



PARLIAMENTARY ASSEMBLY OF THE MEDITERRANEAN
ASSEMBLEE PARLEMENTAIRE DE LA MEDITERRANEE

برلمان البحر الأبيض المتوسط

PAM Global Outlook: Strategic Trends and Challenges in the PAM Regions in 2024 and Beyond

Briefing Note*

Disclaimer: This document was prepared by the researchers of the International Study Centre of the Parliamentary Assembly of the Mediterranean (PAM) in San Marino, in their personal capacity. The opinions expressed in the note are the authors' own and do not reflect the views of PAM.

Introduction

Amid a period of acute instability, uncertainty, and distrust on a global scale, states are confronted with many complex challenges that demand solidarity and a coordinated international response. The Euro-Mediterranean and the Gulf regions are among the regions most exposed to the harms of these risks and opportunities, demanding a careful consideration of those trends that PAM Member States may face and have to respond accordingly in 2024 and beyond.¹

* This briefing note serves as an analytical summary of the key global trends and challenges foreseen to unfold in 2024 and beyond, identified from reports and documents published by International Organizations, Non-Governmental Organizations, research centers, and think tanks. The list, which is non-exhaustive, is included as a bibliography.

¹ <https://www.politico.eu/article/mediterranean-sea-risk-planet-heat-climate-change-crisis/>

Global risks for the PAM regions, ranked by severity and impact over the short and long term

Short term (two years)	Long term (ten years)
Emerging and disruptive technologies	Suspension of arms control, disarmament, and non-proliferation regimes
Violence and armed conflict	Climate change
Elections and the rise of right-wing populism	Mass displacement, illegal migration, and trafficking in human beings
Economic downturn and uncertainty	
Rising distrust and resort to unilateralism	

1. Revolutionary advances in emerging and disruptive technologies

Highlighted in the World Economic Forum’s “Global Risk Report 2024” as the greatest global risk in the immediate two-year term, the spread of Artificial Intelligence (AI)-generated misinformation and disinformation campaigns, and the broader applications of other technologies, pose both threats and opportunities for the stability and security of the PAM regions. Similarly stressed in the interim 2023 Report “Governing AI for Humanity” of the United Nations (UN) Secretary-General’s AI Advisory Body, deficiencies in regulation, or the absence of it in many constituencies, fail to effectively counterbalance the risk of the malicious use of these technologies especially given their accessibility, impact, and pace of development.² As such, the establishment and dissemination of international standards and regulatory frameworks for these technologies are emerging as an important area for global competition, where the United States (U.S.), the European Union (EU), and China remain the frontrunners.

² https://www.un.org/sites/un2.un.org/files/ai_advisory_body_interim_report.pdf

2. Proliferation of violence and armed conflict

Active and frozen conflicts, spanning from Sub-Saharan Africa and the Middle East, to Eastern Europe and the Western Balkans, continue to alter geopolitical dynamics and influence peace and stability in the PAM regions. Of particular concern for the PAM regions are the illegal Russian war of aggression against Ukraine, now in its third year, and the recent outbreak of conflict in the Middle East, risking a regional escalation and the diversion of support to Ukraine. Interethnic strife and tensions in the Western Balkans, partly fueled by Russian hybrid operations, hamper regional integration efforts and risk spiraling violently out of control.³

As stressed in the PAM background note on the active circumvention of international sanctions by state actors, notably Russia, Iran, and North Korea, sanction evasion activities emerge as a distinct threat to the maintenance of peace and stability in the PAM regions, as it sets a precedent for other countries to cooperate on sanctions evasion methodologies to pursue their illegal objectives.⁴ The 2024 Military Report Balance report by the International Institute for Strategic Studies, has revealed the extent to which such practices can be successful, given North Korea and Iran's military and financial support to Russia in violation of international sanctions, as Russia may be able to sustain its war effort in Ukraine for "two to three more years".⁵

Notably, the series of attacks by Yemen's Iran-aligned Houthis rebels on commercial shipping in the Red Sea, has not only undermined maritime security, disrupted international maritime trade, and global communications, but also led to an environmental disaster by causing an oil and chemicals slick after the sinking of "the Rubymar", a commercial vessel.^{6,7 and 8} Such assaults against the freedom of navigation carry the risk of being replicated in other regions by non-state armed actors under the pretext of political disagreements, carrying global repercussions on international security and economy.

