

New dots on the security horizon

Results from the Clingendael Expert Survey

Kars de Bruijne
Minke Meijnders
Lauriane Héau

Clingendael Report



Clingendael

Netherlands Institute of International Relations



Clingendael

Netherlands Institute of International Relations

New dots on the security horizon

Results from the Clingendael Expert Survey

Kars de Bruijne
Minke Meijnders
Lauriane Héau

Clingendael Report
November 2017

DISCLAIMER

This report was commissioned by the Netherlands' ministries of Foreign Affairs and Defence within the PROGRESS framework agreement, lot 5, 2017. Responsibility for the contents and for the opinions expressed rests solely with the authors. Publication does not constitute an endorsement by the Netherlands' ministries of Foreign Affairs and Defence.

November 2017

© Netherlands Institute of International Relations 'Clingendael'.

Cover photo: © Flickr.com, November 25, 2013, Pierre Réveillé

Unauthorized use of any materials violates copyright, trademark and / or other laws. Should a user download material from the website or any other source related to the Netherlands Institute of International Relations 'Clingendael', or the Clingendael Institute, for personal or non-commercial use, the user must retain all copyright, trademark or other similar notices contained in the original material or on any copies of this material.

Material on the website of the Clingendael Institute may be reproduced or publicly displayed, distributed or used for any public and non-commercial purposes, but only by mentioning the Clingendael Institute as its source. Permission is required to use the logo of the Clingendael Institute. This can be obtained by contacting the Communication desk of the Clingendael Institute (press@clingendael.org).

The following web link activities are prohibited by the Clingendael Institute and may present trademark and copyright infringement issues: links that involve unauthorized use of our logo, framing, inline links, or metatags, as well as hyperlinks or a form of link disguising the URL.

About the authors

Kars de Bruijne is a Research Fellow at Clingendael and a Senior Researcher in the Armed Conflict Location Event Dataset Project (ACLED). His research focuses on intrastate conflict, fragile states, trend analyses and expert forecasting.

Minke Meijnders is a Research Fellow at the Clingendael Institute. She is part of the Clingendael Strategic Foresight Team, where she is frequently involved in scenario and trend analyses in the field of geopolitics and international security.

Lauriane Héau is a Research Assistant at the Clingendael Institute. Being part of the Clingendael Strategic Foresight Team, her main activities include conducting horizon scans and researching on international relations and security.

The Clingendael Institute
P.O. Box 93080
2509 AB The Hague
The Netherlands

Follow us on social media

 @clingendaelorg
 The Clingendael Institute
 The Clingendael Institute

Email: info@clingendael.org
Website: www.clingendael.org

Contents

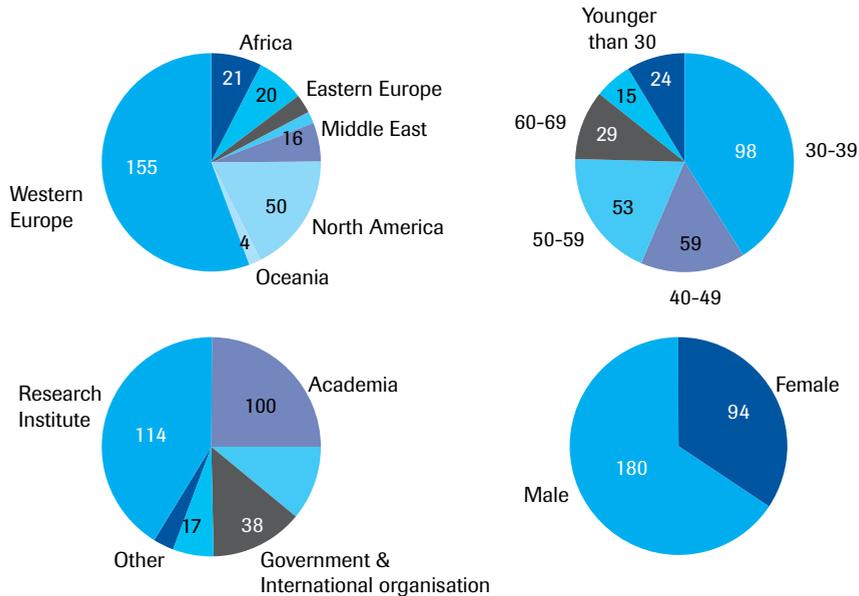
Introduction	1
Terrorism	2
The terrorism regime	4
Migration	4
The migration regime	6
Climate change	6
The climate change regime	7
Nuclear proliferation	8
The nuclear regime	9
Free trade	10
The free trade regime	11
Methodology	12

