

# Munich Security Report 2018

To the Brink – and Back?







# Table of Contents

■	<b>Foreword</b>	<b>5</b>
■	<b>Present at the Erosion: International Order on the Brink?</b>	<b>6</b>
■	<b>Actors</b>	<b>12</b>
	EU: Union Crack?	14
	United States: Home Alone?	20
	China: Xi's the One	24
	Russia: Bearly Strong?	28
■	<b>Regions</b>	<b>30</b>
	Central and Eastern Europe: In or Out?	32
	Africa: The Young and the Restless	36
	Middle East: Gulf Clubs and Curses	40
■	<b>Issues</b>	<b>44</b>
	Environmental Security: Running on Fumes	46
	Cybersecurity: What the Hack?	50
	Nuclear Security: Out of (Arms) Control?	54
■	<b>Food for Thought</b>	<b>58</b>
	Books	60
	Reports	62
■	<b>Acknowledgments</b>	<b>64</b>
■	<b>Endnotes</b>	<b>68</b>

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# Foreword

Dear Reader,

Our Munich Security Report, which we first published in 2015, is our conversation starter for the Munich Security Conference and aims to serve as a useful compilation for decision makers, security professionals, and the public. In anticipation of the Munich Security Conference 2018, we are pleased to present the report's fourth edition.

In the last year, the world has gotten closer – much too close! – to the brink of a significant conflict. Tensions between North Korea and the United States have greatly increased and rhetoric on both sides has escalated. The relationship between Saudi Arabia and Iran is showing a similar dynamic, manifesting itself in further regional instability. In Europe, tensions between NATO and Russia remain high, and the war in and over Ukraine continues unabated. Moreover, landmark arms control treaties, such as the Intermediate-Range Nuclear Forces Treaty, are at risk of unraveling, while efforts to limit arms races in new fields, such as cyber, are stalling. This is all taking place against the global backdrop of rising nationalism and illiberalism, weakening some of the core principles of the international order.

So far, most of today's contentious relationships and disputed issues have not come to a head. 2018 promises to be a year where some of these crises might either move towards resolution or escalation – with potentially catastrophic consequences. We must do whatever we can to move away from the brink.

This report aims to make sense of today's security environment by presenting condensed information on some of these crises and, more generally, on some of the most important actors, regions, and issues on the international security agenda. As in previous editions, the list of topics is neither comprehensive nor exhaustive.

This report would not have been possible without the generous support of the numerous renowned institutions, friends, and partners who made their research and data available to the Munich Security Conference. I would like to thank them all – and wish you an interesting and thought-provoking read!

Sincerely yours,

Ambassador Wolfgang Ischinger  
Chairman of the Munich Security Conference



# Present at the Erosion: International Order on the Brink?

“When I took office one year ago, I appealed for 2017 to be a year for peace. Unfortunately, in fundamental ways, the world has gone in reverse. On New Year’s Day 2018, I am not issuing an appeal. I am issuing an alert – a red alert for our world.”<sup>44</sup>  
**ANTÓNIO GUTERRES,**  
**31 DECEMBER 2017**

“International relationships that had seemed immutable for 70 years are being called into question. From Europe, to Asia, to our own North American home, long-standing pacts that have formed the bedrock of our security and prosperity for generations are being tested.”<sup>45</sup>  
**CHRYSTIA FREELAND,**  
**6 JUNE 2017**

There is a widespread sense that the world – as German President Frank-Walter Steinmeier has been fond of saying – “is out of joint.”<sup>1</sup> Developments in recent years have triggered increasing concern about the stability of the so-called liberal international order, a set of institutions and norms conceived in the aftermath of World War II and largely shaped by the United States. Harry S. Truman’s Secretary of State, Dean Acheson, titled his memoirs of this era “Present at the Creation.”<sup>2</sup>

To be sure, the concept of liberal international order has meant different things to different people and has evolved considerably over time.<sup>3</sup> Yet it is generally understood to include the commitment to freedom and human rights, international institutions and international law, and an open economic order, elements which have since served as the building blocks of international order. Today, however, the pillars of this very order, long taken for granted, have come under increasing pressure.<sup>4</sup> Surprisingly, the most significant attacks come from unforeseen sources. As G. John Ikenberry notes, “the world’s most powerful state has begun to sabotage the order it created. A hostile revisionist power has indeed arrived on the scene, but it sits in the Oval Office, the beating heart of the free world.”<sup>5</sup> So are we present at the erosion or even at the destruction?

The crisis of the liberal international order has not come overnight, though. Over the last several years, most clearly so in 2017, questions on the United States’ role in upholding that very order have become more widespread. The EU has recovered from the euro crisis and the financial crisis but has yet to become a strategic global actor. Meanwhile, China has become more powerful and more assertive, as has, to a different extent, Russia. Nationalism is on the rise in many countries. The authority of international bodies is being challenged in various ways.<sup>6</sup> Critical international agreements – from crucial arms control accords, such as the INF Treaty, to the Charter of Paris – are being put at risk or severely undermined while defense spending is increasing in many parts of the world and threatening rhetoric is becoming frighteningly common. The world, it seems, is becoming less liberal, less international, and less orderly.

## Less Liberal, More Illiberal

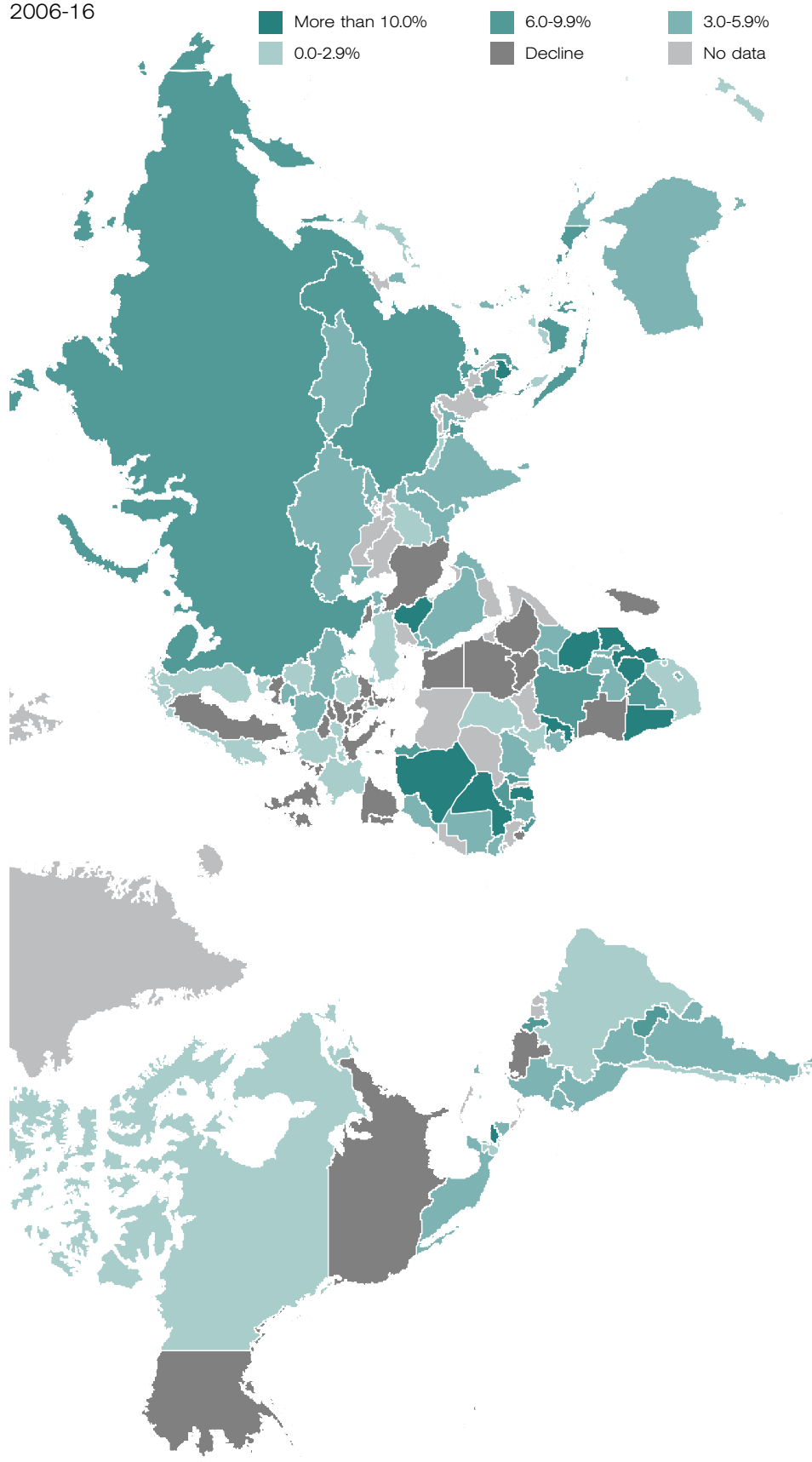
According to Freedom House, “[p]olitical rights and civil liberties around the world deteriorated to their lowest point in more than a decade in 2017, extending a period characterized by emboldened autocrats, beleaguered democracies, and the United States’ withdrawal from its leadership role in the global struggle for human freedom.”<sup>7</sup> Within the liberal-democratic world, democratic optimism has given way to increasing frustration and, in some places, to significant democratic backlash.<sup>8</sup> In the past 12 months, in both the US and Europe, politicians have attacked main elements of liberal democracy that seemed beyond debate in established democracies – from the rule of law and the independence of the judiciary to the freedom of the press.<sup>9</sup>





## THE DEVELOPMENT OF DEFENSE SPENDING AROUND THE WORLD

Compound inflation-adjusted annual growth rate of defense expenditure,  
2006-16



Source: Stockholm International Peace Research Institute (SIPRI)<sup>51</sup>



“The historic era that could be called the post-Cold War order has come to an end. Its main result, as we see it, was the complete failure of the Cold War institutions to adapt to new realities.”<sup>46</sup>

**SERGEY LAVROV,**  
**18 FEBRUARY 2017**

For many decades, US leaders defined their nation's role as the quintessential force for good in the world and as the main champion of democracy and human rights.<sup>10</sup> The Trump administration changed the tune. Secretary of State Rex Tillerson has argued that promoting values too often was “an obstacle” to advancing US interests.<sup>11</sup> Trump and like-minded leaders in other parts of the West promote an illiberal understanding of Western civilization, based on history, culture, and religion instead of liberal values and democratic achievements.<sup>12</sup> If the most powerful state in the world sets this example, others are bound to follow.<sup>13</sup>

And when the leading Western state does not promote liberal ideas anymore, who should blame its opponents for seizing the moment? The title of last year's Munich Security Report – Post-Truth, Post-West, Post-Order? – deliberately ended with a question mark.<sup>14</sup> Yet, some of the speakers at the Munich Security Conference 2017 eagerly embraced the notion of a post-Western world. For the Iranian foreign minister, Javad Zarif, there was no question mark anymore. He spoke about “the ongoing transition in the post-Western global order.”<sup>15</sup> Sergey Lavrov, the Russian foreign minister, rejected “the allegations of those who accuse Russia and the new centres of global influence of attempting to undermine the so-called ‘liberal world order.’” According to him, this model “was conceived primarily as an instrument for ensuring the growth of an elite club of countries and its domination over everyone else. It is clear that such a system could not last forever.”<sup>16</sup> But while Iran and even Russia do not offer an attractive model to other countries, China has increasingly presented its mix of autocratic leadership and capitalism as an appealing alternative to the Western model and cleverly stepped in where the US made room.<sup>17</sup> Its One Belt, One Road initiative is an enormously ambitious infrastructure project. “No country today has developed as effective a global trade and investment strategy as Beijing,” the risk consultancy Eurasia Group observes. “China's model generates both interest and imitators, with governments across Asia, Africa, the Middle East, and even Latin America tacking more toward Beijing's policy preferences.”<sup>18</sup>

Interestingly, more and more Western politicians seem to acknowledge that the world is entering a new era where different models of both domestic and international order compete. As German Foreign Minister Sigmar Gabriel recently argued in an interview: “We are in the midst of an era of competition between democratically and autocratically constituted states. And the latter are already trying to gain influence in the European Union and to drive a wedge between us.”<sup>19</sup> In particular, Gabriel singled out Chinese attempts to pressure European governments that “no longer dare to make decisions that run counter to Chinese interests.”<sup>20</sup> Think tanks have become more vocal in warning of ever more sophisticated efforts by autocratic regimes to influence governments and public opinion in liberal democracies that have only begun to think about how to respond.<sup>21</sup>

### Less Internationalist, More Nationalist

One of the core features of the post-1945 order was the commitment of the United States to principled multilateralism.<sup>22</sup> The US became, at least compared to its predecessors, a benign hegemon or a “user-friendly superpower.”<sup>23</sup> Trump's “transactionalist” understanding of world politics and promotion of “America first,” however, are at odds with that long-term bipartisan US commitment. This administration shares “a clear-eyed outlook that the world is not a ‘global community’ but an arena where nations, nongovernmental actors and businesses engage and compete for advantage. Rather than deny this elemental nature of international affairs, we embrace it,” Trump advisors H.R. McMaster and Gary





“[...] the path, the theory, the system, and the culture of socialism with Chinese characteristics have kept developing, blazing a new trail for other developing countries to achieve modernization. It offers a new option for other countries and nations who want to speed up their development while preserving their independence; and it offers Chinese wisdom and a Chinese approach to solving the problems facing mankind.”<sup>47</sup>

**XI JINPING,**

**18 OCTOBER 2017**

“[...] we can see a weakening of the international regulatory institutions, with an increasing questioning of the rules [...]. There are more and more attempts at withdrawal. People act as lone rangers. [...] Instability that is characteristic of these transition times goes along with an increasing uncertainty of the very nature of the new world order and the rules that organize it.”<sup>48</sup>

**JEAN-YVES LE DRIAN,**

**31 OCTOBER 2017**

Cohn stated.<sup>24</sup> As Carl Bildt noted, while the previous national security strategy's key term was a “rules-based international order,” it does not play a role in the 2017 version.<sup>25</sup>

Some analysts who are sympathetic to a strategy of US restraint highlight that Trump has given voice to those US citizens who are legitimately tired of serving, at significant cost, as the main guardian of the international order while their allies are mostly free-riders.<sup>26</sup> Yet Trump's approach does not adhere to a strategy of restraint – given that he has intensified efforts in all military conflicts the US was engaged in when he took over. He is not an isolationist but a unilateralist. Others maintain that his critics overlook that the administration's foreign policy has been less revolutionary or disruptive than his rhetoric of disdain for international institutions: “[...] 2017 in fact witnessed a far less dramatic departure in American foreign policy than has often been alleged.”<sup>27</sup> It may be true that Trump has yet to implement some of his bold announcements. But, to a certain extent, the effects have started to become obvious.

Again, Trump is the most important symptom of a broader trend – but not the only one. A new nationalism is on the rise in many parts of the world. However, “America first” and Brexit may have the welcome effect that other stakeholders in the liberal order try to make up for less internationalist Anglo-Saxons.<sup>28</sup> But how quickly can they do so even if they wanted to? Canada, Germany, France, or Japan – often seen as the remaining middle-powers with a clear commitment to and major stakes in a rules-based international order – all lack both the material capabilities and ambition to step in. The European Union as a whole could play a stabilizing role for the liberal international order – as could other groupings of liberal democracies, such as the renewed “Quad” in the Asia-Pacific.<sup>29</sup> Yet they are facing their own internal struggles and are far from agreeing on a joint grand strategy.

### Less Order, More Escalation Potential?

In the early post-Cold War period, analysts and policymakers believed that rising powers could be turned into “responsible stakeholders” of the liberal international order. Yet it has become increasingly clear that powers such as China or Russia do not want to be co-opted but have very different ideas of international order. At the very least, they will try to promote their own order in what they see as their spheres of influence. As a result, we may see the emergence of a “multi-order world” in which several orders compete with each other.<sup>30</sup>

Again, this is not a new development, but recent US policy may accelerate this trend. Due to its central role in the global security order (and its several regional sub-orders), it greatly matters for security dynamics across the globe if the United States changes course. As Richard Haass notes, “alliances are important both for what they do – they pool resources on behalf of shared goals and defense – and what they discourage, including proliferation and deferring to adversaries.”<sup>31</sup> Even if Trump eventually committed to NATO's “musketeeer clause” in Article 5, his repeated questioning of the United States' commitment to the defense of its allies has triggered fundamental security debates in many countries. In the Asia-Pacific, some countries are thinking twice about whether it makes sense to continue to side with the United States – or whether accommodating China is the better option.<sup>32</sup> After Trump's visit to Europe in May 2017, German Chancellor Angela Merkel remarked that the “times in which we could completely rely on others are over to a certain extent. That is what I have experienced in the last few days.”



“In the past, we could rely on the French, the British and, especially, the Americans, to assert our interests in the world. We have always criticized the US for being the global police, and it was often appropriate to do so. But we are now seeing what happens when the U.S. pulls back. There is no such thing as a vacuum in international politics.”<sup>49</sup>

**SIGMAR GABRIEL,**  
5 JANUARY 2018

“These are dangerous times, but you should not count America out, and we should not count each other out. We must be prudent, but we cannot wring our hands and wallow in self-doubt. [...] We cannot give up on ourselves and on each other. That is the definition of decadence. And that is how world orders really do decline and fall.”<sup>50</sup>

**JOHN MCCAIN,**  
17 FEBRUARY 2017

According to her, this required a stronger role for Europe: “We Europeans must really take our fate into our own hands.”<sup>33</sup> While this may not be bad a thing at all, the uncertainty caused by Trump’s reluctance to commit himself to Europe’s defense has also provoked previously unthinkable debates.<sup>34</sup> If that is true for America’s closest allies, what should one expect from highly dependent countries with less institutionalized ties to the United States? More self-help – a situation McMaster and Cohn explicitly argued the US would “embrace” – is bound to lead to even more security dilemmas. As Daniel Drezner put it, “the ‘embrace’ of a Hobbesian vision of the world by the most powerful country in the world pretty much guarantees Hobbesian reciprocity by everyone else.”<sup>35</sup>

Unfortunately, many of the world’s arms control efforts that might at least limit competition and reduce the danger of escalation are fraying. Neither Trump’s questioning of the Iran deal nor Russia’s blatant violation of the Budapest Memorandum help make the argument that states can safely forfeit nuclear weapons if they feel threatened. Instead, new proliferation efforts are increasingly likely in a less stable world. In other rather new areas, such as cyber or artificial intelligence, arms control initiatives have not made much progress.

While the world therefore needs diplomatic damage control and de-escalation, it has seen nuclear brinkmanship and rhetorical escalation – especially in those parts of the world where the risk of interstate war has increased. Consider the following recent examples of extraordinary, harsh rhetoric in two of the world’s most contentious relationships – where a misstep or miscalculation could lead to a very serious military escalation.

In the Gulf region, Saudi Arabia’s crown prince Mohammed bin Salman accused Iran of “direct military aggression” against his country<sup>36</sup> and called Iran’s supreme leader “the new Hitler of the Middle East.”<sup>37</sup> Iran’s foreign minister Zarif tweeted, “KSA [the Kingdom of Saudi Arabia] is engaged in wars of aggression, regional bullying, destabilizing behavior [and] risky provocations.”<sup>38</sup> Who knows what would have happened if the most recent ballistic missile attack by the Houthi rebels in Yemen, allegedly aimed at the Saudi king’s official residence in Riyadh, had been successful?<sup>39</sup>

In the conflict between the US and North Korea, President Donald J. Trump touted the “size” of his nuclear button, spoke of unleashing “fire and fury” on North Korea, and vowed his preparedness to “totally destroy” the country in defense of the US or its allies.<sup>40</sup> North Korean leader Kim Jong-un threatened the US territory of Guam and proclaimed, referring to Trump, that he would “surely and definitely tame the mentally deranged US dotard with fire.”<sup>41</sup> Some argue that a nuclear war between the US and North Korea is highly unlikely.<sup>42</sup> This may be true, but the world has already seen its share of close calls since the advent of the nuclear age. Given the potential loss of lives in a nuclear exchange, betting on humankind’s continued streak of good luck does not seem to be a good strategy. As former US Secretary of Defense William J. Perry warned after the most recent false alert of incoming ballistic missiles in Hawaii: “The risk of accidental nuclear war is not hypothetical – accidents have happened in the past, and humans will err again.”<sup>43</sup> Such a failure of statecraft would make all debates about how liberal or internationalist the emerging order can and should be quite meaningless. A new world order – whatever it may look like – cannot be built on the ruins of a suicidal nuclear exchange.



## THE EURASIA GROUP'S TOP 10 RISKS FOR 2018

Each year, the Eurasia Group publishes a list of the top 10 political risk stories for the year ahead. After having warned, in 2017, about a “Geopolitical Recession,” Eurasia Group fears “the world is now closer to ‘Geopolitical Depression’ than to a reversion to past stability.”

- 1 **China loves a vacuum:** At a moment of policy incoherence and dysfunction in Washington, China's government has developed the world's most effective global trade and investment strategy. The global business environment must adapt to new sets of rules, standards, and practices. US-China conflict, particularly on trade, will become more likely in 2018.
- 2 **Accidents:** There has been no major geopolitical crisis since 9/11, and none created by governments since the Cuban missile crisis. But there are now many places where a misstep could provoke serious international conflict: competition in cyberspace, the fight over North Korea, battlefield accidents in Syria, growing US-Russia tension, and the dispersal of Islamic State fighters from Syria and Iraq.
- 3 **Global tech cold war:** The United States and China will compete to master artificial intelligence and supercomputing, and will struggle for market dominance across the globe. Fragmentation of the tech commons creates market and security risks.
- 4 **Mexico:** A collapse of NAFTA talks would not kill the deal, but uncertainty over its future would disproportionately harm the Mexican economy. Meanwhile, ahead of July's presidential election, demand for change favors Andrés Manuel López Obrador, who represents a fundamental break with recent investor-friendly economic policies.
- 5 **US-Iran relations:** The nuclear deal will probably survive 2018, but there is a substantial chance that it will not. Trump will support Saudi Arabia and work to contain Iran in Syria, Iraq, Lebanon, and Yemen. The United States will more frequently sanction Iran for missile tests, perceived support for terrorism, and human rights violations. Iran will push back.
- 6 **The erosion of institutions:** The institutions that support and sustain peaceful and prosperous societies – governments, political parties, courts, the media, and financial institutions – continue to have their legitimacy undermined. The resulting turmoil will make economic and security policy less predictable.
- 7 **Protectionism 2.0:** Protectionism 2.0 creates barriers in the digital economy and innovation-intensive industries, not just in manufacturing and agriculture. New barriers are less visible: instead of import tariffs and quotas, today's tools of choice include bailouts, subsidies, and “buy local” requirements. Measures will more often be micro-targeted at political rivals.
- 8 **The United Kingdom:** Britain faces acrimonious Brexit negotiations and the risk of domestic political turmoil. On Brexit, the principle that “nothing is agreed until everything is agreed” will encourage endless fights over details between and within the two sides. On domestic politics, management of Brexit could cost Prime Minister Theresa May her job, creating risks for both Article 50 talks and domestic economic policy.
- 9 **Identity politics in southern Asia:** Islamism in parts of Southeast Asia fuels local forms of populism, most prominently in Indonesia and Malaysia. Resentment of ethnic Chinese has made a strong recent comeback. In India, the risk is that Prime Minister Narendra Modi could use Hindu nationalism to consolidate support ahead of the 2019 elections.
- 10 **Africa's security:** In 2018, negative spillover from the continent's unstable periphery will affect Africa's core countries. The dangers posed by Al Shabaab and Al Qaeda are not new, but foreign partners that have helped stabilize weak governments in the past are distracted.

Source: Eurasia Group<sup>62</sup>







# Actors





## EU: Union Crack?

"The times in which we could completely rely on others are over to a certain extent."<sup>11</sup>

**ANGELA MERKEL,**  
**28 MAY 2017**

Uncertainty about the transatlantic relationship, Brexit, significant disagreements between member states (especially on migration), and a worsening security situation at its borders: these "cracks" in the European Union made the beginning of 2017 look bleak. Most of these challenges continue to shape the EU today, but there is more than a glimmer of hope: economic growth is stable and unexpectedly high, parts of the European integration project have been reinvigorated, and public opinion of EU membership is increasingly favorable.