In the Sahel, unconstitutional changes in government, climate change, and economic fragility, continue to exacerbate violent extremism, terrorism, and organized crime. In particular, the precarious situation in the region has strongly leveraged non-State armed groups and transnational criminal organizations with a combination of lucrative and low-risk opportunity activities, notably the trafficking in human beings, as well as sex, organ, drugs, and arms trafficking, and forced

³ <https://balkaninsight.com/2023/07/03/geopolitical-strife-fuels-dangerous-parallel-crises-in-balkans/>

⁴ International Study Centre (2024), "The trilateral cooperation: How the Russian Federation, Iran and North Korea are evading international sanctions", Parliamentary Assembly of the Mediterranean

⁵ The International Institute for Strategic Studies (2024), "The Military Balance 2024"

⁶ <https://www.dw.com/en/houthi-attacks-in-the-red-sea-threaten-lives-and-environment/a-68463083>

⁷ <https://www.dw.com/en/houthi-attacks-in-red-sea-threaten-internet-infrastructure/a-68470988>

⁸ <https://www.diplomatie.gouv.fr/en/country-files/yemen/events/article/red-sea-houthi-violation-of-freedom-of-navigation-12-01-24>

labor.⁹ According to the 2024 Global Terrorism Index, the region also remains the epicenter of terrorism in 2023, accounting for nearly 59% of all fatalities, additionally highlighting the clearest operational link visible between organized crime and terrorism.¹⁰ This crisis, as stressed by the UN Secretary-General António Guterres, poses a global threat “far beyond the region and the African continent”, if not responded to collectively.¹¹

3. Erosion of international arms control regimes

Unilateral treaty withdrawals, along with the Russian nuclear war rhetoric, and the expansion of nuclear weapons stockpiles and their delivery systems, is a worrying indication of accumulated distrust regarding arms control between emerging and major powers.¹² Iran’s production of uranium enriched to near-weapons grade, as revealed by the International Atomic Energy Agency, marks a serious escalatory step towards regional nuclear proliferation.¹³

On the other hand, earlier reported use of chemical warfare agents in Syria together with revolutionary advances in biotechnology raise novel threat scenarios, including biological and chemical terrorism.^{14 and 15} A report published by the Think Tank, RAND Corporation, has already indicated the use potential use of AI and large language models which may offer guidance to assist in the planning and execution of biological attacks.¹⁶ On this, the 2024 Annual Threat Assessment of the U.S. Office of the Director of National Intelligence has identified attacks with weapons of mass destruction, namely chemical, biological, radiological, and nuclear (CBRN), and their malicious use by terrorist actors, among the most pressing transnational threats for the near future.¹⁷

In this regard, highlighting its unwavering commitment to promote progress on disarmament, non-proliferation, and weapons control, PAM signed a Memorandum of Understanding with the European Centre for Disaster Medicine of the Council of Europe (CEMEC) in June 2023. The Assembly consequently received the request from CEMEC for the development and implementation of a project aimed at developing strategies and designing a dedicated training for addressing increasingly complex CBRN scenarios.

⁹ The Office of the Director of National Intelligence (2024), “Annual Threat Assessment of the U.S. Intelligence Community”, p. 37 – 38

¹⁰ Institute for Economics & Peace (2024) ‘Global Terrorism Index 2024: Measuring the Impact of Terrorism’.