Introduction

Europe is being challenged. Territorial integrity is no longer a given, the ring of instability remains fragile and exports a number of problems ranging from terrorism to migration. Large segments of the population appear to be dissatisfied with the existing political order. Transatlantic relations are in a state of flux and questions are increasingly being asked as to whether Europe should play the game of nations. Many of today's issues have caught policy-makers by surprise (e.g. think about the annexation of Crimea, Brexit and Trump's election) and policy-makers would have liked to foresee these in advance. The annual *Clingendael Expert Survey* does just that: it is a modest attempt to identify and prioritise some of tomorrow's key security problems.

The Clingendael Expert Survey scans, validates and prioritises novel threats that are not yet part of our common understanding. These may include completely new problems (such as a funding gap in the IAEA) but also known developments that are not sufficiently recognised. From the *Clingendael Radar* – a horizon scan for new threats – we were able to compile a shortlist of key aspects. The survey subsequently validated and prioritised this input. Around 2,000 experts were approached for their views and opinions, and with a response rate of 15.8 %, we acquired more than 250 responses.

Who were our respondents?



The survey assessed novel developments in five policy fields: terrorism, migration, climate change, nuclear proliferation and free trade. The three selected priorities for each policy domain are presented below. Overall, there are five threats that are currently insufficiently prioritised and will require greater attention in 2018 (the upcoming strategic monitor assesses each threat in more depth):

1. The resettlement of ISIS in South-East Asia (terrorism);
2. The divergence of migration policies among EU member states (migration);
3. Increasing signs of climate change as a driver of migration (climate change);
4. Safety issues concerning nuclear installations in and around Europe (nuclear proliferation);
5. New signs of US protectionism (free trade).

Terrorism

What are the key issues which policy-makers working on terrorism should be focussing on to stay ahead of the game? Our sample included 76 responses from terrorism experts across the world. They agreed on the most significant new threats in the coming years, regardless of their age, gender, workplace and region or origin¹:

- 1) **The expansion of ISIS towards South-East Asia.** With ISIS losing control in the Middle East, experts warn that ISIS may relocate its stronghold to South-East Asia, with India seen as the end goal.² ISIS-aligned fighters are responsible for several terrorist attacks and kidnappings in, for example, the Philippines, Malaysia, Bangladesh and Indonesia.³ At the moment, the operational capabilities of ISIS in South-East Asia are limited, but given the resilient nature of this organisation, and the increasing numbers of returning foreign fighters from Syria and Iraq, prioritising policy-making on this topic is a must.

1 We saw some significant differences in how men and women formulated their top 3; women perceive the increased links between ISIS and organised crime networks as the most threatening, for example. In terms of age, we saw that especially young people (30-49) and older people (above 70) worry most about the rise of right-wing terrorism. Experts working in NGOs or within academia are also more concerned about this threat than their peers working at research institutions or public services.

2 Dhruva Jaishankar, "[Assessing the Islamic State threat to India: it is a serious but manageable challenge](#)", Brookings, 8 May 2017; Natalie Tecimer, "[India and the fight against Islamic State](#)", The Diplomat, 14 June 2017.

3 "[Another link in Bangladesh's chain of attacks](#)", Assessments, Stratfor, 7 July 2016; Jens Wardenaer, "[Islamist terror in Southeast Asia: the battle for Marawi](#)", International Institute for Strategic Studies, 6 June 2017.