Over the past year, the EU and its member states have shown an increasing willingness for, and more concrete action in, defense integration. Twenty-five member states have agreed to launch a Permanent Structured Cooperation (PESCO) for defense – a process that allows groups of member states to advance towards further integration and strengthening defense cooperation within the EU framework. Federica Mogherini spoke of a "historic moment in European defense."<sup>1</sup> The German and French governments agreed to jointly develop the next generation of fighter jets.<sup>2</sup> And the European Commission launched its "European Defence Fund," in support of European defense research and procurement.<sup>3</sup> Due to rising defense budgets, European leaders now have the opportunity to build more European, more connected, and more capable forces that are needed to defend the interests of 500 million Europeans.<sup>4</sup>

"I would today like to say with resolute conviction: the Europe of today is too weak, too slow, too inefficient, but Europe alone can enable us to take action in the world, in the face of the big contemporary challenges."<sup>12</sup>

**EMMANUEL MACRON,**  
**26 SEPTEMBER 2017**

Whereas integration has deepened in unexpected areas, the United Kingdom's exit process has also moved forward, albeit more slowly than expected. Negotiations initially suffered from a lack of common understanding as to how Brexit should be sequenced.<sup>5</sup> In London, talks have been hampered by Cabinet-level disagreements as well as vivid public and parliamentary debates.<sup>6</sup> The milestone decision by the European Council in December 2017, which states "sufficient progress" had been achieved in negotiations, has been met with relief by most observers.<sup>7</sup> However, the past year also showed that some sort of transition period would be required after the UK's departure from the EU.<sup>8</sup>

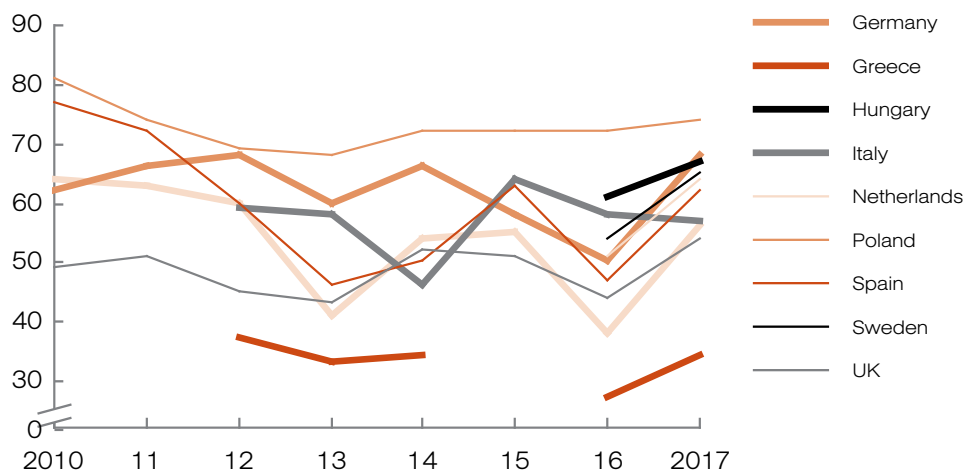
Some core members of the EU have reacted to the Brexit decision with a sense of renewed activism (especially France under President Emmanuel Macron), while other member states are increasingly skeptical about further integration. Germany has been largely absent from the debate for domestic reasons. Some governments, in particular those of Hungary and Poland, have even entered into direct confrontation with the Brussels institutions. Disagreements about how core principles of the EU, such as the rule of law, are to be understood have sparked unprecedented disunity in the EU.<sup>9</sup> However, as experts like Ivan Krastev have argued, it may well be the aftermath of the 2015 refugee crisis and the member states' widely differing opinions on how to tackle this challenge that currently constitute the greatest threat to European unity: "This crisis has, in its way, become Europe's September 11."<sup>10</sup> The coming year will show whether attempts to compromise and ambitious reform proposals will translate into concrete actions and decisions to mend the cracks in the EU.





### WHAT CITIZENS OF SELECT COUNTRIES THINK OF THE EU

Favorable view of the EU, spring 2010-17, percent

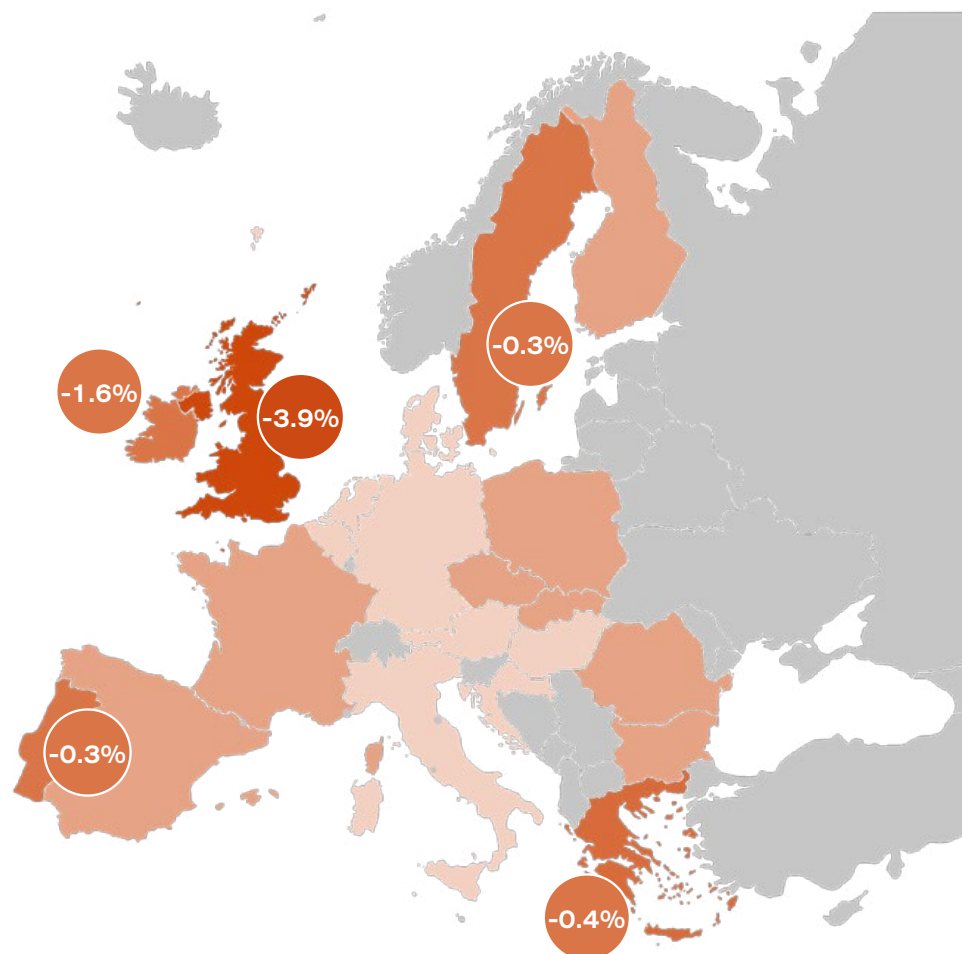


Source: Pew Research Center<sup>13</sup>

### WHAT COUNTRIES WILL BE HIT HARDEST BY BREXIT ECONOMICALLY?

Estimated percentage change in GDP in 2030 relative to no-Brexit baseline

More than -2.0%   -1.9 to -0.3%   -0.2 to -0.1%   0.0 to 0.3%   No estimate available

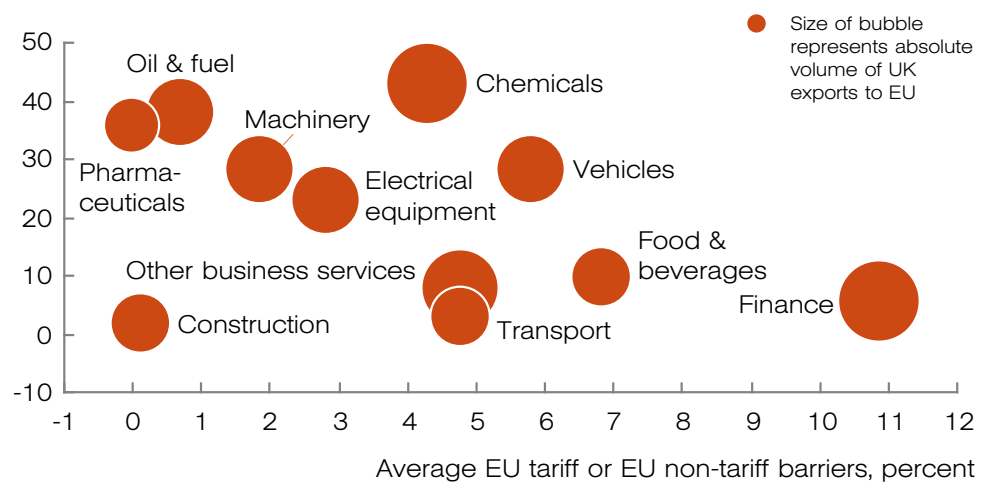


Source: Oxford Economics<sup>14</sup>



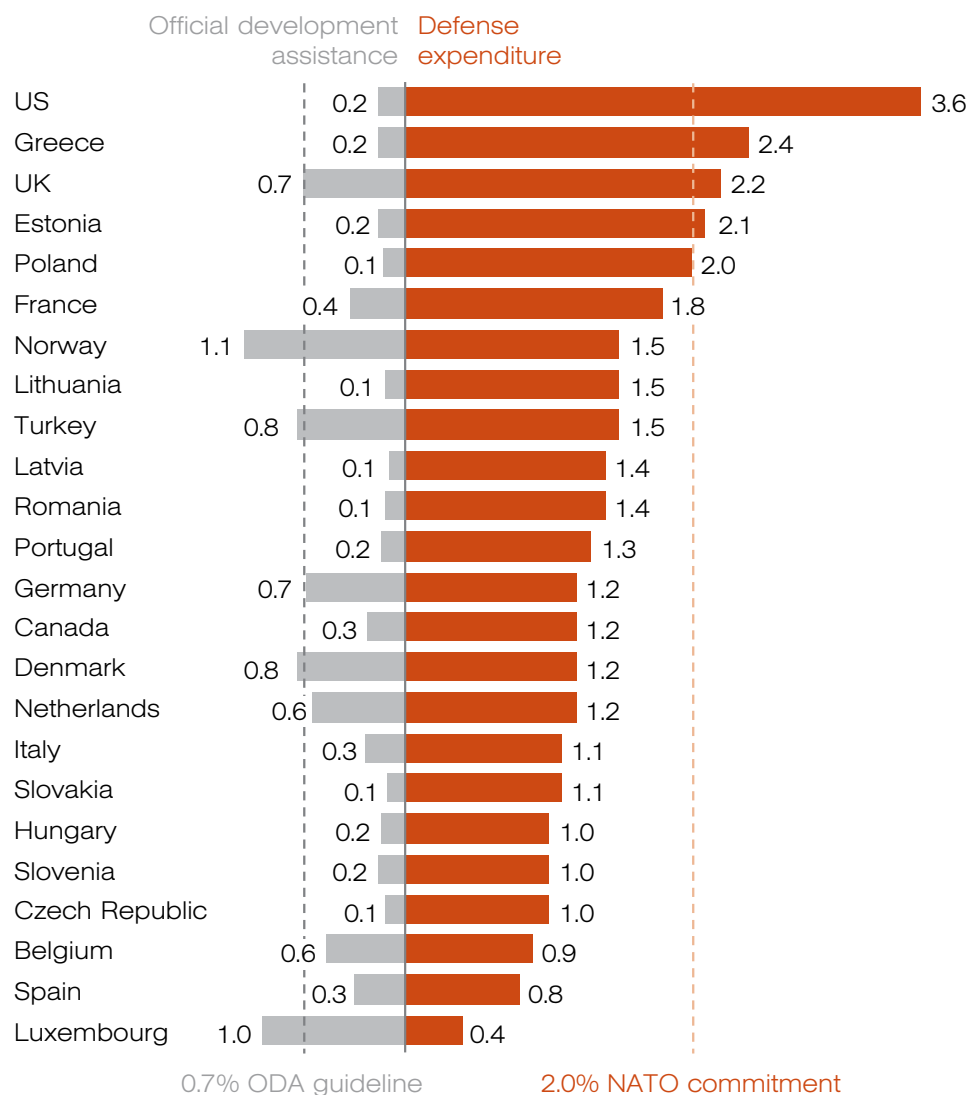
### MOST VULNERABLE UK INDUSTRIES IN CASE OF A "HARD" BREXIT

Exports to EU as share of sectoral demand, 2016, percent

Source: Oxford Economics<sup>15</sup>

### SPENDING ON INTERNATIONAL ENGAGEMENT: DEFENSE AND DEVELOPMENT

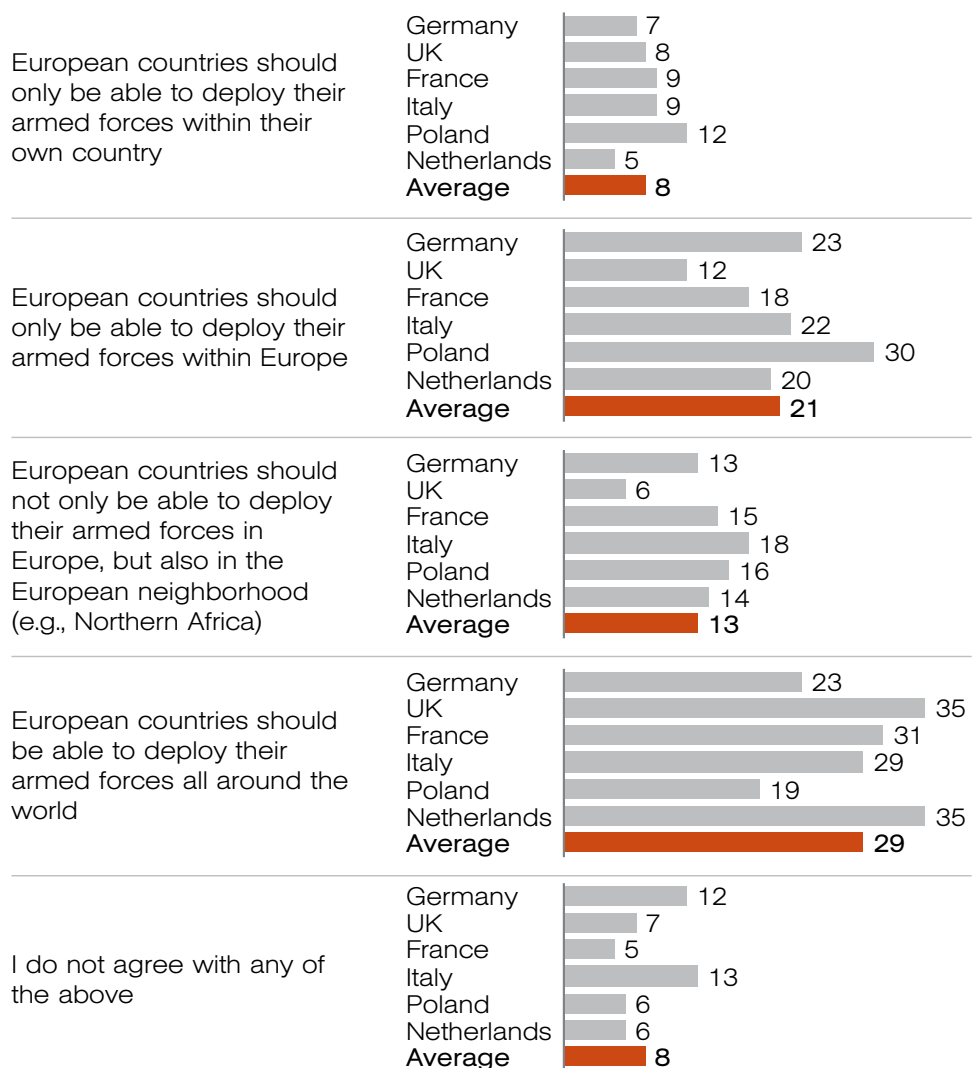
Selected NATO member states, share of GDP, 2016, percent

Source: OECD; NATO<sup>16</sup>



**WHAT CITIZENS  
OF SELECT EU  
COUNTRIES THINK:  
WHERE SHOULD  
EUROPE BE ABLE TO  
DEPLOY ITS FORCES?**

Opinion poll, November 2017, percent

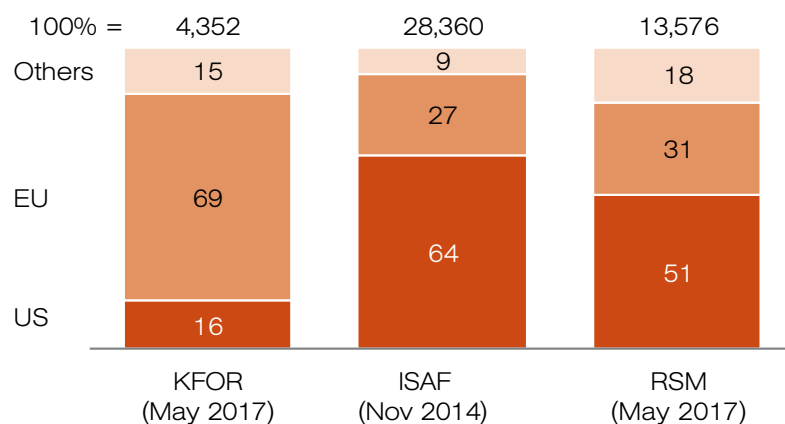


Source: YouGov opinion poll, conducted exclusively for the Munich Security Conference and McKinsey<sup>17</sup>

**YouGov**

**WHO HAS  
CONTRIBUTED TO  
NATO-LED MISSIONS?**

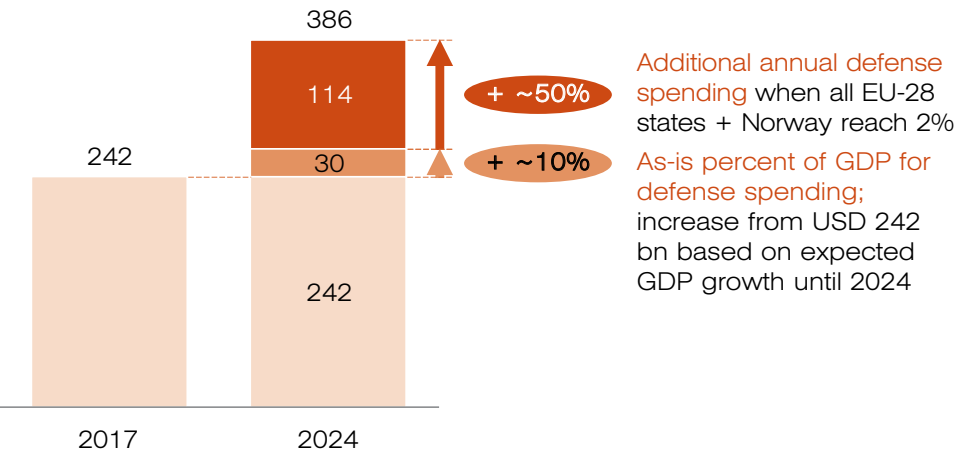
Contribution to NATO-led missions (Kosovo Force, International Security Assistance Force, Resolute Support Mission), percent



Source: NATO<sup>18</sup>

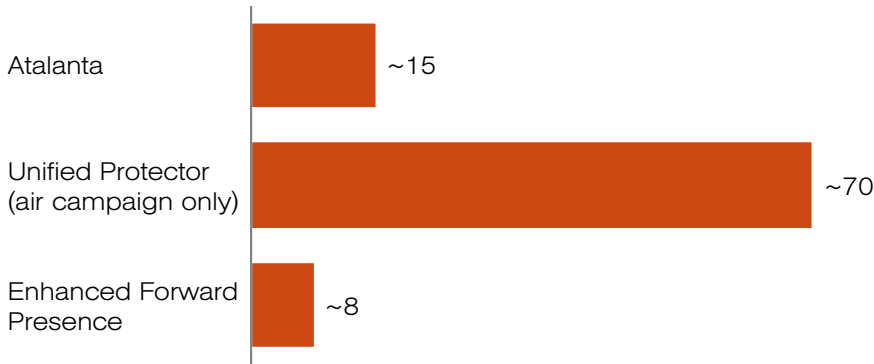
WHAT WOULD IT MEAN IF EUROPE SPENT 2% OF GDP ON DEFENSE?

EU-28 + Norway total defense expenditure, in constant 2017 USD billions



Source: McKinsey analysis, based on IHS Markit Forecast (July 2017) (forecasted GDP); NATO (defense expenditure); IISS, *The Military Balance* 2017 (defense expenditure non-NATO countries)<sup>19</sup>

Total required equipment investment to procure equipment for one additional mission, USD billions



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Source: McKinsey analysis<sup>20</sup>

A “2 percent” scenario in numbers

Today, the NATO benchmark of spending 2 percent of a member state's GDP on defense is being discussed more than ever before. But what would a “2 percent” scenario\* actually look like? In terms of input, compared to today's percentages, such a scenario would imply an additional defense spending of USD 114 billion in 2024. Consequently, defense equipment spending in 2024 would increase from USD 54 to USD 77 billion, assuming NATO's target of spending 20 percent of defense budgets on investment is also met.

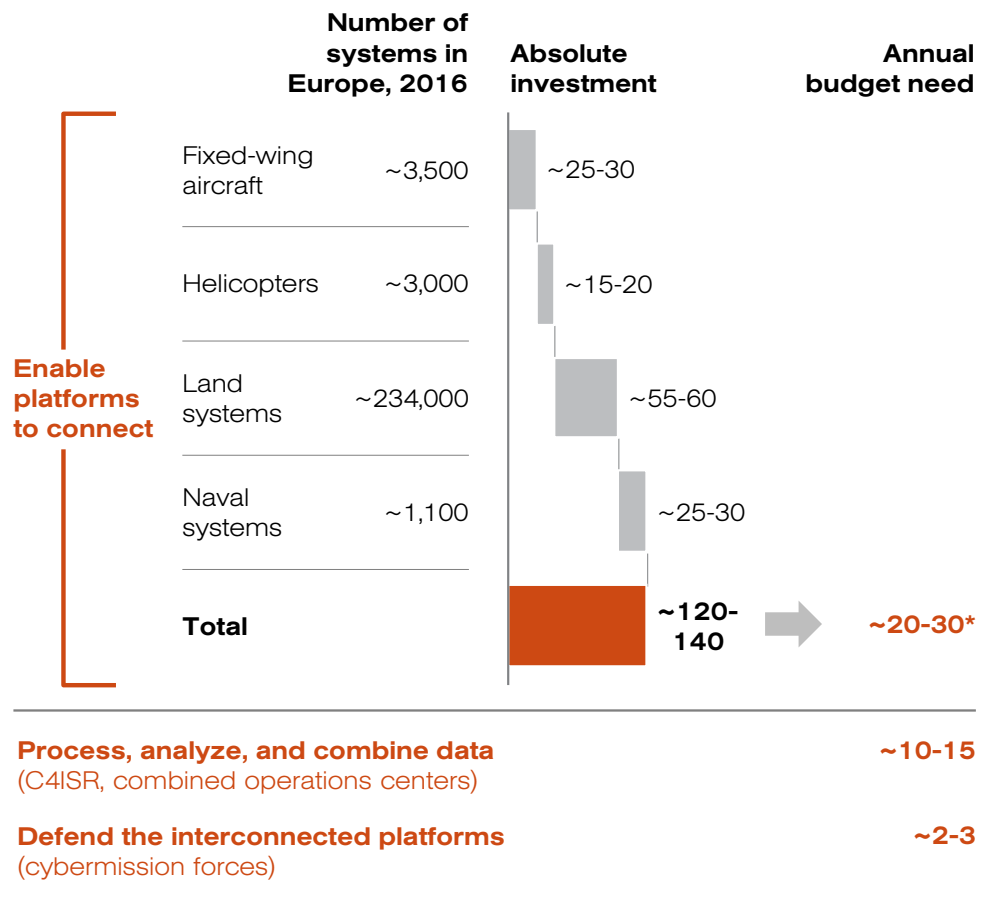
In terms of output (or capabilities), analyses show that increasing defense spending to 2 percent will not be a game changer in the short to medium term – if spent within existing structures. To illustrate: procuring the entire equipment for a major air campaign such as “Unified Protector” would already consume a full year's equipment budget (USD 77 billion).

\* The analysis on these pages is calculated on the basis of the EU's 28 member states plus Norway



## HOW MUCH WOULD IT COST TO CLOSE EUROPE'S INTERCONNECTED- NESS AND DIGITIZATION GAP?

Estimate of costs required to modernize Europe's forces (EU-28 + Norway),  
USD billions



\* To achieve a 5- to 7-year upgrade cycle

Source: McKinsey analysis, based on IISS, *The Military Balance* (2017), company reports, MoD reports, expert interviews<sup>21</sup>

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### Europe's interconnectedness and digitization gap – building the forces of the future

Modern forces' capabilities are significantly determined by the degree to which they are digitally connected and make best use of data.

Today, however, Europe's armed forces suffer from an interconnectedness and digitization gap. To close this gap, they require platforms that are able to communicate with each other, e.g., through high-bandwidth data links. Such an upgrade costs approximately USD 120 to 140 billion. Infrastructure that enables forces to process, analyze, combine, and evaluate data is also needed, requiring USD 10 to 15 billion on C4ISR\* and combined operations centers per year. Finally, a step-up in European cyberforces is needed to protect and defend these interconnected platforms – estimated at an additional USD 2 to 3 billion per year.

