geopolitical confrontation is also building up in the Arctic: the region will become even 'hotter'. The most critical area, the European Arctic, faces increasing Russian military activity. Moreover, China's self-declared "near Arctic state" is an expression of Beijing's desire to create a Polar Silk Road for trade.⁷⁰ This trend is likely to continue and intensify in the following years. While Russia will foster its military capabilities in the Arctic to 'phase NATO out',⁷¹ China will pursue its strategy of developing dual-use research and military awareness presence in the region. The military-political competition is likely to intensify in the Arctic, and the EU will be under pressure to deliver on its new Arctic Policy.

Whether the EU can support a peaceful, prosperous and sustainable northern neighbourhood will depend on its diplomatic efforts to find common interests amid geopolitical tensions.

INFOBOX 3. SECURITY FLASHPOINTS TO WATCH IN 2022

The Sahel region was highly unstable from a political and a security standpoint in 2021. The threat posed by terrorist and armed groups is likely to grow in 2022, with the situation on the ground deteriorating further due to renewed violence. Other challenges (e.g. state fragility, displacement of people, poverty, climate change) will deepen and contribute to the instability. The Sahel could be the next stress test case for the EU post-Afghanistan. France intends to scale down its troops and end Operation Barkhane, which will significantly impact other regional operations (e.g. the UN's Multidimensional Integrated Stabilization Mission in Mali, the G5 Sahel Joint Force). As the security situation deteriorates, tensions between the present international actors will likely converge around the reconfiguration of international missions, and the region's instability will come into question. The threat of Russian foreign influence is likely to grow.⁷²

The Gulf of Guinea will continue to face threats like piracy, illegal fishing, smuggling and drug trafficking. They will impact international trade and maritime security. Western and Central African stability is paramount for the EU;

Africa's population will double by 2050 and there is a high potential for economic growth. The progress of the pilot case of the EU's Coordinated Maritime Presences mechanism in the Gulf of Guinea will have important ramifications for the region's security environment and, more importantly, for enhancing transatlantic maritime cooperation. Observing the development of transatlantic cooperation is crucial, including in the context of the increased influence of competitors in the region. Transatlantic cooperation will follow a dual perspective: enhance the naval component to tackle regional threats and counter the external influence of actors which seek to boost their footprint (e.g. China).⁷³

NATO's Eastern flank, including the Black Sea, will remain a central pillar in the European security architecture. Russia will continue to encroach on the Sea and expand its maritime sphere of influence. Energy tensions could increase. The desire to start exploiting Black Sea gas reserves might also be another source of conflict with Russia, as parts of the exclusive economic zones (EEZ) of Ukraine, Romania and Turkey overlap with Russia's illegally annexed Crimean EEZ.⁷⁴

3.2. EU TRADE POLICY: OPEN, STRATEGIC AND AUTONOMOUS

2022 will be a crucial year for the EU's trade policy, particularly for implementing the European Commission's trade policy review, An Open, Sustainable and Assertive Trade Policy, which was adopted in February 2021.⁷⁵ The review identifies several areas that will be central for the EU's trade policy in 2022, including World Trade Organization (WTO) reform, the European green transition and sustainable value chains; the EU's partnerships with neighbouring countries, enlargement countries and Africa; and the implementation and enforcement of trade tools.

The priority of the EU's trade policy in 2022 will be restoring and strengthening the multilateral WTO framework for international trade while also re-enforcing its autonomous trade toolbox to deal with unfair trade practices.

The priority of the EU's trade policy in 2022 will be restoring and strengthening the multilateral WTO framework for international trade while also re-enforcing its autonomous trade toolbox to deal with unfair trade practices. 'Open strategic autonomy' means that to

protect its values and interests, the EU must "act together with others, multilaterally, or bilaterally, wherever [it] can. [But] act autonomously wherever [it] must."⁷⁶

As such, the Commission will prioritise WTO reform across all its functions, particularly the WTO Dispute Settlement Mechanism and 'rulebook'. Despite the postponement of the WTO Ministerial Conference in early December 2021, the Commission is likely to enhance cooperation with like-minded countries (e.g. Canada, the US, Japan) to agree on more ambitious WTO rules on trade, the climate and competitive neutrality. For the latter, the Commission envisages adopting the first set of reforms that address harmful subsidies and state-owned enterprises (i.e. targeting China's harmful trade practices). In addition, the EU must convince the Biden administration to finally engage in a constructive reform process of the Dispute Settlement Mechanism and Appellate Body.