- 2) **The return of right-wing terrorism in Europe.** There are emerging indications that both the refugee crisis and the perceived threat of Islamisation are being used as a way to mobilise right-wing extremists. Recent attacks have targeted both Mosques and asylum centres.⁴ The recent spark in arrests in Germany, or the recent first conviction for right-wing extremism in the Netherlands, call for more attention. Young people (30-39) appeared to be the most concerned about this trend.
- 3) **Increasing links between ISIS and organised crime networks.** As ISIS continues to lose territory, its ability to generate territory-based income is reduced. There are increasing indications that ISIS is intensifying its links to criminal organisations and engages in various forms of smuggling.⁵ These links could appear in regions like the Middle East, Central Asia and the Balkans.⁶

None of these threats are completely new. They figure in talks given by terrorism experts and are on the radar of intelligence services and some international forums (e.g. some are mentioned in Europol's annual terrorism-trend report (TE SAT) and in analyses made by the UN).⁷ Yet at the same time, they should become a more integral part of policy-making processes.

Selected & prioritised threats	Shortlisted (not selected)
<ul style="list-style-type: none"> • Possible relocation of ISIS stronghold in South-East Asia; • Return of right-wing terrorism in Europe; • Increasing links between ISIS and organised crime networks. 	<ul style="list-style-type: none"> • Return and increase of left-wing terrorism in Europe; • Risk of the use of biological weapons and/or chemical weapons by ISIS or Al-Queda; • Risk of cyber-attacks by ISIS or Al-Queda against European entities; • Competition between terrorist organisations; • Kidnapping for ransom increasingly used by ISIS.

4 See [“TE SAT – European union terrorism situation and trend report 2017”](#), Europol, June 2017; Matthew Tempest, [“Commissioner warns of ‘growing menace’ of right-wing terrorism in EU”](#), Euractiv, 23 March 2017.

5 [Nineteenth Report of the ISIL and Al-Qaida Sanctions Committee](#), United Nations Security Council, 13 January 2017.

6 *Ibid.*; Mariya Y. Omelicheva and Lawrence Markowitz, [“A trafficking-Terrorism Nexus in Central Asia”](#), The Diplomat, 30 June 2016; [“Trafic d’armes en situation post-conflit: étude de cas et enjeux”](#), notes from a conference organised by IRIS and GRIP, 24 January 2017.

7 See [TE-SAT report](#); and [Report of the ISIL and Al-Qaida Sanctions Committee at the UN](#).

The terrorism regime

Last year's Clingendael analysis indicated that international cooperation in the field of terrorism is expected to improve. The role of states is expected to be complemented by non-state actors, while the hard punitive agenda is believed to be broadening with a softer bottom-up approach.⁸ The new threats may successfully be addressed through global cooperation if this trend is sustainable.

However, recent events and analysis suggest that this trend may not be sustainable and the outcomes of the survey are mixed. On the one hand, two-thirds of the experts believe that the current system is well suited to address tomorrow's problems. On the other hand, experts argue that existing arrangements are not sufficient when it comes to practical policy measures. Suggestions to improve cooperation range from the increased use of regional cooperation forums (such as the Arab League, ASEAN, or the African Union) in the fight against new forms of terrorism and a more intensive role for state actors (rather than non-state actors).

Migration

The surge of refugees and migrants to the EU in 2014-2015 has made migration a key priority for the EU and its member states. In fact, Clingendael recently flagged that migration is not only a foreign policy interest but has now also been securitised: migration is seen as a security concern in European circles (even though the current numbers are now at pre-crisis level).⁹ What are the key issues that policy-makers should start prioritising? Our sample of migration experts was 47. This is what they flagged:

- 1) **Increasing divergences in migration policy and a lack of solidarity between EU member states.** Interestingly, experts point away from migration *per se* and towards internal EU politics. The European Commission has pursued legal action against three eastern member states (the Czech Republic, Poland and Hungary) which are refusing to take in asylum seekers.¹⁰ In past years, we have seen various failures when it comes to fair burden-sharing.