¹¹ https://www.unodc.org/unodc/en/frontpage/2023/May/trafficking-in-the-sahel_-_guns--gas--and-gold.html

¹² <https://www.csis.org/analysis/uncertain-future-us-russia-arms-control>

¹³ <https://www.armscontrol.org/act/2024-01/news/iran-accelerates-highly-enriched-uranium-production>

¹⁴ <https://www.opcw.org/media-centre/news/2023/11/opcw-adopts-measures-ensure-compliance-chemical-weapons-ban-syria-and>

¹⁵ The Office of the Director of National Intelligence (2024), “Annual Threat Assessment of the U.S. Intelligence Community”, p. 32

¹⁶ https://www.rand.org/pubs/research_reports/RRA2977-1.html

¹⁷ The Office of the Director of National Intelligence (2024), “Annual Threat Assessment of the U.S. Intelligence Community”, p. 38

4. Climate change and environmental degradation

Driven by pollution and ecosystem collapse, climate change presents a material crisis globally in 2024 and beyond. With 2023 being marked as the warmest year on record, the impact of climate change is having severe impacts on the livelihoods within PAM regions and their proximity.¹⁸ According to the UN High Commissioner on Refugees and the UN Climate Change Conference (COP), these include human and food insecurity, armed conflict, economic vulnerability, displacement, and violent competition over resources.^{19 and 20}

Identifying climate change as “a risk multiplier that can exacerbate existing risks and crises”, the European Environment Agency noted that “Europe is the fastest-warming continent in the world”, which risks reaching “critical or catastrophic levels by the end of this century”, especially for Southern Europe, if no immediate action is taken.²¹ As such, the framing and analysis of the risks posed by climate to the Euro-Mediterranean and the Gulf regions is among the top research priorities of the newly established PAM’s Center for Global Studies.

5. A defining year for elections

For the first time globally, 2024 is the year marked by a record number of elections in which approximately 2 billion voters in 50 countries, will be heading to the polls.²² In fact, 12 PAM Member States are expected to hold either legislative or presidential elections, or both, in 2024. The elections of the European Parliament (EP) and the presidential elections in the U.S. will particularly draw attention in the face of acute polarization, economic volatility, and foreign interference in electoral processes. While the latest opinion polls indicate that the far right could become the third-largest group in the EP, a re-election of former U.S. President Donald J. Trump in the U.S. would raise fundamental questions across numerous strategic matters, ranging from transatlantic partnership and the future of European strategic autonomy, to global trade and countering climate change.²⁴

6. The global economy in transition and adaptation.

Following an unprecedented series of shocks that have considerably redirected and restructured the global economy, uncertainty related to geopolitical developments emerged as a defining factor in positioning national fiscal positions, ensuring food security, transforming energy security

¹⁸ <https://www.nasa.gov/news-release/nasa-analysis-confirms-2023-as-warmest-year-on-record/>

¹⁹ <https://unfccc.int/news/conflict-and-climate>

²⁰ <https://www.unhcr.org/news/stories/climate-change-and-displacement-myths-and-facts>

²¹ European Environment Agency (2024), “European climate risk assessment: Executive summary”, p. 3

²² <https://www.weforum.org/agenda/2023/12/2024-elections-around-world/>

²⁴ <https://www.stimson.org/2023/a-second-trump-term-opportunities-and-risks/>

doctrines, and creating economic vulnerability.²⁵ As a result, much-needed investments, including for the clean and sustainable economic transition against climate change, military support and funding for Ukraine, or advancements in new and emerging technologies, risk being hampered.²⁶

7. Diminishing trust and rising global fragmentation

In parallel to the global shift towards multipolarity, states are increasingly resorting to unilateralism, trust and solidarity among states and communities are eroding, and alternatives to Western-led global structures are gaining momentum.²⁷ Notably, widespread distrust in the multilateral institutional architecture, especially the UN Security Council and the international financial system, and their failure to effectively address pressing challenges of non-Western countries, have directed attention to the UN at the Summit of the Future, to re-instill trust and enhance the representation of regional issues on the global agenda.

Conclusion and recommendations

As the persistence of uncertainties undermines efforts to navigate the strategic landscape, decision-makers are urged to adopt a reactive posture, allowing events to dictate the collective agenda. On the other hand, regional crises are increasingly “complicating international cooperation on other pressing issues” by having spillover effects on a global scale.²⁸ Recognizing the prevailing structural uncertainty, the Assembly and its Member States are presented with ample opportunities to seize, as crises and constraints can be reframed to act as drivers for creating more effective policy. Overall, collective efforts to rebuild trust, and a commitment to international cooperation will emerge as the defining factors to succeed in mitigating risks and seizing opportunities in 2024 within the PAM regions and beyond.

