



Watch List 2022

Spring Update | 24 May 2022

Every year Crisis Group publishes two additional Watch List updates that complement its annual Watch List for the EU, most recently published in January 2022. These publications identify major crises and conflict situations where the European Union and its member states can generate stronger prospects for peace. The two additional updates include an overview of the policy environment and main challenges for the European Union and five crises and conflict situations, which can update those identified in the annual Watch List or present a new focus of concern. For each of the five cases included in this update, Crisis Group provides field-based analysis and specific policy advice to the European Union and its member states, with the aim to guide and improve their efforts to prevent, mitigate or end conflicts.

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Preventing War. Shaping Peace.

President's Take

Europeans have entered a new world since January, when Crisis Group published its 2022 EU Watch List. Back then, Russian troops were massing near Ukraine's border. Western intelligence reports warned that an invasion could be on the cards, causing considerable disquiet in European capitals, but Moscow still insisted that its soldiers were merely conducting exercises. Then, on 24 February, Russia launched a full-scale invasion, turning what had been a grinding standoff in Ukraine's east into a quest to conquer the whole country. The war has wreaked destruction on much of Ukraine, killing perhaps tens of thousands, displacing [some 14 million](#), many of whom have fled to EU countries, and upending European security. The fighting has not gone Russia's way, to put it mildly. The Kremlin, encountering much fiercer Ukrainian resistance than it anticipated, has for now abandoned efforts to take Ukraine's capital, Kyiv, and is concentrating forces in the country's south and east. The invasion has united NATO and the West more broadly – the opposite of what Moscow intended. Many countries in the Global South, however, have been wary of picking sides.

The war is the gravest threat to international peace and security in decades. To be clear, it does not matter more to Crisis Group because it's in Europe; every death, every casualty, every person displaced due to war is a tragedy, no matter where it happens. But Russia's invasion of Ukraine is the biggest violation of another country's sovereignty since the U.S.-led invasion of Iraq in 2003. Especially perilously, it pits Russia, the state with the largest nuclear stockpile in the world, against a smaller neighbour backed by NATO powers, three of which are themselves nuclear-armed. There is a real danger of things spiralling into direct war between Russia and NATO, a confrontation that could quickly turn nuclear.

Russia's invasion poses big dilemmas for European leaders. In Ukraine, they must balance competing imperatives: supporting Kyiv, while minimising risks of escalation into a direct NATO-Russia clash and ideally creating incentives for an end – even if it starts as a temporary pause – to the war, on terms Ukrainians can accept. European capitals must prepare for what comes next, particularly as it relates to Europe's security architecture and the EU itself. They must adapt to a world in which Russia-West hostility is ever more ferocious, doing as much as possible to insulate other crisis management from acrimony. They also need to respond to the cascade of pernicious effects the war has unleashed upon global food and energy prices and supplies, for which some governments blame Western sanctions as much as the Kremlin's aggression.

In Ukraine itself, if Russia has tempered its goals, the risks of escalation are no less severe; indeed, they are perhaps higher now than ever. Western governments are pumping in more and more powerful weaponry, partly because Ukraine's Soviet-era supplies have dried up and partly because, thus far, Russia has done little in response. Some Western leaders have stepped up rhetoric alongside arms supplies, suggesting that their long-term goals are to debilitate Russia and bring Russian President Vladimir Putin to heel. It's not hard to see things spinning out of control.

Clearly, Western arms supplies are critical for helping Ukraine hold the line and securing a settlement it can live with, but Western leaders still need to steer clear of tactics and language that carry too grave a risk of provoking a Russia-NATO war. As our entry below details, that means refraining from providing training to Ukrainian forces on Ukrainian soil and continuing to avoid their own forces' engagement, all while trying to introduce greater oversight regarding the weapons flowing in. It means emphasising that they will take their cues from Kyiv as to what peace deal or other violence reduction arrangements are acceptable: neither pressuring Ukraine to agree to something not in its interests – a ceasefire whose terms lay the ground for a fresh Russian offensive, for example – nor using language suggesting that Ukrainian victory requires immediate Russian acceptance of Kyiv's control over all Ukraine's territory, including Crimea, let alone Putin's downfall. European leaders should also ponder which sanctions levelled against Russia they might lift if there is a deal acceptable to Ukraine.

Beyond Ukraine, the war's implications for Europe's security architecture are already far-reaching. It has breathed new life into both NATO and the EU itself. In mid-May, Finland and Sweden applied for NATO membership – their break with long traditions of neutrality is a direct response to changed perceptions about the menace Moscow's belligerence and unpredictability pose. If their membership goes ahead, as appears likely, it would reinforce the alliance's deterrence and provide further reassurance to the Baltic states, offering substantial capabilities and strategic depth. The very act of their joining would contribute to what looks set to be a large NATO-scale buildup in the east. That said, both countries' ties to NATO were already tight and their militaries largely interoperable, meaning that their entry into the alliance would not significantly alter Europe's strategic balance. Thus far, Moscow has said [it will cut off gas supplies](#) to Finland in response, but beyond that its rhetoric has been fairly restrained. Nor, sensibly, have Western capitals been especially inflammatory in talking about Finnish and Swedish membership. While new deployments to the Baltics are likely, it is not clear that anything extra to their own considerable capabilities will be deployed to Sweden or Finland themselves.

As for the EU, Russia's invasion has [given new impetus](#) to the stalled enlargement process, accelerated defence integration plans and rekindled its ambition to scale up political and trade relations with former Soviet republics. Broadly speaking, the challenge for the EU, as it reinvigorates ties with eastern neighbours, is to avoid fuelling unrealistic expectations for EU accession that could easily undercut Brussels' credibility. European leaders should make clear that accession is a long and hard-to-accelerate process, but that they can develop other forms of closer association that can have earlier tangible benefits for neighbours, even as they plough ahead with the accession track.

Overall, the collapse of Russia-West relations looks set to deepen already dismal trends in multilateral crisis management. True, we should not yet despair. At the UN Security Council, Ukraine hasn't seeped into all files: in fact, Russia has yet to veto anything not Ukraine-related in 2022. Nor has renewed Russia-West hostility much affected the Iran nuclear talks: the main sticking point now – the U.S. designation of Iran's Islamic Revolutionary Guards Corps as a foreign terrorist organisation –

doesn't involve Moscow. Recent truces in Ethiopia's and Yemen's catastrophic wars weren't Ukraine-linked but show that peacemaking can trundle along and opportunities arise notwithstanding broken geopolitics. Still, despite small glimmers of light, the Ukraine war bodes awfully for collective efforts to end crises. The Security Council itself, gridlocked on major crises for years, could well become even less effective. Many efforts to end or head off crises worldwide could be doomed if bad blood from Ukraine spills across multilateral diplomacy.

The EU and European leaders should try not to let that happen. It's not only about European states on the Security Council trying to firewall disputes over Ukraine from other Council business. The entries below show how important that is more broadly. In Nagorno-Karabakh, Brussels will need to cooperate, at least to some degree, with Moscow to avert another bout of fighting and push Azerbaijan and Armenia toward steps that could shore up the region's stability. Russia needs to be involved in diplomacy to help Libyan factions resolve their new political standoff. If including Moscow openly proves too hard on either of these files, Brussels and European capitals should at least maintain discreet or, if necessary, indirect lines to the Kremlin.

Nor should European leaders be too quick to write off relations with countries edging closer to Moscow. As our entry below details, former Pakistani Prime Minister Imran Khan's anti-Western rhetoric and ill-judged visit to Moscow on the day of Russia's invasion strained Islamabad's relations with Brussels. Yet the new government that has since come to power quickly signalled that it wants to turn the page on the quarrels of the Khan years, which Europe should welcome. In Mali, relations have deteriorated further still, partly due to the coup leaders' refusal to hand over power to civilians and partly to their increasing reliance on the Wagner Group, a Russia-based private military contractor closely associated with the Kremlin. Both concerns predated Ukraine, but Western disquiet about Wagner has heightened since Russia's invasion. Yet in Mali too – as our entry lays out – opportunities may yet appear for the EU to turn the page, in this case by supporting a transition, particularly if the regional bloc, the Economic Community of West African States, can nudge the authorities in the right direction.

Lastly, the EU should do whatever it can to help countries cope with the global commodities crisis that is another horrific side effect of the war. For many countries already buffeted by COVID-related shocks, potentially disastrous gaps in food, fertiliser and other goods loom.

Several factors lie beneath shortages and price hikes. The main ones are the war itself and Russia's de facto blockade of Ukraine's Black Sea ports, which hinder the export of Ukrainian grain and other exports (land routes are congested and much less efficient). Russia has stopped exporting its own grain and other cereals, as well as fertiliser – none of which are actually under sanction. Sanctions do play a role, though: the blacklisting of key financial intermediaries has upset trade in commodities and deterred insurance companies from covering Russian maritime shipping, inhibiting their operations. Perhaps as important are the jitters generated in global markets by the war and sanctions. The grain market was tight before the war; now

India – partly due also to extreme weather – and more than a dozen other countries have imposed food export bans as a hedge against domestic shortfalls.

The commodities crisis is reverberating worldwide but its brunt will be borne by those who can least afford it. Even countries that have ways to buffer shocks will find those hard to sustain the longer the crisis endures. Foreign debts ballooned during the COVID-19 pandemic, leaving many states with little fiscal headroom and vulnerable to default. Global price hikes do not necessarily fuel unrest, but for many countries, especially those whose social contracts the pandemic has already torn at, further instability is all too plausible. The war is further testing a global humanitarian aid system that for the past few years has been creaking at the seams. Even before the war in Ukraine, funding shortfalls had forced cuts in life-saving aid to seventeen countries in Africa, plus places including Syria and Yemen. These countries are bracing for further cuts, which will mean yet more suffering for the world's most vulnerable.