8 Bibi van Ginkel, "Terrorism", in: Kars de Bruijne and Minke Meijnders (eds), ["Multi-order; Clingendael. Strategic Monitor 2017"](#), February 2017.

9 The reason why migration was included as one of the five 'security' topics in this survey.

10 Global Conflict Tracker, "Refugee crisis in the European Union", Council on Foreign Relations, consulted on 27 June 2017; Patrick Wintour, "EU takes action against eastern states for refusing to take refugees", *The Guardian*, 13 June 2017; Gabriela Baczynska and Foo Yun Chee, ["EU to open case against Poland, Hungary, Czech Republic over migration"](#), Reuters, 12 June 2017.

2) **Breakdown in EU member states’ asylum systems.** A second key ‘threat’ according to the experts is – interestingly – also an internal affair. The majority prioritised the situations in Italy and Greece where reception systems cannot keep up with the influx. While stemming the migration flow, the breakdown of asylum systems in some member states is something that needs to be addressed.¹¹ Both issues are important since they point to the fact that the core problems in the future of European migration are internal rather than external.

3) **Increased migration to Europe due to climate change.** Experts finally pointed to new drivers of migration in areas which are particularly susceptible to climate change (resulting in flooding, droughts, salinisation) and extreme weather conditions which could force an increasing number of people to migrate to Europe.¹² This trend is already visible: migrants from Bangladesh have already become the third largest migrant group to reach Europe via the central Mediterranean route.

There was no difference in how experts from various origins selected and prioritised these three threats. Hence, both EU and non-EU citizens point out that internal problems are the future problems for Europe when it comes to migration. There were also no differences between gender, age and workplace.

Selected & prioritised threats	Shortlisted (not selected)
<ul style="list-style-type: none"> • Increasing divergences in migration policy and a lack of solidarity between EU member states; • Breakdown in EU member states’ asylum systems; • Increasing number of migrants to Europe due to climate change. 	<ul style="list-style-type: none"> • Risk of ending Schengen system by the end of 2017; • Bringing in consulting firms to handle asylum cases; • Exploitation of migrants by European criminal networks; • Lack of attention regarding the trauma which most migrants suffer; • Collapse of the EU-Turkey deal, causing another refugee crisis in the EU; • Continuation of the EU-Turkey deal, further weakening the EU’s normative base.

11 Diego Cupolo, “Italy’s migrant reception system is breaking”, IRIN, 15 June 2017; Mattia Toaldo, “EU needs to offer work visas to bring migration under control”, News Deeply, 26 June 2017.

12 [Migration, Environment and Climate Change Policy Brief Series](#), International Organisation for Migration, 2016-2017; [Frontex Migratory Routes Map](#), consulted on 3 July 2017; Kelly M. McFarland and Vanessa Lide, “The effects of climate change will force millions to migrate. Here’s what this means for human security”, The Washington Post, 23 April 2017.

The migration regime

International cooperation to deal with migration is difficult. Whilst the IOM and UNHCR compete for authority, the UNHCR Refugee Convention is under immense pressure. According to experts, the existing set of rules and norms is not sufficient to deal with migratory pressures. Half of the respondents (23 out of 46) pointed out that the international system cannot sufficiently deal with the emerging threats. Moreover, many believe that the dynamic guiding international cooperation is not one of cooperation for mutual benefit but is the result of 'your win is my loss' (zero-sum) thinking (22 out of 46). Finally, there is hardly any agreement on what norms should guide migration according to the participants (36 out of 46). The majority of the experts see a large role for states in addressing the current problems.

Climate change

It is almost a *contradictio in terminis* to identify new and emerging threats when it comes to climate change. Climate change by its very definition is a long-term process where time frames of 20 to 30 years are a minimum to observe changes. As a consequence, many 'new' threats identified in the questionnaire are in fact new signals of longer-range patterns that have been identified previously. What are these 'new' developments according to 75 experts who returned our questionnaire?

