The Quasi-Biennial Oscillation: Impacts, Processes, and Projections

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ABSTRACT

In the tropical stratosphere, deep layers of eastward and westward winds encircle the globe and descend regularly from the upper stratosphere to the tropical tropopause. With a complete cycle typically lasting around two and a half years, this quasi-biennial oscillation (QBO) is arguably the most predictable mode of atmospheric variability that is not linked to the changing seasons. The QBO affects climate phenomena outside the tropical stratosphere including ozone transport, the North Atlantic Oscillation and Madden-Julian Oscillation, and its high predictability could enable better forecasts of them if models can accurately represent the coupling processes. We review progress over the past two decades in understanding and simulating the QBO and its effects on climate. Uncertainties about the waves that force the oscillation, particularly the momentum fluxes from small-scale gravity waves excited by deep convection, make simulation of the QBO challenging. Improved representation of processes governing the QBO is expected to lead to better forecasts of the QBO and its impacts, increased understanding of unusual events such as the two QBO disruptions observed since 2016, and more reliable future projections of QBO behaviour under climate change.

Key points

- The quasi-biennial oscillation (QBO) is a periodic wind variation in the equatorial stratosphere with a timescale of roughly two and a half years.
- The QBO is valuable for predictability due to its teleconnections to phenomena outside the tropical stratosphere.
- A major advance in the last two decades is that many climate models now simulate QBO-like oscillations, but with systematic errors including weak amplitude in the lowermost stratosphere.
- Improving the representation of the QBO in models is challenging due to uncertainties in observations and in understanding of the waves that drive it.
- Climate models project a weakening of the QBO amplitude in future.
- Although historically very predictable, since 2016 the regular QBO cycling has been disrupted twice, for reasons not yet well understood.

Introduction

High above the equator alternate layers of eastward and westward winds descend through the stratosphere from near the stratopause ($\sim$ 50 km) down to the tropical tropopause region ($\sim$ 16 km; FIG. 1). At each altitude it typically takes between 20 and 37 months for the winds to change from eastward to westward and back again, averaging around 28 months [1]. As this is close to 2 years, these repeating irregular cycles, extending roughly 15° either side of the equator [2], are referred to as the quasi-biennial oscillation (QBO). Despite its irregular period, the QBO is one of most repeatable fluctuations of the large-scale circulation seen anywhere in Earth's atmosphere after those associated with the changes in season and from day-to-night. Consequently, the QBO, or at least its phase progression, is one of the most predictable modes of large-scale internal variability in the atmosphere [3].

The QBO was discovered in the early 1960s [4, 5] though evidence for its existence extends back to the 19th century [6, 7]. The basic theoretical framework for an understanding of the QBO followed soon after its discovery [8, 9] and by the time of the first comprehensive review of the QBO [10] a canonical model for the oscillation was well established **(Box 1)**. While this canonical model explains the underlying oscillation in the equatorial winds, the observed evolution and detailed structure of the QBO is affected by contributions from several other processes and phenomena (FIG. 2).

Since its discovery the QBO's signal or influence has been identified in many other atmospheric phenomena, such as the strength of the stratospheric polar vortex [11–13], the distribution of stratospheric ozone [14, 15] and other trace gases (**Box 2**), the subtropical jets [16, 17], the tropical troposphere [18–21], the Madden Julian oscillation (MJO) [22] and semi-annual oscillations in the stratosphere and mesosphere [23, 24]. Much research has gone into understanding the pathways and mechanisms controlling the QBO's impacts and improving their representation in models. Potentially this could bring societal benefits with better predictions and projections that utilise the QBO's long timescales.

At the start of the twenty first century most state-of-the-art numerical models that included the stratosphere were unable to represent the QBO [25]. Since then, parameterisations of unresolved gravity waves, and improved vertical resolution, which enable models to represent the rudiments of the canonical QBO model, have led to a significant number of stratosphere-resolving models with realistic QBOs [26–28]. Indeed at least 15 of the climate models used to support the current Intergovernmental Panel on Climate Change (IPCC) 6th assessment report (AR6) feature a QBO compared to none for AR4 [28].

Developing an understanding of the QBO and its reliability as a source of predictability became more challenging when the descending cycles were unexpectedly interrupted during the 2015/16 Northern Hemisphere (NH) winter [29–32] and then again during the 2019/20 NH winter [33, 34]. These interruptions were associated with an anomalously high injection of wave momentum from the extratropics temporarily dominating the wind evolution [35]. Importantly, the QBO's predictable signal was lost during the interruptions and when the oscillation re-emerged after a few months the phase was significantly shifted from what would have been predicted without the disruption. Two interruptions occurring in the space of four years raises the question of whether these events are not "once-in-a-lifetime" events but rather the QBO's behaviour is evolving due to the changing climate [33].

In this Review we describe the processes governing the QBO, physical modelling of these processes, the effects of the QBO on other parts of the climate system, and future projections of the QBO under climate change. We focus on the two decades of progress since the previous review [10], deferring readers to that comprehensive article for a more in-depth presentation of fundamental aspects of the QBO. We first discuss QBO impacts (teleconnections) since the QBO's high predictibility motivates considerable practical interest in these. Realizing this predictability will require sufficiently accurate representation of the QBO's governing processes in physical models, discussed next, followed by examination of future projections and their uncertainties. We conclude with some perspectives on future directions for QBO research.

Impacts

Various mechanistic pathways have been proposed to explain QBO teleconnections (FIG. 3) but the processes involved remain uncertain. Determining the strength of impacts, either from observations or models, can be challenging. The QBO has been reliably observed since the 1950s, limiting the observational record to ∼70 years [1], which results in large uncertainty in observed impacts [2]. Distinguishing QBO influence from other sources of interannual variability such as the El Niño-Southern Oscillation (ENSO), large tropical volcanic eruptions, and the 11-year solar cycle, is often not straightforward although the QBO's distinct timescale is of some aid [40, 41]. Observational studies show that QBO impacts can differ in their sensitivity to the height region of the QBO. Some impacts are maximised using 50 hPa (∼ 21 km) winds to identify the QBO phase while others maximise when using 20 hPa (∼ 27 km) or 70 hPa (∼ 19 km), suggesting different physical mechanisms are present. Many of the proposed pathways for QBO impacts overlap and interact, which creates substantial challenges for identifying the dominant pathways and mechanisms. Models can provide larger samples than observations and can be configured to exclude competing influences such as ENSO, but are affected by modelling uncertainties in both the pathway mechanisms and the representation of the QBO.

If the processes underlying the QBO and its teleconnections are simulated with sufficient accuracy then long-range weather forecasting can benefit from the QBO's high predictability, which can extend out to several years [12, 42, 43]. We first give an overview of tropical and subtropical impacts that could potentially be forecast more skilfully, followed by extratropical impacts.

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[1] A reconstruction of the QBO back to 1900 exists, but its reliability prior to the 1950s is unclear [36, 37].

[2] Systematic inter-reanalysis differences are generally small enough that in most cases different modern reanalyses are equally suitable for characterizing an observed teleconnection over a given time period [38, 39].

Tropical and Subtropical Impacts

A QBO modulation of seasonal-mean tropical deep convection has been observed in the atmospheric layer directly beneath the QBO region (FIG. 3, **Pathway 1**) [18–20, 44]. Increased precipitation is found in the western tropical Pacific under QBO eastward winds at 70 hPa together with a southward shift of the Inter-tropical Convergence Zone. Precipitation differences between the QBO phases are roughly the order of 1 mm day^{-1} but with strong regional and seasonal variation. Diagnosing this signal requires careful separation of the QBO signal from the much larger ENSO impact [20, 45]. A stronger QBO response is observed in the variability of deep convection associated with the MJO, which is $\sim$ 40% stronger during NH winter when QBO winds at 50 hPa are westward [22, 45, 46]. This latter signal has only become apparent over the past four decades, possibly associated with cooling of the stratosphere induced by changing greenhouse gas concentrations [47]. The QBO signal at the tropical tropopause is a peak-to-peak temperature variation of $\sim$1 K [48], yielding an anomalously cold and high tropical tropopause during QBO westward wind shear (when the MJO is enhanced) that can plausibly induce a tropospheric convection response [49]. However the mechanisms remain uncertain and are a focus of active research [21].