Bilaterally, the Commission is expected to struggle with several key trade or investment agreements that are in the pipeline. The Commission will not move forward on the EU-China CAI in the current political climate – and definitely not as long as China's sanctions against MEPs and European institutions and think tanks are in place.⁷⁷

Regarding the EU-Mercosur free trade agreement (FTA), the Commission will, at best, propose the signature to the Council. However, this 'mixed' trade deal will then face a long and winding road to ratification, as it will need to be approved by all member states and the European Parliament. The Commission will most likely try to extract additional sustainable development commitments from the Mercosur bloc in the form of joint statements or

protocols to convince the agreement’s critics, including a review of its Trade and Sustainable Development chapters for future trade deals. Nevertheless, this will be insufficient for certain member states and political groups in the European Parliament.⁷⁸

The EU will also face several challenges to make something of the renewed transatlantic trade partnership with the Biden administration. The EU already managed to address some of the trade irritants inherited from the previous administration, making difficult compromises on the Boeing–Airbus dispute and the Section 232 tariffs on steel and aluminium – even if these deals do not tackle the root causes of the disputes appropriately. However, the EU and the US will need to first overcome crucial diverging views and interests at the next TTC meeting in the spring of 2022 before reaching ambitious commitments on issues like cross-border data flow, carbon pricing, export control and investment screening. However, the shared concerns vis-à-vis China’s harmful trade practices can help overcome these differences.⁷⁹

In situations where no options or instruments are available at the multilateral or bilateral level, the Commission will continue to develop a more assertive trade policy by strengthening its autonomous trade enforcement toolbox. The Commission proposed in December 2021 a new anti-coercive mechanism that would allow the EU to take immediate action against ‘trade bullies’. It will also revise in 2022 its ‘blocking statute’ to further deter and counteract the unlawful extraterritorial application of sanctions to EU operators by non-EU countries.

Finally, the Council and the European Parliament should reach an agreement in 2022 on the Commission’s recent proposal for a foreign subsidy instrument to address distortions on the EU’s internal market caused by foreign subsidies, and the International Procurement Instrument.

3.3. THE EASTERN PARTNERSHIP: BETWEEN INERTIA AND GEOPOLITICS⁸⁰

In 2022, the EaP will continue to be shaped by ‘geopoliticisation’ and policy inertia.⁸¹ Even though the EU is trying to be a more assertive global player, its

approach to the EaP will likely be defined by a lack of strategic vision resulting from diverging perspectives among member states, as reflected in the EaP summit declaration from 15 December 2021.

Launched in 2009 and comprising six countries – Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine –, the EaP aims to create an area of stability, security and peace at the EU’s eastern border. A decade later, the EU has not only been unsuccessful in stabilising and securing the region but also started importing its instability.

This year, most EaP states will continue to struggle with widespread corruption, rule-of-law violations, and the undue influence of oligarchs and other vested interests. Other obstacles are the economic and social impact of COVID-19, disinformation and hybrid challenges, security vacuums and geopolitical competition.

This year, most Eastern Partnership states will continue to struggle with widespread corruption, rule-of-law violations, and the undue influence of oligarchs and other vested interests.

Table 2 shows all six EaP countries’ performance in terms of levels of transparency, corruption and conflict. Transparency International’s Corruption Perceptions Index grades and ranks corruption levels based on “a number of different sources that provide perceptions among business-people and country experts of the level of corruption in the public sector” in 180 countries.⁸² A high rank and low score signal a high corruption level. Freedom House’s Freedom on the Net 2021 shows government influence and control over digital media. It rates countries’ internet freedom based on “obstacles to access”, “limits on content” and “violations of user rights”. Scores between 100 and 70 are assigned to “free” countries, 69 to 40 to “partly free” countries, and below 39 to countries that

Table 2. Corruption, freedom and peace levels in the Eastern Partnership countries

Indicators	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine
Corruption Perception Index rank/score	60 th / 49	129 th / 30	63 rd / 47	45 th / 56	115 th / 34	117 th / 33
Freedom on the Net 2021 score	71	35	31	77	N/A	62
Global Peace Index rank	94 th	121 st	117 th	89 th	59 th	142 nd

Sources: Transparency International (2020), Freedom House (2021), Institute for Economics & Peace (2021)⁸³

are “not free”.⁸⁴ Finally, the Institute for Economics and Peace’s Global Peace Index ranks countries in order of decreasing states of peace. Most EaP countries have a medium state of peace, except Ukraine, which ranks low.