- 1) **More resources have induced conflict due to climate change.** Although the relationship between climate change and conflict is not straightforward, climate experts prioritised this risk. In particular, shortages in resources may affect conflict risks at the local, national and even international level.¹³ A recent study has identified key climatic risks that are likely to impact global security, among which is the risk of increasing tensions and conflict among the 4 billion people who are dependent on mountain "water towers".¹⁴
- 2) **More migration due to climate change.** As was observed in the migration scan, climate experts also expect more migration and displacement due to climate change. People will be increasingly forced to migrate due to a greater risk of natural disasters, extreme weather events and changing water and food availability. At greatest risk are people living in coastal megacities, in extreme drylands and deserts or on atolls in the Pacific and Indian Oceans.¹⁵

13 Willem Ligtoet & al., "[Water, Climate and Conflict: security risks on the increase?](#)", Briefing note, Planetary Security Initiative & others, April 2017.

14 Caitlin Werrell and Francesco Fernia (eds.), "[Epicentres of Climate and Security: The New Geostrategic Landscape of the Anthropocene](#)", The Center for Climate and Security, June 2017.

15 *Ibid.*

3) **Negative climate-related incentives for markets due to US disengagement.**

Markets and financial institutions are affected by the sceptical position of the US. Markets consider the potential danger in investing in companies which are highly exposed to climate risks, or companies that do not have clear plans on how to deal with the said risks.¹⁶ Yet, American disengagement may remove the incentive to make the necessary assessments so that financial markets may (again) ignore risks and withdraw support from (green) investments.¹⁷

The respondents demonstrated a strong consensus concerning these priorities: there were no significant differences in age, gender, workplace or nationality. The overall lesson is that we should not only focus on tackling and preventing dangerous climate change itself, but that we should further increase our understanding of the complexities of the relationship between climate change, (political) conflict and migration.

Selected & prioritised threats	Shortlisted (not selected)
<ul style="list-style-type: none"> • Shortages of resources due to climate change could be one of the contributing factors likely to cause more conflicts; • Negative climate-related incentives for markets due to US disengagement; • Global migration due to sudden (natural) disasters due to climate change. 	<ul style="list-style-type: none"> • Global warming could result in more weather-related disasters for Europeans; • Current carbon price is too low to have an effect on the reduction of greenhouse gas emissions; • Danger that some mitigation policies following the Paris Agreement, such as energy crops and hydropower, will increase flood risk and water-stress; • US disengagement from climate issues triggering a funding gap.

The climate change regime

Last year, the Clingendael Strategic Monitor argued that international cooperation on climate change has been relatively stable and positive, although there is much to be done. The result is generally confirmed in this survey. Many respondents feel that international actors agree on a basic set of norms and see cooperation as the way to address (emerging) threats (42 out of 75). The key problem is that the concrete actions to address the concerns are much harder to agree upon and 52 experts (out of 75) felt that the current set of rules is insufficient. Moreover, only 31 respondents believe that the current system is sufficient to deal with the increasing risks. Suggestions

16 George Stylianides and Jon Williams, "[The 2016 Low Carbon Economy Index shows that climate risks are here to stay, so managing the credit implications is simply common \(financial\) sense](#)", PwC, 31 October 2016.

17 Michel Aglietta, Etienne Espagne et Baptiste Perrissin Faber, "[Accord de Paris : Le retour inquiétant de l'incertitude face au climat](#)", Le Monde, 28 June 2017.

to improve include a bigger role for the great powers (primarily the US and China). Other suggestions pertained to a larger role for non-state actors such as the scientific community that should play a bigger role in informing the policy process and the private sector which should be engaged more effectively in order to combat future climate issues.