The presence of the QBO also influences the passage of vertically propagating tropical waves into the upper stratosphere and beyond (FIG. 3, **Pathway 2**). The QBO modulates the semi-annual oscillation (SAO) in the upper stratosphere, with the SAO amplitude being roughly 5–10 m s^{-1} larger near 3 hPa ($\sim$ 41 km) when QBO winds at 10 hPa ($\sim$ 32 km) are westward than when they are eastward, though many models fail to reproduce this effect [50]. QBO influence on equatorial wind oscillations at higher altitudes is expected due to the same mechanism that causes the QBO: winds at lower altitudes alternately restrict or permit the upward propagation of waves whose phase speeds fall within the range of QBO wind speeds **(Box 1)**. Although observations at even higher altitudes are more limited, there is evidence that mesospheric zonal winds exhibit quasi-biennial variability coherent with the stratospheric QBO and consistent with this mechanism [51].

In the subtropics, seasonally-dependent QBO signals have been found in the subtropical jet and mean sea level pressure (MSLP) in both Pacific and Atlantic basins [16, 17, 20]. When the lower stratospheric ($\sim$ 50 hPa) QBO winds are westward, the Pacific subtropical jet tends to be further poleward during NH early and late winter (when the jet is weaker than in midwinter). This response is likely associated with the QBO-induced mean-meridional circulation (or secondary circulation; FIG. 2) [52] that induces zonal wind anomalies in the subtropics [16] (FIG. 3, **Pathway 3**). The Pacific storm track shifts poleward, while the Atlantic storm track contracts vertically, when 50 hPa QBO is westward during NH winter [17]. QBO-related variations in East Asian climate are likely related to the Pacific jet response [53–56], including an eastward shift of western North Pacific tropical cyclone tracks near 30°N during westward 50 hPa QBO [57]. However an early statistical association between the QBO and Atlantic tropical cyclones [58] disappeared when a longer data record became available [59]. The QBO can modulate the regions in which MJO teleconnections occur [60–62], and combining information about the MJO and QBO can increase the predictability of atmospheric river events that funnel water vapour from the subtropics to the west coast of North America [63].

Extratropical Impacts

The QBO influence on the NH winter stratospheric polar vortex (FIG. 3, **Pathway 4**), often referred to as the Holton-Tan effect [64], is a well-studied route for influence on the underlying tropospheric mid-latitude weather and climate. When the polar vortex winds are anomalously strong or weak there is an annular impact on the tropospheric winds and MSLP [65–67]. This is particularly evident in the Atlantic sector, where 60-day composite MSLP anomalies of $\sim$ 4 hPa following sudden stratospheric warming (SSW) events show a pattern resembling the North Atlantic Oscillation (NAO) [67]. Forecasts of the NAO are valuable due to its large effect on European and eastern North American climate. During NH winter, eastward QBO winds in the lower tropical stratosphere ($\sim$50 hPa) favour a stronger stratospheric polar vortex, leading to a positive NAO phase (normally associated with a poleward-shifted Atlantic jet) while westward QBO winds favour a negative NAO [42, 68] and greater likelihood of extreme cold surface temperatures [69]. The average difference in stratospheric vortex strength in January is $\sim$5–10 m s^{-1} between eastward and westward QBO phases [11], with corresponding NAO-like mean sea level pressure differences of $\sim$ 5 hPa [20]. Forecasts of the NAO are improving [70, 71], but it is unclear whether all processes underlying NAO predictability are well represented by the atmospheric models used in current forecasting systems. It is common for the predictable signal in these forecasts to be weaker than observed, necessitating large ensembles to extract it and achieve skillful predictions [72]. The QBO is expected to contribute skill to NAO forecasts [68], but could also be a source of this signal-to-noise problem if processes underlying QBO teleconnections are not well represented in the models [73].

The underlying mechanisms for QBO influence on stratospheric winds at higher latitudes (FIG. 3, **Pathway 4**) are uncertain because it is difficult to predict the effects of different tropical wind states on planetary waves from first principles [11, 64]. One proposed mechanism involves a latitudinal shift in the zero-wind line (ZWL) that acts as an effective waveguide for planetary-scale Rossby waves by modulating the occurrence of low-latitude wave breaking [64, 74, 75]. During the westward QBO phase the ZWL shifts into the subtropics of the winter hemisphere, constraining these waves to higher latitudes and resulting in a weaker, warmer polar vortex than in eastward QBO years. This mechanism (often referred to as the Holton-Tan mechanism) has been demonstrated in a general circulation model by artificially introducing horizontal wind shear in the vicinity of the ZWL, although the response is highly non-linear so that within a few days feedback processes rapidly alter the background winds, thus obscuring direct evidence of the mechanism [76]. Another proposed mechanism involves planetary waves interacting with the zonal wind anomalies associated with the QBO secondary circulation (FIG. 2), not requiring ZWL-induced wave breaking [77, 78]. An ambiguity with both mechanisms is that planetary waves have deep vertical wavelengths and prevailing tropical winds typically change direction with altitude (because the QBO consists of descending wind layers). It is not clear which QBO altitudes exert the strongest influence on the extratropical stratosphere, and even tropical winds at very high altitudes near the stratopause that are influenced by Pathway 2 might be important [79, 80]. The strength of the NH QBO-vortex relationship also appears to vary on decadal timescales [81] and the source of this longer-term modulation is not fully understood [82–85].

Although most studies have focused on the NH response, the Southern Hemisphere (SH) winter stratospheric polar vortex is also affected by the QBO [86]. The late-winter vortex breakdown is delayed when QBO winds near 20 hPa are eastward; November-average differences in stratospheric vortex winds between eastward and westward QBO phases are $\sim$5–8 m s^{-1} [11]. The SH response indicates that the high-latitude circulation can respond to tropical wind anomalies at different altitudes (20 hPa, compared to 50 hPa for the NH vortex). The timing of the SH response (late winter) also differs from that in the NH (early to mid-winter). The vortex response to QBO phase may depend on the vortex state itself, as shown by numerous modelling studies [11, 87], and the SH winter stratospheric polar vortex is much stronger and colder than the NH vortex. Highly nonlinear vortex variability – as occurs during NH midwinter, including SSW events – may respond differently than a more quiescent vortex [74, 88–90]. The seasonal evolution of the NH response [82, 91–93] is often not captured by models [13, 94].

Clarifying the coupling mechanisms between tropical and high-latitude stratospheric winds should help clarify the efficacy of the polar vortex route (FIG. 3, **Pathway 4**) for generating extratropical surface impacts. But in addition to this well-studied (at least in the NH) route, evidence is growing that the pathways described in the previous subsection can also cause extratropical surface impacts. QBO influence on tropical convection (FIG. 3, **Pathway 1**) can influence the generation of Rossby waves that propagate to higher latitudes. This can directly influence extratropical weather systems, including the Aleutian Low pressure region in the North Pacific and the NAO [95]. Since Rossby waves are the main source of winter stratospheric variability this can also influence stratospheric polar vortex variability, and hence Pathway 4, in either hemisphere [96–98]. Additionally, QBO modulation of the subtropical jet (FIG. 3, **Pathway 3**) could also impact the southern component of the NAO, and affect wave propagation into the winter stratosphere governing the vortex response [99]. The different routes for impacting the tropospheric extratropics are difficult to disentangle, and climate models vary widely in their ability to represent them [100]. Judicious choice of multi-linear regression indices can help to isolate the different pathways [20], but more research is needed to determine which ones dominate.

Processes and Modelling

Increasingly, climate prediction models are being developed to include an internally generated QBO in order to represent more realistic modes of internal variability at sub-seasonal to seasonal (S2S) and interannual timescales [101]. However, impacts described in the previous section tend to be weaker in models than is observed [61, 102, 103] and deficiencies in simulated QBOs could be at least partly responsible [13, 94, 104]. This section describes current methods used to simulate a self-consistent QBO in global forecast and prediction models, i.e., general circulation models (GCMs). We discuss common biases in the QBO in those models, and how these shortcomings relate to the underlying physical processes driving the QBO.