The Eastern Partnership region has turned into a contested neighbourhood where the EU’s agenda and interests are clashing with what Russia perceives as its sphere of influence and Beijing as its geoeconomic heft.

The EaP region has turned into a contested neighbourhood where the EU’s agenda and interests are clashing with what Russia perceives as its sphere of influence and Beijing as its geoeconomic heft.⁸⁵ In 2022, the situation is likely to worsen as Beijing’s political and economic influence expands further.

Meanwhile, the Kremlin will continue to undermine the region’s stability and security. It will continue to use the region’s unresolved conflicts – Donbas and annexed

Crimea (Ukraine), Transnistria (Moldova), and occupied South Ossetia and Abkhazia (Georgia) – to project its power and influence throughout the area and beyond. Isolated by the West following the 2020 fraudulent elections and brutal crackdown on peaceful protestors, Belarus will inch ever closer to being swallowed by Russian stealth. A growing Russian military presence in Belarus, including the takeover of key military infrastructure, further undermines the EU’s eastern border security and NATO’s eastern flank. Military clashes and ceasefire violations will continue to be a regular feature of the Donbas conflict in 2022.

Border issues, such as the Lukashenko regime’s weaponisation of migrants at the Belarus–Poland border, may become even more challenging this year.⁸⁶ The deployment of some 2,000 Russian peacekeepers to the Nagorno-Karabakh conflict allows Moscow to project its influence and manipulate local communities. Furthermore, the absence of a real peace agreement could result in renewed fighting between Azerbaijan and Armenia.

As witnessed in the latter part of 2021, energy – particularly gas – will continue to be weaponised by Moscow, including via the Nord Stream 2 pipeline (if and when it becomes operational).

Strengthening ties with the West while becoming more open to the East will define the foreign policies of Ukraine,

Fig. 4

CHINA’S MANY ROADS OF INFLUENCE



■ Silk Road Economic Belt ■ 21st Century Maritime Silk Road ■ Proposed economic corridor ● Port with Chinese engagement

Source: Gordon, Tong and Anderson (2020)⁸⁸

Moldova and Georgia in 2022. All three countries expect to strengthen political and economic cooperation further with the EU through the newly created Association Trio. But they are also seeking closer ties with China. Georgia signed a FTA with Beijing in 2018, while Moldova and Ukraine are negotiating FTAs.

The EaP region, especially Ukraine, is part of Beijing’s expansionist agenda in Europe to gain geopolitical and geoeconomic influence through its Belt and Road Initiative (BRI; see Figure 4, page 24). Ukraine could become a transit hub within the BRI, linking China to EU markets. The financial support offered by China – with no strings attached – also represents a challenge for the EU.⁸⁷ Leaderships that, for different reasons, do not want to implement EU accession reforms will be tempted by Chinese finance. Brussels and Beijing will likely clash on various issues in the eastern neighbourhood.

In addition, Turkey will increase its engagement within the region. Turkey’s growing presence will be predominantly in the construction and security sectors. While ties with Ukraine are set to increase, the South Caucasus will see the greatest increase in Turkey’s presence, from strengthened economic, defence and security ties (i.e. with Azerbaijan) to investments in economic and transport corridors.

The EU’s failure to offer a membership perspective or strategic vision to Ukraine, Moldova and Georgia risks undermining its soft power and impacting the reform processes in these countries, making them more susceptible to the other global actors.⁸⁹ This failure to become a serious regional security actor means that the

EU will remain very much on the side-lines regarding security issues and conflict resolution. Its continued inability to speak with one voice will also hurt its ambitions to be a major geopolitical global actor.