International action so far has focused on increasing emergency aid, mainly by providing the money necessary to procure food supplies at today's higher prices. The U.S. contribution has been substantial, including an additional \$4.3 billion for food and other humanitarian aid that President Joe Biden signed into law on 21 May. The EU has reallocated some existing development and humanitarian funding and mobilised additional aid to respond to these emergencies, while also supporting member states and multilateral initiatives. In May, the G7 presidency and the World Bank, with participation from the European Commission, launched the [Global Alliance for Food Security](#), which will coordinate the efforts of various UN agencies and the African Union. Whether through this initiative or others, the EU and its member states should further increase their aid contributions.

The current attention to food aid is entirely appropriate given the severity of the crisis. The shock waves will grow in the months ahead, affecting not only food but economic systems more broadly. But supporting the demand for food should not be the EU's (or the world's) only concern. States and multilateral institutions also need to work on the supply side of the equation, to reestablish the smooth functioning of global supply chains for food, fuel, fertiliser and other commodities, if they hope to escape the reactive posture they find themselves in today.

The war in Ukraine poses Europe its biggest test in a generation and, however it ends, will reshape the continent's security. Supporting Ukraine, while avoiding policies that run too high a risk of escalation with Russia; preparing for what comes next; all while avoiding a global standoff that would spoil crisis diplomacy elsewhere; and, crucially, mitigating the food shortages and price hikes that the war has triggered will be no small challenge for European leaders. This Watch List Update sets out some guideposts for these efforts.

Comfort Ero, Crisis Group President & CEO

May 2022

Reuniting Libya, Divided Once More

The progress Libya made toward stability in 2021 has all but vanished. Then, an interim leader unified two competing cabinets, and rival factions agreed to schedule parliamentary and presidential elections that would eventually lead to the formation of a new elected government. But the elections were cancelled at the last minute and now the country is once again stuck in a standoff between two rival executives, one based in the western city of Tripoli and the other currently operating from the coastal city of Sirt in central Libya, with no consensus on the way forward.

The feud has not relapsed into an outright conflict, as thus far both camps and their respective foreign sponsors (some of whom have recently achieved their own rapprochements) appear reluctant to resume fighting. But the rekindled dispute over who leads Libya is eroding stability on many other levels. Economically, it has triggered new disputes over oil revenues, which account for almost the entirety of the government budget and remain for now in the hands of the Tripoli-based interim government led by Abdelhamid Dabaiba. The crisis has also prompted constituencies backing Dabaiba's Tobruk-based rival, Fathi Bashagha, to shut down a significant portion of Libyan oil production in an attempt to stop the flow of receipts to Tripoli. Militarily, the showdown has undermined already faltering efforts to unify parallel security factions and in Tripoli it has triggered occasional fighting between loyalists of the rival governments. Politically, the factions' rival claims to legitimacy and conflicting roadmaps for finding a way out of the crisis are hindering UN-backed mediation efforts.

This crisis implicates important EU and member states energy and security interests. An unstable Libya risks harming European attempts to diversify hydrocarbon imports, and reduce dependence on Russian oil and gas. Disputes over the oil and gas sector undermine supply stability in the short term and jeopardise the availability of additional resources in the long term. Another concern relates to the Wagner Group, a Russian private military contractor partnering with the Bashagha government and the aligned forces of Field Marshal Khalifa Haftar. Wagner personnel are operating in Libya's eastern and southern regions. Although the company appears to have withdrawn some of its fighters since Russia's Ukraine invasion, leaving fewer than a thousand in Libya, European capitals fear that growing confrontation with Russia could lead Moscow to use Wagner to make trouble in Libya, on NATO's southern flank. Finally, institutional divisions put at risk Europe's desire for a functioning Libyan partner to stem irregular northward migration and the spread of jihadist groups in the region.

Despite their limited leverage, the EU and its member states could still contribute to stabilising Libya:

- They should arrange for a member state to host consultations among foreign governments engaged in Libya to chart a way out of the crisis, using the model of the successful Berlin conferences in 2020-2021. If Brussels and Washington exclude Moscow from such talks, they should still keep communication channels open, even if through a third party, and in the meantime secure the participation of other influential parties, such as Egypt, Turkey, Qatar, the UAE and Algeria.

- They should urge the UN Security Council to appoint a new special representative to replace UN Special Adviser Stephanie Williams, who is set to leave at the end of June. They should encourage her successor to lay out a comprehensive plan for resolving the dispute between the two rival governments and paving the way for fresh elections. While there are many roadmap proposals, the most logical sequence would be to seek, as a first step to negotiate, a new unity government and a roadmap that prioritises parliamentary elections and leave the contentious issue of the election of a head of state to a later date. The EU and EU member states should encourage the UN to support this sequencing.
- As a member of the Economic Working Group on Libya, which also comprises the U.S., Egypt, the UN, the World Bank, the IMF and Libyan stakeholders, and is tasked with addressing economic and financial disputes, the EU should encourage the opposing factions to reach agreement on a unified state budget and create interim financial arrangements that would put state funds in a lock-box pending the achievement of a clear political objective – reunification of the executive branch. Without this step, which is missing from a U.S. proposal now under consideration, establishing temporary financial arrangements could be futile.

International Consultations

Since March, Libya has found itself once again caught in a feud between two parallel governments, each of which claims legitimacy. One is the Tripoli-based executive led by Dabaiba, who became interim prime minister following UN-mediated talks in March 2021. The other is a rival executive led from the country's east by former Interior Minister Bashagha, who received a vote of confidence from the Tobruk-based House of Representatives on 1 March. Except for Russia, which recognises Bashagha, the Dabaiba government continues to enjoy international recognition, due mainly to procedural concerns relating to the 1 March confidence vote. (UN Secretary-General António Guterres was among the most prominent voices to express [reservations](#) about the vote.) Yet the House of Representatives, Haftar – the east-based commander of the forces that laid siege to Tripoli in 2019 – and other Bashagha supporters [insist](#) that the poll was sound and that Dabaiba's continued rule is illegitimate.

Libyan factions are at odds on how to exit the [crisis](#). Bashagha demands that Dabaiba step aside. Since being appointed, Bashagha has tried to instal himself in the capital twice, but on both occasions, forces loyal to Dabaiba were able to push him out. He continues to vow to enter Tripoli peacefully, but until that moment comes, the former interior minister has proposed to base his government in the central Libyan city of Sirt. He [promises](#) to support a parliament-backed roadmap which prioritises amending a draft constitution, followed by simultaneous legislative and presidential elections in 2023. Dabaiba, on the other hand, [is committed](#) to staying in power until legislative elections, which he says he will begin to hold in the areas under his government's control in the coming months, even in the absence of an approved constitution. Other factions have started to call for a "third way", an-

other interim unity government at the helm of which would be someone other than Bashagha or Dabaiba. They consider such a “third way” a first step out of the crisis, yet they have not laid out who would be involved in negotiations over the search for a new premier or what the election roadmap to follow a new government’s creation would look like.

Against this backdrop, Libya is unlikely to find a path out of its political crisis without more vigorous international engagement, but for that engagement to be effective, there will need to be a greater level of consensus about which path to choose. That consensus could be difficult to forge. Notwithstanding wide international recognition of Dabaiba government’s legitimacy, key outside actors diverge on the steps needed to complete the transition from his interim administration to an elected government.

One group of countries, which includes [Algeria](#), Turkey and the UAE, supports Dabaiba and his declared intent to hold parliamentary elections before a presidential contest, mainly because they doubt that Bashagha will manage to gain broad international recognition or succeed in establishing his government in Tripoli, as he has publicly promised. Some may also have reservations about Bashagha or qualms about whether he could bring his preferred parliament-backed roadmap – which puts amending the draft constitution prior to simultaneous parliamentary and presidential elections – to fruition.

A second group, comprising Egypt, France and the U.S., officially recognises the Dabaiba government but tacitly supports Bashagha. Although they profess to be neutral in the feud, according to some Libyan stakeholders and foreign diplomats, these states would prefer to see the latter’s government assume power. They believe Libya would benefit from an alliance between Bashagha and Haftar, who are former enemies. For now, they still appear to think that Bashagha could take power in Tripoli, and probably for that reason, they have not actively supported the idea that the rival governments need to negotiate their unification. Whether or not Bashagha succeeds, these countries generally back the House of Representatives’ roadmap out of the impasse, which, as noted, calls for amending the draft constitution prior to simultaneous presidential and parliamentary elections. They do so largely in deference to Cairo’s opposition to stand-alone parliamentary elections, which it believes would give Islamist political factions an unacceptable leg up.

A third group, consisting of Germany, Italy and the United Kingdom, recognises the Dabaiba government and has given a more wary reception to the Bashagha-Haftar alliance, in part because they are concerned about Haftar’s reliance on Russia’s Wagner Group. This group is also sceptical about holding a presidential election in view of the insurmountable legal disputes that led authorities to cancel polls at one point slated for December 2021, but they do not have a set-in-stone preference on the path ahead. While they remain committed to supporting a UN-led political process, they appear more open than others to accepting negotiations for a new interim government and prioritising legislative elections, both over presidential ones and over amending the draft constitution.

Finally, Moscow – the sole foreign capital to officially recognise the Bashagha government – is an outlier. Its position on the steps required to complete the transition remains unclear.

Fortunately, foreign actors that have been active in Libya have thus far been unwilling to push their respective proxies into a new war, largely because former regional foes, such as Egypt and Turkey, or the UAE and Qatar, have to some degree set aside their animosities, at least for the time being. Nor, within Libya, do the rival camps themselves seem eager for renewed conflict. But in the tense geopolitical environment created by the war in Ukraine, the situation could deteriorate rapidly. Moscow could, for example, direct Haftar-aligned Russian mercenaries with the Wagner Group to stir up trouble in the country's east and south.