Think Tanks and int.l research centers whose findings were consulted for this research:

Atlantic Council; Barcelona Centre for International Affairs; Brookings Institution; Brunswick Group; Institute for Economics & Peace; International Crisis Group; Rasanah International Institute for Iranian Studies; the Asia Foundation; the Center for Strategic and International Studies; the International Institute for Strategic Studies; the Italian Institute for International Political Studies; the Middle East Institute; the RAND Corporation; and the Stimson Center.

²⁵ <https://www.ecb.europa.eu/press/key/date/2023/html/ecb.sp230825~77711105fe.en.html>

²⁶ <https://www.euronews.com/my-europe/2023/10/11/brussels-sounds-alarm-about-eus-rapidly-ageing-population-recommends-migration-to-fill-vac>

²⁷ The General Secretariat of the Council of the European Union (2024) “Forward Look 2024: Managing uncertainty”, p. 10

²⁸ U.S. Office of the Director of National Intelligence (2024), “Annual Threat Assessment of the U.S. Intelligence Community”, p. 5

Relevant Publications

Ahmadzai, A. et al. (2024) '*Asia and the Pacific in 2024: Elections, Economics, and Geopolitics*', The Asia Foundation. Available at: <https://asiafoundation.org/2024/01/10/asia-in-2024-elections-economics-and-geopolitics/>

Atlantic Council (2024) '*The Top Risks and Opportunities for 2024*', Global Foresight 2024. Available at: <https://www.atlanticcouncil.org/content-series/atlantic-council-strategy-paper-series/the-top-risks-and-opportunities-for-2024/>

Brookings Institution (2024) '*Foresight Africa: Top Priorities for the Continent in 2024*'. Available at: <https://www.brookings.edu/wp-content/uploads/2024/01/ForesightAfrica2024.pdf>

Brunswick Group (2023) '*Eight Elections to Watch in 2024*'. Available at: https://www.brunswickgroup.com/media/11259/geopolitical_eightelections2024_091523_final.pdf

Burrows, M. and Manning, R. A. (2024) '*Top Ten Global Risks for 2024*', the Stimson Center. Available at: <https://www.stimson.org/2024/top-ten-global-risks-for-2024/>

Colomina, C. (2023) '*The World in 2024: ten issues that will shape the international agenda*', Barcelona Centre for International Affairs. Available at: https://www.cidob.org/en/publications/publication_series/notes_internacionals/299/the_world_in_2024_ten_issues_that_will_shape_the_international_agenda

Creedon, M. R. et al. (2023) '*America's Strategic Posture: The Final Report*', The Congressional Commission on the Strategic Posture of the United States. Available at: <https://armedservices.house.gov/sites/republicans.armedservices.house.gov/files/Strategic-Posture-Committee-Report-Final.pdf>

European Environment Agency (2024) '*European climate risk assessment: Executive summary*'. Available at: <https://www.eea.europa.eu/publications/european-climate-risk-assessment>

EY - Parthenon (2023) '*The 2024 Geostrategic Outlook*'. Available at: https://assets.ey.com/content/dam/ey-sites/ey-com/en_gl/topics/geostrategy/ey-2024-geostrategic-outlook-report.pdf

Institute for Economics & Peace (2024) '*Global Terrorism Index 2024: Measuring the Impact of Terrorism*'. Available at: <https://www.economicsandpeace.org/wp-content/uploads/2024/02/GTI-2024-web-290224.pdf>

International Crisis Group (2024) ‘*Eight Priorities for the African Union in 2024*’. Available at: <https://icg-prod.s3.amazonaws.com/s3fs-public/2024-02/b195-eight-priorities-au-2024.pdf>