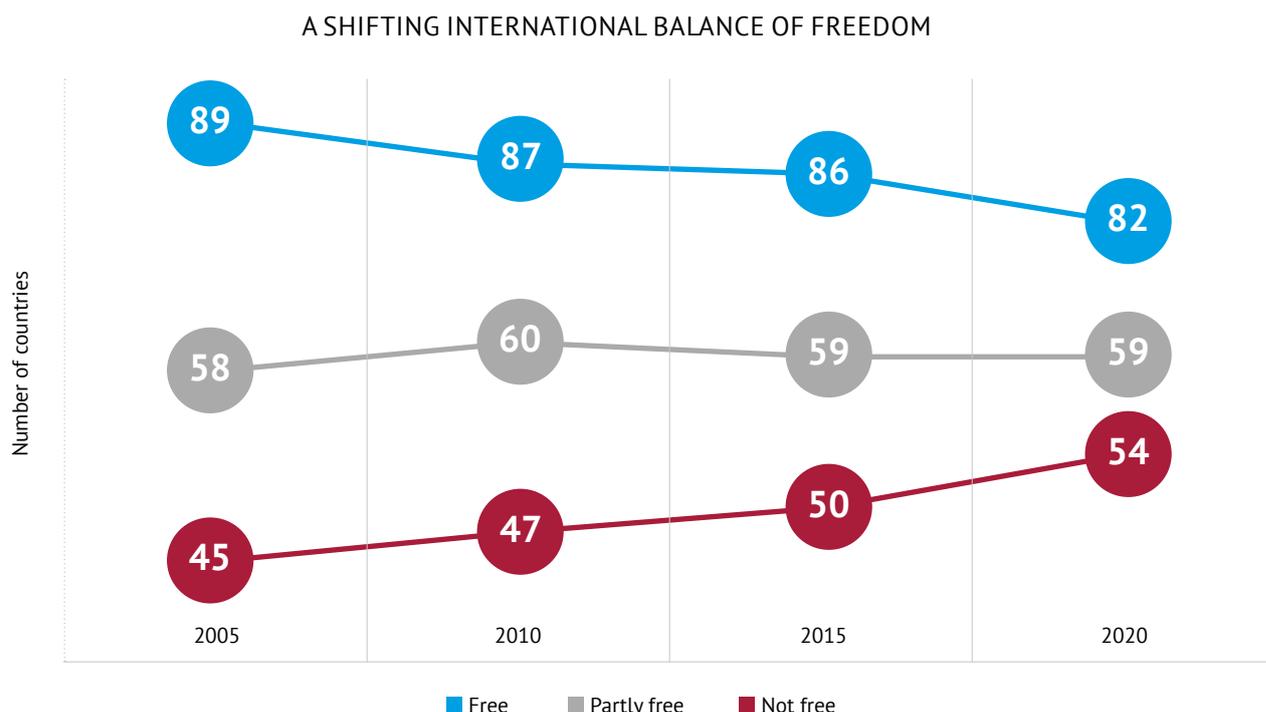
Hybrid threats, disinformation and propaganda campaigns will remain a major threat in 2022. Coming predominantly from Russia, China and, to a lesser extent, Iran (in the case of the South Caucasus), these threats will challenge the EU’s and US’ regional agendas, which are focused on resilience and democracy-building.

Boosting EaP states’ resilience – thereby lessening the spread of instability on the EU’s doorstep – will remain a priority for Brussels, as will COVID-19 recovery policies, including assistance with vaccine supplies and support for reforms. The EaP’s success lies in both Brussels and local leaderships, but the necessary political will remains uncertain. Short of that, the EU should prepare for a bumpy ride in the East.

3.4. HUMAN RIGHTS AND FREEDOMS: IN DIRE STRAITS

2022 will continue to look dire for human rights around the world. The COVID-19 pandemic was not only a global health crisis but also allowed a sustained attack on democratic principles⁹⁰ and human rights, which have been declining for the last 15 years (see Figure 5). As the pandemic is still ongoing, the use of COVID-19 restrictions to crack down on civil society and democratic processes is likely to continue in some parts of the world.

Fig. 5



Source: Repucci and Stipowitz (2021)⁹¹

From conflicts between states and armed groups to assaults on civilians in Africa (i.e. Ethiopia's Tigray Region, Mozambique, Burkina Faso); from severe economic repercussions and famine caused by COVID-19 (i.e. Venezuela, Syria, Yemen, North Nigeria, the Democratic Republic of the Congo) to the Taliban's return to Afghanistan and increased climate change repercussions and risks of climate-related conflicts, we are facing the worst "cascade of human rights setbacks".⁹²

Global internet freedom is declining,⁹³ and the freedom of expression online is under threat, too. Countries

have used COVID-19 contact-tracing software to spy on citizens (e.g. Russia, Australia, Bahrain),⁹⁴ with China being the worst example.⁹⁵ Misinformation, propaganda and fake news have further eroded people's trust in democratic electoral processes⁹⁶ and public health authorities alike. The trend of digital authoritarianism⁹⁷ is likely to advance in 2022, and the EU should continue to foster a resilient and open internet and regulate the digital space to protect human rights online. In 2022, the drive to regulate 'Big Tech' further is likely to persist, especially regarding data use and content.