The best way to heal the rift that has reopened in Libya is for outside actors to arrive at a consensus on how to navigate out of the crisis and apply concerted pressure on domestic actors to steer in that direction. The EU and individual member states, like Germany, Italy and France, should immediately resume international consultations aimed at building such a consensus. As they do so, the Ukraine crisis will present diplomatic challenges relating to engagement with Russia. On one hand, Moscow's attendance at these meetings would be most useful given its informal military ties to the Haftar-led coalition. On the other hand, the EU and member states may be loath to invite Russia given the strains created by its war in Ukraine. Even if Russia does not attend, Brussels and national governments should seek to keep communication channels with the Kremlin open concerning Libya or ask a third country to convey messages – both to ensure that Moscow's viewpoint is not ignored and to guard against the possibility that it could be a spoiler, should a path forward be decided.

UN-backed Peace Process

The framework for talks that UN Special Adviser Williams has proposed for bringing together representatives of the two opposing factions is foundering. Part of the problem is that the UN-backed talks aim to reach agreement on a "constitutional basis" that would enable elections to proceed. This approach has at least two flaws. First, it does not tackle head on the problem of the rival governments but assumes that, by proposing talks aimed at creating a legal basis for elections and eventually holding such elections, the problem of the rival executives will be automatically resolved. The problem with this approach is that with rival executives in power the chances of elections taking place are slim at best.

Secondly, the talks are based on a parliament-backed approach centred around a twelfth amendment to the constitution. The Libyan parliament, which is based in Tobruk and backs the Bashagha government currently based in Sirt, adopted this [roadmap](#) in February and considers it legitimate. This plan proposes to create an expert committee to review the draft constitution and put it to a referendum prior to moving ahead with elections. But the plan is fraught with problems. It was never officially published and is rejected by the majority of the Tripoli-based rival assembly. Moreover, the approach it sets out is politically and legally controversial and, as

Crisis Group has previously [explained](#), will most likely lead to a dead end rather than constitutional reform.

The appointment of a new UN special representative to Libya could be an opportunity to rethink the UN's approach to the crisis. The EU and member states, especially UN Security Council member Ireland and permanent member France, could help in two ways. First, they should call on the Security Council to swiftly appoint a special representative who enjoys support both on the Council and among the two main Libyan factions, so as to ensure a smooth handover and avoid a gap in UN mediation. Secondly, they should make clear that the EU and member states consider the current UN approach insufficient to resolve the impasse and in need of an overhaul.

Assuming the new special representative can bring the parties back to the table (neither wishes to negotiate with the other at present), he or she will also have to grapple with whether the UN should launch a new diplomatic track to negotiate the executive branch's reunification or whether, instead, talks should continue to focus exclusively on elections. There are legitimate arguments for both options. On one hand, a government deal bringing rival factions together could provide stability, unify the country and lessen the chance of a return to violence. On the other hand, holding elections first could restore legitimacy to state institutions and precipitate a clean break from years of bad governance. On balance, however, the better approach – and the one that the EU and member states should support – is to encourage consultations between the rival factions to forge a deal on a unified executive; without such a deal, any electoral process would be contentious, especially if carried out without the other side's buy-in.

Financial Track

The feud over access to government funds is a central feature of the political crisis, and thus needs to be resolved as a matter of urgency. Both the Dabaiba and Bashagha camps argue that they are legally entitled to control this money and Bashagha has curtailed oil production in areas under his control in order to prevent revenues from flowing to Tripoli. Given the state's dependency on these income streams, the economic implications could be severe if the parties do not find at least a *modus vivendi* that allows them to resume.

Lately, the idea that an [interim financial arrangement](#) should be put in place has been gaining ground, especially among U.S. diplomats who back the creation of what they label a Mechanism for Short-Term Financial, Economic and Energy Dependability. (In acronym form, the term resembles the Arabic word *mustafeed*, meaning beneficiary.) Under this proposal, all oil revenues would sit in the National Oil Corporation's accounts at the Libyan Foreign Bank for an interim period. Only those funds necessary to cover public sector salaries and subsidies would be available to the Central Bank each month. The proposal provides that ad hoc emergency transfers from this account to the Central Bank can occur, but only with the written agreement of the Central Bank, the National Oil Corporation and the Dabaiba government.

The U.S. supported a similar mechanism in 2020, when Haftar and his backers demanded that oil revenues be kept from the Tripoli-based Central Bank in exchange for restarting oil production, and the Tripoli-based government accordingly requested that the National Oil Corporation withhold oil revenues in its accounts and release only the bare minimum to cover salaries and state subsidies. At the time, this arrangement helped stop the war between Haftar-led forces and Tripoli-based armed groups. It also added momentum to political talks that led to the formation of a unity government in 2021, when all parties realised that oil revenues would be released only after a unity government came about.

The problem with the U.S.-backed proposal is that it does not create the same incentive structure. It fails to link the temporary withholding of the oil sales revenues to a specific political objective, such that, if the parties were to take the right steps toward greater unity, the temporary withholding would cease. U.S. diplomats have suggested that they will back the freezing of oil revenues “[until there is an agreement on a revenue management mechanism](#)”, but this objective is unhelpfully vague; it is not clear what the revenue management mechanism must achieve to satisfy Washington’s criteria and who needs to agree to it. Absent this kind of specificity, the U.S. approach could yield a new financial mechanism that is aimed mainly at ensuring that Libyan hydrocarbons are put back on the market (benefiting Western buyers), but that does little to resolve the country’s political crisis. The EU should use its presence in the Economic Working Group on Libya to avoid such an outcome. It should call for an interim arrangement that would last until the parties reach agreement on a unity government – one that would put a stop to the competition between Dabaiba and Bashagha for power.

Mali: Staying Engaged Despite Souring Relations

The Malian government's conflict with jihadist insurgents has entered its tenth year with no resolution in sight. The government that came to power in 2021 has adopted a populist, anti-Western stance, blaming France, its long-time ally in fighting the militants, for the deadlock, while doubling down on offensive military action that has resulted in a surge in civilian casualties. Alienated by Bamako's rhetoric and its decision to bring in the Russian private security company Wagner, France and other EU member states are withdrawing their troops from Mali, except for those deployed in the UN's mission there. Although the Malian army has recently won limited victories in the country's centre, the departure of its best equipped allies could shift the conflict's momentum, energise militants and worsen the protracted humanitarian crisis. The authorities in Bamako have thus far shown little inclination to revive a 2015 peace agreement the government made with (non-jihadist) armed groups in the north. Meanwhile, the state has stepped up prosecution of political opponents, space for public debate is shrinking and online attacks on independent media are proliferating.

Bamako's actions have greatly complicated the task for outside actors concerned with stability in the Sahel. Though the government's feud with France has seemingly won it broad domestic support, it has worried neighbouring countries struggling to contain jihadist violence on their own soil. Bamako has also taken a hardline stance against scheduling elections that, per the previous transitional government's agreement with other West African capitals, were to occur in early 2022. Its ties with most of its neighbours are at an all-time low since the Economic Community of West African States (ECOWAS) imposed trade restrictions on Mali over the authorities' refusal to compromise on the elections issue.

Despite the withdrawal of French and European troops now under way and Mali's growing opposition to the West, the EU and its member states must endeavour to keep channels of communication open. They should avoid public disputes with Bamako that could undermine the ECOWAS efforts to help restore civilian rule in Mali, while working quietly with regional partners to nudge the authorities toward a consensual transition.

To these ends, the EU and its member states should:

- ❑ Endorse ECOWAS-led talks to forge consensus on the timeframe for Mali's return to constitutional rule, urging the parties to de-escalate polarising rhetoric and find points of compromise.
- ❑ Increase diplomatic and financial support for Malian civil society, particularly for groups that support the freedoms of movement and expression and monitor restrictions on those rights.
- ❑ Make available and, where appropriate, provide support for electoral reform initiatives, including by working with civil society organisations and relevant authorities as opportunities arise. An important improvement, which the EU and member states should support, would be to establish an independent electoral body.

Mali Alienates Traditional Partners after Second Coup

After the military overthrew President Ibrahim Boubacar Keïta in August 2020, it put in place a largely civilian government that forged good working relations with foreign partners and neighbouring countries, but the arrangement proved unstable. Military leaders continued to pull the strings of government decision-making, causing civilian officials to chafe. The government's attempts to free itself from military influence prompted army officers to stage a second coup in May 2021, installing Colonel Assimi Goïta, who had been vice president, as interim president and Choguel Kokalla Maïga as prime minister. The latter exploited hardening anti-French sentiment – the result of grievances built up over the course of years of France's military presence – by ascribing the continued deterioration of security wholly to Paris's stabilisation strategy, which since 2014 has centred around a military counter-insurgency campaign called Operation Barkhane. The new government has also significantly slowed down talks aimed at implementing the important 2015 peace agreement signed with northern armed groups, and backed by the EU and other international actors.

A series of escalating verbal clashes then set Mali on a collision course with Western and regional partners. Fierce objections by the former to Bamako's plan to bring in mercenaries from Russia's Wagner Group led to a standoff. At the same time, the government reneged on an agreement between ECOWAS and the previous transitional government that elections would be held by February 2022. In January, in response to what it saw as Bamako's provocative proposal to extend the transition by up to five years, ECOWAS restricted regional trade with Mali and froze the country's financial assets. Additionally, the bloc imposed individual sanctions on senior government officials. These penalties deeply aggrieved Mali's leadership, which called for street protests and alleged that ECOWAS was acting under foreign pressure. The regional standoff affected another grouping, the G5 Sahel, which aimed to promote security and development in the five countries, although in fact little has been achieved. Mali effectively left the group in mid-May when its partners refused to hand its rotating presidency over to Bamako's military leaders.

Against this backdrop, relations between Mali and European partners quickly worsened. On 24 January, authorities told the Danish government to immediately withdraw a 90-strong contingent that was to operate within Takuba, a European task force that France had helped assemble to complement Operation Barkhane. The Malian authorities claimed Denmark had flouted procedure. A week later, angered by the French government's disparaging remarks about the transitional authorities' legitimacy, Bamako expelled the French ambassador. At that point, and following in ECOWAS' footsteps, the EU on 4 February imposed travel bans and asset freezes on five prominent officials, including Maïga, for undermining the transition.