\* Command, control, communications, computers, intelligence, surveillance, and reconnaissance



# United States: Home Alone?

"Many of America's allies are in a state of confusion and alarm. And America's adversaries, in particular China and Russia, are taking advantage of the disarray to advance their own interests."<sup>10</sup>

**GIDEON RACHMAN,**  
**22 MAY 2017**

Figuring out US positions on key issues can be a complicated matter. In the range of public utterances between President Trump's tweets and official strategy documents, US allies and adversaries can find widely varying messages. Regarding North Korea, for instance, policy pronouncements since October have ranged from Trump saying negotiations were a waste of time to Secretary of State Tillerson saying the United States were ready to talk anytime and without precondition.<sup>1</sup> In the Middle East, Trump called Islam "one of the world's great faiths" – after calling for a ban on all Muslims entering the US and saying that "Islam hates us."<sup>2</sup> The new National Security Strategy, issued in December 2017, addresses both China and Russia as autocratic adversaries and stresses the importance of values in foreign policy.<sup>3</sup> Trump, on the other hand, has repeatedly shown sympathy for strongmen and deemphasized the importance of human rights while reserving strong criticism for democratic allies.<sup>4</sup> These allies are wondering how deep the US commitment to them still is. Does Trump's rhetoric primarily aim to get them to share more of the burden – or is he really prepared to retreat from important partnerships and alliances? Trump argues that unpredictability is key to his approach to foreign policy, but the resulting lack of clarity can make successful diplomacy much more difficult.<sup>5</sup>

"We are going to have peace through strength."<sup>11</sup>

**DONALD J. TRUMP,**  
**9 JANUARY 2018**

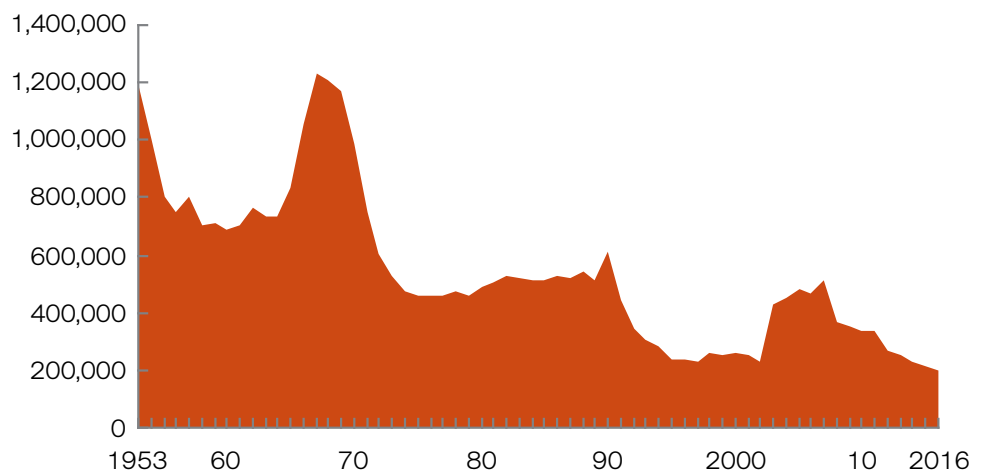
In three important and related respects, clarity has emerged. First, the Trump administration puts a premium on sovereignty and approaches international relations as "an arena where nations, nongovernmental actors and businesses engage and compete for advantage", as key Trump advisors H.R. McMaster and Gary Cohn argued in a widely discussed op-ed.<sup>6</sup> To some extent, this approach is also applied to allies. "We delivered," McMaster and Cohn write, "a clear message to our friends and partners: where our interests align, we are open to working together to solve problems and explore opportunities." Arguably, this extraordinarily narrow approach to friendship and partnership undercuts the most important strength of US diplomacy since 1945: the bipartisan long-term investment into forging a community of like-minded states whose relationships are based not just on shared interests but shared values as well. Second, US policy aims to focus on "peace through strength,"<sup>7</sup> exemplified by a reduced investment in diplomacy, with significant cuts to the State Department and USAID and a simultaneous boost of military spending.<sup>8</sup> Third, there is a pattern of withdrawal in specific instances – and of "abdication" of leadership in a larger sense. The US has abandoned UNESCO, the Trans-Pacific Partnership, and the Paris climate accord. Trump has also threatened to cancel NAFTA and has decertified the Iran nuclear deal under US law. As Richard Haass argues, the US engages in "abdication, the voluntary relinquishing of power and responsibility. [...] The US is no longer taking the lead in maintaining alliances, or in building regional and global institutions that set the rules for how international relations are conducted."<sup>9</sup>





### US OVERSEAS MILITARY PRESENCE SINCE 1953

Number of active duty personnel overseas

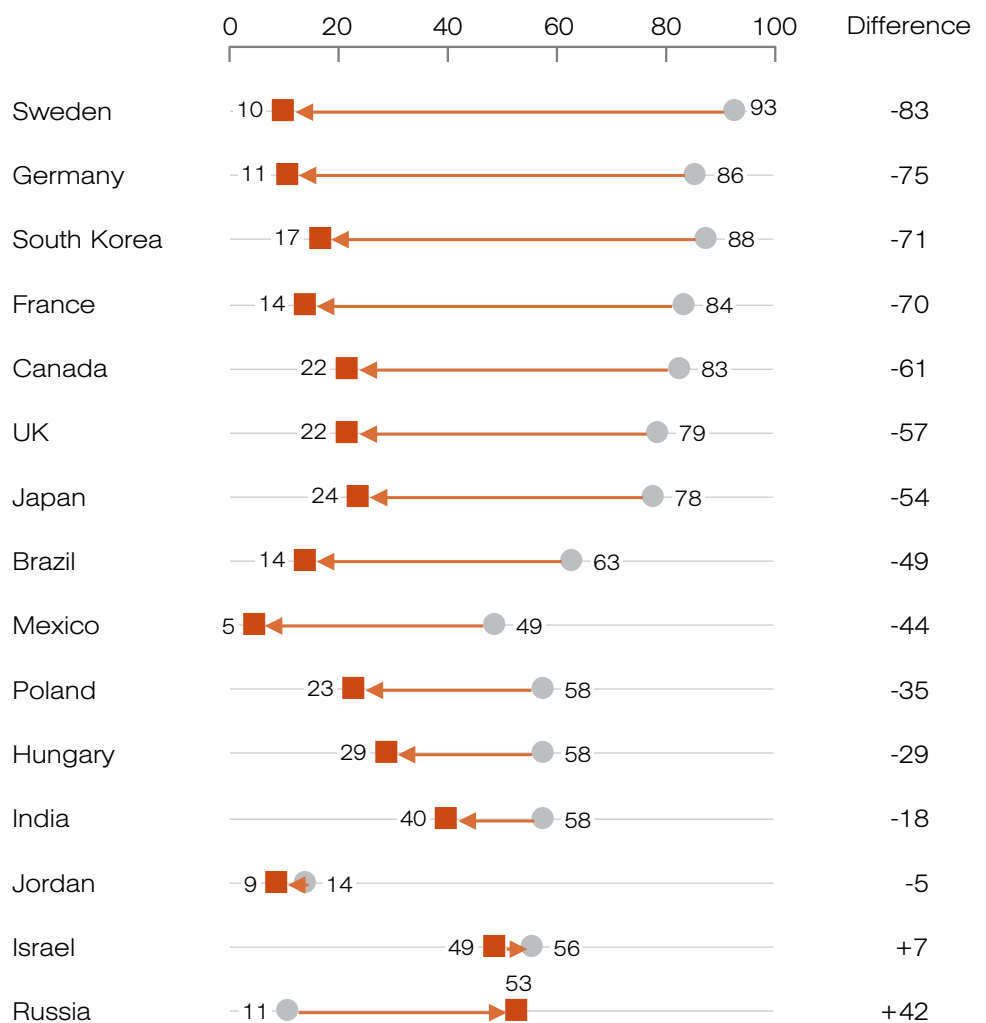


Source: Pew Research Center, based on Defense Manpower Data Center<sup>12</sup>

### WHAT CITIZENS OF SELECT COUNTRIES THINK: DO YOU HAVE CONFIDENCE IN THE US PRESIDENT TO DO THE RIGHT THING REGARDING WORLD AFFAIRS?

Opinion poll, 2014/16 and 2017, "yes" in percent

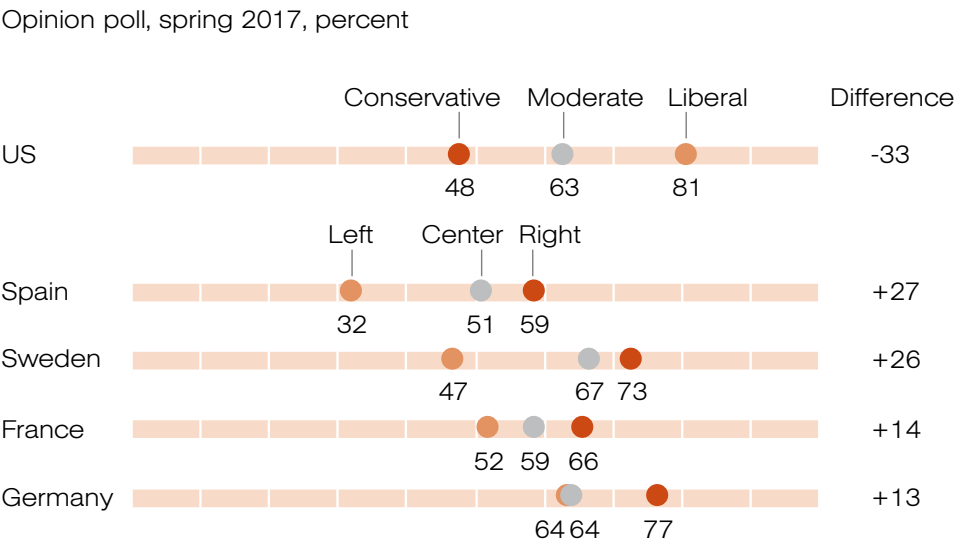
● Obama ■ Trump



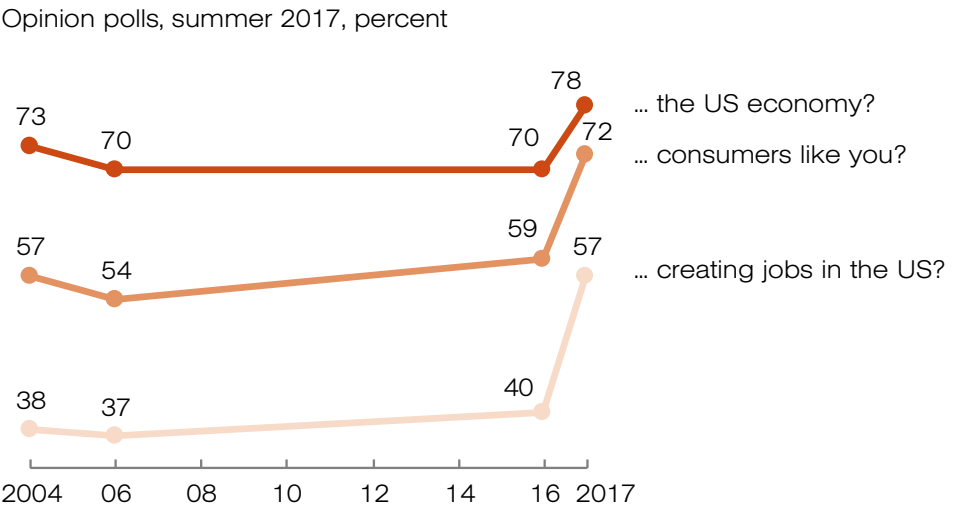
Source: Pew Research Center<sup>13</sup>



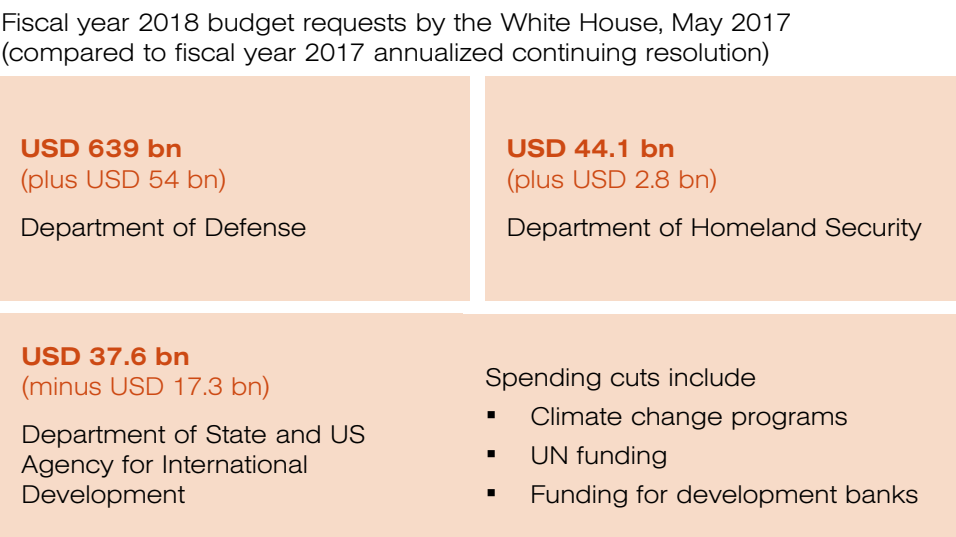
WHAT CITIZENS OF  
SELECT COUNTRIES  
THINK: FAVORABLE  
VIEWS OF NATO BY  
POLITICAL IDEOLOGY



WHAT AMERICANS  
THINK: IS  
INTERNATIONAL  
TRADE GOOD FOR ...



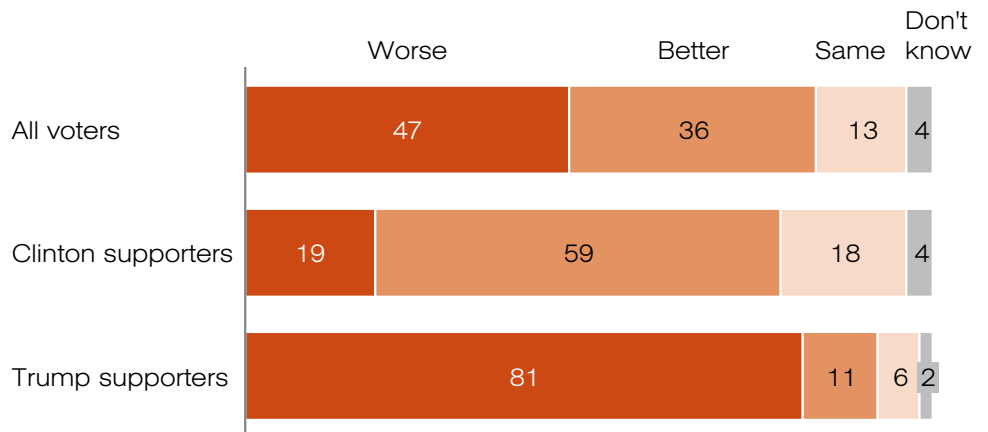
PRESIDENT TRUMP'S  
"AMERICA FIRST"  
BUDGET PRIORITIES





### WHAT AMERICANS THINK: COMPARED WITH 50 YEARS AGO, LIFE FOR PEOPLE LIKE YOU IN AMERICA TODAY IS ...

Opinion poll, August 2016, percent

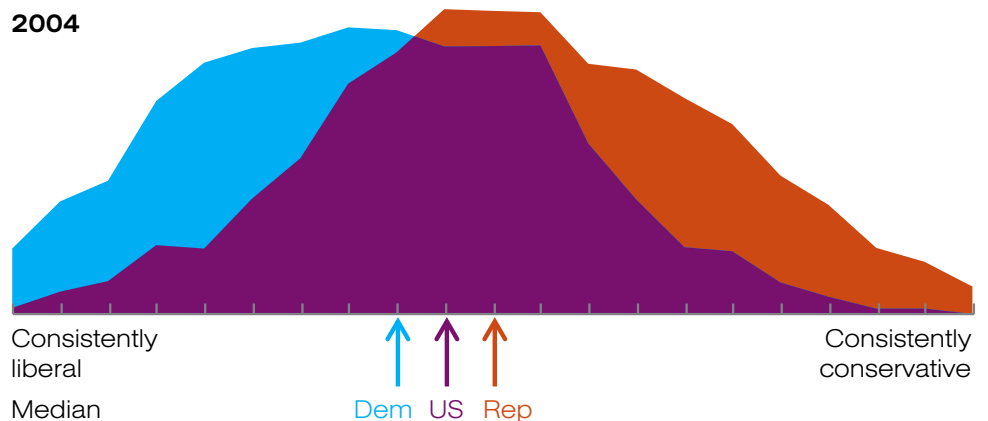


Source: Pew Research Center<sup>17</sup>

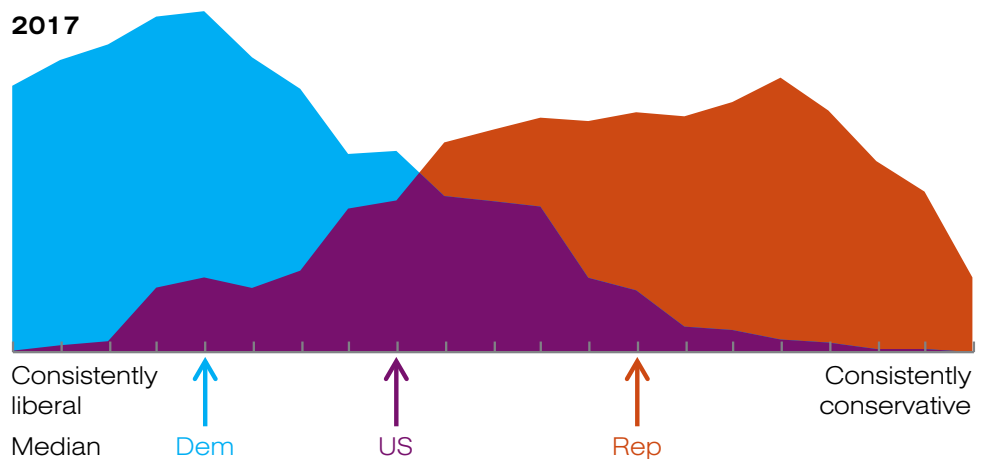
### THE GROWING POLITICAL POLARIZATION AMONG AMERICANS

Distribution of the US public on a 10-item scale, based on surveys of US citizens on their political values

**2004**



**2017**



Note: The surveys are based on a scale, composed of 10 questions asked by the Pew Research Center going back to 1994 to gauge the degree to which people hold liberal or conservative attitudes across many political values (including attitudes toward size and scope of government, the social safety net, immigration, homosexuality, business, the environment, foreign policy, and racial discrimination). Where people fall on this scale does not always align with whether they think of themselves as liberal, moderate, or conservative. The scale is not a measure of extremity, but of consistency.

Source: Pew Research Center<sup>18</sup>



# China: Xi's the One

"China's development does not pose a threat to any other country. No matter what stage of development it reaches, China will never seek hegemony or engage in expansion."<sup>12</sup>

**XI JINPING,**  
**18 OCTOBER 2017**

"Socialism with Chinese characteristics has crossed the threshold into a new era," President Xi Jinping proclaimed in his speech at the 19th Congress of China's Communist Party in October 2017. "It will be an era that sees China moving closer to center stage," said Xi.<sup>1</sup> Simultaneously, the Congress consolidated Xi's power and enshrined his political philosophy into the Chinese constitution. The risk consultancy Eurasia Group called Xi's speech "the most geopolitically noteworthy event since Mikhail Gorbachev formally dissolved the Soviet Union."<sup>2</sup>

Xi's speech has been widely dissected over many issues, including its implications for China's growing role in diplomacy and international security. "No one should expect us to swallow anything that undermines our interests," declared Xi.<sup>3</sup> Beijing's buildup of infrastructure in the disputed South China Sea and its continued "life support" for North Korea's regime in the face of harsh international criticism illustrate China's increasingly confident and assertive foreign policy. China is also readying its military for a greater role: over the past years, significant investment has gone into improving the self-sufficiency and global operational range of China's forces. Ambitious modernization plans, including the creation of an equivalent to the US Defense Advanced Research Projects Agency (DARPA),<sup>4</sup> intend to turn the People's Liberation Army into "world-class forces" by mid-century,<sup>5</sup> especially in the realms of space, cyber, and artificial intelligence.

"Although the United States seeks to continue to cooperate with China, China is using economic inducements and penalties, influence operations, and implied military threats to persuade other states to heed its political and security agenda."<sup>13</sup>

**US NATIONAL SECURITY**  
**STRATEGY,**  
**DECEMBER 2017**

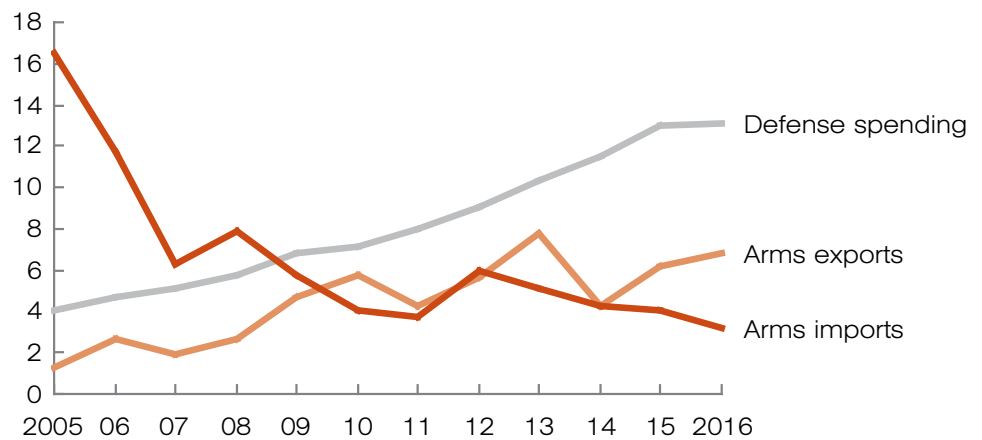
Far from planning for the middle of the century, US foreign policy, by contrast, currently appears aimed at short-term gains and tweetable solutions.<sup>6</sup> For President Trump, retreating from international institutions has signaled quick political wins and financial gains. Be it free trade, climate governance, or UN peacekeeping: China has been quick to respond by taking the initiative in existing institutions or promoting alternate structures of cooperation.<sup>7</sup> With concerted activities in Africa, the Belt and Road Initiative, the Asian Infrastructure Investment Bank, and its renewed push for the Regional Comprehensive Economic Partnership, viewed as an alternative to the Trans-Pacific Partnership, the scope of the new China-centric architecture for trade and investment is steadily increasing. As a result, countries' deepened economic dependency on China could enable Beijing to incentivize (or coerce) cooperation in other arenas.<sup>8</sup>

Even as China gains ground on the United States economically and militarily, it will face critical demographic and sociopolitical challenges at home.<sup>9</sup> Accordingly, few Chinese strategists believe China will displace the US as the world's top power in the near future.<sup>10</sup> Likelier in the medium term, some experts say, is a "G2 with Chinese characteristics"<sup>11</sup> – with China continuing its rise as a global rule maker, but the two countries' interdependencies containing their conflicting interests.