INFOBOX 4. 10 HUMANITARIAN CRISES TO WATCH IN 2022

Afghanistan is rapidly transforming into the world's greatest humanitarian crisis. After the international military forces withdrawal, government collapse and the return of Taliban rule, the country plunged into a severe economic crisis. Up to 23 million Afghans might experience severe famine in the winter of 2021-2022, and 8.7 million people could suffer "emergency levels of hunger".⁹⁸

The Democratic Republic of the Congo is one of the world's longest and most complex humanitarian emergencies. A mix of continuing internal conflict; COVID-19 and recurring bouts of Ebola, cholera and measles; economic woes; and climate change brought 27 million people,⁹⁹ of which 3 million are children,¹⁰⁰ to face severe hunger. This is the highest number ever recorded.

Northern Ethiopia is on the brink of humanitarian disaster. After more than one year of civil unrest between the Ethiopian army and the Tigray People's Liberation Front (TPLF), 2 million people are displaced and 400 thousand face famine,¹⁰¹ causing a serious humanitarian crisis. As the fight intensified in 2021, numerous reports of ethnic cleansing and other abuses emerge. Reports suggest that ongoing fighting between TPLF rebels and governmental forces and general instability are hindering the humanitarian convoys and bringing food instability to more than 9 million people.¹⁰²

Lebanon is turning into a failed state and faces one of the worst economic crises in the world. Confronted with political instability for the past two years, harsh economic and financial crises plummeted half of the country into poverty.¹⁰³ With severe shortages of fuel and electricity hosting over 1 million Syrian refugees, the country is in dire need of international aid.

Madagascar is undergoing the world's first starvation crisis created entirely by climate change.¹⁰⁴ As one of the countries most affected by the devastating effects of global warming, its climate has substantially altered in the past three years. More than 1 million people are enduring food insecurity, and this number will rise in the future as climate change brings more severe droughts and reshapes local biodiversity.

Myanmar is a step away from becoming a "catastrophe" in Southeast Asia.¹⁰⁵ Since the military took control of the country, protracted conflict and protests have internally displaced hundreds of thousands of people (in addition to the 600,000 Rohingya Muslims displaced in the previous years). Besides the illegitimate authoritarian leadership, the state is struggling with an economic crisis, severe floods and the pandemic. This mix has put 3 million people in need of life-saving support.¹⁰⁶

South Sudan is suffering from a severe and alarming food crisis. The world's newest state struggles with internal fighting, economic loss and extreme flooding. 7.2 out of 12 million South Sudanese are dealing with extreme starvation,¹⁰⁷ and the prospects for improvement are dire, as climate change impact will be more severe in the upcoming years.

Syria continues to be home to the world's biggest refugee crisis and deals with unprecedented levels of food insecurity. 60% of the population (12.4 million) struggles with food insecurity.¹⁰⁸ 6.7 million Syrians are internally displaced persons in acute need of humanitarian aid. Adding to this, the continuation of conflict, UN-documented war crimes and crimes against humanity are making the country unsafe to return to for almost 7 million Syrian refugees, 80% of whom live below the poverty line.¹⁰⁹

Venezuela continues to be the source of Latin America's greatest refugee crisis. After more than 7 years of socio-political and economic crisis, 5.6 million people (a sixth of Venezuelans) have fled the country, and 9.3 million people are faced with acute hunger.¹¹⁰ Besides COVID-19, the reappearance of cholera and malaria; state oppressions against dissidents; and shortages of electricity, fuel and medicines plague Venezuelans.

Yemen is undergoing one of the world's largest humanitarian crises. Facing internal armed conflict, a collapsed economy and institutions and the pandemic, 20.7 million Yemenis (66% of the country) need humanitarian aid, 15.4 million lack access to clean water,¹¹¹ 16 million face food insecurity and 11 million children need urgent assistance.¹¹²

The EU's neighbourhood is facing numerous human rights abuses. From Russia's imprisonment of political dissidents, crackdowns on civil society and protesters, and Chechnya's targeted attack on LGBTQAI+ persons;¹⁰³ to Libya's recruitment of child soldiers, mass killings and arbitrary detention and torture,¹⁰⁴ human rights protection is not only a necessity but a duty for the EU and its member states. The EU's Global Human Rights Sanctions Regime was first used to level sanctions on North Korea, China, Russia, Libya, South Sudan and Eritrea in 2021. It should be used again against severe human rights violations in 2022. The EU should also make

up its mind this year if corruption will become a criterion for imposing sanctions against individuals, entities and states, as is currently the case with the US' Magnitsky Act.