International Crisis Group (2023) ‘*Ten Challenges for the UN in 2023-2024*’. Available at: https://icg-prod.s3.amazonaws.com/s3fs-public/2023-09/b011-ten-challenges-for-the-un-in-2023-2024_0.pdf

International Crisis Group (2024) ‘*Watch List 2024*’. Available at: <https://icg-prod.s3.amazonaws.com/s3fs-public/2024-02/wl-2024-web.pdf>

International Study Centre (2024) ‘*The trilateral cooperation: How the Russian Federation, Iran and North Korea are evading international sanctions*’. Parliamentary Assembly of the Mediterranean. Available at: <https://www.pam.int/sites/default/files/2024-03/PAM%20-%20Background%20Note%20-%20The%20trilateral%20cooperation%20How%20the%20Russian%20Federation%20Iran%20and%20North%20Korea%20are%20evading%20international%20sanctions%20as%20of%2028.02.24.pdf>

NATO Science & Technology Organization (2023) ‘*Science & Technology Trends 2023-2043 Across the Physical, Biological, and Information Domains*’, Two Volumes. Available at: https://www.nato.int/nato_static_fl2014/assets/pdf/2023/3/pdf/stt23-vol1.pdf and https://www.nato.int/nato_static_fl2014/assets/pdf/2023/3/pdf/stt23-vol2.pdf

Rasanah International Institute for Iranian Studies (2024) ‘*Annual Strategic Report: Obstacles to Peace and Strategic Hedging 2023-2024*’. Available at: <https://rasanah-iiis.org/english/wp-content/uploads/sites/2/2024/02/Annual-Strategic-Report-2023-2024-by-rasanah.pdf>

The African Union (2024) ‘*The Plan for the Second Decade of Agenda 2063, a Decade of Acceleration: Second Ten-Year Implementation Plan 2024 – 2033*’. Available at: https://au.int/sites/default/files/newsevents/workingdocuments/43517-wd-Agenda_2063_STYIP_Feb_2024_Launch_Version.pdf

The European Parliamentary Research Service (2024) ‘*Ten issues to watch in 2024*’, The European Parliament. Available at: [https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757592/EPRS_IDA\(2024\)757592_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757592/EPRS_IDA(2024)757592_EN.pdf)

The General Secretariat of the Council of the European Union (2024) ‘*Forward Look 2024*’. Available at: https://www.consilium.europa.eu/media/69285/forward-look-2024_10-january-2024_web.pdf

The International Institute for Strategic Studies (2024) ‘*The Military Balance 2024*’. Available at: <https://www.iiss.org/en/publications/the-military-balance/2024/editors-introduction/> and <https://www.iiss.org/en/publications/the-military-balance/2024/chapter-1-era-of-insecurity/>

The Italian Institute for International Political Studies (2024) ‘*The ISPI Report 2024: Europe in the Age of Insecurity*’. Available at: <https://www.ispionline.it/en/publication/europe-in-the-age-of-insecurity-163702>

The Middle East Institute (2023) ‘*Conflict, competition, and containment will shape the contours of the MENA region in 2024*’. Available at: <https://www.mei.edu/sites/default/files/2024%20Look-ahead%20roundup%20-%20sm.pdf>

The Munich Security Conference (2024) ‘*The Munich Security Report 2024*’. Available at: https://securityconference.org/assets/01_Bilder_Inhalte/03_Medien/02_Publikationen/2024/MSR_2024/MunichSecurityReport2024_Lose-lose.pdf

The United Nations Secretary-General's AI Advisory Body (2023) ‘*Interim Report: Governing AI for Humanity*’, The United Nations. Available at: https://www.un.org/sites/un2.un.org/files/un_ai_advisory_body_governing_ai_for_humanity_interim_report.pdf

The World Economic Forum (2024) ‘*The Global Risks Report 2024*’. Available at: <https://www.weforum.org/publications/global-risks-report-2024/>

U.S. Office of the Director of National Intelligence (2024), ‘*Annual Threat Assessment of the U.S. Intelligence Community*’. Available at: <https://www.dni.gov/files/ODNI/documents/assessments/ATA-2024-Unclassified-Report.pdf>