### EVOLUTION OF CHINA'S DEFENSE SPENDING AND ARMS TRADE

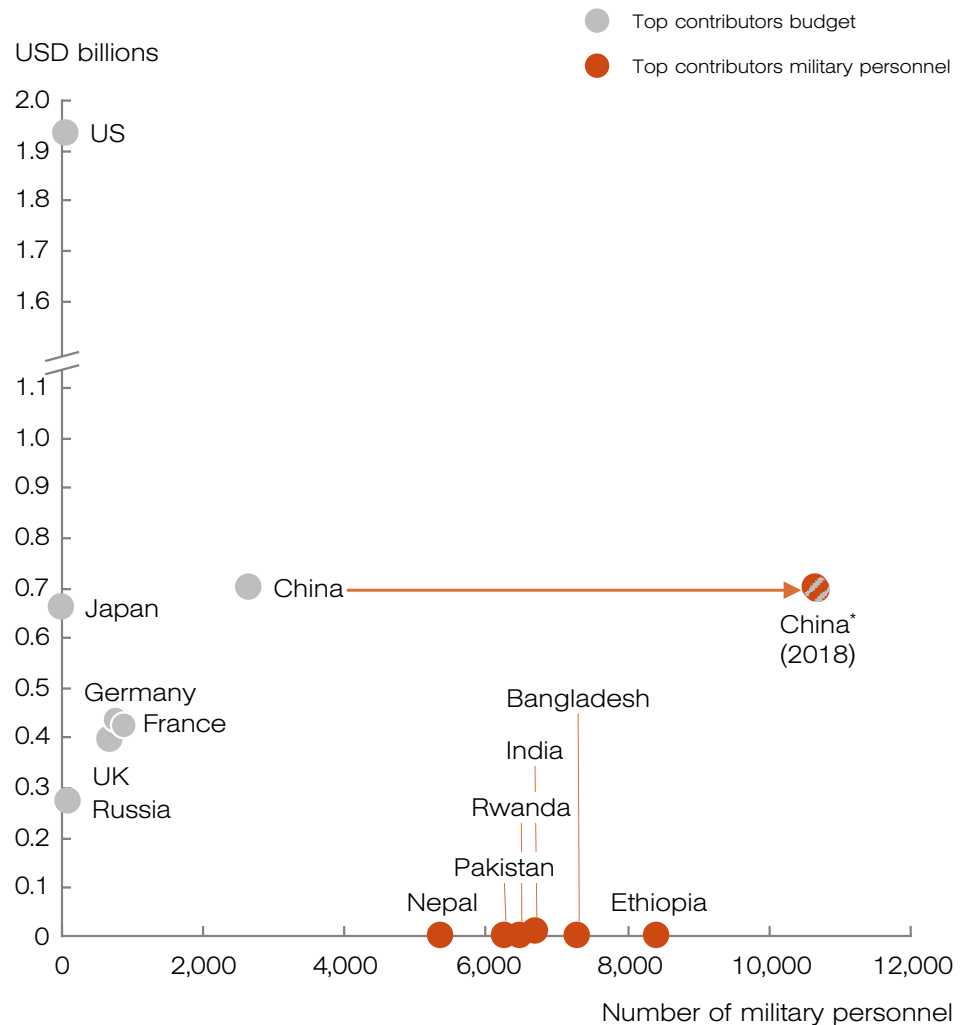
China's defense spending, arms imports, arms exports as share of global total, 2005-16, percent



Source: Own calculations, based on Stockholm International Peace Research Institute (SIPRI)<sup>14</sup>

### CHINA'S GROWING COMMITMENT TO UN PEACEKEEPING OPERATIONS

National contributions to UN peacekeeping: military personnel (as of October 2017) and USD billions (fiscal year 2017-18)



\* China has committed 8,000 additional troops as a standby force deployable in 2018

Source: Mercator Institute for China Studies (MERICS)<sup>15</sup>



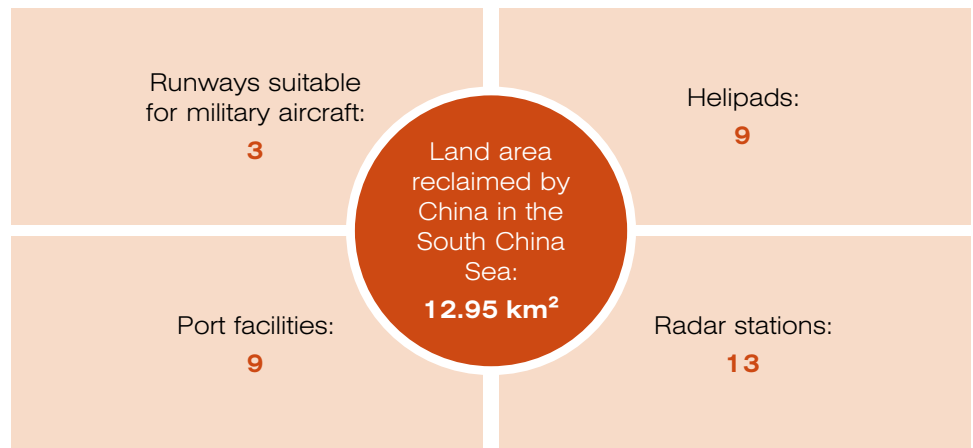
26





### CHINA'S RECENT INFRASTRUCTURE BUILD-UP IN THE SOUTH CHINA SEA

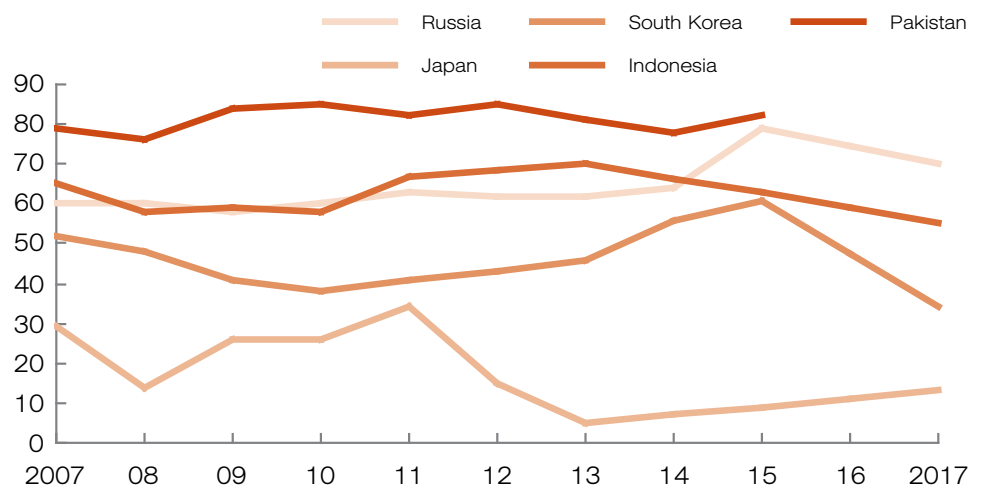
Selected Chinese infrastructure built in the South China Sea since 2013



Source: Mercator Institute for China Studies (MERICS)<sup>17</sup>

### WHAT CITIZENS OF COUNTRIES NEIGHBORING CHINA THINK: DO YOU HAVE A FAVORABLE VIEW OF CHINA?

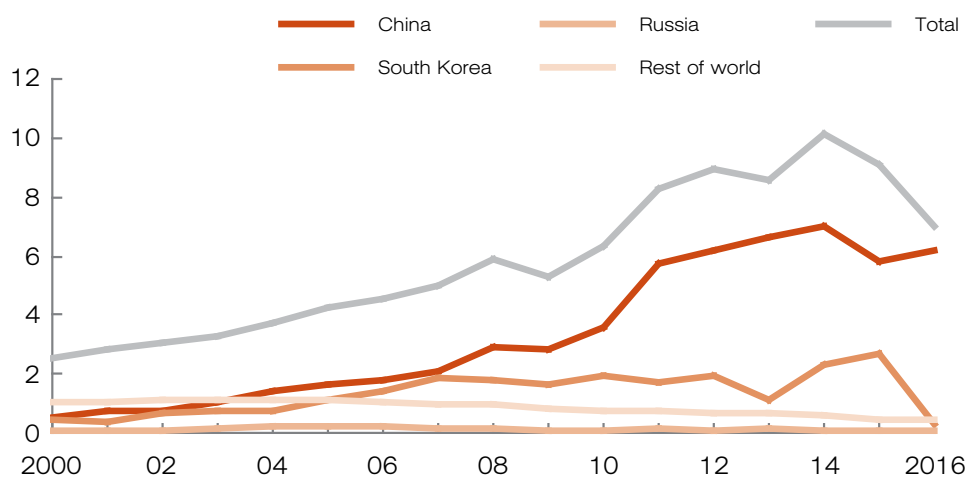
Opinion poll, 2007-17, percent responding favorable



Source: Pew Research Center<sup>18</sup>

### WHO STILL TRADES WITH NORTH KOREA?

Total trade with North Korea, 2000-16, adjusted USD billions



Source: Peterson Institute for International Economics (PIIE)<sup>19</sup>





# Russia: Bearly Strong?

"In essence, Moscow wants the West to give up on its vision of liberal international order and to return to conducting international affairs based on *realpolitik*."<sup>18</sup>  
**KADRI LIIK, 26 MAY 2017**

According to a December 2017 poll, 72 percent of Russians believe their country is a great power, significantly more than the 31 percent who answered this way in 1999.<sup>1</sup> This perception of growing Russian strength is not unfounded, as Moscow has managed to expand its regional and global influence considerably in recent years.<sup>2</sup> From Russia's point of view, it has had a number of successes: the war in and over Ukraine, fueled by Moscow, has for now contributed to freezing Kiev's aspirations to join the European Union or NATO.<sup>3</sup> A disinformation campaign during the French presidential election in 2017 may have fallen flat, but efforts to influence the US presidential election in 2016 have paid dividends.<sup>4</sup> Across Central and Eastern Europe, "Russia has cultivated an opaque web of economic and political patronage across the region [...] to influence and direct decision-making," an extensive CSIS study found.<sup>5</sup> Syria may be the most notable example of Russia's growing international agency: with comparatively little money and manpower, Moscow has reversed the course of the Syria conflict – bolstering the Assad regime – and reasserted its power and military foothold in the Middle East.<sup>6</sup> The intervention was also a testing ground for Russia's modernized military to use electronic warfare systems, drones as well as longer-range weapons and missiles.<sup>7</sup>

"China and Russia want to shape a world antithetical to US values and interests."<sup>19</sup>  
**US NATIONAL SECURITY STRATEGY, 18 DECEMBER 2017**

But the long-term prospects for Russian foreign policy are less obvious. First, domestic factors, especially the economy, limit Russia's international clout.<sup>8</sup> It has a GDP the size of Spain<sup>9</sup> and growth prospects remain moderate for the foreseeable future.<sup>10</sup> Moreover, the country faces massive public health problems and is lagging behind in international competitiveness.<sup>11</sup> In May 2017, President Putin approved a new national economic security strategy – the first since 1996 – but it is unclear whether this will have any significant impact.<sup>12</sup> Second, Russian foreign policy has a limited ability to persuade others, as its partners and neighbors grow increasingly worried. As Strobe Talbott and Jessica Brandt observe, "precisely because of Putin's flagrant forays beyond Russia's borders, he has awakened its neighbors to the threat [and] underscored the need for NATO."<sup>13</sup> Moreover, while US President Trump's rhetoric toward Russia may be friendly, large parts of the US establishment see Russia once again as a major adversary: "Russia challenge[s] American power, influence, and interests, attempting to erode American security and prosperity," the new US National Security Strategy posits.<sup>14</sup>

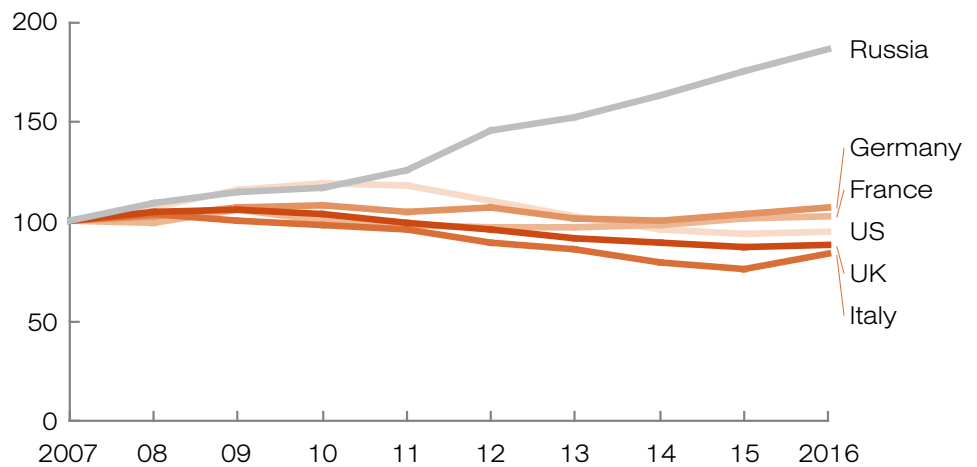
"Russia is a rare major power that has bounced back after a historical defeat. [...] Russia is getting back on its feet as a major power."<sup>20</sup>  
**DMITRI TRENIN, DECEMBER 2016**

Meanwhile, the fundamental conflicts underlying the crisis between the West and Russia remain unresolved. What Russia seeks is a "post-West world order," as Russian Foreign Minister Sergey Lavrov said at the 2017 Munich Security Conference.<sup>15</sup> Moreover, Russia and the West continue to clash over Russia's quest for a "sphere of control in its neighborhood" – which the West cannot accept.<sup>16</sup> Summing up the relationship as seen from Moscow, Andrey Kortunov observes: "At this stage, there are not many compelling reasons for the Kremlin to reconsider its fundamental approaches to the West. [...] The current status quo is perceived as not perfect, but generally acceptable."<sup>17</sup>



### RUSSIA AND THE WEST: TRENDS IN DEFENSE SPENDING

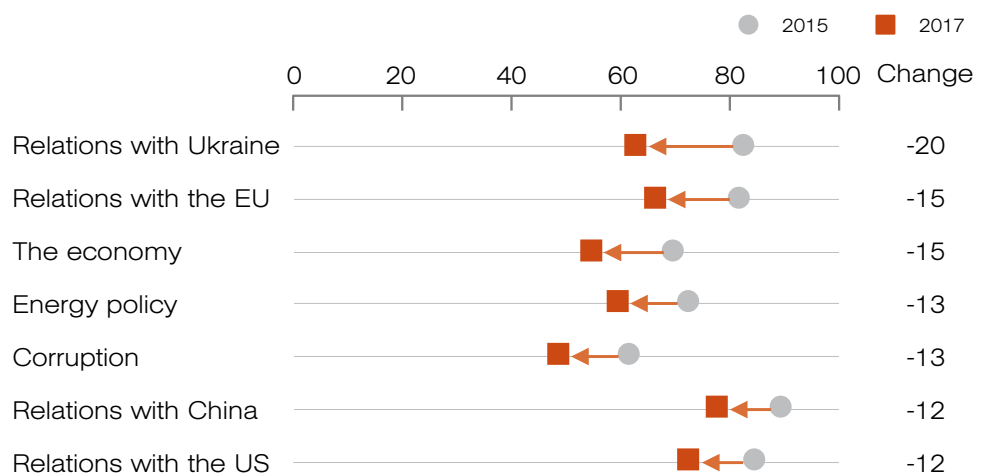
Defense expenditures, indexed (base year 2007), percent



Source: Own calculations, based on Stockholm International Peace Research Institute (SIPRI)<sup>21</sup>

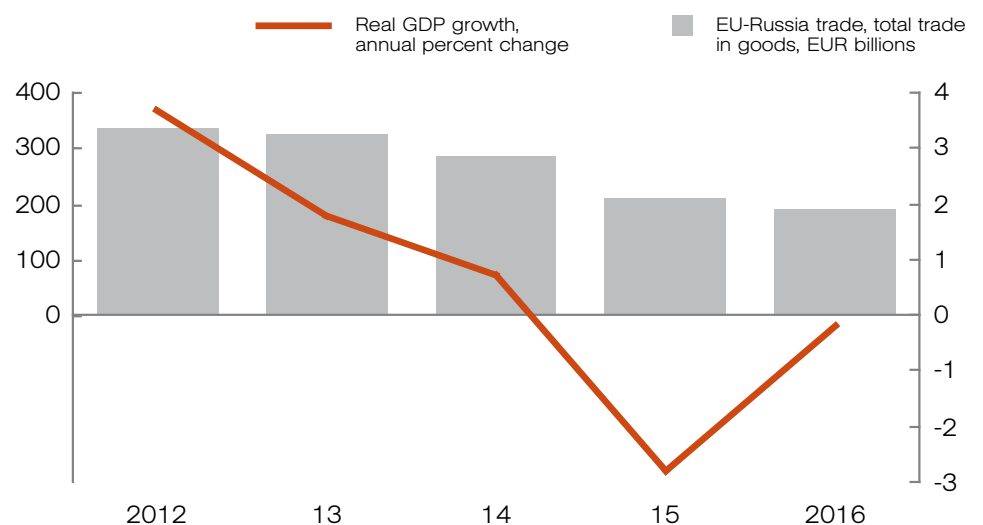
### WHAT RUSSIANS THINK: APPROVAL OF PRESIDENT PUTIN'S HANDLING OF ...

Opinion polls, percent



Source: Pew Research Center<sup>22</sup>

### HOW HAVE RUSSIA'S ECONOMY AND TRADE WITH THE EU EVOLVED?



Source: Eurostat; International Monetary Fund<sup>23</sup>







# Regions





# Central and Eastern Europe: In or Out?

Central and Eastern Europe have been the focus of a tense political dispute, as many in the European Union worry about democratic backsliding in parts of the region.<sup>1</sup> According to many scholars and observers, state control over courts, the media, and civil society has been tightened in Hungary's self-identified "illiberal democracy" as well as in Poland.<sup>2</sup> In fact, in an unprecedented decision in December, the EU Commission triggered Article 7(1) of the Treaty on European Union to address the risk of a serious breach of the rule of law by the Polish government.<sup>3</sup>

In contrast to these political fault lines, military cooperation on NATO's eastern flank has progressed. Having long asked for allied boots on the ground, Poland and the Baltic states welcomed the deployment of NATO's "Enhanced Forward Presence" in early 2017. Still, these rotational battalions do not constitute substantial combat forces and would be unable to withstand a significant external attack.<sup>4</sup> In order to strengthen the Alliance's rapid-deployment capabilities, NATO is overhauling its military command structure.<sup>5</sup>

Maintaining that it does "not want a new arms race" with Russia, the Alliance continues its dual-track strategy of deterrence and dialogue.<sup>6</sup> However, the creeping erosion of negotiated arms control instruments and the deployment of additional military capabilities could lead to a further deterioration of the security situation in Europe. Key nuclear disarmament treaties like INF or New START are under pressure, conventional arms control agreements like the CFE treaty are effectively dead, and confidence-building measures like the Vienna Document are increasingly circumvented, as Russia's Zapad exercise in September illustrated.<sup>7</sup> In this dire state of affairs, miscalculations and misunderstandings could well lead to an inadvertent military clash.<sup>8</sup>

The continued conflict in and over Ukraine remains the most important stumbling block on the path toward de-escalation. With no meaningful progress on the implementation of the Minsk agreement, prospects for a political solution are dim. Russia surprisingly suggested a UN peacekeeping mission for Donbas, which has previously been proposed by the Ukrainian government. But Moscow's initiative failed to gain traction, because it did not include a monitoring of the Russian-Ukrainian border.<sup>9</sup> At the same time, the Trump administration reversed an Obama-era policy by approving lethal arms sales to Ukraine to help the country defend itself but likely cementing the current stalemate.<sup>10</sup>

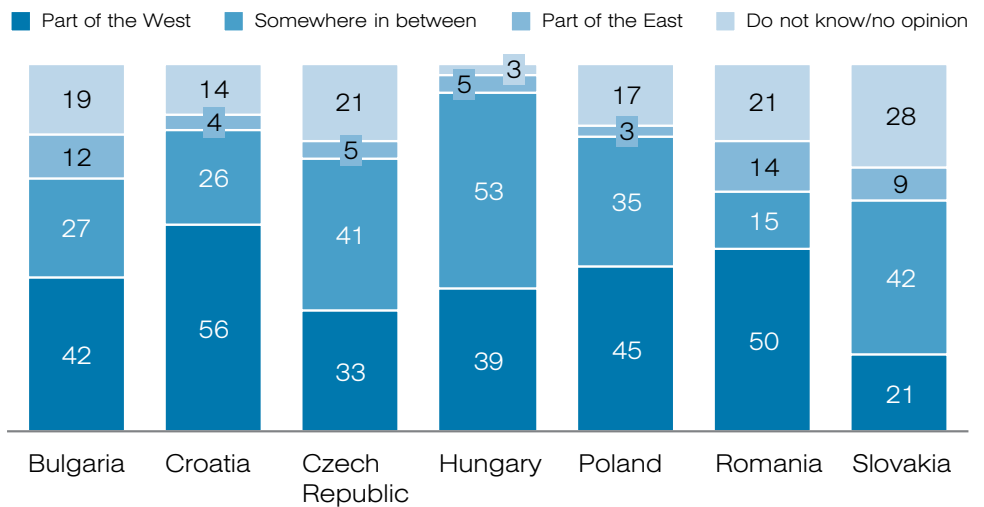
Looking beyond Ukraine, much of Europe's east struggles in an environment of contested security. A string of countries from Azerbaijan to Belarus remains sandwiched in between the European Union and NATO on the one hand and Russia on the other. Brussels' Eastern Partnership policy seems to have lost its steam.<sup>11</sup> And NATO's open-door policy notwithstanding, most interested states do not have a realistic chance of joining the Alliance anytime soon. Some security experts debate ideas for a new security architecture, but both the attractiveness and feasibility of these proposals remain in doubt.<sup>12</sup>





### WHAT CENTRAL AND EASTERN EUROPEANS THINK ABOUT GEOPOLITICAL ORIENTATION: YOUR COUNTRY SHOULD BE ...

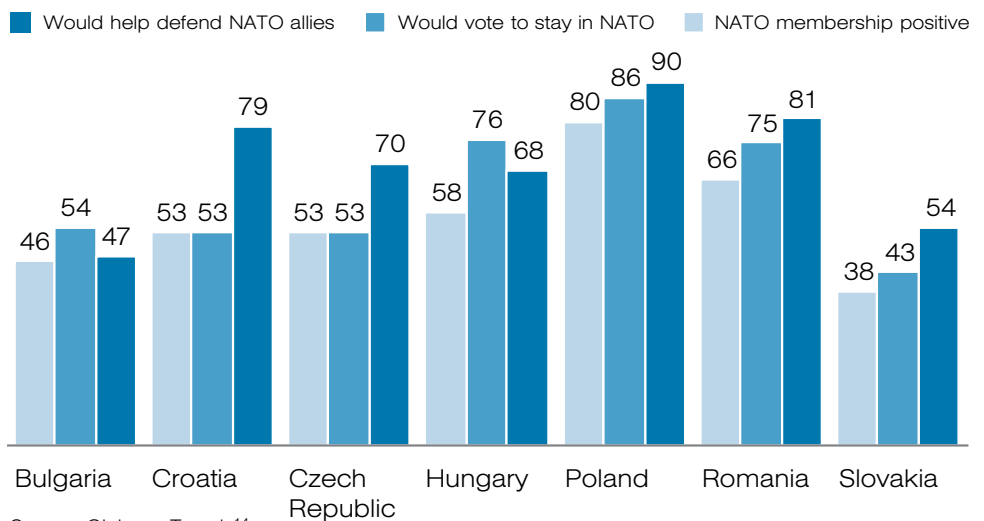
Opinion poll, April 2017, percent



Source: Globsec Trends<sup>13</sup>

### WHAT CENTRAL AND EASTERN EUROPEANS THINK: SUPPORT FOR NATO

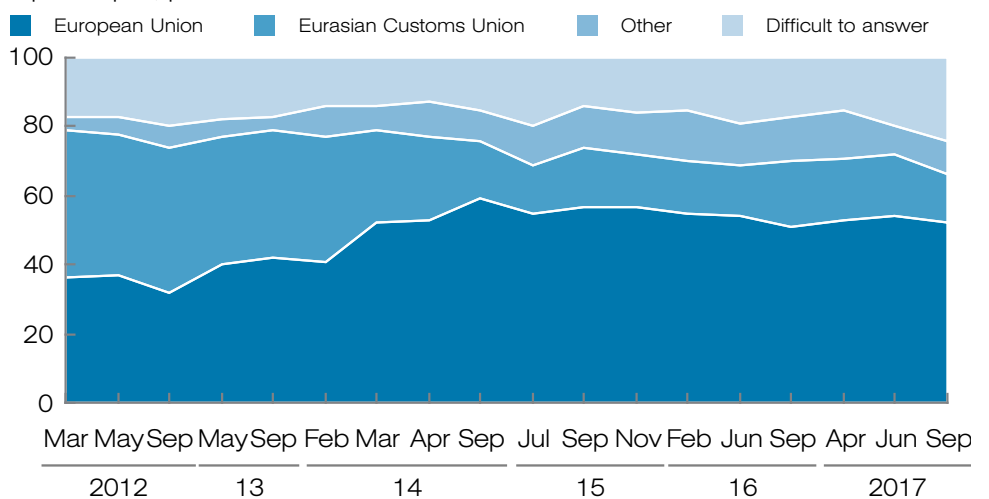
Opinion poll, April 2017, percent



Source: Globsec Trends<sup>14</sup>

### WHAT UKRAINIANS THINK: IF UKRAINE COULD ONLY ENTER ONE INTERNATIONAL ECONOMIC UNION, WHICH SHOULD IT BE?

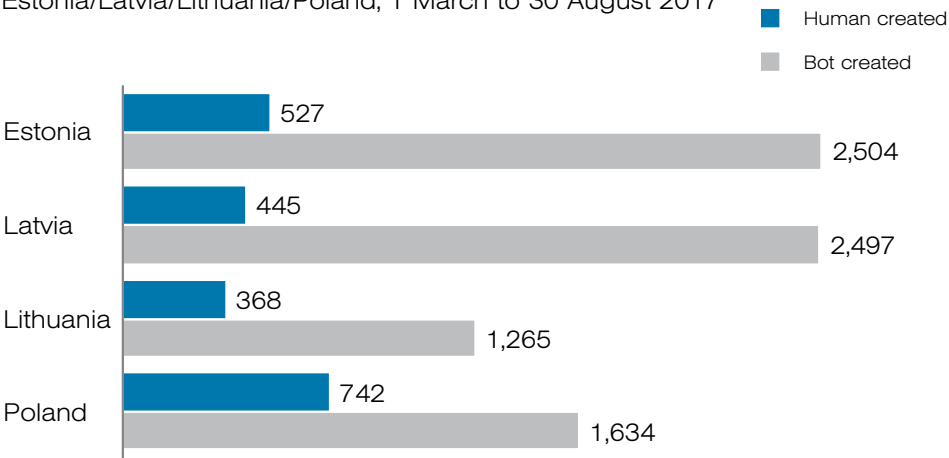
Opinion poll, percent



Source: International Republican Institute<sup>15</sup>

AUTOMATED RUSSIAN  
TWITTER ACTIVITY ON  
NATO'S PRESENCE  
IN POLAND AND THE  
BALTIC STATES

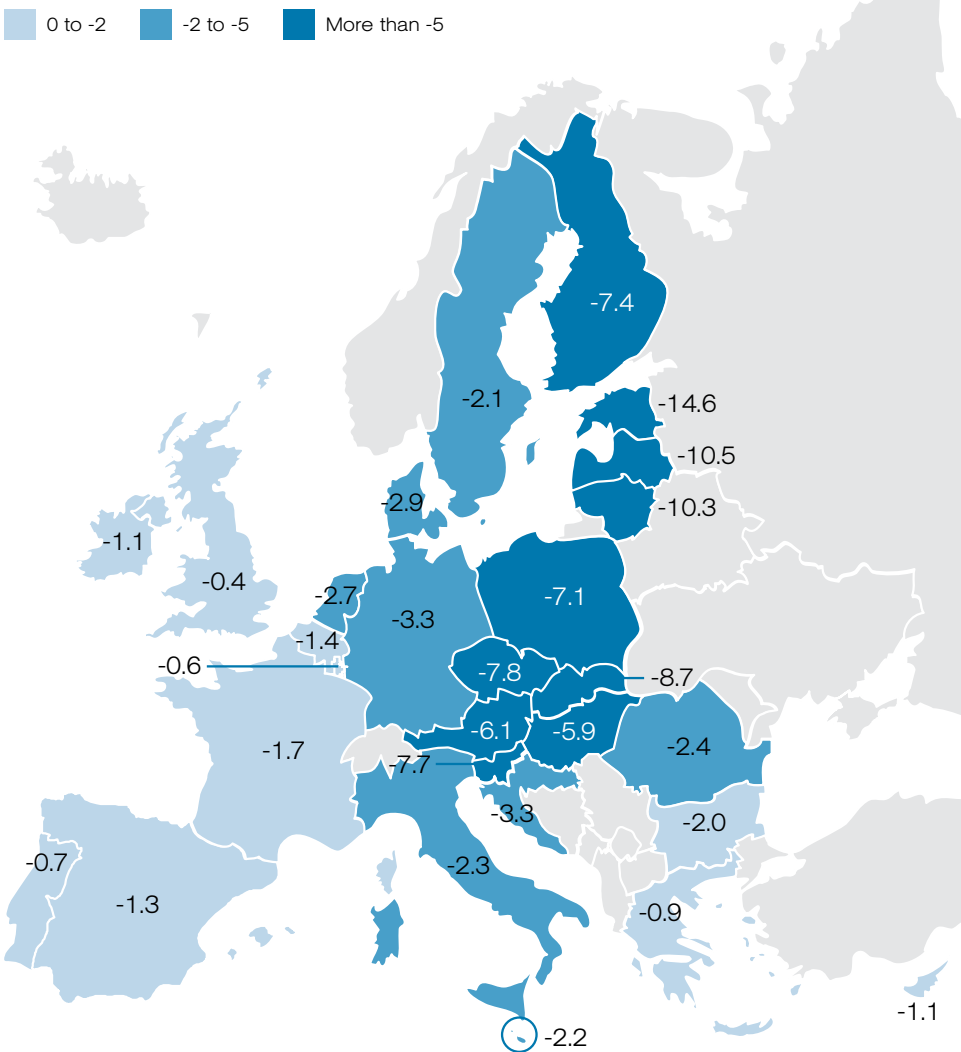
Number of Russian-language tweets mentioning NATO and Estonia/Latvia/Lithuania/Poland, 1 March to 30 August 2017