The 2021 humanitarian crisis fabricated by Belarus at the EU's eastern border still poses serious challenges to EU unity and joint initiatives on migration and asylum. In 2022, the EU will have a difficult balancing act to master: staying 'open' to refugees and asylum seekers and 'closed' to hybrid actions that manipulate human suffering for political gains.

4. Recommendations

2022 will not only be a challenging year for the EU, but also represents an opportunity to adapt and prepare for new challenges ahead. As Europe and the world transition into a new global order, there are many actions that the EU could take in the coming year:

- ▶ **Launch a review of the 2016 EU Global Strategy** to better define the Union's global role towards 2030. Continue strengthening its freedom and capacity to act – alone if necessary.
- ▶ **Set strategic goals** for the coming decade and consider how to achieve them. In a world of limited resources, priorities and trade-offs should be considered.
- ▶ **Foster better coordination** between the European External Action Service, and the European Commission and its Directorates-General. The continued policy 'siloes' within the EU undermines its overall ability to project power and influence.
- ▶ Identify the tools and processes that can be mobilised within the current EU Treaties to **build up its capacity and freedom to act**, as well as its executive power in global affairs.
- ▶ **Continue building partnerships with like-minded countries** to achieve common goals.
- ▶ **Back up the Indo-Pacific strategy with adequate political and economic resources** to make it fully operational and viable in a competitive global context. Recent initiatives like the Global Gateway should be leveraged to boost EU member states' interests in the region.
- ▶ **Foster and maintain high-level political dialogue processes with Beijing** to reverse its countersanctions against European researchers and MEPs and avoid a further deterioration of the EU–China relationship.
- ▶ **Speak with one voice on Russia** by adapting a credible and proactive policy towards the Kremlin that enables the EU to respond to challenges from Moscow, both internally (i.e. hybrid threats) and in its immediate neighbourhood.
- ▶ **Develop a forward-looking strategy towards Turkey.** This should include strengthening cooperation and dialogue in areas of mutual interest including migration, climate change, and Black Sea security.
- ▶ **Strengthen EU–Ukraine cooperation**, providing further assistance in energy security, judicial legislation and the rule of law, and the professionalisation of public administration.
- ▶ **Increase high-level dialogues and engagement with countries in the MENA region.** Explore cooperation avenues in areas like green energy, maritime security and infrastructure.
- ▶ **Invest political and diplomatic capital in strengthening EU partnerships with Africa.** Prioritise addressing the persistent COVID-19 vaccine inequity in the continent through the COVID-19 Vaccines Global Access initiative and other international mechanisms.
- ▶ **Develop an EU security and defence policy that fosters a common European strategic culture** and is inclusive of member states' threat perceptions.
- ▶ **Use the Strategic Compass to upgrade the Union's strategic foresight capabilities and situational awareness**, to better understand change and emerging risks in the eastern and southern neighbourhoods and beyond.
- ▶ **Align and coordinate the EU defence policy with NATO** and enhance member states' interoperable defence capabilities.
- ▶ **Cooperate and coordinate more on climate-related security threats with NATO** and adopt a comprehensive and operational approach towards climate security.
- ▶ In the face of greater regional challenges to peace and stability, **reinvigorate the EaP** and set a clear, long-term and visionary strategy based on the realities on the ground.
- ▶ **Increase the EaP region's resilience** against hybrid threats via the Strategic Compass and set up a framework for cooperation on defence and security between the EU and EaP countries.
- ▶ Continue to **strengthen the multilateral WTO framework** for international trade while also **re-enforcing the Commission's autonomous trade toolbox** to combat unfair trade practices.
- ▶ As democracy backslides globally, **expand its Global Human Rights Sanctions Regime** to include more countries, companies and individuals that commit severe human rights violations. Include corruption in the Regime as a human rights offence.
- ▶ **Build a common and comprehensive framework for data protection across digital space**, with human rights at its centre, to regulate Big Tech.

Conclusion: Beyond 2022

This Outlook Paper ventures into 2022, but the effects and implications of the topics covered will certainly last beyond this year. 2023 will be an opportunity to take stock of the EU's relations with the key global actors and policy areas selected in this paper; from transatlantic relations to EU security and defence efforts. Looking back on these prospective exercises is critical to ensuring the quality of analysis and reviewing assumptions.