Since then, the rift has widened further still. As it became clear that Russians in camouflage gear were indeed arriving at military bases in central Mali – despite the authorities' emphatic denials that they were working with Wagner – French President Emmanuel Macron said the French counter-terrorism force's presence in the country had become untenable. On 17 February, he announced that French and

other European troops part of the Barkhane and Takuba operations would withdraw and redeploy to other countries in the Sahel by June. In April, the EU suspended its training of Mali's army, though it has kept offering humanitarian law courses, and giving strategic and organisational advice to the military command and the government, especially the defence ministry. Around the same time, the country's centre saw a modest improvement of security following army pressure on jihadist groups, allowing for a return of some displaced people and some timid renewed economic activity.

The Malian government says security has improved because it is "diversifying partnerships", arguing that its efforts will create an enabling environment for eventual elections. Authorities appear to genuinely believe that Russian assistance, which includes rapid delivery of arms purchases and the presence of Russian paramilitaries alongside the national army in combat situations, can help respond to the Malian people's desire for progress in the counter-insurgency campaign. They attribute the improvement in security in some areas to new military equipment and Russian "instructors". The army has amplified news of its advances through a vigorous communications campaign.

But it is far from certain that the army will be able to keep its new foothold in the centre. Recent history shows that the army lacks capacity to hold areas for any length of time and that jihadist groups quickly return, often bent on revenge against civilians perceived as having helped the authorities. Meanwhile, insecurity still plagues other parts of the country. The impending departure of Barkhane and Takuba forces could see jihadist groups opportunistically expand their operations, while the UN force will be weakened as it previously relied on air cover, as well as medical and logistical support from the French. The humanitarian situation remains dire, in terms of both displacement and civilian casualties. In addition, while the French mission drew its share of human rights complaints, Wagner's track record gives reason to believe that abuses will get worse with the European troops gone and Wagner "instructors" influencing the army's behaviour.

Indeed, recent Malian military actions point to soldiers' disregard for the requirements of international humanitarian law and a heavy toll on the civilian population. In April, the army said it killed 203 militants during an operation in the village of Moura. According to multiple reports by human rights organisations and international media, the operation turned into a bloodbath as troops and Wagner mercenaries summarily executed hundreds of civilians they accused of collaborating with jihadists. The government barred the UN from investigating the incident.

There are also signs of a growing political crackdown. The judiciary has arrested or opened cases against opposition leaders, notably several who are very critical of the prime minister, for engaging in destabilising activities and inciting ethnic divisions, and jailed two politicians for criticising the head of government. (Their criticism of him is not the stated reason for the arrests.) Further, the government is using anti-Western sentiment as justification for circumscribing the space for public debate – accusing its opponents of siding with foreign powers. Activists, journalists

and members of the political opposition are expressing growing concerns about their ability to work freely or counter official narratives.

How the EU Can Stay Engaged

The EU has long sought to take a comprehensive approach to the situation in Mali, emphasising political solutions to the challenges the country faces, good governance and social, environmental and economic development. It has in the last several years [promised a surge of support](#) for civilian leaders across the Sahel to assist them in promoting good governance, but with violence rising, that proved hard to implement. Now, the standoff with Bamako has left European diplomats at a loss, not just about how to put its strategy into practice, but also how to salvage relations. Staying engaged at member state level in the UN mission in Mali, in line with the German government's 11 May announcement that it would boost its troop contribution, is a good step. In addition, there are three important things they can and should do.

First, the EU and its member states should throw their weight behind ECOWAS diplomacy as the bloc tries to persuade Bamako that it must agree to a deadline for a return to constitutional rule. [Recent statements](#) by the two sides indicate that tensions between Bamako and the bloc may be easing, raising prospects for an agreement. Through quiet diplomacy and (when appropriate) public support, the EU should use its good offices to help these negotiations move toward consensus. At this point, further EU sanctions would likely complicate an already delicate negotiation. Rather, the EU should signal its willingness to start dialling down sanctions if progress is made with the West African body.

Secondly, the EU should build on its existing support for Malian civil society organisations to counter tightening restrictions on freedom of expression. With international rights groups and foreign media finding it increasingly difficult to work in Mali, domestic groups will play a vital role in highlighting abuses and restrictions and in ensuring a healthy public debate, but they are facing mounting pressure. The EU's diplomatic and financial support can help them sustain their activities, which are valuable both in the short term and in the run-up to eventual elections. While there is some risk that Western funding will undermine the credibility of local NGOs, the EU can at least partly mitigate it by working with groups that are well-established in their locales and sectors, including the many vibrant women's groups working outside the capital. For the moment, given the tense political atmosphere, the EU should avoid highly visible initiatives.

Thirdly, the EU and its member states should offer their support for electoral reform initiatives. Many European diplomats in Brussels and the Sahel understandably worry that the authorities will use promises of major reform, and potentially constitutional amendment, as a pretext for delaying the transition to constitutional rule. Nevertheless, there is [wide agreement](#) that some reforms are needed and the EU should make clear that it is ready to help flesh out necessary restructuring to move toward elections. Perhaps most important among the reforms under discussion is the establishment of an independent electoral body, which the EU and member

states should support. Such a body would both absorb the territorial administration ministry's role in organising elections and limit the constitutional court jurisdiction for the arbitration of electoral disputes. Both steps would be important for increasing public trust in election integrity, as [many Malians accuse](#) the territorial administration and court of meddling in 2020 parliamentary contests in favour of the ruling party. While there appears to be solid domestic support for establishing an independent elections authority – it was identified as a priority in forums like the 2019 national inclusive dialogue, the 2020 national concertation days and the national refoundation meeting of December 2021 – actually creating one will be a significant undertaking. It will require complex legislative changes and additional resources. The EU should make clear that it can and will help with both technical and financial support.

New Opportunities for Mediation in Nagorno-Karabakh

In the shadow of Russia's war in Ukraine, a series of clashes and a subsequent period of quiet have raised both fears about renewed fighting in Nagorno-Karabakh and hopes that diplomacy might still bring the parties closer to peace. In March, Azerbaijani forces seized territory around Farukh, an ethnic Armenian-populated village that has been patrolled by Russian peacekeepers since a ceasefire ended the 2020 war that upended an almost three-decade status quo in the region. The Armenian government, along with Nagorno-Karabakh's de facto authorities, worried that the move might herald a broader Azerbaijani offensive, taking advantage of Moscow's focus on Ukraine. But subsequent talks between Yerevan and Baku appear to have calmed the situation and even suggested some areas for future engagement, indicating that neither side has ruled out the possibility of a peaceful settlement, although the two remain far apart on many core issues. While it remains unclear whether the situation will deteriorate or improve, the EU can help coax things in a positive direction by facilitating diplomatic efforts, preserving Russia's positive role in conflict resolution and making clear that it will stand behind any agreed steps toward an eventual settlement, with financial and technical support.

To enhance prospects for peace, the EU and its member states should do the following:

- ❑ Having already brought leaders from Armenia and Azerbaijan together for talks, Brussels should work with both sides to develop a format and agenda for further negotiations – including by providing a venue, facilitating regular working groups on specific issues and using its good offices to try to iron out differences among state and military officials at all levels.
- ❑ Brussels should also continue to help the two countries resolve disagreements over their common border – particularly at flashpoints, such as Azerbaijan's Kelbajar and Armenia's Gegharkunik, which have seen particularly deadly skirmishes since 2020. At the same time, the EU should preserve the role of the Organization for Security Cooperation in Europe's (OSCE) Minsk Group, which has been the main international format for negotiations on the Nagorno-Karabakh conflict and still has an important – albeit likely more limited – role to play.
- ❑ Despite rising tensions between Moscow and European capitals amid the war in Ukraine, the EU should continue to support Russia's efforts to resolve the dispute between Armenia and Azerbaijan, avoiding actions that suggest it is looking to block any mediation efforts by Russia.
- ❑ Brussels should make clear that, as the region's largest donor, it is prepared to fund a peace dividend in the form of financial support toward easing the countries' most pressing socio-economic problems, including by helping meet the needs of displaced people, in the event that the parties reach a peace settlement. In the meantime, it should boost funds to help clear landmines and unexploded ordnance from conflict zones, which are now too dangerous for reconstruction or resettlement.

- ❑ The EU and member states should not neglect engagement with de facto authorities and residents of Nagorno-Karabakh. Indeed, it should communicate to a sceptical Baku that such engagement is essential for ensuring buy-in to any future peace deal. The ethnic Armenian population of Nagorno-Karabakh is nervous that a deal will mean full Azerbaijani control of the enclave, forcing them to flee. Support for these people's post-war needs will be crucial to sustaining a deal, but it must be carefully managed, as Baku views any engagement with Nagorno-Karabakh's de facto authorities as undermining its claim to the territory.

Dangerous Currents to Be Navigated

The beginning of 2022 saw violence in Nagorno-Karabakh conflict zone reach its highest point since a Russian-brokered ceasefire in November 2020 ended the second war between Armenia and Azerbaijan in and around the Armenian-majority enclave of Nagorno-Karabakh. The first war, which lasted from 1992 to 1994, had concluded with Nagorno-Karabakh having declared independence that no one recognised and seven neighbouring Azerbaijani territories under Armenian control. In the 2020 fighting, Baku took back part of Nagorno-Karabakh along with those seven adjacent territories. Under the new ceasefire deal, Russian peacekeepers deployed to the areas of Nagorno-Karabakh still held by ethnic Armenians after Armenia's troops withdrew.

A spate of flare-ups since has nevertheless disrupted the ceasefire, fuelled by frustration on both sides over the fragile status quo. The recently redrawn front lines separating de facto and Azerbaijani forces are closer to ethnic Armenian settlements than before, in some cases cutting directly through them and complicating daily life. Azerbaijan remains concerned that Nagorno-Karabakh's de facto authorities have retained an armed force, with Baku arguing that it is illegal and that Russian peacekeepers should disarm it, and Armenia and the de facto authorities saying its disarmament was never part of the ceasefire deal. For their part, Armenia and the de facto authorities have accused Azerbaijan of intentionally damaging a pipeline bringing gas into the enclave, leaving Nagorno-Karabakh Armenians without their primary source of heating for almost a month in extreme cold weather conditions. Baku rejected the allegations.