Source: NATO Strategic Communications Center of Excellence<sup>16</sup>

RUSSIA'S DECLINING  
SHARE IN EU  
EXPORTS

Change of goods exports to Russia as share of extra-EU exports, 2013-16, percentage points

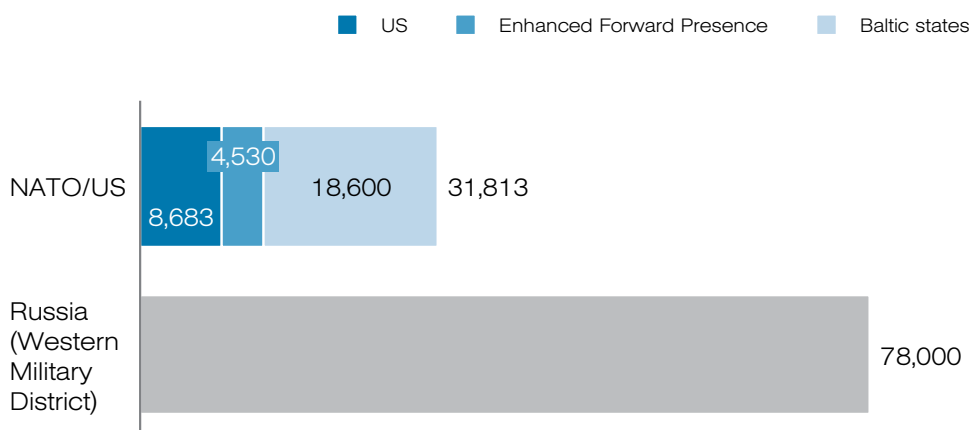


Source: Own calculations, based on Eurostat<sup>17</sup>

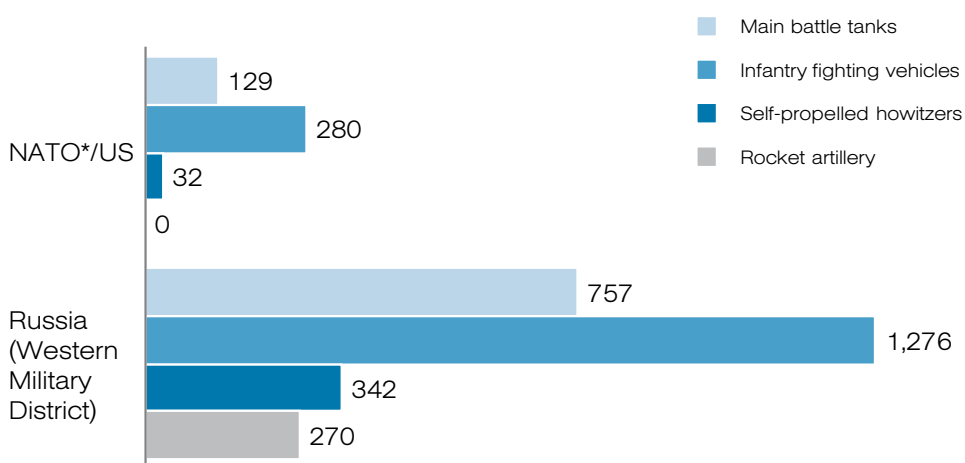


## ASSESSMENT OF CONVENTIONAL FORCE IMBALANCES IN THE BALTICS: NATO AND RUSSIA IN COMPARISON

Readily deployable personnel in combat units on short-notice warning, 2017

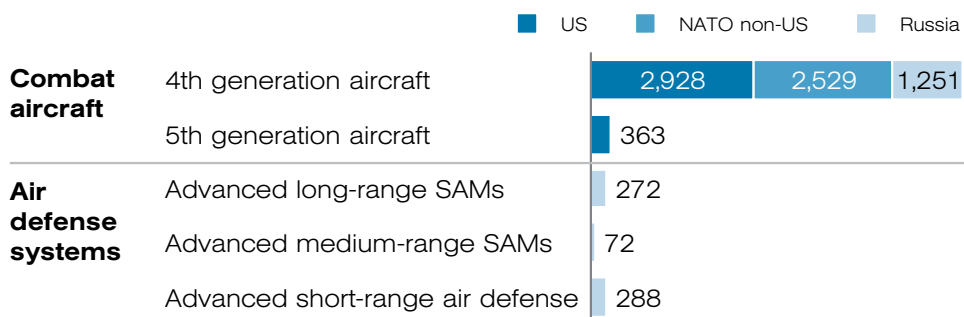


Selected weapon systems readily deployable on short-notice warning, 2017



\* Includes military of the Baltic states and NATO Enhanced Forward Presence

Active combat aircraft inventories and air defense capabilities, 2017



### NOTE

The depicted figures show the comparison of key major weapon systems that can deploy and fight in the Baltics in the opening weeks of a conflict. For details on estimates and the analysis please consider the cited study by the RAND Corporation.

Source: RAND Corporation<sup>18</sup>



# Africa: The Young and the Restless

"The question of emigration, especially to Europe, arises in tragic terms. The boats of death on the high seas compete, in a dismal tragedy, with shipwrecks in the ocean of dunes and rocky terrain of the Great Sahara. [...] How long are we and you going to watch this tragedy unfold, insensitive, helpless, inactive, paralyzed?"<sup>10</sup>  
**MOUSSA FAKI MAHAMAT,**  
**29 NOVEMBER 2017**

"The [Sahel] region is now trapped in a vicious cycle in which poor political and security governance, combined with chronic poverty and the effects of climate change, has contributed to the spread of insecurity."<sup>11</sup>  
**ANTÓNIO GUTERRES,**  
**16 OCTOBER 2017**

The "African Century" narrative appeared to be in full swing when African countries' financial resources peaked in 2012.<sup>1</sup> Since then, they have been declining, and Africa's expected "demographic dividend" seems less likely to materialize.<sup>2</sup> As the president of the African Development Bank Akinwumi Adesina argued: "No wonder Africa's youth – our assets – take huge risks migrating to Europe. [...] We must create greater economic opportunities for our youth right at home."<sup>3</sup> If African countries fail to do so for the approximately 20 million youths entering the continent's labor force every year,<sup>4</sup> a ballooning youth population – deprived of quality education, gainful employment, and political voice – could well lead to widespread unrest and destabilization instead of boosting productivity.

In Europe, the inflow of migrants and refugees is increasingly the lens through which military engagement and development aid is seen. Meanwhile, African countries have been more concerned with the vast majority of migrants and refugees who move within the continent rather than to Europe.<sup>5</sup> However, late last year, evidence of a migrant slave trade in Libya propelled the issue to the top of the agenda at the AU-EU summit in Abidjan. The summit produced a groundbreaking joint initiative to repatriate economic migrants and start clearing the Libyan camps. But critics stress that such stopgap measures are inadequate to govern Africa's migration patterns – let alone to address their root causes.<sup>6</sup>

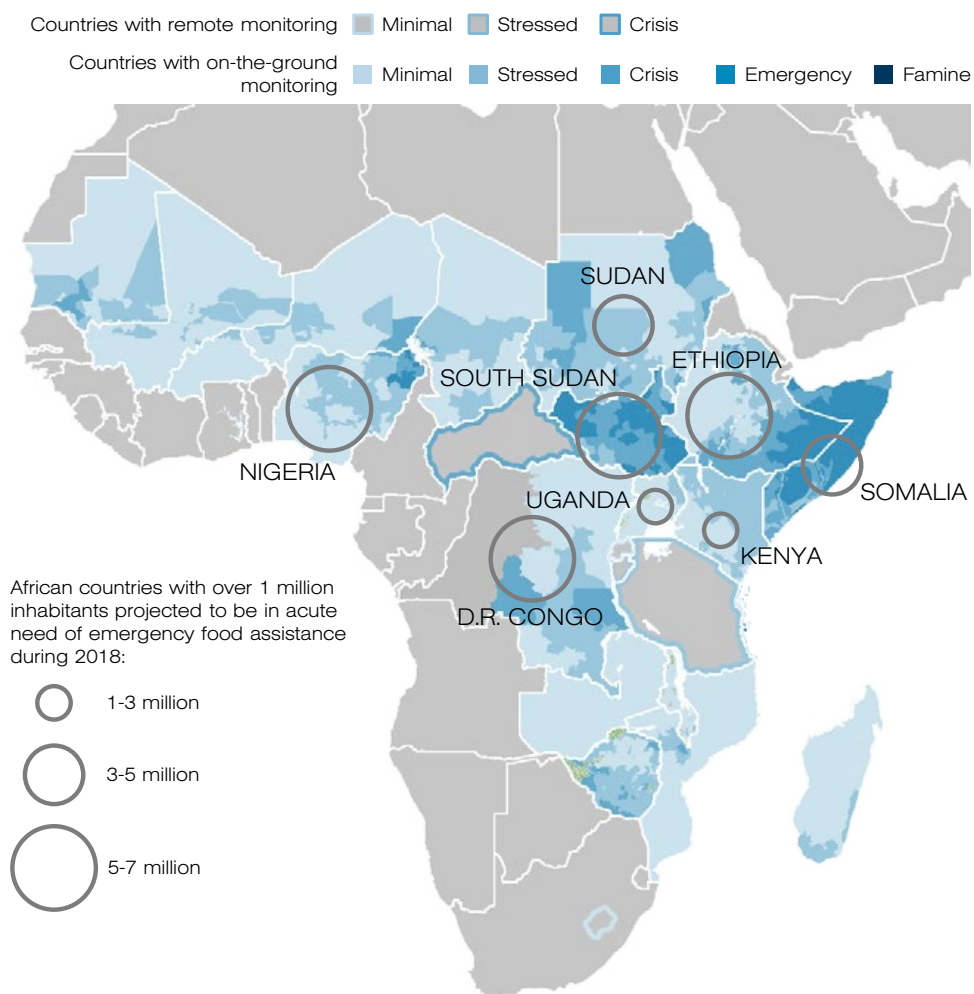
The continuation of numerous long-running armed conflicts in 2017 was one root cause of migration, displacement, and hunger. In northeastern Nigeria, remote areas were ravaged by the Boko Haram insurgency. In South Sudan, civil war and hyper-inflation led to extreme levels of food insecurity. In Somalia, consecutive droughts have been exacerbated by the actions of jihadist group Al Shabaab. Despite USD 3.2 billion in food assistance provided through the UN, all three areas will remain at risk of famine throughout 2018.<sup>7</sup> The creation of the G5 Sahel joint force demonstrates that some momentum toward cooperatively tackling conflicts is building. However, such initiatives are no substitute for missing regional strategies on a political and diplomatic level.<sup>8</sup>

Weak or arbitrary governance exacerbates the potential for extremism and violence. Last year alone, several African states, large and small, saw increased political repression, unconstitutional extension of term limits, and crises over the conduct of elections. In the past, orderly transfers of power have been all too rare. Last November's coup against Robert Mugabe marked the end of one long-standing authoritarian, but it left little hope for a shift toward democratization. In parts of the continent, governance seems to be trending in the wrong direction at a critical juncture,<sup>9</sup> raising the question of whether the continent's regional leaders – let alone fragile states – will have the political capacity and financial resources to address their current crises and long-term challenges.



## THE RISK OF FAMINE IN SUB-SAHARAN AFRICA

### Projected areas of acute food insecurity in Africa, February to May 2018

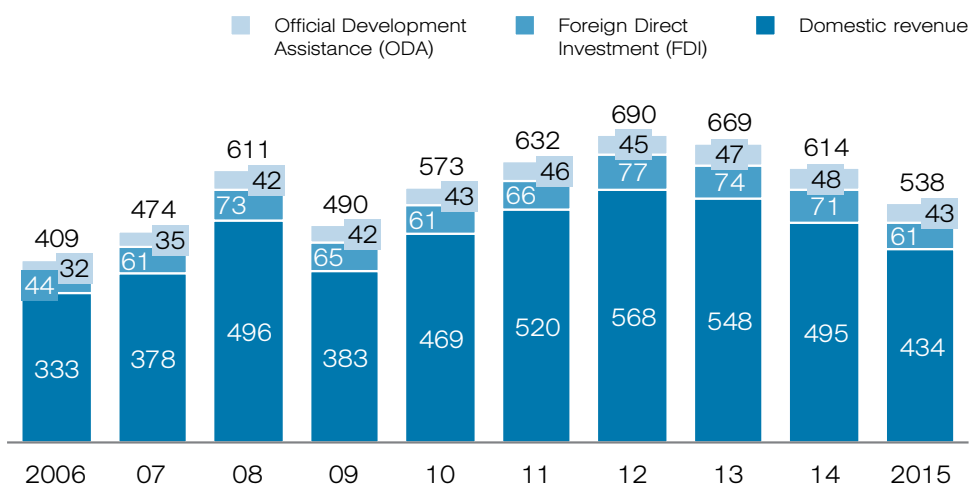


Note: The classifications used in this map are compatible with Integrated Phase Classification (IPC) 2.0 and follow the global standard protocols to classify severity of food insecurity.

Source: Famine Early Warning Systems Network (FEWS NET)<sup>12</sup>

## AFRICA'S TREND OF DECLINING FINANCIAL RESOURCES

### Financial resources in Africa, 2006-15, current USD billions

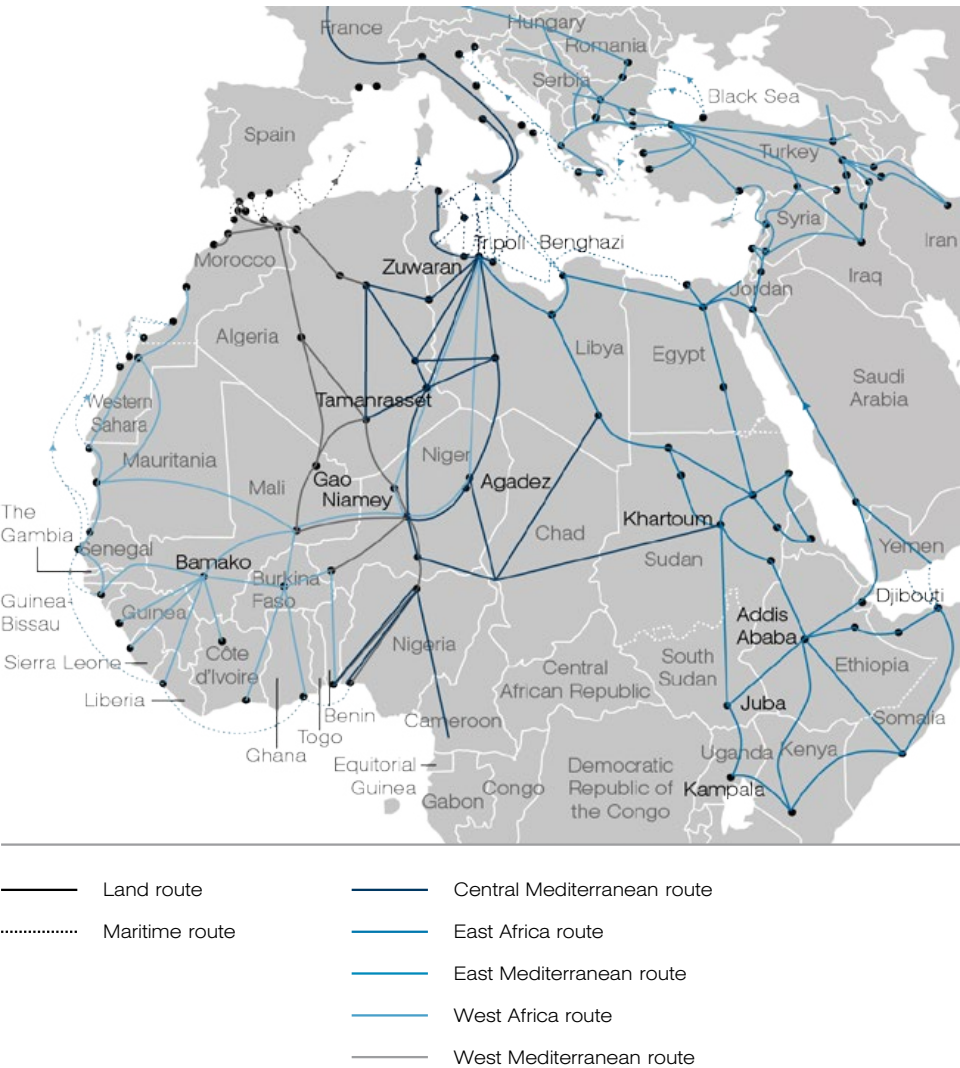


Source: ONE<sup>13</sup>



LAND AND SEA  
MIGRATION ROUTES  
TOWARD EUROPE

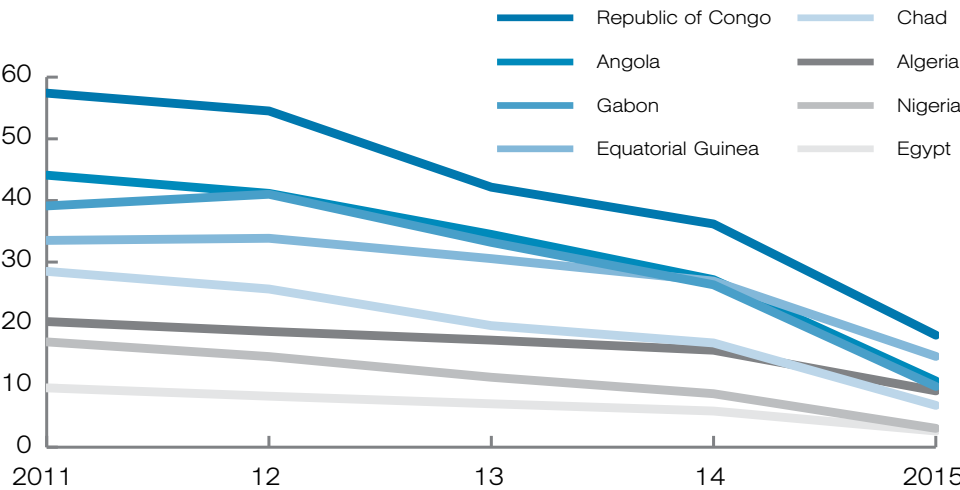
Main active land and sea migration routes as of December 2017



Source: International Organization for Migration (IOM)<sup>14</sup>

THE RAPID DECLINE  
OF AFRICAN  
COUNTRIES'  
REVENUES FROM OIL

Revenues from oil rents as share of GDP, 2011-15, percent

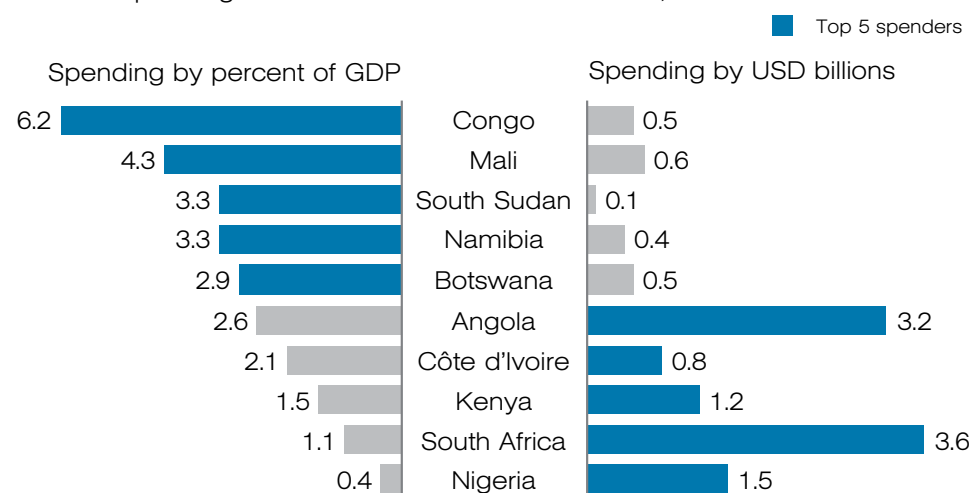


Source: World Bank<sup>15</sup>



## LEVELS OF DEFENSE SPENDING IN SUB-SAHARAN AFRICA

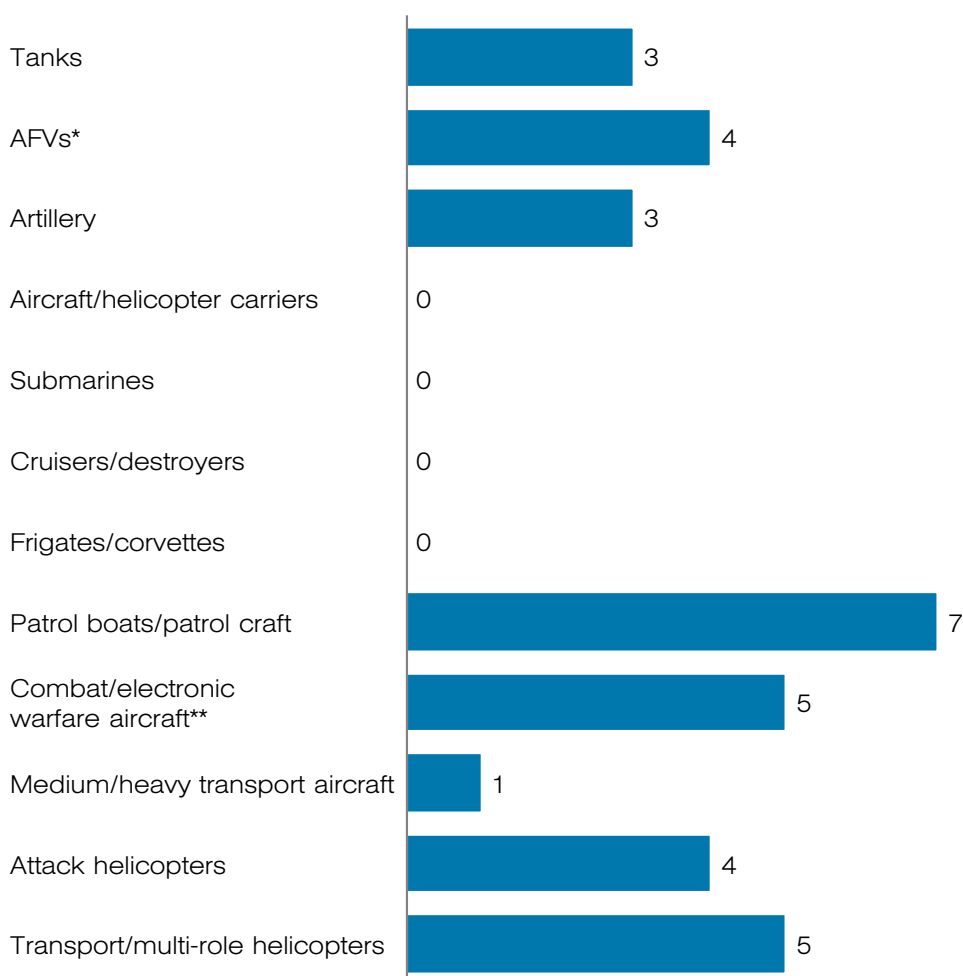
Defense spending of selected Sub-Saharan countries, 2017



Source: The International Institute for Strategic Studies<sup>16</sup>

## PROCUREMENT PRIORITIES OF SUB-SAHARAN AFRICA'S ARMED FORCES

Selected ongoing or completed procurement contracts, 2017, number of countries purchasing



\* Armored fighting vehicles not including battle tanks

\*\* Including combat-capable training aircraft

Source: The International Institute for Strategic Studies<sup>17</sup>





# Middle East: Gulf Clubs and Curses

"Iranian 'aggression' is a myth, easily perpetuated by those willing to spend their dollars on American military equipment and public-relations firms, and by those promising to protect American interests rather than those of their own people."<sup>10</sup>

**JAVAD ZARIF,**  
**9 OCTOBER 2017**

Eight of the world's ten most lethal conflicts are taking place in the wider Middle East area, according to the 2017 IISS Armed Conflict Survey.<sup>1</sup> Fueled by a lack of societal and economic progress, growing sectarian divisions, regional rivalries, and shifting engagement from external powers, the region continues to be in turmoil. This is particularly obvious in Syria, the theater of the region's deadliest war. Several hundreds of thousands of Syrians have been killed and more than 11.6 million are internally displaced or have fled the country.<sup>2</sup> Assisted by Russia and Iran, the Assad regime has increasingly reasserted its territorial control. However, despite this military success, Moscow is struggling to reconcile the differing interests of the parties involved in the Astana peace negotiations. By contrast, the Trump administration has reduced its political involvement to resolve the war in Syria, instead focusing on the fight against the "Islamic State." Having been driven out of Iraq in December, the "caliphate" is now facing a similar fate in Syria. But the group might not soon disappear, as it is already establishing new footholds in Northern Africa.<sup>3</sup>

Both inside and outside Syria's borders, Saudi Arabia and Iran are seeking greater regional influence. Tensions between the two countries have intensified over the past months as they are involved in a regional proxy conflict, including in Lebanon. Charges over state-sponsored terrorism culminated in a diplomatic and economic boycott of Qatar by a Saudi-led coalition. Both Riyadh and Tehran are backing local forces in a protracted conflict in Yemen that, according to the WHO, has become "the worst humanitarian crisis in the world."<sup>4</sup> At the same time, empowered Saudi crown prince Mohammed bin Salman has set his country on a profound reform course.