The QBO is forced by wave dissipation (see **Box 1**) involving wave scales ranging from global scale Kelvin waves to mesoscale gravity waves. High vertical resolution (< 1 km) is needed in models to capture realistic wave-mean flow interactions of resolved large-scale waves such as Kelvin waves and mixed Rossby-gravity waves [105–110]. Since descent of eastward QBO shear zones is driven by an approximate 50/50 mix of Kelvin wave and gravity wave forcing, and descent of westward shear zones driven primarily by gravity waves, most global models require parameterization of unresolved gravity waves to simulate an internally generated QBO [109, 111–116]. Exceptions include research models with a set of very special ingredients that include: highly active and variable convective rain/latent heating (parameterized and/or resolved); high horizontal resolution; weak implicit and explicit grid-scale dissipation; and high vertical resolution [107, 117]. The first two conditions are needed to generate a broad spectrum of tropical waves [118, 119], while the latter conditions are needed to support wave propagation without excessive dissipation, allowing waves to get reasonably close to their critical levels [109, 120–124]. Most state-of-the-art climate model experiments and even ultra-high resolution global models without all four ingredients require specially-tuned non-orographic gravity wave drag parameterizations to obtain a QBO [26, 28, 122]. Simulated QBO-like oscillations are sensitive to small changes in model details such as horizontal and vertical resolution [121–123, 125, 126], dynamical core [120], location of the model top [127], filtering of upward-propagating waves by tropical winds below the QBO [121], and strength of the tropical wave convective sources [110, 128]. Therefore, arriving at a simulation of a QBO with realistic period and amplitude in a climate model can be a difficult and time-consuming task.

The number of climate models that are able to simulate the QBO has increased in the last two decades. Fifteen models in the 6th phase of the Coupled Model Intercomparison Project (CMIP6) were able to simulate a QBO [28], compared to five models in CMIP5 [1]. While the mean period of the QBO in these models and those participating in the SPARC QBO Initiative

(QBOi) [129] is represented quite well, the vertical structure of its amplitude is not: models systematically underestimate the QBO wind amplitude in the lower-most stratosphere ($\sim$ 50 hPa), and often overestimate it above 10 hPa (FIG. 4). The latitudinal extent of the amplitude tends to be well represented near 10 hPa but underestimated near 50 hPa [129]. Weak QBO amplitude in the lowermost stratosphere is often manifested by the development of weak westward winds (FIG. 5) and a lack of downward descent of shear zones to the tropopause [43], both of which could be linked with the under-representation of QBO teleconnections in models [94, 104]. Insufficient vertical resolution can lead to weak QBO amplitude in the lowermost stratosphere [121, 123, 125, 126], but the reasons for this systematic model error have not been fully clarified.

Finer features of the QBO are not well captured by models. In observations, eastward phases of the QBO descend about twice as fast as westward phases, which sometimes stall in the lower stratosphere [130], whereas most models have comparable eastward and westward descent rates, and under-represented (or less pronounced) stalling [1, 129]. The vertical depths of QBO phases in models are often shallower than observed [94], possibly due to errors in descent rate, which could weaken the QBO teleconnection to high latitudes if deep QBO phases are important [131, 132]. The variability in the duration and amplitude of individual cycles is less than in observations [129, 133], which is likely related to over-reliance on parameterized gravity wave forcing.

The contribution of large-scale equatorial wave modes, such as Kelvin, mixed Rossby-gravity, and inertia-gravity waves, to the driving of the QBO is generally underestimated by models. The distributions of equatorially trapped waves in the stratosphere with equivalent depths < 90 m (zonal phase speeds $|c| < \sim 30$ m s^{-1}, those most relevant to QBO forcing) generally correspond to sources resulting from tropospheric convection [134]. Only roughly half of the QBOi models showed realistic convectively coupled Kelvin waves and only a few models have convectively coupled mixed Rossby-gravity waves [110]. Those models with stronger convectively coupled waves and higher vertical resolution tend to produce stronger resolved wave forcing in the QBO region.

Reanalyses can provide observation-based estimates of QBO driving by different equatorial wave modes [115, 135, 136]. While tropospheric convection in reanalyses is parametrized and hence the sources of resolved waves in reanalyses are somewhat model-dependent, observational constraints on the large-scale circulation are provided by data assimilation. In particular, stratospheric temperatures are observationally constrained by assimilation of satellite radiances, leading to reasonable agreement on equatorial wave spectra among modern reanalyses [135] although diagnosed QBO driving can still differ appreciably between reanalyses due to other modelling issues (e.g., vertical resolution). Modern reanalyses agree on broad aspects of the forcing by different equatorial wave modes, such as Kelvin waves driving $\sim$ 50% of eastward phase onsets, and systematic inter-reanalysis differences are generally smaller than the variations between different QBO cycles [39, 135, 137]. This may be consistent with the waves propagating through very similar and realistic background QBO winds in all modern reanalyses, due to the strong constraint on equatorial winds provided by assimilation of tropical radiosonde wind observations [138, 139], although it should be noted that the timing of QBO phase transitions can differ slightly between reanalyses and eastward phase onsets are often delayed by $\approx$1–2 months compared to radiosonde winds [39, 139]. Improved assimilation of radiosonde winds has led to dramatic improvements in the quality of QBOs in modern reanalyses compared to earlier generations of global reanalyses [39, 140], but the degree to which the highly inhomogeneous spatial coverage of tropical radiosonde stations might bias reanalysis representations of the QBO remains unclear [139, 141].

Models using parameterized gravity wave drag with wave sources that are fixed in time and space typically simulate QBOs with less cycle-to-cycle variability and less asymmetry in the descent rates of eastward and westward shear zones compared to observations and reanalyses [1, 129], and consequently, the QBO could be too regular in such models [42]. Variability in tropical waves, including gravity waves [133, 142–146], as well as variations in the tropical upwelling [147], lead to period and amplitude variations that make the QBO an irregular oscillation. ENSO is one source of these variations, with faster QBO phase propagation and weaker amplitude observed during El Niño conditions [148]; models vary in their ability to reproduce this behaviour [149, 150]. Low-latitude volcanic eruptions (FIG. 2) are another: aerosol-induced heating warms the tropical lower stratosphere and drives increased upwelling, biasing the QBO toward increased eastward shear and modulating its period, though the exact response depends on the QBO phase at the time of the eruption [151, 152]. The response of modelled QBOs to stratospheric sulfate geoengineering is qualitatively similar but model-dependent in its details, as well as depending on the magnitude and latitude of aerosol injection [153–156]. In the case of observed extreme deviations from typical QBO behaviour, anomalous tropical wave activity may have preconditioned the eastward QBO phase to be disrupted by large Rossby wave fluxes from the extratropics during the 2015/16 NH winter [32, 157, 158], and significantly weakened the eastward QBO phase during the 3 months prior to the emergence of 40 hPa westward winds during the 2019/20 NH winter [34]. The ability of extratropical Rossby waves to interact with the QBO also depends sensitively on the subtropical winds [159, 160], which are critical for forecasting QBO disruptions [161]. The general lack of QBO disruptions in models is consistent with their QBOs being too regular.

Disruptions aside, skillful predictions of QBO phase out to 3 or 4 years have been demonstrated and a longer horizon could be feasible if model representation of the QBO's driving processes is improved [42, 162]. Models do not predict the QBO equally well at all altitudes or for both QBO phases [43, 163]. When initialized with realistic winds they have particular difficulty maintaining the westward QBO phase (FIG. 5), which is driven mainly by small-scale gravity waves. Descent of the westward phase is opposed by tropical upwelling more strongly than during eastward phase descent because the QBO secondary circulation is upward in westward shear (FIG. 2) [52, 164], and there is substantial uncertainty in the observed upwelling speed [39] and hence a question as to whether models represent it well. The vertical component of the QBO secondary circulation also leads to a QBO in ozone in the lower stratosphere (**Box 2**), producing radiative heating anomalies that in turn influence the dynamical evolution. This feedback can alter the duration of QBO cycles [165–167] or increase the QBO amplitude [168] and might increase predictive skill [169].

In summary, simulating the QBO in models requires high horizontal resolution for realistic tropical convection and a broad spectrum of tropical waves, and also requires high vertical resolution and minimal numerical diffusion to simulate stratospheric waves and wave-mean flow interactions. In lieu of these high resolutions, significant development in gravity wave parameterization, informed by high-resolution observations, will be needed. While a wide variety of gravity wave parameterizations and tunings can all simulate a similar realistic QBO under current conditions, the details of the parameterized gravity waves can lead to very different predictions of the response of the QBO to climate change [101, 170], as discussed in the next section.