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The second Outlook Paper in 2023 will also explore developments in other policy areas that have important implications for EU external relations and were not fully covered this year: relations with the UK, EU enlargement policy, the green and digital transitions and their implications for EU foreign policy, the geopolitics of energy, and supply chains and critical dependencies. Some points on these topics are outlined below:

Relations with the UK. 2023 marks the 50th anniversary of the UK's accession to the then European Communities. It is also 7 years after 51.9% of Brits voted to leave the EU. Like most difficult divorces, estranged couples take time to mend relationships and sometimes never do. In next year's Outlook Paper, EU relations with the UK will be considered in more detail to anticipate the future evolution. Many in Europe seem to be struggling to accept the change in the UK's status. It may be time for the EU to reconsider its assumptions and start seeing the UK as a separate player, rather than just understanding the EU–UK relationship to be shaped by common geostrategic interests.

Enlargement fatigue. The EU's enlargement policy is deservedly credited as an engine for change and reform. But it has all but stalled in the last few years. 2022 is unlikely to produce any positive developments, as EU

member states fail to find common ground to boost the process. Internal EU issues should not be downplayed in this regard: rule-of-law backsliding in EU member states provides few incentives to move ahead with enlargement.

Greening and digitalising EU foreign policy. The digital and green transitions will continue to be high on the EU's agenda in 2022 and beyond. Given the current trends, the decarbonisation and digitalisation of the European economy are likely to have implications for the bloc's foreign policy and shape Europe's role in the world. Successfully managing the transitions can give Europe an edge in frontier technologies in the green transformation and in setting up a regulatory framework that advances the EU's interests and values in the digital age.

The geopolitics of energy. The EU continues to rely heavily on energy from third countries: its energy dependency stands at 61%.¹¹⁵ Nord Stream 2 reinforces this trend, seemingly running contrary to the ongoing greening of the European economy and creating problems for the EU and across the Atlantic. The necessary energy transition will be a major challenge to tackle in the coming years, both for the EU and its suppliers. What is more, Russia, a key energy provider, continues to weaponise energy for its geopolitical goals and exert influence in Europe's vicinity.

Supply chains and dependencies. The twin transitions will not happen without clean energies, raw materials and reliable supply and value chains. The pandemic sharpened dependencies and revealed unreliable supply chains in vital products; from active pharmaceutical ingredients to semiconductor chips. Untrustworthy suppliers, the concentration of supplies in a few countries or the sudden increase of global demand turn interdependence into vulnerabilities. Besides boosting the resilience of existing value chains, the EU must also diversify its pool of suppliers, including within the Union, and seek reliable partnerships with like-minded countries.

As the EU enters a new year still fighting the COVID-19 pandemic and with a security crisis on its doorstep, European policymakers should prepare for 12 months beset with challenges to key relationships and relevant policies, as this Outlook Paper shows. Setting clear strategic priorities and goals as well as fostering foresight and anticipation have never been as important as they are today for the EU to thrive in a world in transition.

Annex I. 2022 elections and national congresses

Elections in the EU

Member state	Date	Election type	Comments
Italy	24 January	Presidential elections	Incumbent Sergio Mattarella is not seeking another mandate. Prime Minister Mario Draghi signalled he is interested in the post.
Portugal	30 January	Legislative election	For the 230 seats of the Assembly of the Republic.
France	10 April	Presidential election 1 st round	Incumbent President Emmanuel Macron is eligible for re-election.
	24 April	Presidential election 2 nd round	
Hungary	03 April	Parliamentary election	For the 199 seats of the Hungarian National Assembly.
France	12 June	Legislative elections 1 st round	For the 577 seats of the French National Assembly.
	19 June	Legislative elections 2 nd round	
Slovenia	24 April	Parliamentary election	For the 90 seats of the Slovenian National Assembly.
Germany	13 June	Presidential election	Incumbent President Frank-Walter Steinmeier is eligible for re-election.
Malta	June	General elections	For the 65 seats of the House of Representatives.
Latvia	01 October (TBC)	Parliamentary election	For the 100 seats of the <i>Saeima</i> .
Slovenia	October	Presidential election	Incumbent President Borut Pahor is not eligible for re-election.
Sweden	11 September	General elections	For the 349 seats of the <i>Riksdag</i> .
Austria	13 November (TBC)	Presidential elections	Incumbent President Alexander Van der Bellen is eligible for re-election.