The seizure of Farukh in March was especially significant, however, as it was the first time since the 2020 war that Azerbaijani troops penetrated the Armenian-populated area of Nagorno-Karabakh and established positions there. Following several days of clashes, which de facto authorities in Nagorno-Karabakh's main city of Stepanakert said killed at least three ethnic Armenians, Azerbaijani forces took control of the Farukh area. (Crisis Group uses Soviet-era place names for locations in Nagorno-Karabakh.)

After moving into Farukh, Azerbaijan denied it had violated the November 2020 ceasefire agreement. Moscow, Paris and Washington called for it to withdraw, but Baku said it had no intention of doing so, as the village is part of its internationally recognised territory. Because Farukh lies in a strategic spot, surrounded by mountains giving direct views deep into Armenian-populated areas, this sequence of

events prompted concerns in Yerevan and Stepanakert that Baku might have decided to press its advantage, leveraging both Moscow's divided attention as it pursues its campaign in Ukraine and Azerbaijan's much stronger military position since the 2020 war to mount a new offensive.

The spring witnessed an easing of tensions, however, following a 6 April meeting between the leaders of Azerbaijan and Armenia in Brussels, at which they declared their readiness to start talks on a peace agreement. Subsequent diplomacy by both Moscow and Brussels helped reverse the escalatory dynamic between Armenia and Azerbaijan. On 11 April, the two countries' foreign ministers held their first publicly announced telephone call in over 30 years, a milestone in bilateral engagement. Two days later, Armenian Prime Minister Nikol Pashinyan [said](#) he would be ready to soften Yerevan's longstanding insistence that talks address the question of Nagorno-Karabakh's independence claim if that would prevent a renewed war. The residents' security and rights, he said, were more important.

But, for all the positive rhetoric, there is no reason to think negotiations will be easy-going from this point forward. Baku has not responded to Pashinyan's statement, while [Armenian opposition leaders](#) angrily denounced it as a betrayal and [Stepanakert](#) reconfirmed its demand for independence from Azerbaijan. Moreover, to date, Azerbaijan has shown no willingness to give special security and rights assurances to ethnic Armenians in Nagorno-Karabakh, saying they will have the same rights and security as all Azerbaijani citizens should Baku take over the entire territory. Without such assurances, however, Armenia will almost certainly find it impossible to publicly and formally recognise Azerbaijan's control of Nagorno-Karabakh.

Shifting the Momentum toward Peace

Brussels, the only party besides Moscow to bring Armenian and Azerbaijani leaders together since the ceasefire to the 2020 war, has played a tremendously useful role in keeping contacts going. In 2021, in response to particularly sharp firefights along the stretch of border separating Kelbajar in Azerbaijan from Gegharkunik in Armenia, the EU helped relaunch a hotline linking the two sides' defence ministries, which has significantly decreased tensions in the troubled border area. Since then, Brussels facilitated several meetings that have allowed the two sides to proceed with both talks on demarcation of the border.

The EU can and should continue to do more to help revitalise diplomacy, but it will need to work with others to be most effective, starting with the Organization for Cooperation and Security in Europe's Minsk Group. The Minsk Group is jointly chaired by Russia, France and the U.S. Though it has struggled since 1994 to produce a breakthrough in resolving the conflict, it has an international imprimatur and the benefit of continuity. It appeals to Yerevan and Stepanakert, as it has long recognised the needs of ethnic Armenians living in Nagorno-Karabakh and kept the question of the region's status on the table. Even Baku agrees that the OSCE process may be helpful in supporting confidence-building measures, such as contacts between Azerbaijanis and Nagorno-Karabakh's ethnic Armenians, although it has long been critical of the process as failing to resolve the conflict – a view that hard-

ened after its 2020 military success. Now, with the Ukraine war raging, ill will between Russia on one hand, and France and the U.S. on the other, risks impeding the process's viability. In recent weeks, Moscow has [accused](#) Paris and Washington of boycotting the Minsk Group, which both denied. All three, as well as Armenia, insist that it remains a live format. Diplomacy by Brussels and EU member states should include coordination with the OSCE Minsk Group co-chairs and should not seek to replace the format.

In general, the EU will also need to find a way to work directly or indirectly with Moscow. Russia, long the leading outside power in this conflict, is preoccupied with Ukraine and the worsening standoff with the West. It fears being sidelined in negotiations if it loses influence with Baku and Yerevan. Aside from accusing France and the U.S. of abandoning the Minsk Group, Moscow has also alleged that the EU itself is trying to cut it out of peace talks. While Russia's aggression in Ukraine may indeed tempt Brussels to try weakening it in the South Caucasus, it remains the only country that has been willing to dispatch forces to the region. Even distracted, Moscow pays more attention to Armenia and Azerbaijan than does either Brussels or Washington. As a trade partner of both countries (indeed, Armenia's largest), it retains meaningful leverage there. Working with Moscow, distasteful as it may seem in European capitals, improves the odds of bringing peace to the region, while working against it, or in a disconnected parallel process, would complicate the equation. Thus, even as they continue to impose costs on Russia for invading Ukraine, EU diplomats could, at least privately, indicate that they welcome Russian engagement on Nagorno-Karabakh, including the peacekeepers, and quietly cooperate to ensure that different sets of talks – such as the Minsk Group, EU-hosted meetings and talks on border demarcation – reinforce, rather than exclude each other.

Brussels will also need to engage with Turkey. The country's role and perspective with respect to conflict resolution are different from the EU's given Ankara's longstanding support of Baku. But today, with Turkey and Armenia taking tentative steps toward establishing contacts, Ankara has an increased interest in preserving stability. The EU should encourage Ankara's instincts in this direction, supporting engagement between Turkey and Armenia.

Aside from collaborating with other outside powers, the EU can help sweeten the deal if peace appears to be at hand. So far, the Union's economic assistance to Armenia and Azerbaijan – which has no provision for direct support in Nagorno-Karabakh – excludes any condition related to the conflict settlement. Brussels should use its economic leverage to encourage progress in negotiations. By making clear that peace will boost European investment and development aid, it will make any difficult compromise more palatable. Northern Ireland, though very different and until recently inside the EU itself, could serve as a model. To cement a 1998 accord, the EU promoted a "peace dividend" by funding a wide range of bottom-up and inclusive projects to support infrastructure, urban regeneration, young people and small businesses – the kind of initiatives long absent in Nagorno-Karabakh.

In the same connection, the EU should prepare to step up its aid to Armenia, which is poorer than Azerbaijan and already hosts people displaced by the 2020 fighting. It could find itself absorbing more if a peace deal leads ethnic Armenians to feel unsafe in territory controlled by Azerbaijan or if a new war provokes additional displacement from Nagorno-Karabakh. This aid could build on critical EU funding that already supports Armenian infrastructure projects and economic revival. In addition, EU member states that reduced bilateral aid after the 2020 war (like Germany, which is a major development donor) should renew their funding to help the two countries deal with post-conflict challenges.

Azerbaijan too could benefit greatly from EU support, notably for its mine clearance efforts, as it looks to enable over 600,000 people displaced in the early 1990s to return to territory it regained in 2020. This land is heavily mined, resulting in the deaths of several dozen Azerbaijanis since 2020. Mine clearance, moreover, is expensive. Local authorities in Azerbaijan say a mine costs \$3 to set, but up to \$1,000 to remove. The EU could work with Azerbaijan to organise a donor conference on landmine removal and explore other support programs.

The EU should throw its weight behind convincing Baku that it is in the interest of peace to let mediators (such as the EU special representative for the South Caucasus and the crisis in Georgia) visit the conflict zone and meet de facto and civil society representatives. Member states that are strengthening their ties with Baku, as they diversify their energy supply due to the Ukraine war's fallout, should drive home the same message. Doing so can only help the peace process, which, if it inches forward, still risks being derailed by potential "spoilers" – leaders, parties or interest groups who feel they are being left out. Indeed, engagement by the EU special representative with Nagorno-Karabakh's ethnic Armenians could go some way to easing their fears that a deal will be struck without their involvement and full consideration of their concerns. The EU should step up the aid it has provided through the Red Cross for people displaced by the conflict, as this assistance can also go a long way to making this isolated community feel more secure.

A durable solution to the Nagorno-Karabakh conflict is not yet within reach. But if outside actors can allow each other space to play their respective roles, it may be possible to fend off a return to war and help make a settlement more plausible.

Keeping Turmoil at Bay in Pakistan's Polarised Polity

Though Pakistan's former Prime Minister Imran Khan was ousted through a democratic, constitutional process, he has denied the new government's legitimacy, a tack that could lead to violence. The strategy Khan has relied on since parliament passed a no-confidence vote against him on 10 April has two goals: to undermine the coalition government led by Shehbaz Sharif and to galvanise popular support for new polls. Khan accuses his political opponents, now heading a new government, of conspiring with the U.S. to remove him, and is calling on his supporters to reject "foreign-imposed regime change". He also bears grudges against the Supreme Court for upholding the constitutionality of the no-trust vote and against the country's powerful military for refusing to back him in the standoff. Khan's only hope for a political comeback seems to lie in building mass opposition to Sharif's government and forcing it to hold general elections well ahead of the scheduled 2023 date. He assumes that the military high command would back new polls, much as his relations with the top brass have soured, in order to keep political turmoil at bay. Yet his own approach – his refusal to accept the authority of the apex election body, the Election Commission of Pakistan (ECP) – dents the prospect of a peaceful post-election transfer of power.

The Sharif government has taken a resolutely different direction from that of its predecessor. It is seeking to re-engage with key diplomatic and trading partners, particularly the European Union and the U.S. In an effort to stem the economic downturn, worsened by the war in Ukraine, it has appealed to international financial institutions, including the International Monetary Fund (IMF) and the World Bank, for support. The coalition government has also taken tentative steps to improve democratic governance, including by removing some curbs on media freedom. Additionally, it has pledged to enact legislation reforming the electoral process prior to holding new polls.