"The involvement of Iran in supplying missiles to the Houthis is a direct military aggression by the Iranian regime and may be considered an act of war against the Kingdom."<sup>11</sup>

**MOHAMMED BIN SALMAN,**  
**7 NOVEMBER 2017**

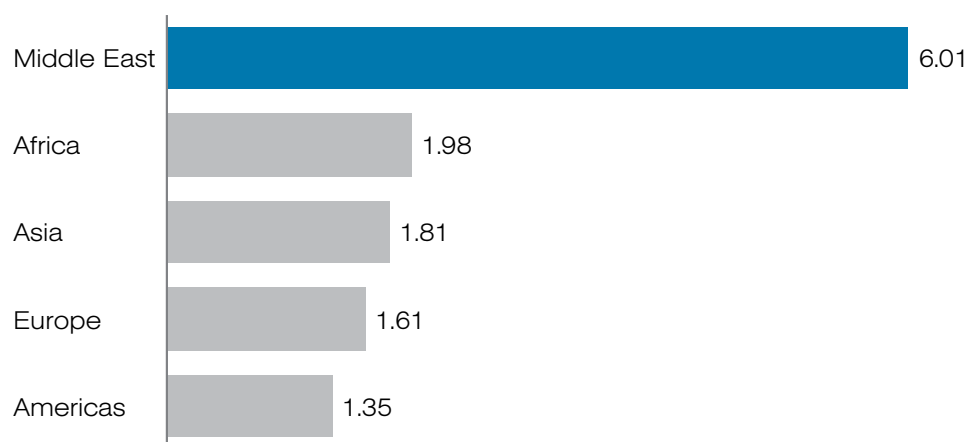
Meanwhile, Turkey is struggling to balance its relations with both countries while searching for its own role in the region's shifting power dynamics. Ankara and Riyadh have been close partners on Syria, but collided when Turkey sided with Qatar in the Saudi-led boycott. By contrast, Tehran and Ankara are backing opposite sides in the Syrian conflict, but cooperated closely when faced with a September referendum on Kurdish independence in Iraq.<sup>5</sup> For his part, Iranian President Rouhani faces public unrest due to economic frustration.<sup>6</sup> Reforming and opening Iran's economy may grow increasingly difficult in the face of renewed hostility from the United States.

Indeed, except for the anti-ISIS campaign, the Trump administration prioritizes one overarching goal in the region: curtailing Iranian influence.<sup>7</sup> Addressing the United Nations General Assembly in September, Trump demanded international action against what he called the Iranian "rogue state whose chief exports are violence, bloodshed, and chaos."<sup>8</sup> As tensions continue to rise, the future of the Iran nuclear deal hangs in the balance. A failure of the agreement in 2018 could spark a dangerous geopolitical dynamic.<sup>9</sup>



### AVERAGE DEFENSE EXPENDITURES ACROSS THE GLOBE

Non-weighted average of defense expenditures, 2016, percent of GDP\*

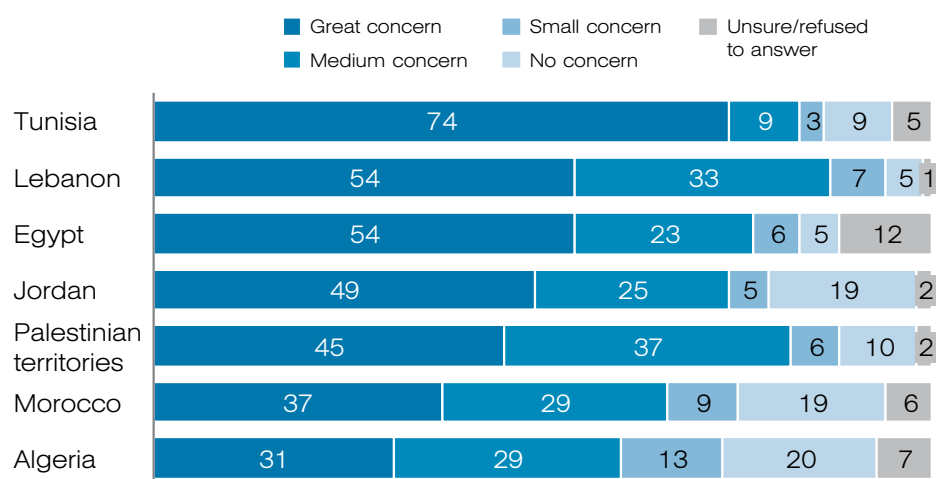


\* Considering countries for which 2016 data is available

Source: Stockholm International Peace Research Institute (SIPRI)<sup>12</sup>

### WHAT CITIZENS OF SELECT COUNTRIES THINK: HOW CONCERNED ARE YOU ABOUT GROWING SECTARIAN DIVISION?

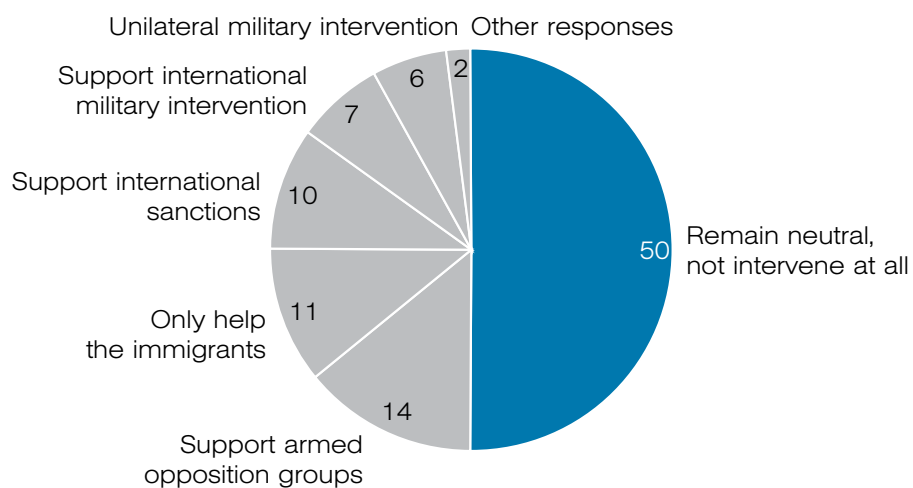
Opinion poll, 2016, percent



Source: Arab Barometer<sup>13</sup>

### WHAT TURKISH CITIZENS THINK: WHICH POLICY SHOULD TURKEY ADOPT IN SYRIA?

Opinion poll, July 2017, percent

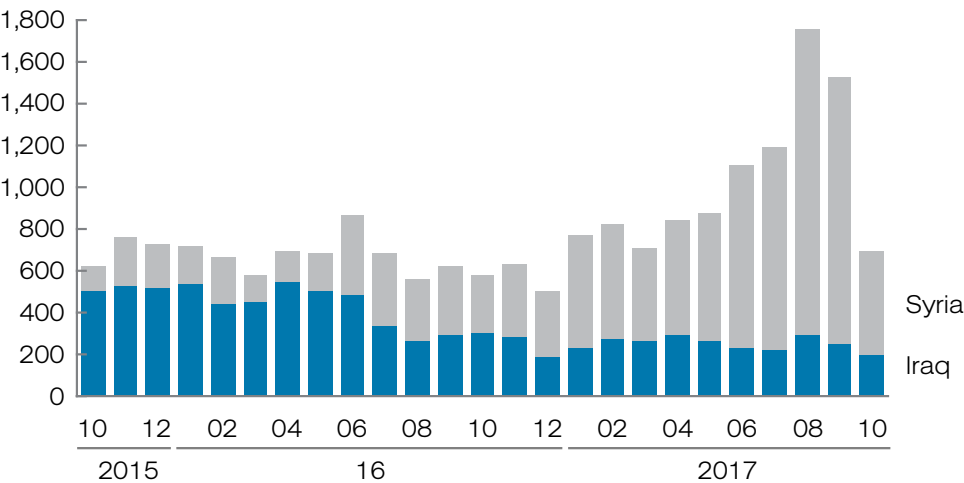


Source: Kadir Has University<sup>14</sup>



THE US-LED AIR CAMPAIGN IN THE FIGHT AGAINST THE ISLAMIC STATE

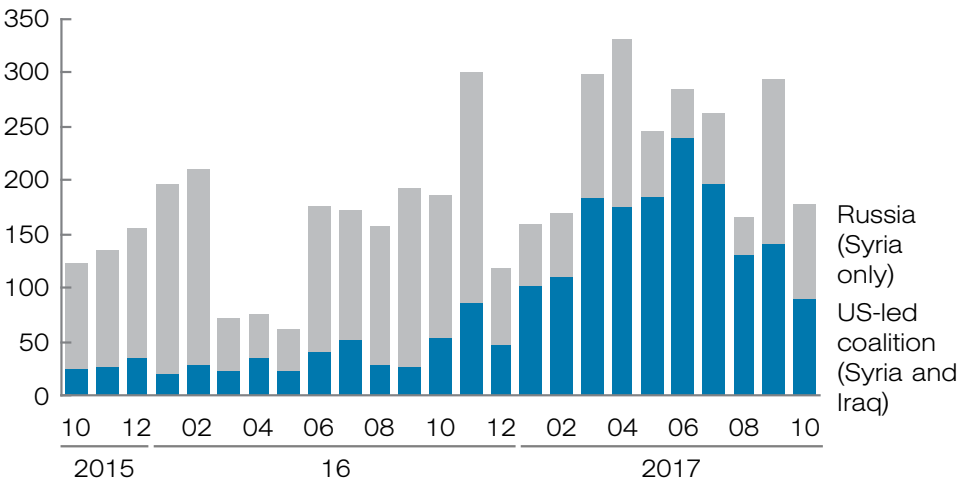
Number of airstrikes, by targeted country



Source: Airwars.org<sup>15</sup>

INCIDENTS OF ALLEGED CIVILIAN CASUALTIES FROM AIRSTRIKES IN SYRIA AND IRAQ

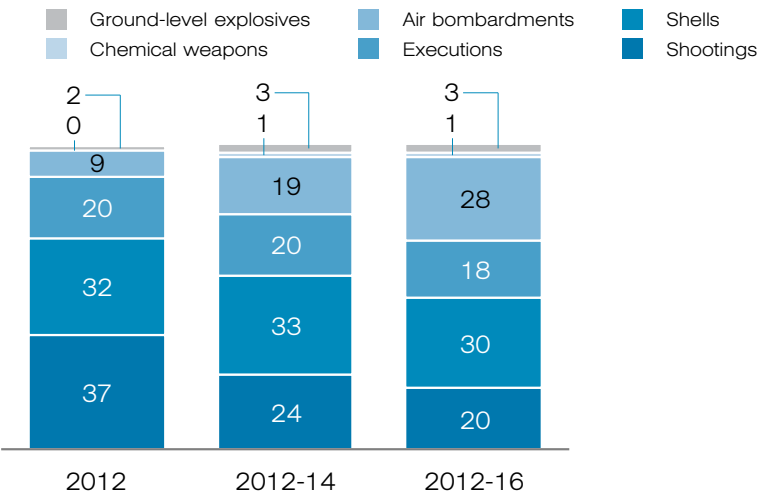
Number of airstrikes resulting in alleged civilian casualties, by actor per month



Source: Airwars.org<sup>16</sup>

CIVILIAN DEATHS IN THE SYRIA CONFLICT

By causes of death, percent

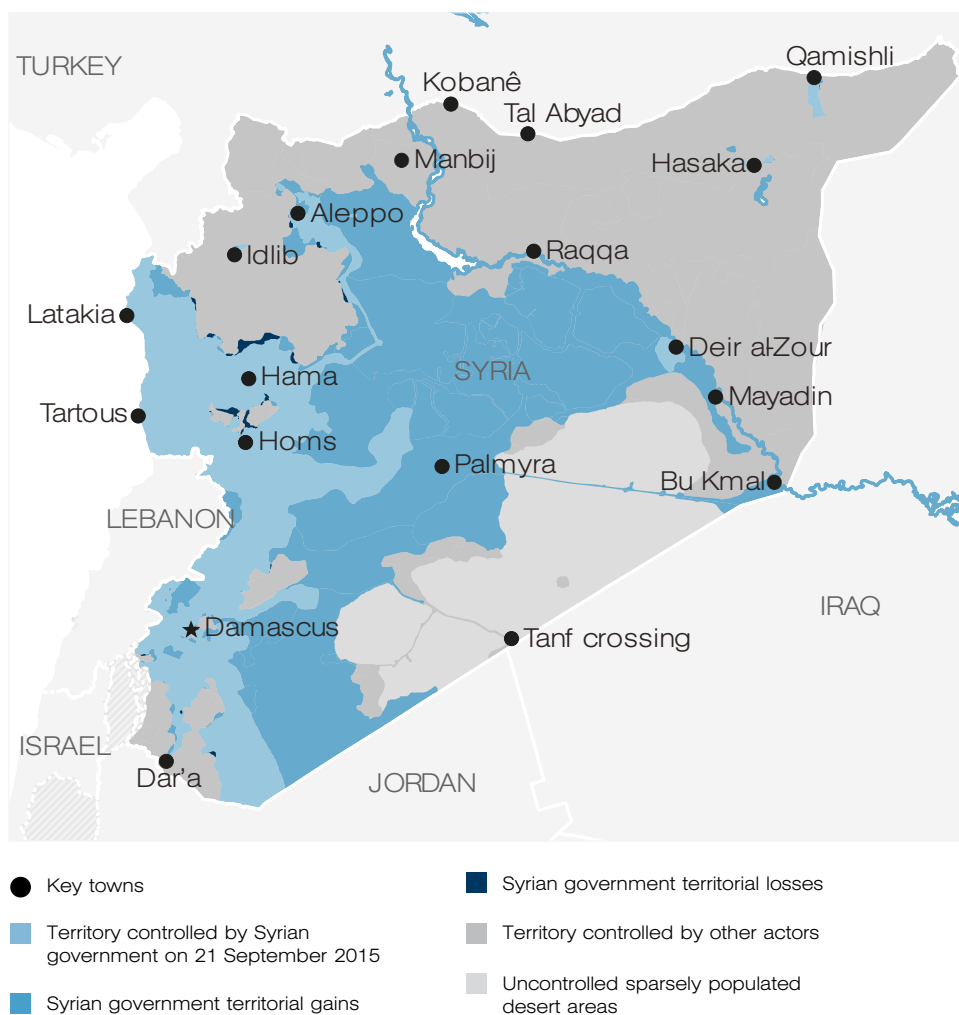


Source: Guha Sapir et al.<sup>17</sup>

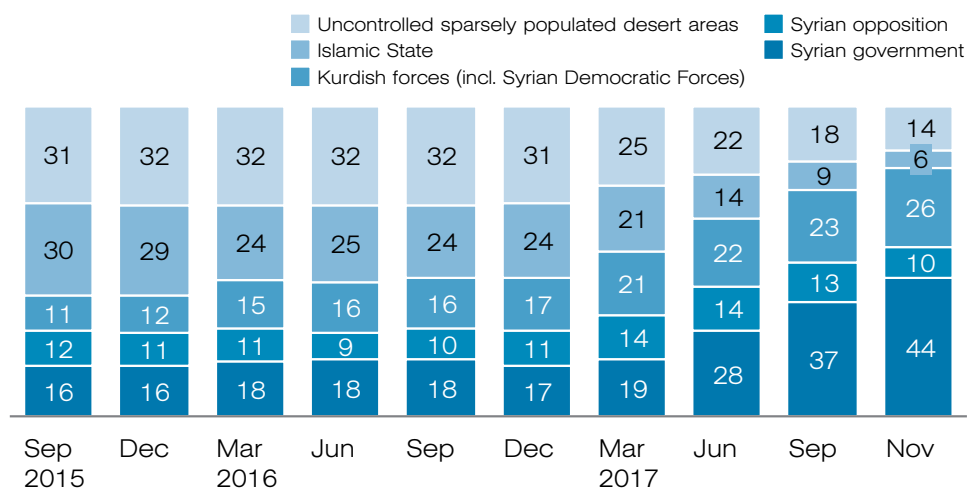


## TERRITORIAL GAINS AND LOSSES IN THE WAR OVER SYRIA

Changes in territory controlled by the Assad regime, 21 September 2015 to 20 November 2017



Shares of territorial control over Syria, percent



Source: IHS Conflict Monitor<sup>18</sup>







# Issues





# Environmental Security: Running on Fumes

"Climate change is moving faster than we are."<sup>17</sup>

**ANTÓNIO GUTERRES,**  
1 JANUARY 2018

"The rest of the world applauded when we signed the Paris Agreement — they went wild; they were so happy — for the simple reason that it put our country, the United States of America, which we all love, at a very, very big economic disadvantage."<sup>18</sup>

**DONALD J. TRUMP,**  
1 JUNE 2017

The year 2017 was one of the three hottest on record (the other two being 2015 and 2016) and was marked by catastrophic storms, droughts, floods, and other extreme weather events.<sup>1</sup> Critics warn that political progress toward a more sustainable future is far too slow as many parts of the world are already suffering from the devastating consequences of climate change and environmental degradation. Oxfam has found that between 2008 and 2016, on average 21.8 million people were reported to be newly displaced by sudden extreme weather events each year.<sup>2</sup> Most affected were people living in low and lower middle income countries, whose risk of being displaced was five times higher than people in high income countries.<sup>3</sup>

While the international community discussed how the Paris Agreement could be put into practice at the UN Climate Conference COP23 in Bonn, the United States announced their withdrawal from international efforts to combat climate change.<sup>4</sup> Since the United States had pledged emission cuts amounting to some 20 percent of all cuts agreed upon in the Paris Agreement, President Trump's decision has major consequences.<sup>5</sup> However, the vast majority of the international community remained committed, with 197 signatories and 172 states who have already ratified the Paris Agreement in record time.<sup>6</sup> As the Trump administration embarked on its lonely path and decided to no longer include climate change as a security threat in its 2017 National Security Strategy,<sup>7</sup> it seems that the leadership gap might be filled by unexpected actors: China, the world's number one polluter,<sup>8</sup> announced plans for an ambitious carbon emissions trading scheme.<sup>9</sup> Even in the US, Trump's decision triggered a counter movement: numerous US states, cities, and corporations pledged their continued support for efforts to combat climate change.<sup>10</sup>

For, in the end, few experts doubt the long-term effects a changing climate will have on international security. A recent overview of existing research concluded that most studies found a positive correlation between climate change and higher levels of violent conflict, "although many subtleties and countertrends underlie this overall pattern."<sup>11</sup> While climate change will affect economic, security, and political systems all over the world, it will mainly act as a "threat multiplier" in those states with limited capacities to deal with it.<sup>12</sup>

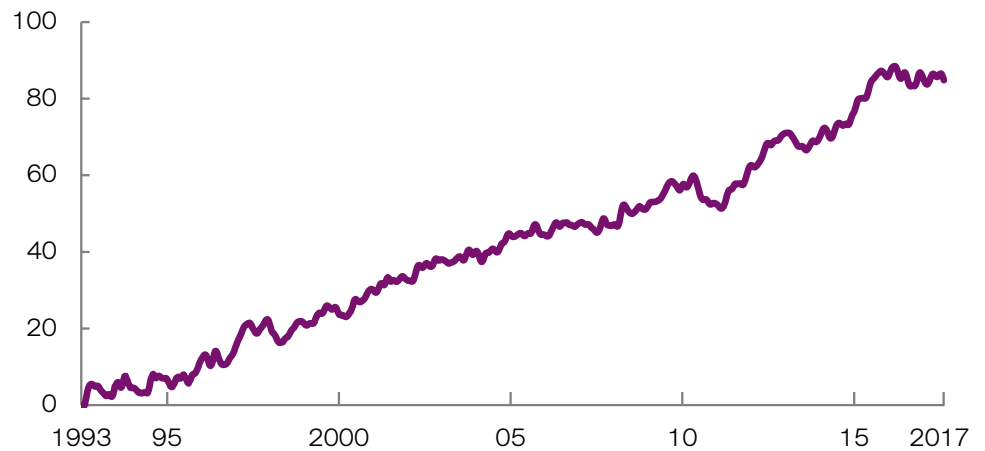
Combustion of fossil energy sources not only fuels climate change but also has an immediate effect: air pollution is the number one cause of death among all kinds of pollution and was responsible for some 6.5 million deaths in 2015 alone.<sup>13</sup> Pollution kills 15 times as many people as war and all forms of violent conflict combined.<sup>14</sup> While more than 20 countries, among them France, the United Kingdom, Canada, and Mexico, pledged to achieve a rapid phaseout of coal power in the newly formed Powering Past Coal Alliance,<sup>15</sup> much more needs to be done. The global energy need is set to rise by 30 percent by 2040 – the equivalent of adding another India and China to the present world energy demand.<sup>16</sup>





### HOW FAST IS THE SEA LEVEL RISING?

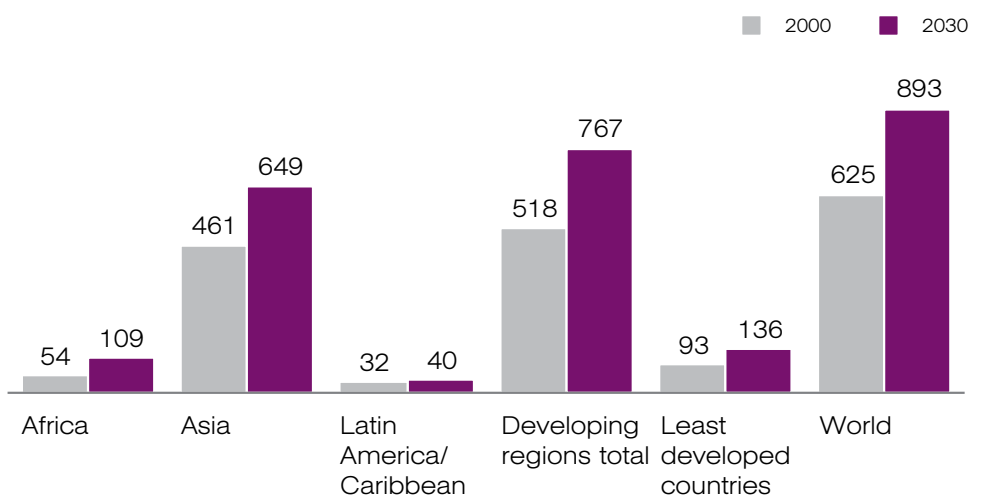
Mean sea level rise, 1993-2017, millimeters