Elections and national congresses around the world by region

Region	Country	Date	Election type	Comments
Africa	Mali	February (postponed)	General elections	For the Presidency and the National Assembly, following the coup of May 2021.
	The Gambia	22 April	Parliamentary elections	For the 58 seats of the National Assembly.
	Senegal	July	Parliamentary election	For the 125 seats of the National Assembly.
	Kenya	09 August	General elections	Incumbent President Uhuru Kenyatta is not eligible for re-election. For the 337 seats of the National Assembly and the 67 seats of the Senate.
	Angola	August	General elections	Incumbent President João Lourenço is eligible for re-election. For the 220 seats of the National Assembly.
America	Brazil	02 October	General elections	For the presidency, vice-presidency and the 594 seats of the National Congress of Brazil.
	US	08 November	Midterm elections	For the 435 seats of the US House of Representatives and 34 seats of the Senate.
Asia	India	Throughout 2022	Parliamentary elections (upper house)	For 80 seats of the <i>Rajya Sabha</i> .
	South Korea	09 March	Presidential election	President Moon Jae-in is not eligible for re-election.
	China	27 March	Hong Kong Chief Executive election	Incumbent Chief Executive Carrie Lam is eligible for re-election.
	The Philippines	09 May	Presidential and general elections	For 12 seats of the Senate of the Philippines and 316 seats of the House of Representatives.
	India	July	Presidential and vice-presidential elections	The presidency and vice-presidency are limited to one term.
	China	Autumn	20 th National Congress of the CCP	Xi Jinping is expected to remain General Secretary of the CCP and President of China.
Europe	Serbia	April	General elections	For the presidency and the 250 seats of the Serbian National Assembly.
	UK (Northern Ireland)	May	Assembly election	For the 90 seats of the Northern Ireland Assembly.
	Bosnia and Herzegovina	02 October	General elections	For the 3 presidencies and the 42 seats of the Bosnian House of Representatives.
MENA	Libya	January (postponed)	Parliamentary election	Postponed from 24 December 2021; for the 200 seats of the Libyan House of Representatives.
	Lebanon	15 May	General elections	For the 128 seats of the Lebanese Parliament.
	Tunisia	December (TBC)	Legislative elections	Dependent on whether President Kais Saied's announced timetable for constitutional revision, referendum and legislative elections do take place.
Oceania	Australia	May	Federal election	For the 151 seats of the Australian House of Representatives and 40 seats of the Senate.

Annex II. Key EU meetings and international summits in 2022

Organisation	Date	Event	Location	Comments
EU	2022	European Year of Youth	N/A	
Council of the EU	01 January - 30 June	French Presidency of the Council of the EU	Brussels	
EU	17 - 18 February	6 th EU-AU summit	Brussels	
Munich Security Conference	February	58 th edition	Munich	
European Committee of the Regions	3 - 4 March	7 th European Summit of Regions and Cities	Marseille	
G7	26 - 28 June	G7 summit	Schloss Elmau	
NATO	29 - 30 June	NATO summit	Madrid	Official endorsement of NATO's Strategic Concept.
UN	June	Security Council election	New York	76 th UN General Assembly
Council of the EU	01 July - 31 December	Czech Presidency of the Council of the EU	Brussels	
UN	13 - 27 September	77 th UN General Assembly	New York	
Shanghai Cooperation Organisation	15 - 16 September	Summit	Samarkand	
Russia-Africa Partnership Forum	October	2 nd Russia-Africa summit and economic forum	Addis Ababa	
UN	7 - 18 November	27 th UN Climate Change Conference	Sharm El Sheikh (TBC)	
G20	November	G20 summit	Bali	Closing of Indonesian Presidency.
Council of the EU	First half of 2022	European defence summit	TBD	
Council of the EU	TBD	EU-India summit	TBD	
Council of the EU	TBD	EU-US summit	TBD	

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As we celebrate our 25th anniversary in 2022, the **Europe in the World** (EiW) programme is launching a new publication: the **Outlook Paper**. Published yearly, this paper identifies and anticipates developments in the EU's global relationships and policies for the coming year. It is not an exercise in prediction but rather an attempt to guide the EPC and EU community through a new year.

Every year, the EiW team will select topics depending on their relevance for the EU and the team's expertise. The 2022 edition is a pilot, but some of its components will be permanent features. A central theme, key actors and regions, policies, emerging challenges and chronologies of key events within and outside the EU will always be included. What is likely to change each year are the countries and issues covered.

Future editions will include contributions from other EPC programmes to broaden its scope. We will also add a "Look Back" section that revisits the previous edition. This will be a critical feature to review and reassess previous assumptions and ensure the continued quality of our analysis.

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