Projected changes

One goal of comprehensive climate modeling is to simulate the response of the climate system to external forcing, with a particular practical focus on understanding and projecting the response to greenhouse gas induced global warming. Since the QBO is a significant aspect of climate variability, the question of how the QBO responds to global warming has been studied in various GCM simulations [28, 171–176]. Some studies included a detailed specification of atmospheric greenhouse gas concentrations based on historical data and standard IPCC scenarios of the future, while others have compared control simulations with runs using enhanced, typically doubled or quadrupled, CO_2 concentration. One robust aspect of the global warming effect that GCMs agree on is the weakening of the QBO amplitude in the lower stratosphere which is seen in present and future climate simulations running without non-orographic GW parameterization, in which the QBO is driven by the models' resolved waves only [172]. The weakening of the QBO in these simulations is attributed to increased mean tropical upwelling in the lower stratosphere, which overwhelms counteracting influences from strengthened wave fluxes associated with more tropical precipitation in a warming climate [101, 172].

Weakening of the QBO in a warming climate has indeed been found in nearly all GCMs that have investigated this issue, including models from CMIP5 [174], QBOi [28] and CMIP6 [175–177]. The time series of QBO amplitude at 70 hPa ($\sim$19 km) in four CMIP5 models showed a weakening of the QBO between 1.9 and 2.7 % per decade in historical simulations continued through 2100 using the IPCC RCP4.5 scenario [178] (FIG. 6a). The global warming related QBO amplitude trends in model studies with $\sim$200 year integrations or in extensive ensembles of integrations can be determined with confidence. Determining the trends in the observed record, which begins in 1953, is much more challenging. The weakening of the QBO amplitude was found with 60 years of near-equatorial radiosonde observations during 1953–2012 [174]. The black curve in FIG.6a updates this analysis with the record extended to September 2021. The observed decreasing amplitude trend is $3.5\pm3.0\%$ per decade with 95% confidence. This trend is smaller than previously reported by using 1953–2012 data, possibly due to, in part, somewhat larger amplitude coinciding with two anomalous QBO disruptions in 2016 and 2020. A negative trend in the 1953–2020 period is different from zero with only 93% confidence using a somewhat different definition for QBO amplitude and a bootstrapping approach to estimating natural variability[176]. Quasi-decadal variability imposed on a long-term decreasing trend is found in both observations and models. The 70 hPa trends in the QBO amplitude and mean upwelling in "pre-industrial" CMIP5 runs with fixed climate forcing are extremely small, indicating that the trends are externally forced [174].

CMIP6 models, with a non-orographic gravity wave parameterization, project a weakening of the QBO ranging of $5.8 \pm 0.5\%$, 4.3 ± 0.5 %, and $2.0 \pm 0.5\%$ per decade at 50 hPa for the SSP585, SSP370 [179], and historical simulations, respectively (FIG. 6b) [175]. The weakening of the QBO amplitude was found as well in simulations of the QBO in doubled and quadrupled CO_2 simulations that were performed by eleven GCMs participating in QBOi [28]. The observed trend in QBO amplitude is significantly negative only in the lower stratosphere (FIG. 6b). On the other hand, data from $\sim$200-year simulations of CMIP5 [174] and CMIP6 [175] models simulating the QBO show weakening trends between 70 and 10 hPa (FIG. 6b). The positive trends at 30–10 hPa in observations may not be representative of the long-term global warming changes due to other low frequency natural variations in trends [174].

In contrast to the QBO amplitude, there is no consistent response in the simulated QBO period change in a warming climate among GCMs. Early single-GCM studies showed a decrease in QBO period under doubled CO_2 forcing, with the caveat that the degree of shortening was shown to be dependent on the prescribed increase in the strength of parameterized GW momentum flux at the source level [171]. However, other GCM experiments without non-orographic GW parameterization [172] or with constant parameterized wave sources [173] suggest that the QBO period may lengthen in a warming climate. In a 60-year observational record no significant trend in QBO period was detected, and the trends are inconsistent in sign among the multi-century CMIP5 model simulations [174]. The projected QBO period changes in eleven QBOi models range from a decrease by 8 months and lengthening by 13 months in a doubled CO_2 climate (FIG. 6c). In the quadrupled CO_2 simulations, some models showed a QBO period reduction with periods as short as 14 months, where in others a tropical oscillation was no longer easily identifiable [101]. The wide spread in response of the QBO period to warmer climate was also found in the most recent generation of GCMs used in CMIP6 [175].

Uncertainty in projections of the QBO is in large part due to uncertainties in gravity wave parameterizations [101, 170]. Parameterized non-orographic gravity wave momentum flux at the source level in GCMs is poorly constrained even in present-day conditions and difficult to project in a warming climate. A majority of existing models prescribe a fixed value of GW momentum flux at the source level and hence miss the effects of changing gravity wave sources on the QBO [101]. However, the magnitude of the change of source-level GW momentum flux is a key determinant of whether the QBO period will increase or decrease in a warming climate [101, 171]. Several GCMs have implemented gravity wave parameterizations that link the properties of gravity waves to the properties of convection (in the tropics) and fronts (in the extratropics) [145, 180, 181]. These parameterizations were developed in order to capture the effects of changing GW sources not only on the QBO but other aspects of the middle atmospheric circulation. However, three QBOi models with source-dependent GW parameterizations showed vastly different changes to GW momentum flux at the source level with doubled and quadrupled CO_2, and very different changes to the QBO in these simulations [101]. Hence, reducing uncertainty in gravity wave parameterizations is crucial to reducing the uncertainty in the projections of the QBO period in the warming climate.

Uncertainty in QBO projections may also arise from deficiencies in representation of large scale tropical waves in GCMs, as well as shortcomings of other model elements such as resolution and dynamical core. Large-scale tropical waves are likely to change in a warming climate due to changes in tropospheric convection and latent heating [182]. However, as described in the previous section, the generation of Kelvin and mixed-Rossby gravity waves is often underestimated in GCMs [110], and hence changes to these waves in a warming climate as represented in models are quite uncertain [101].

If weak QBO amplitude in the lowermost stratosphere is a source of error for teleconnections, the observed amplitude trend suggests that teleconnections might weaken in the future. However there is evidence that QBO impacts on the extratropics in NH winter could strengthen under climate change [177, 183, 184]. While future changes in stratospheric vortex variability are not robust across models and should be treated with caution [185], the multi-model mean of 20 CMIP5/6 climate models shows strengthened QBO impact on the NH winter stratospheric vortex and a strengthened surface impact in the Atlantic section (though the not all models agree on the sign of this change) [177]. In the tropics, the emergence of the QBO-MJO linkage has been suggested to be caused by climate change [47] although this is difficult to verify as climate models generally do not capture this teleconnection [104].

Summary and Future Perspectives

The QBO is an exceptionally long-duration mode of atmospheric variability that affects the predictability of other phenomena such as the stratospheric polar vortex and the MJO. Accurate modelling of the QBO and its impacts could potentially bring societal benefit by realizing this predictability. A major advance in the past two decades is that many more climate and forecasting models now represent the QBO, largely due to the inclusion of parametrizations of small-scale tropical waves. However the overall quality of these simulated QBOs has not significantly improved during this time, and models show common biases including persistently weak QBO amplitude in the lowermost tropical stratosphere. Future projections by climate models consistently show the QBO amplitude weakening under increased greenhouse-gas forcing, and observations show a weakening of QBO amplitude at lower altitudes (∼70 hPa). Two disruptions of the QBO have occurred, during the NH winters of 2015/16 and 2019/20, which were unprecedented in the observational record that started in 1953.

Further advances in understanding and simulating the QBO will require better quantitative knowledge of how the real QBO is forced by the whole spectrum of atmospheric waves, from small-scale gravity waves up to planetary-scale modes. In the canonical model, all waves with zonal phase speeds within or near the range of QBO wind speeds can drive the QBO, and so a QBO may occur in a numerical model even if the tropical wave spectrum (the mix of different wave types driving the QBO) is unrealistic. But the precise mix of driving waves can affect important details such as the QBO's vertical extent or its sensitivity to climate forcings such as ENSO or changing greenhouse gas concentrations. To simulate a realistic QBO for realistic reasons, it is necessary to reduce the quantitative uncertainty in the forcing contributions by different wave types.