Source: NASA Goddard Space Flight Center<sup>19</sup>

### WHICH PARTS OF THE WORLD ARE MOST VULNERABLE TO RISING SEA LEVELS?

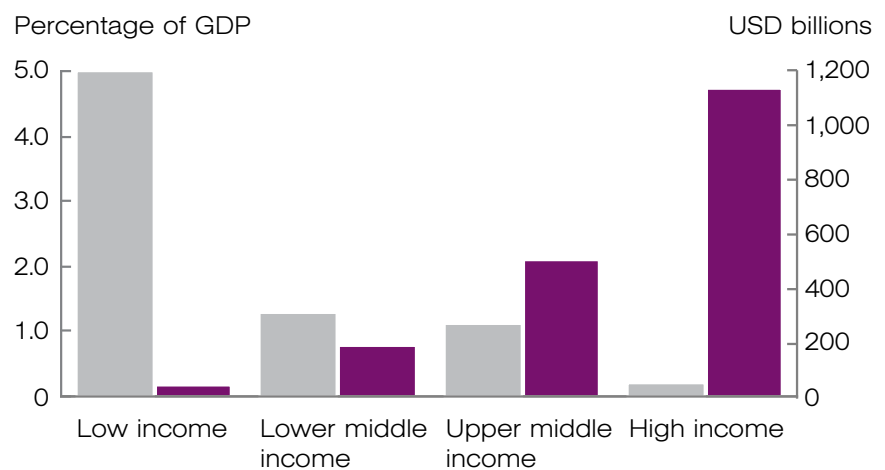
People living in low-elevation coastal zones, by region, millions



Source: United Nations Department of Economic and Social Affairs, based on Johnston 2016<sup>20</sup>

### WHO IS MOST AFFECTED BY CLIMATE HAZARDS?

Economic losses from climate hazards, by country income level, 1995-2015

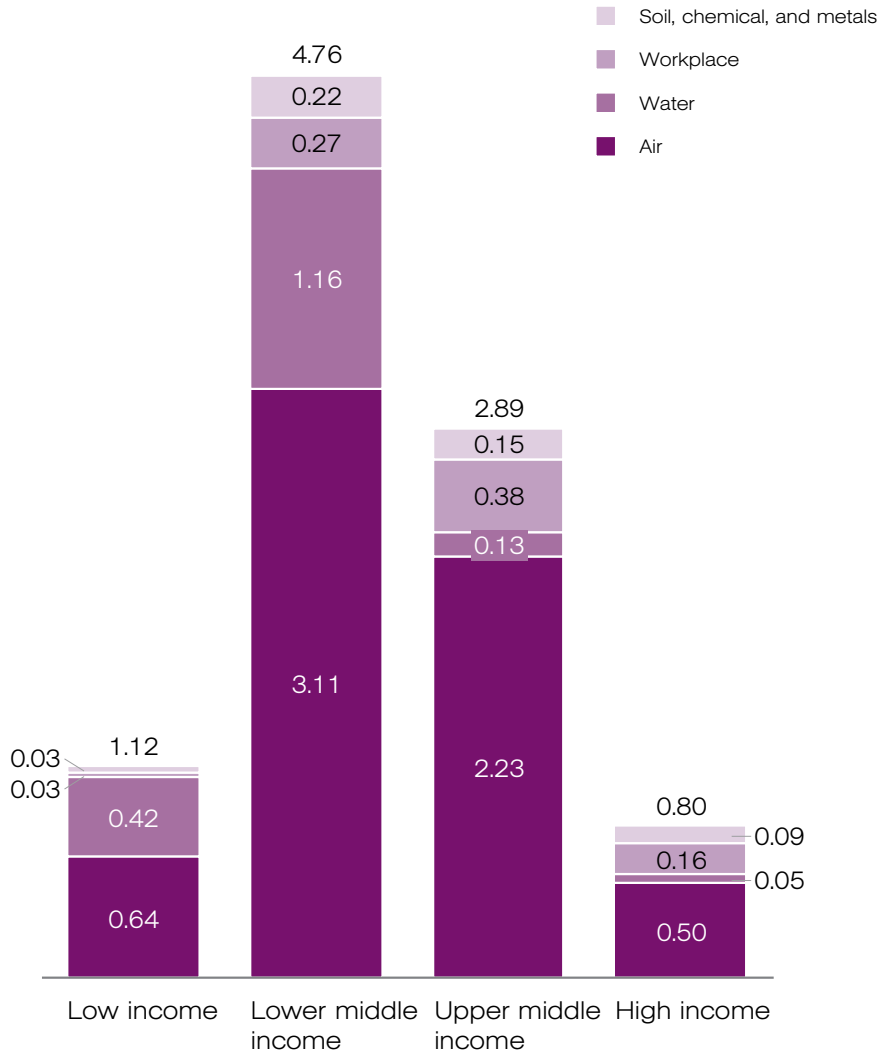


Source: United Nations Department of Economic and Social Affairs, based on Centre for Research and the Epidemiology of Disasters<sup>21</sup>



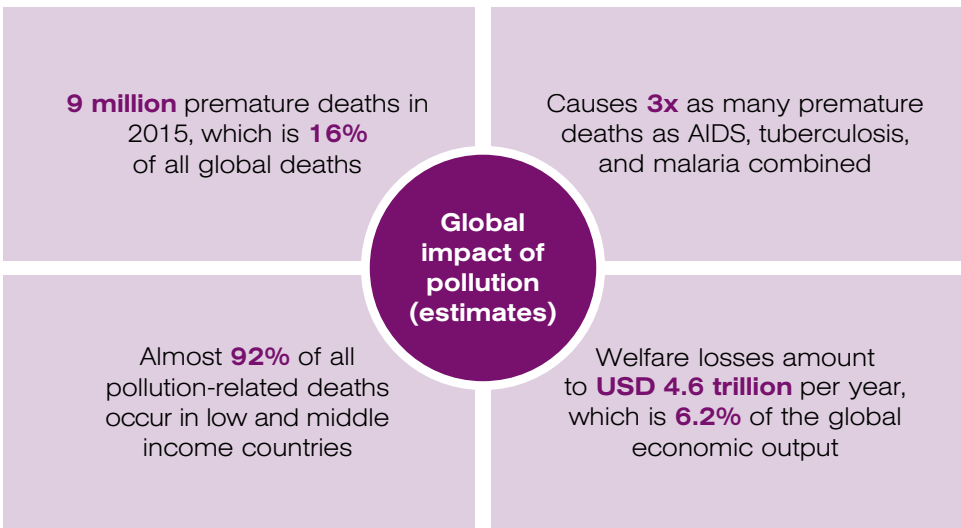
HOW MANY PEOPLE DIE PREMATURELY DUE TO DIFFERENT TYPES OF POLLUTION?

Estimated premature deaths by pollution, by country income levels, 2015, millions



Source: The Lancet Commission on Pollution and Health<sup>22</sup>

KEY FIGURES ON THE DEVASTATING IMPACT OF POLLUTION



Source: Icahn School of Medicine at Mount Sinai; The Lancet; Global Alliance on Health and Pollution<sup>23</sup>

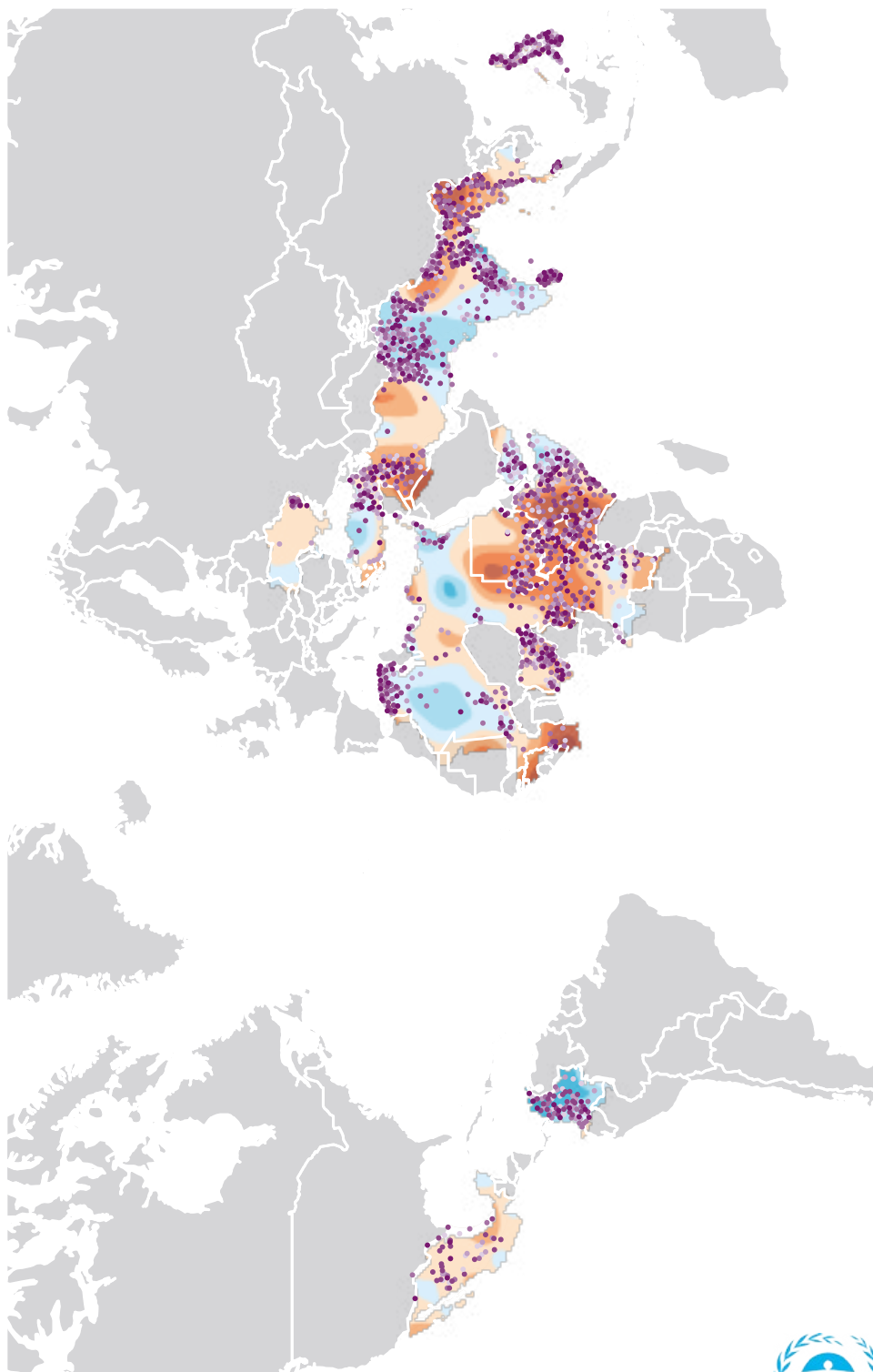


## HOW DO DROUGHT AND LOW INTENSITY CONFLICT CORRELATE?

Incidents of low intensity civil conflict (1989-2014) overlaid with the Palmer Drought Severity Index (2005-14)

Very low precipitation  Very high precipitation

● Low intensity civil conflicts (darker color indicates more recent conflicts, lighter color indicates older ones)



Source: United Nations Environment Programme<sup>24</sup>



# Cybersecurity: What the Hack?

“Cyberattacks can be more dangerous to the stability of democracies and economies than guns and tanks.”<sup>8</sup>

**JEAN-CLAUDE JUNCKER,**  
13 SEPTEMBER 2017

Cybersecurity issues have immediate ramifications for classic security topics, such as nuclear deterrence. If cyberattacks on nuclear capabilities materialize, uncertainty and poor decision making might bring instability to an already fragile nuclear arms regime.<sup>1</sup> As a consequence, cybersecurity has moved to the top of the agenda for many states and their militaries. The past years have been marked by the emergence of a group of countries with superior cybercapabilities, fundamental disagreements over norms governing cyberspace, and previously unseen levels of cybercrime activity.

Whereas the United States continues to have the most advanced cybercapabilities,<sup>2</sup> other countries have caught up over the past years. Especially noteworthy are North Korea's efforts, focusing in particular on offensive capabilities with a variety of objectives, ranging from outright criminal activity to stealing military secrets and targeting telecommunication channels in order to protect Kim Jong-un's image abroad.<sup>3</sup> Beyond missiles, cyberweapons are the only area where North Korea can effectively threaten more advanced countries, which increasingly rely on technical sophistication for their infrastructure.<sup>4</sup> Defensive capabilities have been the focus of the European Union's 2017 update to its 2013 cyberstrategy, which plans for – among other things – the creation of an EU agency for cybersecurity, Europe-wide crisis response mechanisms and emergency funds, the development of projects in military cyberdefense, and the promotion of confidence-building measures.<sup>5</sup>

“So I have a very simple message for Russia. We know what you are doing. And you will not succeed.”<sup>9</sup>

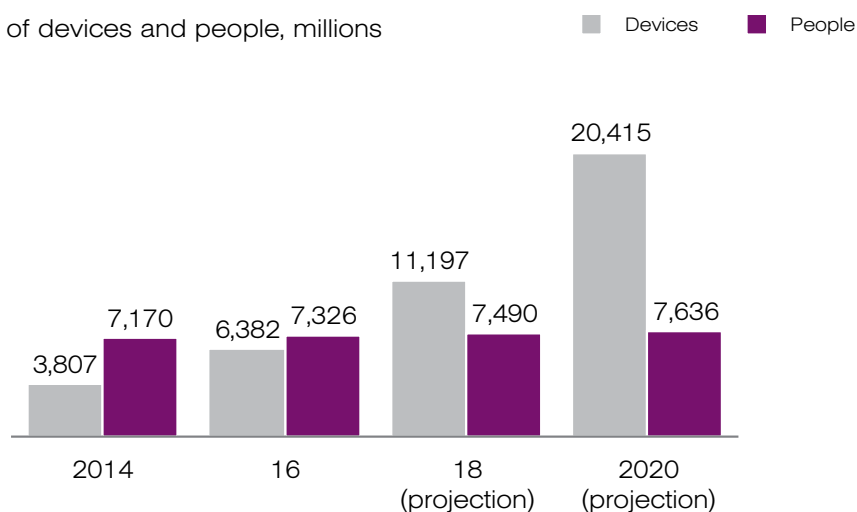
**THERESA MAY,**  
13 NOVEMBER 2017

The international cybernorms process came to a halt this summer when the relevant UN Group of Governmental Experts could not agree on a final communiqué. Some fundamental disagreements have come to the fore despite progress made over the past years. Contentious topics included, in particular, the applicability of the rules of international law. However, the nature of what cybersecurity entails also remains open to debate. The US and its Western allies primarily focus on the security of infrastructure, hardware/software, and data, whereas Russia, China, and other states would prefer to broaden the debate to include “information security,” which would also consider content as a threat that should be addressed. As a result, the way forward for cybernorms is unclear. The US and Europe have shown signs of developing an approach that would unite “the good guys” and hope for the effectiveness of a naming-and-shaming approach. Some experts also propose a focus on confidence-building measures in cyberspace.<sup>6</sup>

Finally, cybercrime has reached unprecedented levels of activity and scale in 2017, in particular with ransomware attacks such as WannaCry, which in May of 2017 eclipsed all previous attacks and infected an estimated 300,000 victims in 150 countries.<sup>7</sup> Whereas the focus of cybersecurity efforts in previous years was on worst-case scenarios in particular, such as large attacks on critical infrastructure, increasingly it is everyday cyberattacks on companies, individuals, and states that define the cybersecurity realm.

### THE ARRIVAL OF THE INTERNET OF THINGS: INCREASING NUMBER OF CONNECTED DEVICES

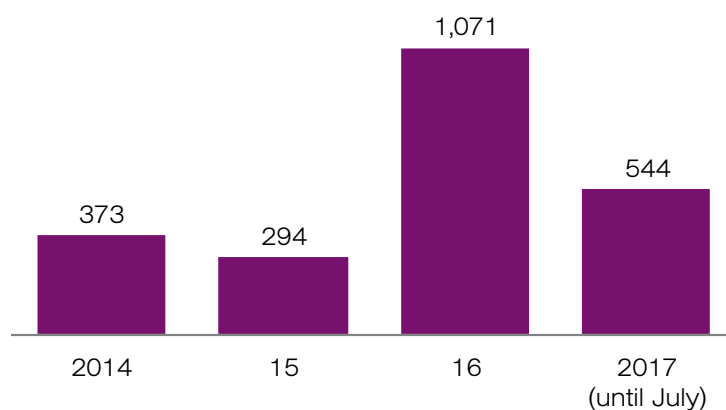
Number of devices and people, millions



Source: Gartner; United States Census Bureau<sup>10</sup>

### AVERAGE SUM DEMANDED IN CYBER-RANSOMWARE ATTACKS

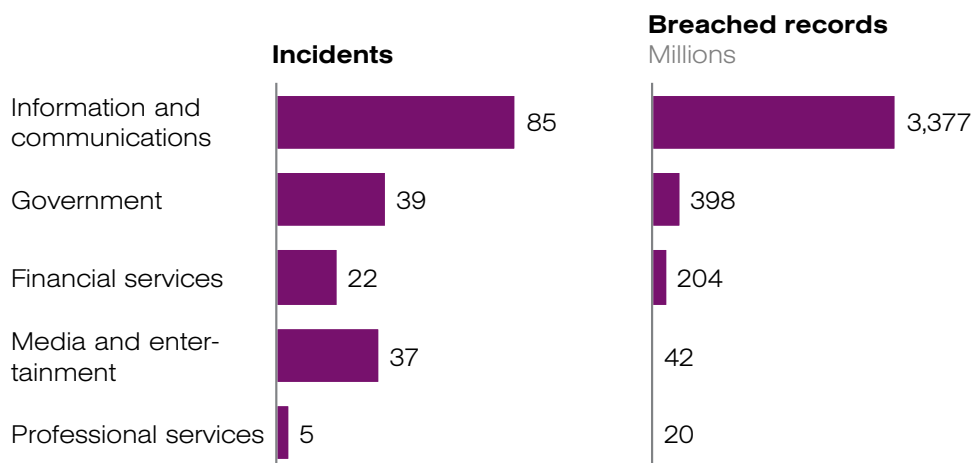
Average ransom amount, USD



Source: Symantec<sup>11</sup>

### PUBLICLY DISCLOSED CYBER-SECURITY EVENTS: MOST TARGETED INDUSTRIES

Cybersecurity events, by industry, 2016

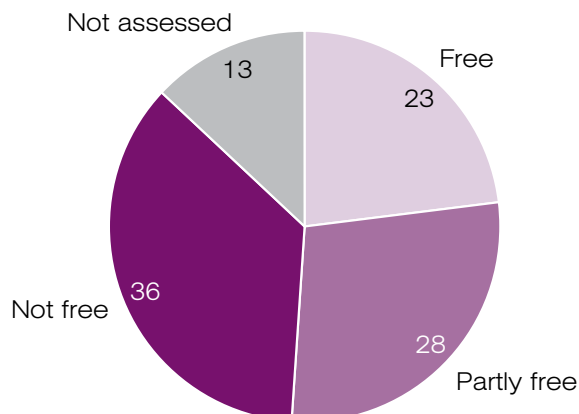


Source: IBM X-Force<sup>12</sup>



## HOW MANY GLOBAL USERS ENJOY FREEDOM OF THE INTERNET?

Internet users by freedom of the net status, 2017, percent



Source: Freedom House<sup>13</sup>

## KEY CHALLENGES IN INTERNATIONAL CYBERNORMS DISCUSSIONS

### Terminology

Some states use the more narrowly technically defined term “cyber-security,” others use “information security” based on a more expansive definition that includes content and views information itself as a potential threat to be addressed.

### International law

How international law applies to cyberspace remains highly contentious. This includes disagreements over how international humanitarian law applies, the right to self-defense, what constitutes an “internationally wrongful act using ICT,” and the use of countermeasures, as well as issues that remain controversial more broadly, such as due diligence.

### Attribution

Attributing malicious cyberactivity remains challenging. While some states possess sophisticated capabilities to attribute such activity, it usually takes time. Moreover, attribution capabilities are unevenly distributed and most states continue to struggle with this task.

### Sector-specific agreements

States are starting to explore more specific agreements, e.g., focusing on protecting the core of the Internet or financial stability, and to discuss whether they would help advance or pose a risk to the broader discussion about rules of the road for cyberspace.

### Forum

There is uncertainty and disagreement about which forum and format is best suited to further advance the discussions about rules of the road for cyberspace and to what extent nongovernmental actors ought to be involved.

Source: Carnegie Endowment for International Peace<sup>14</sup>





## DEVELOPMENT OF CYBERNORMS DISCUSSIONS AT MULTILATERAL LEVEL

### Multilateral accords on cybernorms or containing cybernorms references

- Global intergovernmental organization (UN)
- Regional IGOs (OSCE, OAS, SCO, NATO, ASEAN, etc.)
- Other (G20, G7, BRICS, etc.)

<b>2017</b>	Sep	●	BRICS Xiamen Declaration
	Aug	●	Australia-Japan-United States Trilateral Strategic Dialogue Joint Statement
	Apr	●	G7 Declaration on Responsible States Behavior in Cyberspace
		●	OAS CICTE Resolution
	Mar	●	G20 Finance Ministers and Central Bank Governors Communiqué
<b>2016</b>	Dec	●	EU-US Cyber Dialogue Joint Elements
		●	OSCE Ministerial Decision
	Nov	●	APEC Leaders' Declaration
	Oct	●	BRICS Goa Declaration
	Sep	●	Joint Statement on Third Annual Nordic-Baltic + US Cyber Consultations
	Jul	●	NATO Warsaw Summit Communiqué
		●	NATO Cyber Defence Pledge
	May	●	G7 Principles and Action on Cyber
		●	US-Nordic Leaders' Summit Joint Statement
	Mar	●	OSCE Confidence-Building Measures (expanded list)
<b>2015</b>	Feb	●	OAS CICTE Statement
	Dec	●	EU-US Cyber Dialogue Joint Elements
	Nov	●	G20 Antalya Communiqué
	Jul	●	UN Group of Governmental Experts (UNGGE) report
		●	BRICS Ufa Declaration
<b>2014</b>	Jan	●	Shanghai Cooperation Organization (SCO) Draft International Code of Conduct for Information Security (revised version)
	Dec	●	EU-US Cyber Dialogue Joint Elements
	Sep	●	NATO Wales Summit Declaration
<b>2013</b>	Jul	●	BRICS Fortaleza Declaration
	Dec	●	OSCE Confidence-Building Measures
<b>2011</b>	Jul	●	UNGGE report
	Sep	●	SCO Draft International Code of Conduct for Information Security
<b>2010</b>	Jul	●	UNGGE report
<b>2009</b>	Jun	●	SCO Agreement on Cooperation in the Field of International Information Security

Source: Carnegie Endowment for International Peace<sup>15</sup>



# Nuclear Security: Out of (Arms) Control?

"The United States has great strength and patience, but if it is forced to defend itself or its allies, we will have no choice but to totally destroy North Korea. Rocket Man is on a suicide mission for himself and for his regime."<sup>14</sup>

**DONALD J. TRUMP**  
**19 SEPTEMBER 2017**

On paper, 2017 has not been a bad year for nuclear disarmament. On July 7, 122 states voted to adopt a Treaty on the Prohibition of Nuclear Weapons.<sup>1</sup> In November, the International Campaign to Abolish Nuclear Weapons (ICAN), a coalition of nongovernmental organizations that has long fought for a ban treaty, was awarded the Nobel Peace Prize. However, at the same time, nuclear-armed powers are modernizing their arsenals, smaller nuclear-armed states are building capabilities, and arms control agreements are fraying. A second nuclear age, with more actors and less stability, is taking shape.<sup>2</sup>

In both Russia and the United States, nuclear modernization programs are in full swing. Analysts warn that Moscow's pursuit of "a broad range of existing and new versions of nuclear weapons suggests that the real doctrine goes beyond basic deterrence toward regional war-fighting strategies – or even weapons aimed at bluntly causing terror."<sup>3</sup> Under the Obama administration's budget request for 2017, the United States would spend almost USD 400 billion exclusively on modernizing its nuclear forces over the next 30 years.<sup>4</sup> Beyond the two nuclear superpowers, others with smaller arsenals, such as China, India, or Pakistan, are also investing in new capabilities.<sup>5</sup>

Most worryingly, North Korea successfully tested a thermonuclear weapon and intercontinental-range ballistic missiles which, it claims, can carry a nuclear warhead and reach the US homeland.<sup>6</sup> Trump vowed to respond to North Korean threats with "fire and fury like the world has never seen."<sup>7</sup> But if neither deterrence nor diplomacy are seen as viable approaches by the administration that has stressed it would never accept a nuclear-armed North Korea,<sup>8</sup> a military option becomes more likely. US National Security Advisor H.R. McMaster recently argued that the risk of war with North Korea was "increasing every day."<sup>9</sup> Concerning Iran, Trump's decision not to recertify Tehran's compliance with the Joint Comprehensive Plan of Action has concerned US allies who fear the end of the deal and of "the world's most robust nuclear verification regime."<sup>10</sup> That could result in an unconstrained Iranian nuclear program – a potential catalyst for nuclear proliferation in the region and beyond.<sup>11</sup>

Moreover, landmark arms control treaties are at risk of unraveling. Most importantly, the 1987 Intermediate-Range Nuclear Forces (INF) Treaty has been put in jeopardy 30 years after it eliminated an entire category of US and Soviet missiles. Its cancellation would likely trigger a severe crisis in European security and pose tough questions for the future of arms control in Europe.<sup>12</sup> New START, which has further reduced the number of US and Russian deployed nuclear weapons, expires in February 2021 – but could be extended for up to five years. However, US Congress has already passed legislation denying funding for an extension should Russia not comply with the INF Treaty. As Steven Pifer has noted, "there is a prospect that, in 2021, for the first time in five decades, no negotiated agreements will be regulating the US-Russian nuclear arms relationship."<sup>13</sup>



## WHAT'S AT STAKE IN THE INF DEBATE?

### The Intermediate-Range Nuclear Forces (INF) Treaty and compliance concerns

#### Why the INF Treaty matters

The INF Treaty, signed in 1987 between the US and the Soviet Union, eliminated all ground-launched missiles and launchers with ranges between 500 and 5,500 km. "It was like holding a gun to our head," Mikhail Gorbachev said, referring to the weapons' short warning times. The Treaty is of unlimited duration. Russian and US experts have warned of a new missiles arms race in Europe should INF collapse.