Nuclear proliferation

Tensions between the US and North Korea have sharply increased recently, with unprecedented verbal clashes and threats by both parties to deploy their nuclear arsenals. Yet, what are the other important developments that have occurred beyond these eye-catching headlines and that need to be noted? A total of 47 CBRN experts identified the following three 'new' threats:

- 1) **Safety issues with nuclear installations in and around the EU.** Europe's nuclear safety will – surprisingly perhaps – in the future not necessarily be threatened from the outside but rather from within. Safety concerns have been raised regarding two nuclear plants in Belgium (Tihange and Doel) as a result of their age.¹⁸ Moreover, the Astravet power plant in Belarus (a mere 50 kilometres from Vilnius) is a source of major concern, with some labelling the plant a “disaster waiting to happen”. The Belarusian authorities have so far hindered a full-scale IAEA review.¹⁹ Further concerns relate to the ongoing conflict in Ukraine and its impact on the safety of its nuclear industry.²⁰
- 2) **Escalating conflict if the Iran deal falls apart.** A second issue is better known: the possible collapse of the Iran nuclear deal.²¹ US President Trump has accused Iran of “multiple violations” of the nuclear agreement and called it “the worst deal ever”. If the US is going to dismantle the deal, it might cause a chain of unpredictable events that could eventually lead to escalating conflict – or even war – between the US and Iran.²² Experts prioritise this potential development.

18 Dagmar Dehmer, “Berlin invested in Belgian nuclear plants despite safety concerns”, Euractiv, 7 July 2017.

19 Sijbren de Jong, “Belarus nuclear plant: a disaster waiting to happen”, EU Observer, 31 May 2017.

20 Dmytro Chumak, “The implications of the Ukraine conflict for national nuclear security policy”, Stockholm International Peace Research Institute (SIPRI), November 2016.

21 Nazanin Soroush, “US president adopting policy of testing limits of nuclear agreement, increasing risk of deal's collapse”, IHS Jane's Intelligence Weekly, 30 July 2017; Philip Godron and Amos Yadlin, “Will Iran Become the Next North Korea?”, Foreign Affairs, 1 August 2017; James M. Dorsey, “Playing With Fire: Trump's Iran Policy Risks Cloning North Korea”, The Huffington Post, 3 August 2017.

22 “Donald Trump accuses Iran of violating the nuclear deal”, The Economist, 13 October 2017.

3) The risk of a new nuclear arms race due to increasing geopolitical tensions.

Whilst the third priority is not new, recent developments have led to a re-emergence of its importance. The US has hinted that it could expand its military nuclear capabilities, instead of continuing to reduce their number.²³ In Asia, we know that both South Korea and Taiwan had secret nuclear programmes in the past. Japan could also decide to follow the nuclear route as well, if tensions grow in the region (although this is highly unlikely at the moment).²⁴

There are (significant) disagreements between the experts. Employees of research institutions generally rate the threat of North Korea lower than government officials. Moreover, men were generally more concerned about the collapse of the Iran deal than women. At the same time, all groups (age/sex/background) agreed on the internal threats being the most important future threat.

The nuclear regime

Last year’s Clingendael analysis pointed out that the nuclear regime is under pressure. The great powers are expected to take on a greater role. At the same time, normative disagreement is believed to emerge when the notion of non-proliferation is challenged by ‘rogue’ states coupled with the lack of progress in disarmament. This subsequently leads to the emergence of parallel initiatives (the open-ended working group). These trends are clearly confirmed in this year’s survey; around half of the respondents feel that the system cannot deal with new threats (21 out of 47). One-third of the experts believe that the great powers should be the ones to ultimately address issues in international cooperation.

Selected & prioritised threats	Shortlisted (not selected)
<ul style="list-style-type: none"> • Safety issues with nuclear installations in and around the EU; • Escalating conflict if Iran nuclear deal falls apart; • Risk of a new nuclear arms race due to increasing geopolitical tensions. 	<ul style="list-style-type: none"> • Large funding gap in the International Atomic Energy Agency budget; • New Nuclear Ban Treaty established by a large number of NPT (Non-Proliferation Treaty) member states may undermine support for the NPT; • Risk of North Korea proliferating weapons of mass destruction (material); • Russia and US accusing each other of non-compliance with the Intermediate-Range Nuclear Forces Treaty (INF) treaty provisions.

23 Daryl G. Kimball and Kingston Reif, “[Trump questions US nuclear policies](#)”, Arms Control Association, 1 March 2017

24 Florence Gaub et al., “[What if... Conceivable crises: unpredictable in 2017, unmanageable in 2020?](#)” EU Institute of Security Studies, Report 34, June 2017; Liubomir K. Topaloff, “[Japan’s nuclear moment](#)”, The Diplomat, 21 April 2017.