The political, economic and diplomatic challenges confronting the new government are compounded by deteriorating security. Khan's anti-Western rhetoric risks emboldening Islamist militant and jihadist forces in the country. Militant violence is already surging, particularly in Khyber Pakhtunkhwa province's tribal belt bordering Afghanistan, straining relations between Islamabad and Kabul's Taliban-led authorities. Political polarisation could worsen and erupt into violence, weakening parliamentary institutions, while sapping the state's capacity to counter security threats.

To help lower these risks, the EU and its member states should:

- ❑ Use the structured dialogues that are part of the EU-Pakistan cooperation framework to build a constructive working relationship with the new government on political, security and foreign policy issues of mutual concern, and pursue plans to hold the first official EU-Pakistan Security Dialogue. Repairing ties with Islamabad would help undo damage done by Khan's conspiracy narrative.
- ❑ Hold talks with the new government on the renewal of Pakistan's status under the EU's Generalised Scheme of Preferences Plus (GSP+), which provides substantial trade benefits to Islamabad and is set to expire at the end of 2022, in-

cluding by moving forward with the European External Action Service's GSP+ mission that was put on hold amid the Pakistani political crisis.

- Assist Sharif's government in expanding the social safety net, with special attention to women and girls, and in rebuilding militancy-hit regions, particularly in Khyber Pakhtunkhwa's tribal belt abutting Afghanistan, thus thwarting militants looking to take advantage of local alienation.
- Promote electoral reforms to stop the forthcoming elections from sparking violence and prepare to send an election observation mission, as past missions have helped identify problems in the electoral process.

The Costs of Populist Rhetoric

Since his dismissal, Khan has relied on an anti-Western narrative to attack his opponents and incite his supporters. Addressing large rallies in Karachi, Peshawar, Lahore and other cities countrywide, and using social media to spread his message to his youthful supporters, Khan has alleged that the U.S., angered by his "independent foreign policy", conspired to remove his government. He cites as evidence a diplomatic cable, which he calls a "threat letter", sent by Pakistan's then-envoy to Washington after a 7 March meeting with a top State Department official. Khan claims that the U.S. was antagonised by his refusal to cancel a trip to Moscow on 24 February, the day Russia invaded Ukraine, and by his opposition to the U.S. war in Afghanistan – he says he rejected Washington's demands for military bases in Pakistan for operations next door.

Khan's allegations are targeted at political opponents but also the judiciary and army. He has accused the Pakistan Muslim League-Nawaz and Pakistan Peoples Party, who now spearhead the coalition government, of conniving with the U.S. to remove his Pakistan Tehreek-e-Insaf (PTI) government. Khan turned to these allegations when the opposition, supported by most of his coalition partners, moved to vote no confidence in his leadership. The charges formed the bedrock of the deputy parliament speaker's case for dismissing the motion and President Arif Alvi's case when on 3 April he dissolved the National Assembly. Had the dissolution stood, it would have required new polls within 90 days. But on 7 April, the Supreme Court reversed both actions as unconstitutional and the no-confidence motion went ahead, resulting in Khan's removal on 10 April and Sharif's election as prime minister the next day. Khan's supporters subsequently took to social media to lambast the Court, but also Pakistan's military leaders, who stayed neutral during the show-down.

Following his ouster, Khan opted to take to the streets, hoping to whip up popular sentiment against the Sharif government, as well as the PTI dissidents who had chosen to back it. Khan accused the new government's entire top leadership of corruption, based on charges filed against them by his government. He insisted that they had bought the loyalty of those PTI lawmakers, both federal and provincial, who have lined up behind them. Most PTI members of the National Assembly, the lower house of parliament, resigned en masse upon Khan's instructions. Khan

has since asked the Supreme Court to bar those who refused to quit, and other PTI dissidents in the Punjab assembly, from legislative office for life, and many of them have been forced into hiding by PTI supporters' threats of violence. The Court has passed over this request, but on 17 May, it did rule that votes of party defectors on no-confidence motions, or elections for prime minister or chief minister (the top office in Pakistan's provinces), cannot be counted. That decision has direct implications for Punjab, the country's most populous and politically weighty province, where provincial lawmakers, including some two dozen PTI dissidents, chose Sharif's son Hamza over Khan's nominee as chief minister in mid-April.

In this atmosphere of heightened polarisation, Khan's call on his supporters to march on Islamabad and to remain there until his demand for new elections is met could lead to deadly violence. Accepting Khan's conspiracy narrative at face value, the PTI base is infuriated by their leader's ouster. With such a ready audience, Khan's inflammatory rhetoric aimed at besieging the federal capital could fuel bloodshed, paralyse the government and force a military intervention that would lead to new polls. Indeed, some analysts believe that may be Khan's intent. The PTI used similar tactics in 2014, when its sit-in against Nawaz Sharif's government saw party activists attack parliament and other government buildings, bringing the administration to a standstill. Addressing a rally in late April, Khan called on the army to endorse holding "early elections". The military, however, took no sides in the lead-up to the prime minister's ouster and seems disinclined to change its stance in the aftermath. Khan's attempts while prime minister to intrude on the military's jealously guarded institutional autonomy are likely one reason for the high command's lack of support. His meddling included a reported attempt to nominate his own man as army chief to replace the incumbent, who is set to retire in November. Army officials, meanwhile, have long been concerned about the adverse implications of the former prime minister's anti-Western conspiracy narrative and his criticism of the EU and U.S., both key diplomatic and trading partners.

Even before Khan was ousted, army chief Qamar Javed Bajwa [tacitly rebuked](#) his anti-West and pro-Russia rhetoric, saying Pakistan has "very cordial historic relations with both camps". Since Khan left office, however, the military has become more explicit in repudiating his specific claims, one of which is that the high command endorsed his allegations of U.S. skulduggery at a 31 March meeting of the National Security Council. In mid-April, the military spokesman reminded journalists that the Council had issued a statement following the 31 March meeting; they could read it themselves to see that it contained no mention of a U.S. "conspiracy". As for what Khan calls the "threat letter", the spokesman explained that the State Department official had used undiplomatic language in the 7 March meeting with the Pakistani envoy, amounting to "interference" in Pakistan's internal affairs. The envoy's cable – the so-called letter – had merely informed the foreign ministry of this interaction. Islamabad then sent a demarche to Washington, but that is where the matter stopped. The spokesman further rejected Khan's claim that the U.S. asked Pakistan to provide bases on its territory. He concluded by emphasising that the high command had stayed neutral in the political standoff in accordance with the military's constitutional role. On 22 April, in another statement, the Council express-

ly denied the existence of a U.S. plot to oust Khan. Nonetheless, the ex-prime minister persists in saying the army backs his claims.

Khan's relationship with the military could be damaged beyond repair if he opts to violently oppose the Sharif government at a time when militant attacks are surging. Attacks by Pakistani Taliban militants, particularly in Khyber Pakhtunkhwa's merged tribal districts at the border with Afghanistan, have escalated in recent weeks, killing or injuring scores of soldiers. The spike in cross-border attacks and military casualties is straining Pakistan's ties with its Afghan Taliban allies. For the first time since the Taliban takeover in Afghanistan, Pakistani warplanes have reportedly attacked Pakistani Taliban targets in Afghan territory. At a time when the Pakistani Taliban are making a comeback, taking advantage of Afghan havens, the military high command is likely particularly concerned about Khan's anti-Western rhetoric. His allegation that the Sharif government is "foreign-imposed" – in other words, forced upon an Islamic country by meddling Westerners – could give the Pakistani Taliban yet another rallying cry with which to raise funds, find new recruits and attack state institutions.

Opportunities and Constraints

The coalition government faces major economic challenges. GDP growth is low; the current account deficit is unsustainable; foreign exchange reserves are fast depleting; and soaring inflation rates, now driven up further by the Ukraine war and the sanctions on Russia, have raised fuel and food prices. Mending relations with the West, particularly the EU and U.S., its major trading partners, is therefore a top policy priority. Sharif and his cabinet ministers recognise that the EU, through the GSP+ and the trade benefits it provides, is a major source of much-needed assistance for Pakistan's faltering economy, and hence they have vowed to strengthen diplomatic and trade relations with the bloc. Pakistan also needs U.S. support as it approaches the IMF and the World Bank for financial assistance, a task that the government should undertake with some urgency if it is to prevent an economic meltdown. Successful negotiations with the IMF for resumption of a multibillion-dollar loan program will require withdrawing Khan's economically unviable populist measures, such as high subsidies for fuel and power. The government has been slow to act as prices rise and its indecision is further weakening the country's floundering economy.

With poverty levels rising and food price inflation at an all-time high, if the government fails to provide social safety nets for the poorest and most vulnerable households, public anger could play into the opposition's hands. The Sharif government has made some promising commitments. For instance, it has committed to continued support for the Benazir Income Support Program (BISP), which provides targeted assistance in the form of cash transfers to women who head households falling below the poverty line. Islamabad should consider using savings made by discontinuing Khan's financial awards to loyalist parliamentarians and tax amnesty schemes to increase both the amount of BISP cash transfers and the number of grantees.

The coalition government has also moved to reverse steps taken under Khan to reduce media freedom and civil space more generally. Intolerance of criticism was a hallmark of the PTI government, with female journalists in particular bearing the brunt of party activists' social media attacks. It has yet to become clear, however, if the Sharif government's commitment to protect freedom of expression and association will translate into durable action.

Like its predecessor, the Sharif government could be forced to accept the military's policy preferences. This tendency is already evident in a crackdown on criticism of the military on social media websites. The military's red lines have even determined the new cabinet's formation. After agreeing to include in his cabinet Mohsin Dawar, the National Assembly member from North Waziristan, the founder of the civil society-led Pashtun Tahafuz Movement and an outspoken military critic, Sharif now seems to be backtracking. Still, Dawar accompanied the prime minister when he visited Khyber Pakhtunkhwa's North Waziristan district less than a fortnight after taking office. During the visit, Sharif pledged to improve civic facilities such as schools and health clinics. Such civic assistance should be targeted at women and girls, whose access to education, health care and other basic services has severely declined due to both militancy and military operations in this and other conflict-hit zones.