Increasing the horizontal resolution of models can help by improving representation of the wide spectrum of tropical wave sources, although this is not guaranteed because tropical convection can be model-dependent even as resolutions of ∼ 10 km or finer are approached [186]. It remains unclear what vertical resolution in the lower stratosphere is sufficient to realistically represent the mechanisms causing stratospheric dissipation of the waves [126]. Analyses of novel observational datasets such as long-duration balloon flights [124, 187] and lidar satellite wind observations [188] can help address these questions by providing better observational constraints on the waves driving the QBO. This should narrow the range of physically defensible parameter values used in non-orographic gravity wave parametrizations. Weak constraints allow modellers substantial freedom to adjust these parameters, such as by tuning a model's average QBO period to be about 28 months. But the pervasive model bias toward weak QBO amplitude in the lowermost stratosphere (∼ 50 hPa), which has not improved in the most recent generation of climate models (CMIP6), suggests that optimizing the vertical structure of the amplitude is more challenging. Understanding the origins of errors in QBO vertical structure (and why it is less amenable to tuning than the QBO period) is a priority for future research.

Greater understanding of the modelling sensitivities of the QBO, and improved observational constraints on gravity wave parametrizations, could create more confidence in future projections of QBO behaviour. Gravity wave parameter settings tuned to achieve a realistic QBO period in the present-day climate may not be valid in a changed climate, leading to non-robust projected changes in QBO period. The projected weakening of QBO amplitude is robust, but the vertical structure of QBO amplitude trends differs between observations and models. While models project decreasing QBO wind amplitude at all altitudes in response to global warming, the 69-year radiosonde record shows a negative amplitude trend with highest significance in the lowermost stratosphere (∼ 70 hPa) but a positive trend at higher levels (∼ 20 hPa) (FIG.6a). The discrepancy might be due to natural variability obscuring the true forced response in the real atmosphere, although the statistical significance of observed trends suggests this is unlikely. Understanding the origin of the pervasive present-day model biases in QBO vertical structure could elucidate how those biases might affect future projections.

The consequences of models' QBO biases for the simulation of QBO impacts remain unclear. Observed tropospheric teleconnections tend to be most significant when QBO winds at lower levels (e.g., 50 hPa) are used as predictors. Since this is where models systematically underestimate the QBO amplitude, reducing their biases may improve the simulation of teleconnections, which are often found to be weak in models [94, 100, 103, 104]. Complicating the issue is that multiple pathways (mechanisms) for QBO teleconnections are plausible and the dominant pathways are not yet clear, and a single pathway may not dominate. Depending on the relevant pathways, other model biases – e.g., biases in the strength and position of tropospheric jets or the spatio-temporal variability of tropical deep convection – could also affect simulated teleconnections [189]. A promising approach to disentangling these questions is to bias-correct model QBOs by nudging them toward observations[3] so that teleconnections can be compared across different models having the same unbiased QBO winds (but differing in their other biases). Such experiments will help determine what aspects of the QBO, as well as other aspects of the climate system, need improving in order to accurately simulate QBO impacts.

Realizing the QBO's potential benefits for improving forecasting on sub-seasonal, seasonal, and decadal timescales will depend not only on accurate simulation of its teleconnections but also, of course, on predicting the QBO itself. The QBO's most notable feature is its extremely long timescale, and skillful predictions out to several years may be possible with GCMs [42, 162, 169]. The impact of model biases on QBO predictability should be investigated further. A promising approach is to run QBO-resolving climate models in hindcast mode – i.e., initialize them with realistic QBO winds – to test the validity of their modelling assumptions and process representations (e.g., parametrized wave driving) [43]. An important outstanding question is how well can the onset of disruptive events resembling the evolution of tropical stratospheric wind during the 2015/16 and 2019/20 NH winters be predicted.

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Author contributions

S.O. led the writing of the first draft. J.A. led the revisions and reviewer responses. All authors individually led the compilation of specific sections, figures and boxes within the manuscript. All authors contributed to editing the draft text and its revision.

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[3] This refers to artificially constraining a model by adding a forcing term that relaxes the equatorial winds toward observations.

Competing interests

The authors declare no competing interests.

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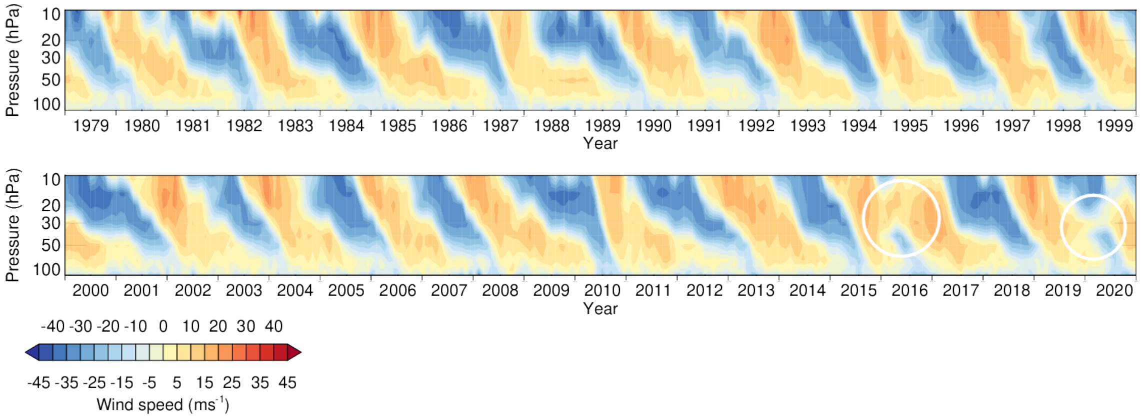


Figure 1. The QBO in tropical stratospheric zonal wind. Monthly means of daily observations (generally twice per day at 0Z and 12Z) of zonal winds above Singapore for 1979–2020 (data were obtained from https://acd-ext.gsfc.nasa.gov/Data_services/met/qbo/QBO_Singapore_Uvals_GSFC.txt). White circles indicate the only two occasions when the sequence of quasi-regular oscillations in the zonal winds over the equator have been disrupted since regular observations became available in the 1950s.