Free trade

Europe's security is not only about territorial integrity and is also not only centred around violence and terrorism. Free and open trade is crucial for the EU's prosperity and wealth. To this end, ensuring a functioning free trade system has been a key security concern. At the moment, concerns about the effects of the financial crisis and the stability of European currency compete for EU's policy-makers' attention. Yet, what will be tomorrow's key concerns? This is what 41 experts suggest are the key priorities for European policy-makers:

1. **A new phase of protectionism following the recent US tariffs.** Last year – before Trump's election – Clingendael already pointed out that protectionism appeared to be rearing its head. Meanwhile, the Trump administration turned away from some major trade agreements (the Transatlantic Trade Partnership (TPP) and threatened to withdraw from WTO and NAFTA).²⁵ Moreover, there are indications of new US protectionist measures aimed at China. For example, the US recently announced an investigation into China's alleged theft of US intellectual property.²⁶ The US administration is considering imposing tariffs on steel imports (mostly from China). A full-blown trade war between the two countries is unlikely (²⁷), yet a new wave of protectionist measures is possible and would have great repercussions for European security.
2. **Risk of rising Chinese corporate debt and the potential for a financial crisis.** The Chinese credit growth has been excessive in recent years, according to the IMF.²⁸ Chinese companies have borrowed large sums of money within and outside China. Experts rank this as a major risk that could cause economic disruption when Chinese growth slows down, and corporations cannot repay their debts. In the longer term this may risk a banking crisis and may creep through the global economy.

25 Timothy R. Heath, "[Strategic consequences of US withdrawal from TTP](#)", RAND Corporation, 27 March 2017; Wim Muller, "[China and the WTO: How US Unpredictability Jeopardizes a Decade and a Half of Success](#)", Chatham House, 7 March 2017.

26 "[US formally launches probe of China's intellectual property practices](#)", Reuters, 18 August 2017.

27 "[Michael Pettis on US China Trade Relations](#)", Podcast, Carnegie Endowment for International Peace, March 2017; Timothy R. Heath, "[Strategic consequences of US withdrawal from TTP](#)", RAND Corporation, 27 March 2017; Wim Muller, "[China and the WTO: How US Unpredictability Jeopardizes a Decade and a Half of Success](#)", Chatham House, 7 March 2017.

28 See the IMF report above, and Kevin Yao and Yawen Chen, "[China corporate debt levels excessively high, no quick fix: central bank governor](#)", Reuters, 10 March 2017; "[Resolving China's corporate debt problem](#)", Working paper, International Monetary Fund, October 2016; "[Trade recovery expected in 2017 and 2018, amid policy uncertainty](#)", World Trade Organisation, 12 April 2017.

3. **Overlapping aims between the EU, the Eurasian Economic Union (EEU) and the Chinese One Belt One Road (OBOR).** There are three major integration projects which are ongoing on Eurasian soil: the EU with its economic neighbourhood projects, the Economic Eurasian Union and the Chinese One Belt One Road. Experts have flagged that these projects overlap both geographically and in their scope and aim. This may lead to tensions. The three projects rest on a divergent set of political and value systems, thereby driving actors to see globalisation and trade in different ways.²⁹ Policy-makers need to start thinking through the consequences of three integration projects to aid the development of sound long-term policy-planning.

The prioritisation of (new and emerging) threats was widely shared by the expert community.³⁰ Perhaps as interesting as the identified priorities are those threats that are considered to be less of a priority. Internal challenges – like the consequences of Brexit and the eroding EU trade mandate – ranked lower than external and global threats. This underscores the very open nature of the EU’s economic system.