With general elections due no later than October 2023, time constraints will limit the coalition government's capacity to carry out governance and economic reforms. It should therefore focus on the most pressing. Clarity on economic policies, including through successful negotiations with the IMF, could help address economic uncertainty, but given the tight timeline electoral reform requires a particularly urgent response. Rejecting Khan's calls for elections before such reforms are enacted, the coalition partners intend to work in parliament to identify gaps and flaws in electoral laws and processes.

Khan's rejection of the ECP's neutrality and refusal to cooperate with parliament might make it difficult to obtain political ownership of the electoral reform process. The parliamentary coalition, composed of nine political parties with widely ranging ideological and regional constituencies, is fairly representative of public opinion. It should, however, also consult civil society, including women's and rights groups, as it devises electoral reform. Moreover, respect for the ECP's autonomy and authority will be crucial for any credible election. The ECP's preparations for the general elections, which could be complete by May 2023, include delineating constituencies, possibly based on a new census. This exercise should ensure that all sidelined groups, including women, are properly represented. Close cooperation between the executive and election authorities will also be needed to address a sizeable gender gap, close to 20 per cent, in the registration of female and male voters. An aggressive drive, with donor support, is needed to ensure that women are issued computerised national identity cards, a prerequisite for registering as voters. The card is also required for access to financial assistance earmarked for women, such as through the BISP.

Moving Ahead

The EU should respond positively to the Sharif government's stated desire to reset the diplomatic ties that the former prime minister's anti-Western agenda adversely affected. Islamabad's growing concerns about militant threats, including from across the Afghan border, offer new opportunities for a security dialogue on issues of mutual concern. The extension of badly needed economic assistance would be particularly helpful to the new government, as it faces an unprecedented economic crisis.

Brussels should also look into expanding bilateral trade and investment ties with Islamabad, notably by renewing Pakistan's GSP+ status, while making clear that the renewal is tied to human rights, rule of law and democratic governance conditions that the EU will monitor closely in the coming months. To assess the progress Islamabad makes on these conditions and to use the leverage that renewal can bring, the European External Action Service should move forward with its GSP+ mission, which was postponed due to Pakistan's political crisis. In its dialogue with Islamabad, the mission should particularly focus on issues pertaining to the protection of women and children, as well as the enforcement of the freedom of association and speech enshrined in Pakistan's constitution.

Further, the European Union should support the new government's efforts to provide social safety nets to the poorest and most vulnerable households, worst affected by the economic crisis. It should provide financial and technical aid to assist Pakistan in giving all women computerised national identity cards to afford them access to existing social safety programs, such as the BISP, and to any new ones (as well as to the ballot box). Brussels should also work with Islamabad in helping residents of the conflict-hit zones of Khyber Pakhtunkhwa province, particularly the tribal belt on the border with Afghanistan. Women and girls, who have borne the brunt of both militancy and military operations, should be a key target of such assistance.

Finally, the EU should encourage parliamentary reforms of the electoral legal framework. It should, for instance, urge Pakistan to consider the recommendations of the 2018 election observation mission, particularly with regard to restrictions on freedom of speech and association. Brussels should also consider sending an election observation mission for the forthcoming general elections, which would, as in the case of past missions, advise the ECP and the incoming government on areas of particular interest for electoral reform. At the very least, a credible electoral process may curb the potential for electoral disputes to degenerate into violence.

The Ukraine War: Europe's Critical Challenge

Russia's military assault on Ukraine, now in its fourteenth week, has deeply unsettled European security and is likely to have profound implications for the EU itself. On 24 February, Russian forces attacked Ukraine from the north, south and east, transforming a simmering eight-year conflict in the country's eastern Donbas region into a war that arguably poses the gravest risk to international peace and security in decades. Russian forces encountered stiff Ukrainian resistance, soon reinforced by Western-supplied weapons and body armour, forcing Moscow at least to postpone its goals of overthrowing the government in Kyiv and bringing Ukraine back into Moscow's sphere of influence. Russia now seemingly seeks, in the near term, to maintain control of captured territory connecting Russia to Crimea, which Moscow annexed in 2014, and to gain land in Donbas beyond what Russian-backed separatists controlled as of 24 February. Even with more limited objectives, however, its forces appear to be struggling along some front lines, though precise battlefield dynamics are hard to gauge. The Kremlin continues to describe Kyiv's government as "Nazis", moreover, suggesting that its overall aims have not changed.

Meanwhile, the rhetoric of some leaders in the Western countries that back Ukraine – including EU member states and their transatlantic partners – suggests that their goals in the war have expanded. Western leaders continue to say they will not fight Russia directly, but they are sending heavier weaponry and allocating greater resources for Ukraine. Some hint that their aim is Russia's strategic defeat, including a Ukrainian victory that recovers for Kyiv all the territory it has lost to Moscow since 2014, Russian reparations payments and war crimes tribunals. This approach risks raising the stakes to where neither side has room for compromise and edging toward an escalation into direct conflict between NATO and Russia.

Since Russia's invasion, the EU and its member states have faced a difficult balancing act. They have simultaneously sought to support Ukraine while avoiding too grave a risk of escalation. While genuine peace talks appear some way off, European leaders should aim to create, as best possible, incentives for both sides to get to talks and lay the groundwork for greater stability in a European security order that will continue to evolve in the years to come.

As they work toward these goals, the EU and its member states should:

- ❑ Keep sending weapons and non-lethal material and financial assistance to help Ukraine hold the line against Russia's invasion, but improve oversight regarding those deliveries. EU leaders should also refrain from providing training on Ukrainian soil and continue to avoid engagement of their own or allied, or partner forces in the fight.
- ❑ Emphasise publicly that they will follow Kyiv's lead as to what peace deal or other violence reduction arrangements are acceptable. They should not push Ukraine to agree to anything not in its interests – such as a ceasefire whose terms would lay the ground for a fresh Russian offensive. Nor should they use language suggesting that Ukrainian victory requires Russian acceptance of Kyiv's sovereignty over all Ukraine's territory, including Crimea, which some West-

ern leaders [have veered](#) toward doing. If battlefield conditions create a situation where Ukraine is better served by a deal that accepts Russian control of some Ukrainian land – still a more than plausible outcome, especially in the case of Crimea – Kyiv should feel supported in taking that deal.

- ❑ Think through which of the sanctions levelled against Russia they might lift if there is a deal acceptable to Ukraine; these might include, for example, those that harm ordinary Russians the most.
- ❑ Assess forms of closer EU association for Ukraine, which could include better trade and political relations, given that a fast-tracked EU accession process is unlikely, notwithstanding enthusiasm in some quarters for Kyiv's membership request.
- ❑ Continue to welcome and provide for Ukrainian refugees, recognising their specific and gender-differentiated needs, and increase aid to help Kyiv cope with a surging number of internally displaced people.

A War Full of Surprises

Russia's war in Ukraine has confounded early expectations and dealt Moscow a series of setbacks. Most analysts – Ukrainian, Russian and Western – expected Russia's larger, better-equipped army to rapidly overcome Ukraine's smaller numbers. Instead, Russian forces turned out to be ill-prepared, quickly demoralised and poorly disciplined – drawing wide condemnation for [reports of looting and brutal attacks](#) on civilians. Ukrainian soldiers and civilians, bolstered by Western-supplied anti-tank weapons, air defences such as Stinger missiles, ordnance and body armour, proved determined and resourceful, shattering Russian hopes of an early victory. Within weeks, Russian troops had withdrawn from northern and central Ukraine and redefined their mission. Now, it appears that Russia's immediate goal is to gain control of the entirety of Donbas and retain the strip of land in the south connecting Crimea to Russia.

The West also produced surprises. The cohesion and extent of its initial response appeared to exceed expectations, not just in Moscow, but perhaps also on the part of Western leaders themselves. Partly as a result, Russia's advance faltered. Admiration for Ukraine's charismatic president, Volodymyr Zelenskyy, accordingly grew in the West, along with revulsion at Russia's initiation and conduct of the war. To date, Russia has done little beyond issue verbal threats to counter Western action. Western governments have thus found themselves both facing domestic pressure and with the political manoeuvring room to take measures that just months earlier might have seemed fanciful.

One pillar of the Western response is material support for the war effort. NATO has respected certain lines, for example, rejecting Ukrainian requests to impose a "no-fly zone" out of concern that this measure would escalate to direct conflict with Russia. But as Ukraine holds out and its dwindling Soviet-era supplies threaten to hamper its capacity to keep doing so, Western governments are becoming readier to supply increasingly heavy and sophisticated weaponry that requires more train-

ing and logistics, and which they had previously held back for fear it might fall into Russian hands. The EU itself has approved the release of €2 billion of weaponry, largely to recompense member states for their bilateral transfers to Ukraine, and coordinated the response to Kyiv's requests for more. Western states have also provided intelligence, sometimes creating the impression that they are behind some of Russia's biggest battlefield losses.

Sanctions are another pillar of the Western response. Going far beyond the sanctions levied in 2014 and 2015 in response to Russia's annexation of Crimea and its intervention in eastern Ukraine, the EU and U.S. came together around a series of far-reaching new measures. These have, in effect, divorced Russian banks from global financial markets, spurred many Western firms to leave the country and hindered many Russian customers who wish to make transactions abroad. Western countries have frozen about \$300 billion worth of Russia's gold and foreign currency reserves. Germany suspended Russia's Nord Stream II gas pipeline, and the EU banned new investment in the Russian energy and defence sectors, in addition to placing other limitations on transport and Russian media. Having stopped coal imports, EU member states are discussing a ban on Russian oil. So far, the EU is unlikely to include gas in its sanctions due to concerns about how sustainable that move would be, given how many member states use significant amounts of Russian gas and how much a cutoff could hurt industry and households in those countries. (For its part, the U.S. [banned imports](#) of Russian coal, oil and gas in March.) Other sanctions targeted President Vladimir Putin, other senior officials, business leaders close to the Kremlin and their respective families.