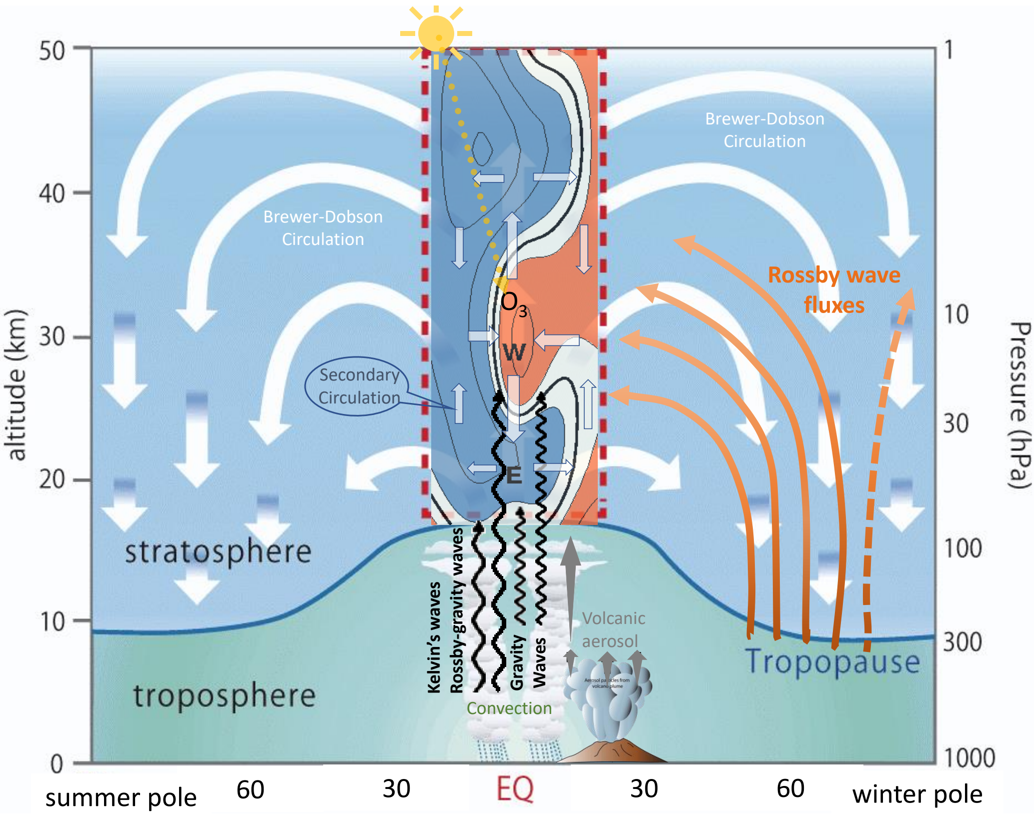


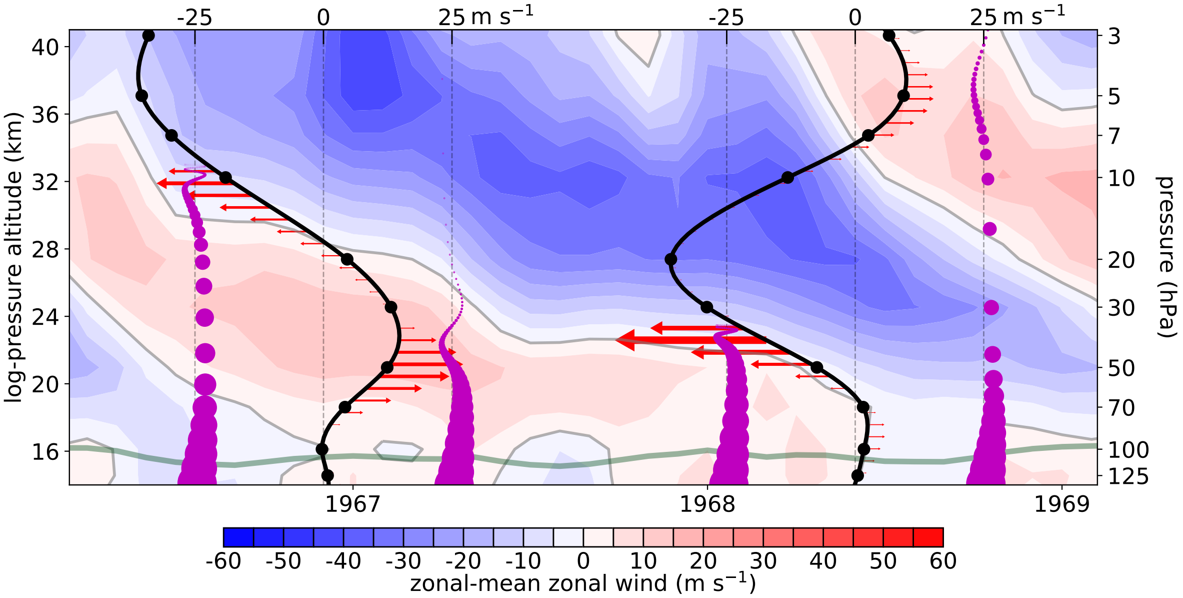
Figure 2. Schematic of the QBO and the global circulation of the stratosphere. Eastward and westward zonal winds (orange and blue, respectively) in the tropical stratosphere (box bounded by dashed red line) are shown when the QBO phase is transitioning from westward to eastward at 30 hPa (zero wind line, thick black contour), and the semi-annual oscillation (SAO) in the upper stratosphere is in its westward phase. Rossby waves propagate through the winter extratropical stratosphere, transporting westward momentum equatorward that can be important for “QBO disruption” events. Upward-propagating tropical waves that drive the QBO in the canonical model are shown as black wavy arrows (see **Box 1**). The QBO is also affected by the overturning circulation of the stratosphere (Brewer-Dobson circulation, thick white arrows) and QBO mean-meridional circulation maintaining thermal wind balance, hereinafter referred to as the QBO secondary circulation (thin white arrows inside red dashed box).

Box 1

QBO Mechanism

Since its discovery, the QBO was correctly surmised to be a wave-driven circulation [5]. The characteristic descending eastward and westward shear zones are caused by the dissipation of eastward and westward wave momentum fluxes, respectively. The schematic [190] shows a 3-year time series of monthly-mean zonal-mean zonal wind vertical profiles in the tropical stratosphere (filled contours) from the JRA-55 reanalysis [191], and overlays two idealized profiles (thick black lines) corresponding to December 1966 and June 1968 along with two assumed waves with ± 25 ms^{-1} phase speed for each profile (upper axis). For an eastward wave propagating upward in eastward wind shear (or westward wave in westward shear), the vertical wavelength and vertical group velocity of the wave both decrease as the wind speed gets closer to the wave phase speed with altitude. Various dissipation mechanisms, including radiative damping and wave breaking due to convective or dynamical instability, become more likely in these conditions. Dissipation reduces the momentum flux carried by the wave (purple dot size), leading to momentum deposition that drags (red arrows) the mean flow toward the phase speed of the wave, and hence in time, the shear zone descends. This two-way interaction between the waves and the mean flow drives the QBO. Descent of shear zones also requires that the wave drag forces exceed advection due to upwelling in the tropical branch of the Brewer-Dobson circulation [164, 174] (not shown on the schematic, but see FIG. 2).

Despite clear understanding of these fundamentals, details on which waves drive the QBO and the relative importance of different dissipation mechanisms remain murky. Contrary to the simple two-wave schematic, the relevant waves range from small-scale (10's of km) / short-period (minutes) gravity waves to global-scale / long-period (days to weeks) Kelvin, Rossby, and mixed-Rossby gravity waves. Estimates from high-resolution global models and reanalyses suggest that Kelvin waves contribute roughly half of the QBO eastward forcing with the remainder contributed by gravity waves, and that gravity waves provide the majority of the westward forcing with smaller contributions from Rossby and mixed-Rossby-gravity waves [107, 109, 115, 116, 137, 192]. Improved global observing systems are needed to verify these results and quantify global wave momentum fluxes, but vertical resolution limits satellite views of the important short vertical wavelength waves < 4 km [111–113, 193]. New results from long-duration, super-pressure balloons overcome these limitations, shedding new light on the details of wave-driving of the QBO at very short vertical wavelengths [124, 187].



Basic column model of the QBO

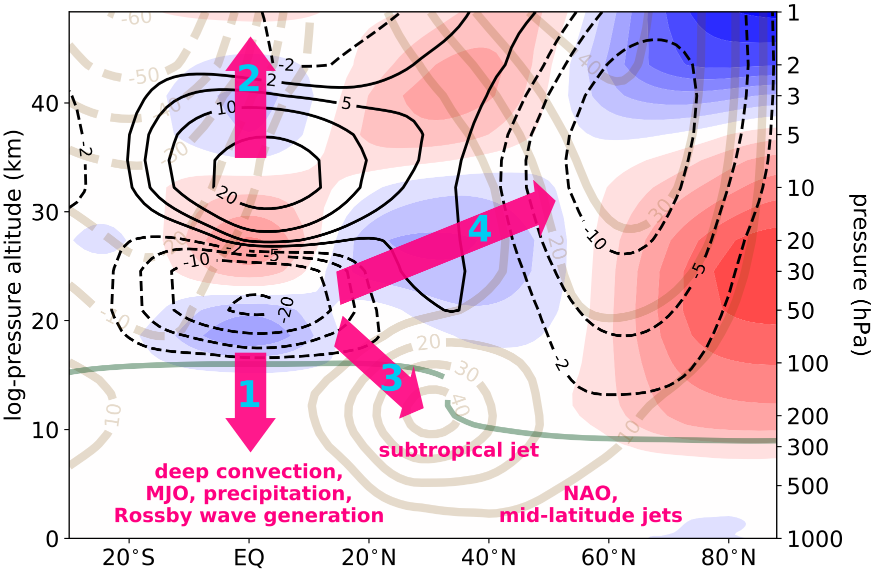


Figure 3. Global QBO teleconnections and their pathways. January difference between westward and eastward QBO composites for 1958–2016 using the JRA-55 reanalyses [191], defining QBO phase by 50 hPa equatorial wind. Black contours: zonal-mean zonal wind difference (westward dashed, eastward solid, units of m s^{-1}). Filled contours: zonal-mean temperature difference (warmer red, colder blue, 1 K contours starting at ± 0.5 K). Also shown are the January climatogical zonal-mean zonal wind (light brown contours, zero contour omitted, units of m s^{-1}) and thermal tropopause (light green). Numbered arrows indicate pathways for QBO influence by (1) modulating tropical tropopause temperature or wind, (2) filtering upward-propagating waves that reach the SAO near the stratopause and above, (3) modulation of the subtropical jet by the QBO secondary circulation, (4) modulating planetary-scale waves that distort the stratospheric polar vortex.