Selected & prioritised threats	Shortlisted (not selected)
<ul style="list-style-type: none"> • New phase of protectionism following the recent US tariffs; • Risk of rising Chinese corporate debt and a potentially looming financial crisis; • Conflict due to overlapping aims between the EU, the Eurasian Economic Union and OBOR. 	<ul style="list-style-type: none"> • Increasing trade chokepoint disruptions likely to affect EU trade; • Slump in oil prices in 2018 if OPEC deal to keep production down falls apart; • Independence of central banks put in question; • EU trade mandate being challenged; • Potential economic disruptions for the EU following Brexit.

The free trade regime

Given their transboundary nature, trade issues have been dealt with on an international level. This system is traditionally seen as a successful example of a regime with a functioning set of institutions, an established set of norms (reduce trade barriers, for example) and a large corpus of (formal and informal) legislation. However, last year Clingendael argued in its Strategic Monitor that international cooperation on free trade was under pressure.

29 Ian Bond, “[The EU, the Eurasian Economic Union and One Belt, One Road: can they work together?](#)”, Centre for European Reform, 16 March 2017.

30 Although experts within the age group 50-59 were less concerned about rising US protectionism than other age groups.

The outcomes of the questionnaire underscore the observed trends. About 70% of the respondents feel that the current system is well equipped to deal with the future threats (29 out of 41). This underscores the previous observation that the trade regime is relatively well developed. However, experts raised similar concerns to those of Clingendael last year. First, they highlight bilateral trade agreements as the main vehicle for agreement (35 out of 41), instead of cooperation within a multilateral setting. It again underscores that the multilateral trade regime (primarily the WTO) has lost its credibility as a negotiating forum. Second, a number of respondents disagreed over fundamental norms (23) and the set of procedures (27) pointing to cracks in the current system. Finally, respondents tend to see a larger role for the great powers in the organisation of the regime. This is in (sharp) contrast to previous decades when non-state actors and smaller states were seen as important actors. Overall the regime seems to be at a point where it can address new threats albeit on a fragile basis.

Methodology

The *Clingendael Expert Survey* is an annual questionnaire with two goals: identifying new security threats and assessing international cooperation.

Input for the survey came from the *Clingendael Radar*, a tried and tested horizon scan system to detect new threats. It uses various techniques ranging from the manual scanning of recent and relevant literature, conferences organised by relevant organisations, and a scan of Twitter feeds and validated expert input. We have selected the developments based upon their novelty and potential impact on European security. Subsequently, the long list was assessed by in-house experts and the foresight team leading to a shortlist of new developments and emerging threats in all five fields.

The *Clingendael Expert Survey* subsequently ensured widespread agreement on important threats (and reduced expert bias) and led to a prioritisation of results. Table 1 describes the general characteristics of the survey. A total of 1,831 subject-matter experts were approached. Each expert was carefully selected by our team, based upon their published material, and extensive project work at top universities, think tanks and research centres, government and international organisations, as well as NGOs. With 286 completely filled-in responses, it resulted in a very high general response rate of more than 15% (which is much higher than the good average score of a 7% response rate for questionnaires). The response was stratified to ensure a sufficient spread over the five selected themes. This year's survey also had a good spread over gender, regions and age.³¹

31 Both points are an improvement of the survey carried out last year.

		Nuclear	Migration	Terrorism	Climate	Free Trade	Totals
Gender	Female	19	36	18	31	12	96
	Male	33	22	67	53	37	186
Age	<30	7	5	7	6	3	24
	30-39	16	24	33	30	15	101
	40-49	16	9	23	17	9	62
	50-59	7	14	11	20	12	55
	60-69	5	5	8	7	7	29
	>70	1	2	5	4	4	15
	Work-place	Academia	8	30	36	18	21
	Government	4	3	6	14	1	24
	International organisation	2	4	2	8	2	14
	NGO	5	1	2	11	1	17
	Other		1	1	8	2	9
	Research institute	33	19	38	25	22	114
Region	Africa		6	4	9	3	21
	Asia	2	2	7	7	4	20
	Eastern Europe	1	1	2	2	1	7
	Eurasia		1	2	2		5
	Middle East		1	15	5	2	16
	North America	16	4	20	8	6	50
	Oceania	2	1		1		4
	South America			1			1
	Western Europe	31	41	33	43	32	155