Worries of a Wider War

While neither Moscow nor NATO wants war with the other, both sides have used rhetoric and signalling that can only escalate tensions. Moscow has [indicated](#) that it sees the Ukraine war as a proxy conflict with the U.S.-led West, which it describes as a puppeteer pulling strings attached to Zelenskyy and his ministers. Increasingly, Russian officials say they are in fact fighting NATO in Ukraine. Western leaders, particularly the EU's partners in the U.S. and UK, have indicated that they may expect the war to end with [war crimes tribunals](#) for Russian officials, and have even [hinted](#) at a regime change in Russia. They have also [spoken](#) openly about the need to ensure that Russia emerges from this conflict weakened.

From the standpoint of European security, there is a logic to aiming at weakening Russia, reducing European dependency on its energy and commodities, and promising that those responsible for atrocities will be held to account. An enervated Russia would, in theory, be less likely to threaten other countries on the continent or in its neighbourhood. Trying those responsible for horrific abuses would, in addition to providing a measure of justice for the victims, signal a commitment to values that European states see as an enduring strength of theirs.

But the danger of such talk, as war still rages, is that the Kremlin will conclude that Western states aim to destroy Russia's government, if not Russia itself, increasing the risk that Moscow itself takes more extraordinary measures. The perils of escala-

tion are significant, given that Russia has the world's largest nuclear arsenal, and has repeatedly made barely veiled threats to use it. President Putin [commented](#) on the invasion's first day that anyone who interfered would face "consequences such as they have never seen in their history".

In reality, the odds of nuclear use remain low, but they are still [too high to be cavalier](#) about. Russia's nuclear doctrine permits using a weapon only in the face of an existential threat to the state, although Western intelligence agencies wonder whether in fact the bar for the Kremlin would be lower (and indeed states are not always bound by their doctrine when push comes to shove). In terms of what might push Moscow over the edge of nuclear use, it seems unlikely that battlefield failures alone would do so, as that would dramatically increase the risk of escalation with NATO – precisely what Russia wishes to prevent – and serve no direct military purpose that could not be accomplished with conventional weapons. By contrast, should NATO enter the war, that would certainly qualify as an existential threat, as would, most likely, a concerted effort by other countries to forcibly change Russia's government. Although Western governments have thus far avoided direct involvement, the escalated rhetoric comes with risks – particularly if it leads Western states to espouse or imply goals that can be accomplished only with such direct involvement, for instance, if Ukraine proves unable to decisively push back Russian forces on its own.

A parallel risk is that Moscow escalates against NATO, risking in turn a stronger NATO response. Faced with ever more substantial Western arms deliveries to Ukraine and training missions to enable Ukrainian soldiers to use those weapons, the Kremlin could increasingly see itself as at war with the West in more than just rhetoric, leading it to strike targets in NATO member states rather than Ukraine. While such action, too, is unlikely at present, any such attack would likely compel a response from NATO, rendering Moscow's fears self-fulfilling. If Western trainers deploy to Ukrainian soil and are struck by Russian weapons, moreover, NATO members may also feel bound to retaliate.

What the EU Can Do

Broadly speaking, EU policies, together with those of other Western states, should seek to balance the imperatives of supporting Ukraine, minimising risks of an escalation into direct NATO-Russia war and creating incentives for an end – even if that starts as a temporary pause – to the war on terms Kyiv can accept. Thus far, the low-level negotiations that have continued sporadically throughout the conflict seem unlikely to lead to a lasting solution. Each of Kyiv and Moscow continues to believe that gains on the battlefield can force the other to back down and acquiesce to greater concessions. But, at some point, both may determine that their interests are better served by seeking some form of settlement, even if they appear far from reaching that conclusion today. The EU and its member states can take several measures to keep the danger of escalation down, encourage an end to violence and prepare for what comes next.

The first relates to the nature of weapons supplies. The continued provision of conventional weapons to Kyiv helps position Ukraine to secure more palatable terms when it and Moscow are ready for serious peace negotiations. At the same time, it is critical that European governments avoid measures that run too high a risk of widening the war.

As they continue to provide assistance, donor countries can do better in how they provide and account for it. They should continue to avoid placing trainers or other forces on the ground in Ukraine. They should also keep training efforts as quiet as possible, wherever they take place. Accountability for weapons deliveries is important, given the [vast quantity of armaments](#) that have entered Ukraine since February. Already, Crisis Group has heard reports of diversion of both lethal and non-lethal supplies for personal gain. With volunteers engaged to a great extent in the delivery of both military and civilian assistance, foreign partners like the EU Advisory Mission in Ukraine can work with local civil society organisations to develop and enforce mechanisms for tracking deliveries. Although monitoring this assistance while fighting rages remains a major hurdle, the EU should work with Ukrainian authorities to ensure all efforts are made to keep their weapon stocks in check and prevent corrupt practices that will keep assistance from reaching those who need it. Brussels should reinforce the monitoring of its supplies by verifying the traceability of sensitive material, Ukraine's stockpile management and respect for international law.

When it comes to the language they use to talk about the war, the EU and other Western states should emphasise that any arrangement for ending it that is acceptable to Kyiv will be acceptable to them too. They should not pressure Ukraine to agree to anything that is not in its interests, such as a ceasefire whose terms would leave Russia in a favourable position for a new phase of hostilities. But, importantly, they should also avoid suggesting that Moscow will need to accept Kyiv's sovereignty over the whole of Ukraine's territory, including Crimea, before Kyiv can consider itself to have prevailed. If Kyiv concludes that its interests are better served by a deal that accepts Russian control of some Ukrainian land – something it may well do – the West should back it in that assessment.

As for Moscow, while thus far signs from the Kremlin of compromise are sparse, it would still be worth the EU laying out which of the sanctions crippling Russia's economy could be eased once Moscow has signed and fulfilled a deal acceptable to Ukraine – perhaps, in some narrow cases, in exchange for progress on, say, enabling Ukrainian grain to safely transit through the Black Sea for export. Generally speaking, EU sanctions, and those of the West more broadly, fall into four rough, overlapping categories: those punishing Russia as a whole; those punishing individuals perceived to be responsible for or strongly linked to the war; economic and trade restrictions that deprive Russia of revenue; and similar constraints that weaken Russia's strategic capacity, including that of its military.

Many of the penalties in the third and fourth categories seem likely to outlast the war: those intended to limit Russian military capacity, such as constraints on Russian import of certain technologies, appear set to be long-term European policy;

some economic measures, which fall in the third category, particularly those that also serve to wean European states off of Russian oil and gas, are also likely to stay. The latter reflect a profound rethink of energy security in Europe that is leading to long-term investment in renewables and new liquified natural gas infrastructure, as well as contracts with alternative suppliers.

But the first and second types of sanctions – punitive measures against the Russian state and certain individuals – could be eased or lifted in exchange for specified Russian actions. Arguably, too, sanctions cutting Russia off from global financial markets – which fall in the fourth category, because they would hamper military rebuilding after the war but also hit Russia’s economy as a whole and punish ordinary Russians – could be put on the table. Governments could also encourage private firms that have left Russia to return, at least in some cases. Improved access to foreign transactions would make it easier for Russians to purchase VPNs, for example, increasing their exposure to non-Kremlin sources of information, and for the government’s opponents who have left Russia to establish themselves abroad.

European states must also start thinking about how a deal on Ukraine might further reshape the security order and define their own terms for how to make that safer. Already, the changes, such as the Finnish and Swedish applications to join NATO, are profound. In reality, Ukraine and broader European security are likely to remain interdependent issues for the foreseeable future. Although a deal between Moscow and Kyiv will probably be necessary to end the war, it will also likely be precarious, with both sides frustrated by the concessions they made. The dangers will likely grow in the months and years to follow, as Russia, Ukraine and European states build up forces and capabilities with the aim of deterring one another or, in Russia’s case, having the option to relaunch an offensive.

Any agreement should thus be accompanied by a broader diplomatic effort involving the major military powers in Europe, including the U.S., to seek a wider settlement. It will inevitably be tremendously challenging to negotiate, given the collapse in Russia-West relations to date and the near certainty that any deal over Ukraine would likely make the bad blood worse. Still, an agreement that redefines the parameters for weapons deployments, exercises and activities across the continent would be a sustainable approach. While such a deal seems like a remote prospect, it is not too early for European leaders to start talking behind closed doors about what it might entail and what they might be willing to limit in exchange for limits on Russia.

Relatedly, European leaders will also need to continue managing Ukraine’s expectations for its future relationship with the EU. Even though President Zelenskyy’s request for membership met with some enthusiasm, a fast-tracked EU accession process remains contentious among European leaders, difficult to define, and therefore unlikely. Still, prospects for increased cooperation between Brussels and Kyiv might be part of Ukraine’s own assessment of elements that make settlement of the war more acceptable. The EU should look at other forms of closer association for Ukraine, which could include better trade and political relations, while not over-promising with respect to EU membership. Whatever the EU does with regard

to Ukraine will shape expectations and policies, with regard to other aspiring members, including Georgia, Moldova and the countries of the Western Balkans.

In the more immediate future, Western countries will need to continue pouring in humanitarian aid. They should continue financially supporting both Ukrainian refugees who now live elsewhere in Europe and the large population of internally displaced people in Ukraine itself – many of whom will not have homes to return to. Because most of the refugees are women, host countries should pay special attention to their needs. The EU can assist host countries and local women's groups in providing adequate health care, including support for those who seek aid in getting urgent access to sexual and reproductive health services. Host countries can also protect refugees from trafficking and other forms of gender-differentiated abuse they might encounter and ensure decent child care as refugees seek employment. At the same time, the EU should keep working on the financial dimension of its humanitarian assistance. The release of €3.5 billion to help member states cope with the needs of displaced Ukrainians seems insufficient, as the war uproots more and more people.