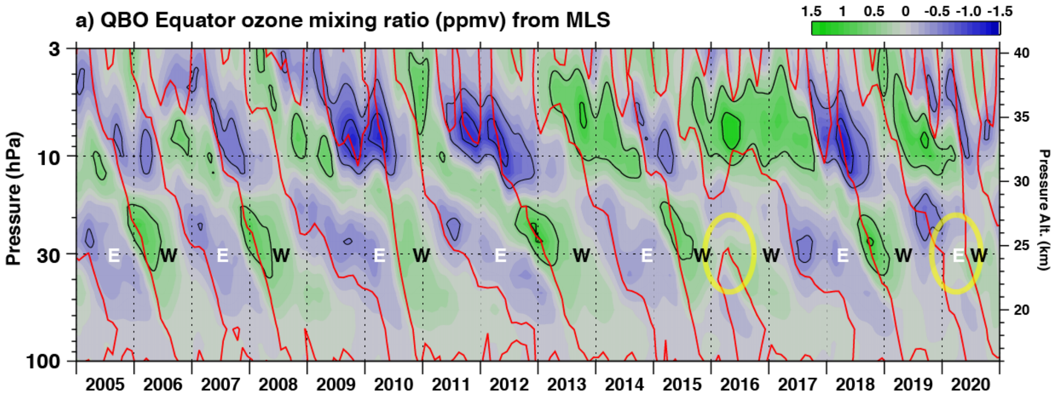
Box 2

QBO in Ozone and other trace gases

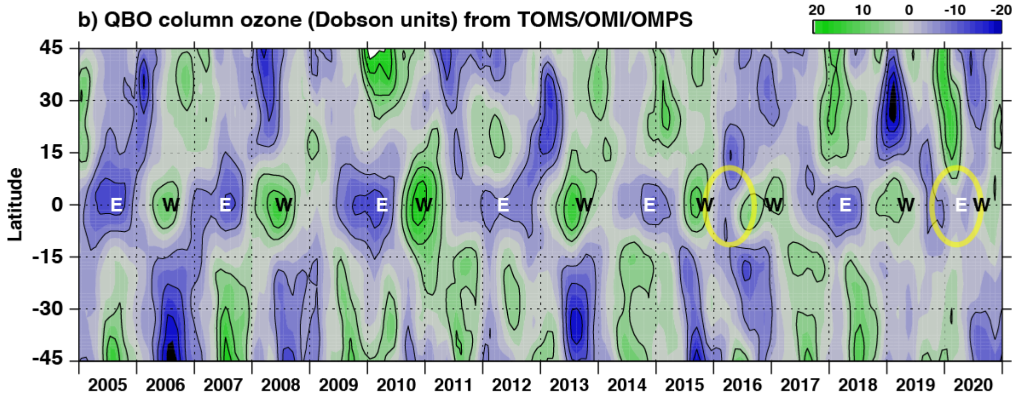
The QBO is enormously important for year-to-year variability of trace gases and aerosols in the tropical stratosphere, and also for their global distributions. Exposing and removing this QBO-driven ozone variability is necessary to calculate underlying stratospheric ozone trends caused by ozone depleting substances [194]. Satellite observations of vertical profiles of ozone concentration show equatorial anomalies (top panel, ppmv; NASA Aura satellite Microwave Limb Sounder) associated with eastward and westward QBO phases (labelled W/E for westerly/easterly, respectively, with zonal wind zero contours shown red). Ozone anomalies are driven by the QBO's impact on stratospheric circulation and temperature [10] (FIG. 3). However, because ozone absorbs both shortwave and longwave radiation, ozone anomalies feed back on the QBO's period and amplitude [165, 166, 195]. The vertical component of the QBO secondary circulation (FIG. 2) produces a negative ozone anomaly in westward shear zones and a positive anomaly in eastward shear zones. The ozone anomalies shift sign above 15 hPa because of the temperature control of the NO_x catalytic ozone loss process [165, 196, 197].

The QBO influence on composition extends from the tropics into the mid-to-high latitudes of both hemispheres. Satellite observations of total ozone column over 45° S to 45° N (bottom panel, Dobson units; Nimbus-7 TOMS, Meteor-3 TOMS, Earth Probe TOMS, Aura OMI, Suomi OMPS, and SBUV) show positive and negative anomalies associated with eastward and westward winds, respectively, in the tropics (8° S to 8° N). The associated subtropical return branch of the QBO secondary circulation results in ozone anomalies of the opposite sign at higher latitudes. The anomalies in total ozone column are formed because ozone density is largest in the lower stratosphere, making the ozone column anomaly most sensitive to the QBO-driven circulation there.

Satellite and balloon profile observations show the QBO influence on advection and distributions of other trace gases and particles [198, 199], including an impact on stratospheric water vapour [200]. The QBO disruption of 2015–2016 (yellow ellipses) had a direct impact on stratospheric composition [201, 202]. Recognition that the QBO influences polar stratospheric composition and surface concentrations continues to grow. The QBO partially controls the Antarctic ozone hole by altering the year-to-year variability of ozone-depleting chlorine and bromine [203] and can influence atmospheric transport from the stratosphere into the troposphere, confounding emission estimates of key ozone depleting substances such as chlorofluorcarbon-11 ($CFCl_3$) [204].



a) QBO Equator ozone mixing ratio (ppmv) from MLS



b) QBO column ozone (Dobson units) from TOMS/OMI/OMPS

Ozone QBO

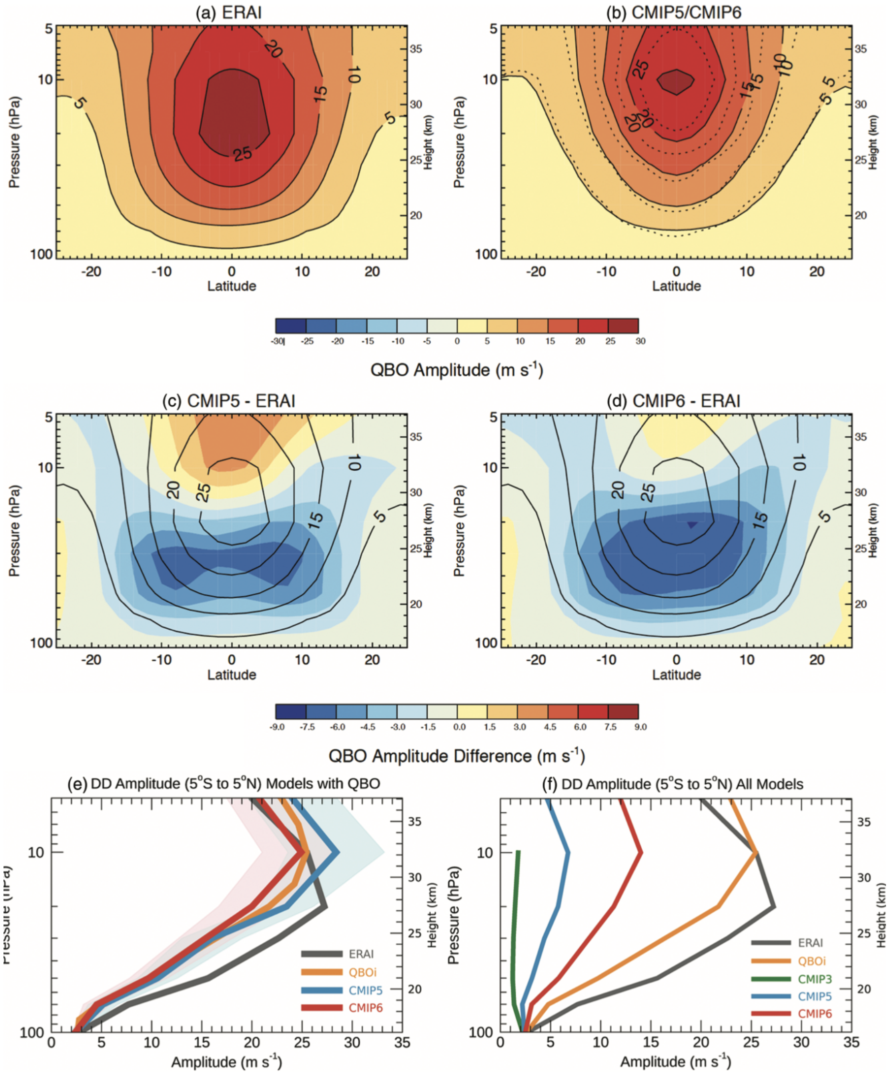


Figure 4. Model biases in tropical stratospheric wind variability. QBO biases in QBOi, CMIP5 and CMIP6 models, following [28]. QBO amplitude derived from deseasonalized zonal-mean zonal wind following [2] (DD) for (a) ERA-Interim (ERAI) reanalysis [205], (b) CMIP6 (shading and solid line) and CMIP5 (dotted line) models with QBOs, (c) CMIP5 minus ERAI (shading), and (d) CMIP6 minus ERAI (shading). Solid contours in panels (c) and (d) show the ERAI amplitude from (a) for comparison with the model biases. In (e) the vertical profile of DD amplitude averaged 5°S–5°N is shown for ERAI (black), QBOi models (orange), and CMIP5 and CMIP6 models with QBOs (blue and red). Blue and pink shading represent the ±2 standard error for CMIP5 and CMIP6, respectively (2 times the multi-model standard deviation divided by $\sqrt{n}$ for n models). In (f) the DD amplitude is averaged for all CMIP5 and CMIP6 models (whether or not they have QBOs) and CMIP3 models are also shown (none of which have QBOs; green line).

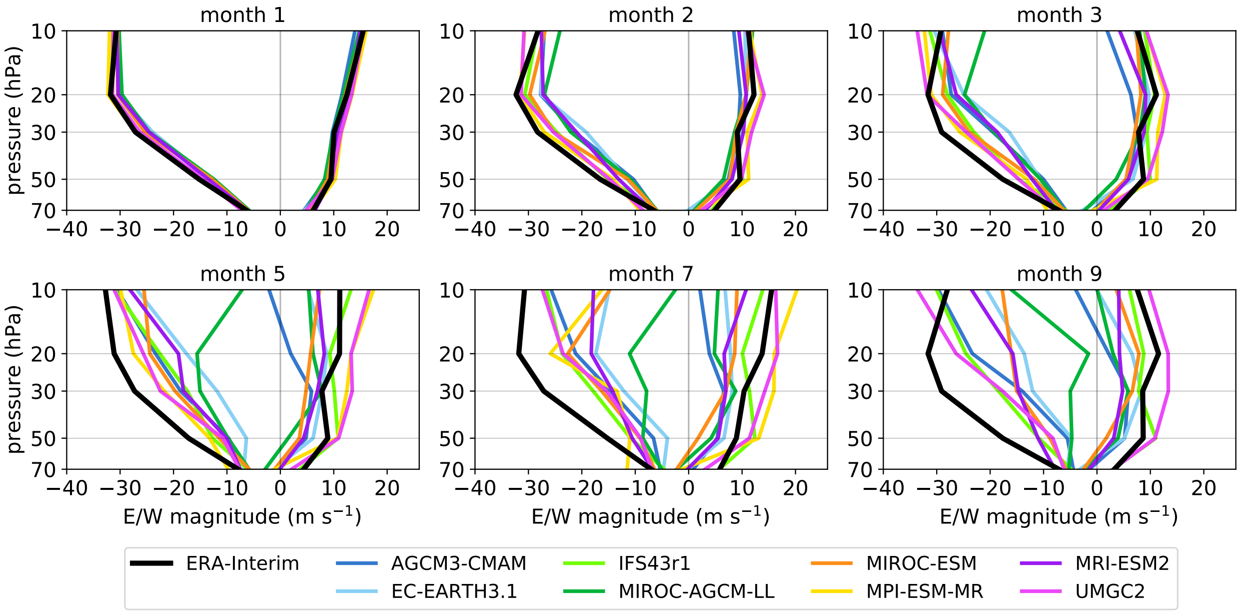
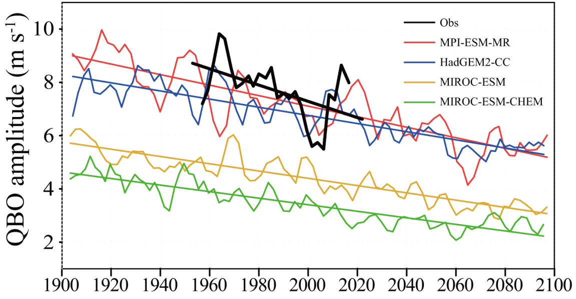
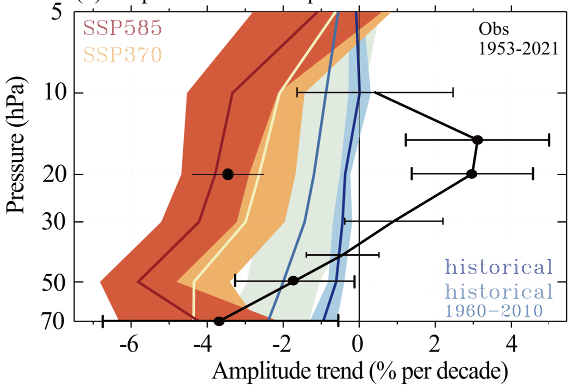


Figure 5. **Predictability of QBO evolution impacted by model biases.** Westward and eastward monthly-mean equatorial wind composited for the cases of 10 strongest analysed monthly-mean eastward and westward winds at each level and forecast verification times for hindcasts by QBOi models. Systematic westward wind biases develop with time in a majority of seasonal forecasts. Adapted from [43].


(a) QBO amplitude of zonal wind at 70 hPa (~19 km)


(b) Amplitude trend of equatorial zonal wind

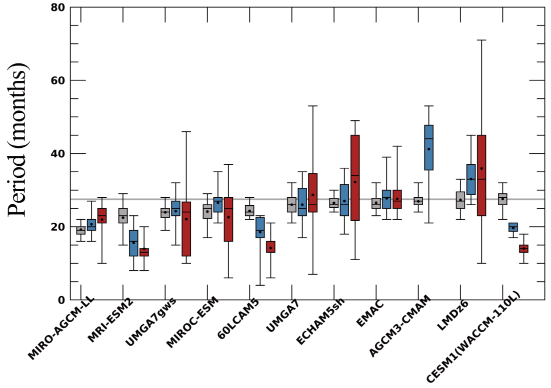

(c) QBO period changes

Figure 6. QBO changes under future climate change scenarios. (a) Time variation in the mean QBO amplitude in observations (black) and four CMIP5 models (colours) at 70 hPa ($\sim$ 19 km), adapted from [174]. Observations are radiosonde data provided by FUB [206] (https://www.geo.fu-berlin.de/en/met/ag/strat/produkte/qbo/index.html) from January 1953 to September 2021. CMIP5 output is from historical simulations and future simulations with the RCP4.5 scenario. The linear regression trends shown are all statistically 95% significant. (b) Multi-model mean trend (% per decade) in QBO amplitudes in CMIP6 historical (blue), SSP370 (yellow) and SSP585 (red) simulations and FUB observations from January 1953 to September 2021 (black) as a function of altitude, adapted from [175]. Shading denotes the uncertainty in the multi-model mean ($\pm$2 standard error) and error bars of black lines are ranges of 95% significance (filled circles satisfy 95% significance). (c) Distribution of QBO periods in present day (grey), double CO_2 (blue) and quadrupled CO_2 (red) simulations from QBOi models [101]. Box edges mark the lower and upper quartiles, box whiskers mark the minimum and maximum values, and black dots represent mean values.