#### US position

According to the US, Russia has developed, tested, and deployed a ground-launched cruise missile (GLCM) in violation of the Treaty. Efforts to resolve the issue have, so far, failed. In order to bring Russia back into compliance, the Secretary of Defense was mandated with developing a conventional GLCM within INF ranges – an action that is permitted by the Treaty up until a missile is flight tested.

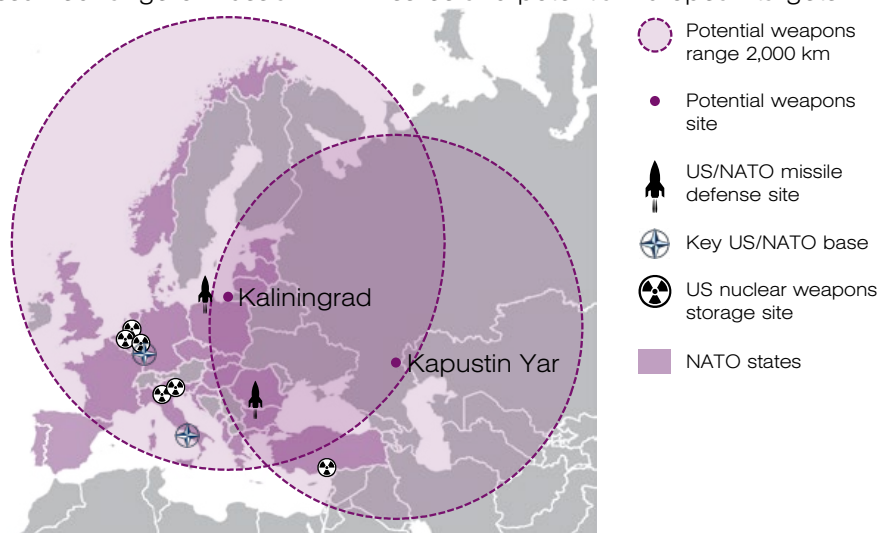
#### Russian position

Russia has rejected US allegations and presented its own counteraccusations, particularly the deployment of US missile defense launchers in Romania and Poland, allegedly capable of launching forbidden INF-range cruise missiles. According to President Putin, if the US were to withdraw from the INF Treaty, "our response would be immediate ... and reciprocal."

Source: VCDNP<sup>15</sup>

## WHAT TARGETS COULD RUSSIAN INTERMEDIATE-RANGE MISSILES REACH?

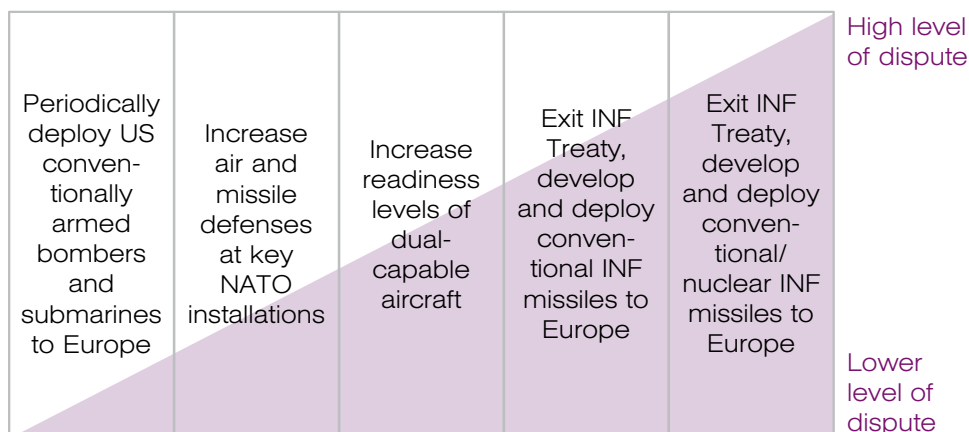
### Assumed range of Russian INF missiles and potential European targets



Source: VCDNP<sup>16</sup>

## WHAT ARE POTENTIAL US COUNTERMEASURES AND THEIR LIKELY EFFECT ON THE NATO ALLIANCE?

### Potential US military countermeasures and possible level of NATO dispute



Source: VCDNP<sup>17</sup>



## THE IRAN NUCLEAR DEAL

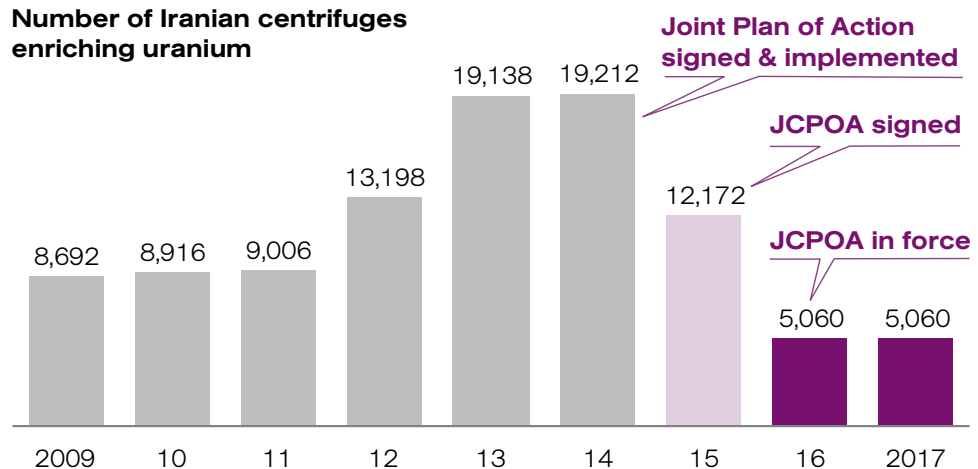
### Under the 2016 Joint Comprehensive Plan of Action (JCPOA), Iran ...

<b>Until 2026 (10 years)</b>	... is limited in the number and type of advanced centrifuges that it can test
	... is limited to 5,060 IR-1 centrifuges at the Natanz Fuel Enrichment Plant (FEP)
<b>Until 2031 (15 years)</b>	... cannot enrich uranium above 3.67% U-235 (lower than weapons grade)
	... cannot stockpile more than 300 kg of low-enriched uranium
	... can only conduct enrichment at Natanz FEP, under strict monitoring measures
	... will not reprocess plutonium
	... has limits on uranium and plutonium metals
<b>Until 2036 (20 years)</b>	... must submit production of specific centrifuge parts to IAEA monitoring
<b>Until 2041 (25 years)</b>	... must submit uranium ore production to international monitoring
<b>Forever</b>	... will implement the Additional Protocol and stronger subsidiary arrangements
	... is prohibited from research that could contribute to the development of a nuclear weapon

### With no JCPOA, Iran would have the ability to ...

... build an unlimited number of centrifuges at an unlimited number of sites  
 ... enrich uranium to any level and stockpile as much as it chooses  
 ... develop and test more advanced centrifuges without restriction  
 ... operate reactors to produce weapons grade plutonium  
 ... separate plutonium from spent fuel

### Number of Iranian centrifuges enriching uranium



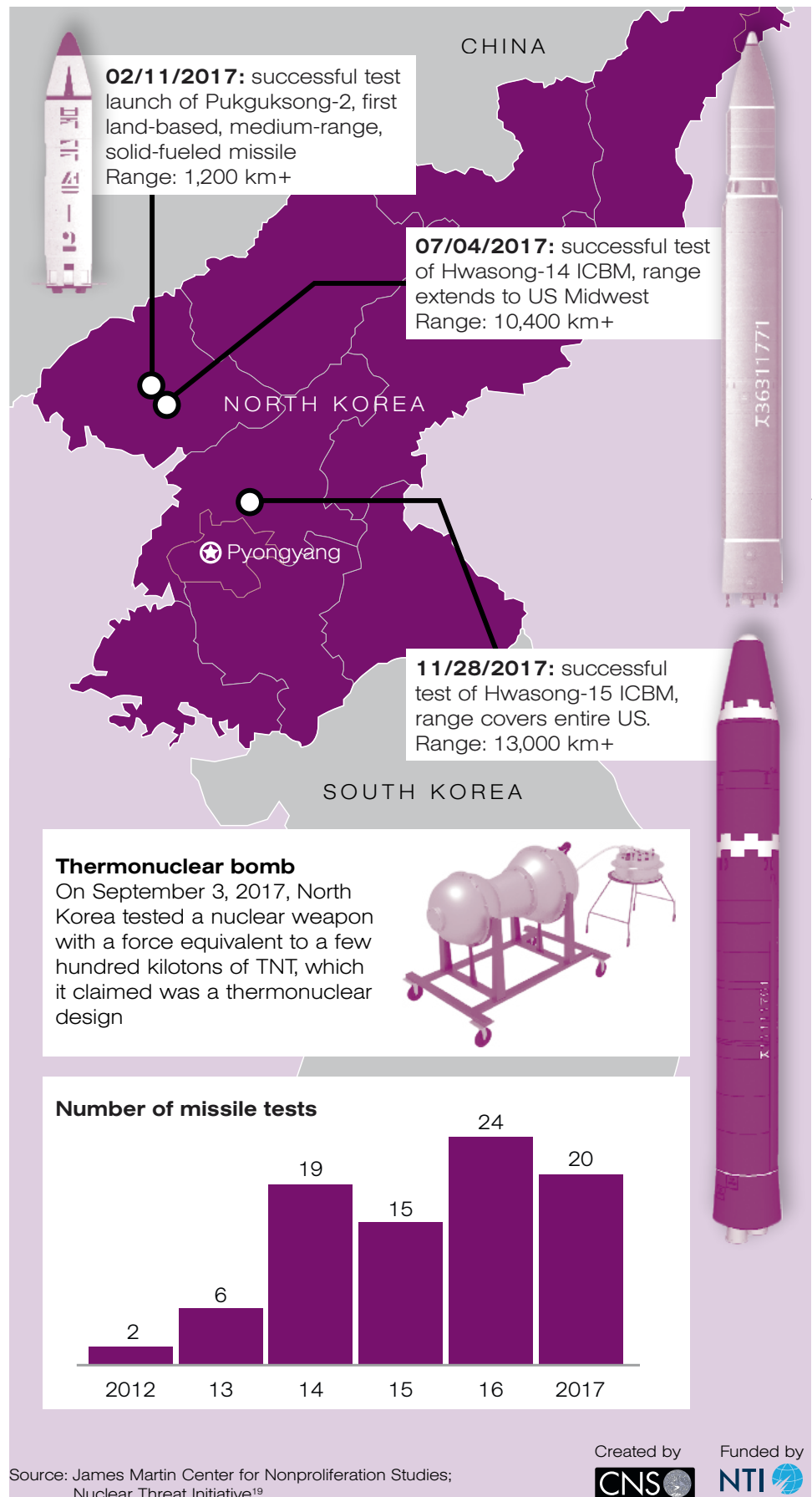
Source: James Martin Center for Nonproliferation Studies;  
Nuclear Threat Initiative<sup>18</sup>

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BUILDING A SAFER WORLD



## NORTH KOREA'S NUCLEAR ADVANCEMENTS









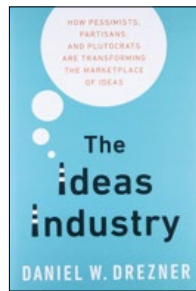
# Food for Thought







## Books



### DANIEL W. DREZNER: **The Ideas Industry**

#### How Pessimists, Partisans, and Plutocrats Are Transforming the Marketplace of Ideas

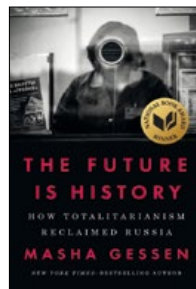
Arguing that “thought leaders” have largely supplanted traditional “public intellectuals,” Drezner provides a lucid analysis of today’s “marketplace of ideas.” Despite the ideas industry’s shortcomings, Drezner appreciates that it provides diverse thinking to a wider audience.<sup>1</sup>



### LAWRENCE FREEDMAN: **The Future of War**

#### A History

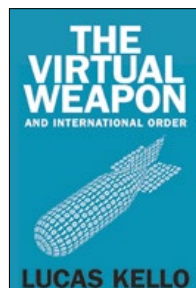
Freedman, one of the world’s leading thinkers on strategy, tells the history of how people have thought about the potential future of violent conflicts. He shows that predictions on how future wars would play out were regularly incorrect and underestimated how catastrophic the results would be.<sup>2</sup>



### MASHA GESSEN: **The Future Is History**

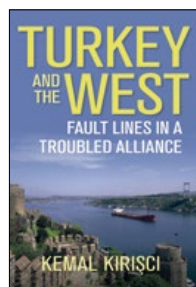
#### How Totalitarianism Reclaimed Russia

By documenting the lives of seven Russian individuals, Gessen illustrates the various developments Russian society has undergone since the 1980s. Based on her account of the inherent characteristics of Russian society, her outlook for Russia’s future appears gloomy.<sup>3</sup>



### LUCAS KELLO: **The Virtual Weapon and International Order**

Kello develops a conceptual framework for understanding the effects of the cyberrevolution on international relations. Drawing on a broad range of case studies, his book should help experts adapt strategy and policy to this unprecedented challenge.<sup>4</sup>



### KEMAL KIRIŞCI: **Turkey and the West**

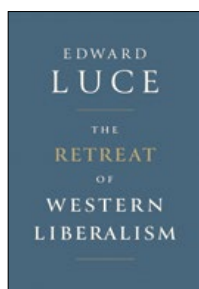
#### Fault Lines in a Troubled Alliance

Will Turkey be a reliable partner for its NATO allies and other Western countries or will disillusionment with its closest partners continue? Kirişçi discusses Turkey’s integration into the transatlantic community, the effects of this on Turkish foreign policy today, and scenarios for the country’s future orientation.<sup>5</sup>



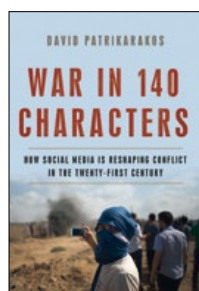
### IVAN KRASTEVE: **After Europe**

Offering a distinctly Eastern European perspective, this short volume by the Bulgarian intellectual Ivan Krastev is a sharp-witted account of the most pressing challenges the continent is facing today, such as the migration crisis, the spread of right-wing populism, and the threat of Russia in the East.<sup>6</sup>



### EDWARD LUCE: **The Retreat of Western Liberalism**

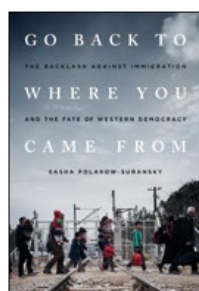
In his newest book, Edward Luce sounds the alarm bell for Western liberalism. The author provides an overview of root causes for Western liberalism's decline, thereby depicting the rise of populist parties and the election of Donald J. Trump as mere symptoms of a larger trend.<sup>7</sup>



### DAVID PATRIKARAKOS: **War in 140 Characters**

*How Social Media Is Reshaping Conflict in the Twenty-First Century*

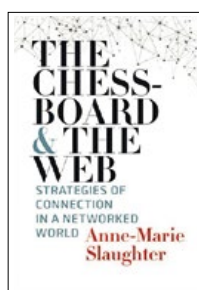
In today's conflicts, images and stories sometimes seem more important than military action on the battlefield. Patrikarakos sheds light on how tech-savvy actors shape the outcome of conflict by deploying the power of social media.<sup>8</sup>



### SASHA POLAKOW-SURANSKY: **Go Back to Where you Came From**

*The Backlash Against Immigration and the Fate of Western Democracy*

During the last three years, people fleeing war were welcomed to Europe with open arms – but also with racist and anti-Islam fervor. Polakow-Suransky recounts the surge of anti-immigrant populism that may be the gravest threat to liberal democracy.<sup>9</sup>



### ANNE-MARIE SLAUGHTER: **The Chessboard & The Web**

*Strategies of Connection In A Networked World*

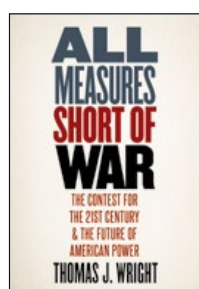
According to Slaughter, a global web of networks, in which building connections and relationships is more important than bargaining or coercion, complements the traditional image of global politics as a chessboard. She calls on policymakers to develop a new “network mindset” to chart a path for this new reality.<sup>10</sup>



### NATHALIE TOCCI: **Framing the EU Global Strategy**

*A Stronger Europe in a Fragile World*

The co-author of the EU Global Strategy (EUGS), Nathalie Tocci, remains a facilitator between academia, politics, and civil society. In this book, she provides insights on how the EUGS came about and steps ahead, as well as on the quirks of European foreign policy as a whole.<sup>11</sup>



### THOMAS J. WRIGHT: **All Measures Short of War**

*The Contest for the Twenty-First Century and the Future of American Power*

This topical book examines what consequences an erosion of the liberal international order would have. According to Wright, revisionist powers and the return of traditional patterns of great-power rivalry necessitate a strategy of “responsible competition” in order to prevent war and strengthen the liberal order.<sup>12</sup>

# Reports



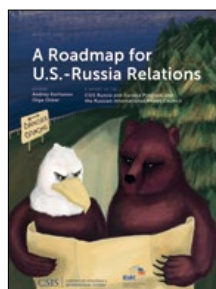
## BELFER CENTER, HARVARD KENNEDY SCHOOL: **The Cybersecurity Campaign Playbook**

Against the backdrop of repeated foreign attempts to meddle in democratic elections, a group of experts in cybersecurity, politics, and law came together to write a concise checklist and recommend steps to follow in order to minimize the vulnerability of both political campaigns and one's own personal data to cyberthreats.<sup>1</sup>



## THE CHICAGO COUNCIL ON GLOBAL AFFAIRS: **What Americans Think About America First**

While Donald Trump has made the case for an "America First" doctrine, the Chicago Council's 2017 survey shows that a majority of Americans still endorses sustaining American engagement abroad, maintaining alliances, supporting trade, and participating in international agreements.<sup>2</sup>



## CSIS/RUSSIAN INTERNATIONAL AFFAIRS COUNCIL: **A Roadmap for US-Russia Relations**

The chapters in this report, co-authored by US and Russian experts, identify areas where coordination between Moscow and Washington is crucial and those where it may be possible. As the contributions show, US-Russian failure to positively engage would make things much worse and affect the entire world.<sup>3</sup>



## EU INSTITUTE FOR SECURITY STUDIES (EUISS): **Permanent Structured Cooperation** *What's in a Name?*

Described as the "sleeping beauty of the Lisbon Treaty" by Jean-Claude Juncker, PESCO has come to life. The EUISS team sheds light on its historical development and describes how it could change operational and capability development in the realm of EU defense policy.<sup>4</sup>



## GLOBSEC: **One Alliance** *The Future Tasks of the Adapted Alliance*

Assembled by GLOBSEC, a group of senior leaders offer recommendations for NATO's future adaptation lest the Alliance fall behind the increased pace of political change and technological development. They call for an in-depth strategy review that could be completed in time for NATO's 70th anniversary summit in 2019.<sup>5</sup>



## GREENPEACE: **Climate Change, Migration, and Displacement** *The Underestimated Disaster*

As an increasing amount of studies try to measure the extent to which migration is induced by climate change, this Greenpeace report argues that the problem is still widely underestimated. Combining an overview of existing research with case studies, it explains how environmental stress affects family decisions to stay or leave.<sup>6</sup>



## INSTITUTE FOR ECONOMICS AND PEACE: **Global Peace Index**

### Measuring Peace in a Complex World

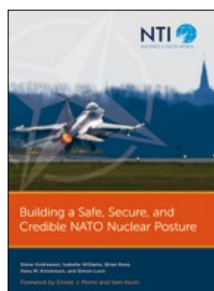
Relying on 23 indicators, the Institute for Economics and Peace measures peace in 163 independent states and territories. The Global Peace Index 2017 finds that the average level of peace has slightly increased: 93 countries have become more peaceful and 68 less so.<sup>7</sup>



## NATIONAL ENDOWMENT FOR DEMOCRACY: **Sharp Power**

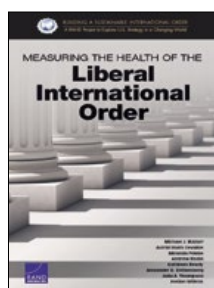
### Rising Authoritarian Influence

The authors argue that the social, cultural, and media presences of Russia and China abroad are not elements of “soft power” but means for manipulating the political and information environments of targeted countries. The report suggests a number of steps that can be taken to counteract this “sharp power.”<sup>8</sup>



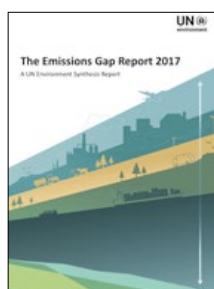
## NUCLEAR THREAT INITIATIVE: **Building a Safe, Secure, and Credible NATO Nuclear Posture**

This NTI report thoroughly outlines to what extent NATO's resumed focus on collective defense and deterrence could trigger a debate on its nuclear posture. Experts and laypersons are provided with an array of analyses on policy debates and options.<sup>9</sup>



## RAND: **Measuring the Health of the Liberal International Order**

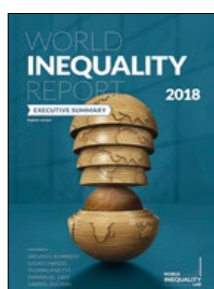
Based on numerous indicators, RAND researchers find that the liberal international order has seen an “impressive degree of stability – and, in many cases, steady process” since 1945. However, they also warn that this order is threatened by geopolitical and socioeconomic trends questioning its fundamental premises.<sup>10</sup>



## UNITED NATIONS ENVIRONMENT PROGRAMME: **The Emissions Gap Report 2017**

### A UN Environment Synthesis Report

This comprehensive report stresses the urgent need for accelerated short-term action and greater long-term ambition if the international community is to succeed in keeping global warming below 2 °C. According to the authors, practical and cost-effective options are available to make this possible.<sup>11</sup>



## WORLD INEQUALITY LAB: **World Inequality Report 2018**

Over a hundred researchers from across the globe describe and quantify the development of income and wealth inequality between 1980 and 2016. They show that income inequality has increased in almost all regions, albeit at different speeds, with the global middle class as the main loser.<sup>12</sup>







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# Endnotes







# Endnotes

Please note that all links were last checked on 22 January 2018. All quotes in British English have been changed to American English.

## Present at the Erosion: International Order on the Brink?

1. Frank-Walter Steinmeier, "Words of Thanks to the 16th Federal Convention," Berlin, 12 February 2017, <http://www.bundespraesident.de/SharedDocs/Reden/EN/Frank-Walter-Steinmeier/Reden/2017/02/170212-Federal-Convention.html>.
2. Dean Acheson, *Present at the Creation. My Years in the State Department*, Hamish Hamilton (London), 1970.
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5. G. John Ikenberry, "The Plot Against American Foreign Policy. Can the Liberal Order Survive?," *Foreign Affairs*, Vol. 96, No. 3, May/June 2017, pp. 2-9, p. 2. Donald Trump's presidency is just one year old. "It seems certain, though," Hal Brands notes, "that historians will someday view Donald Trump's presidency as an inflection point in the trajectory of American grand strategy and the US-led international system." Hal Brands, "The Unexceptional Superpower: American Grand Strategy in the Age of Trump," *Survival*, Vol. 59, No. 6, 20 November 2017, <http://www.iiss.org/en/publications/survival/sections/2017-579b/survival-global-politics-and-strategy-december-2017-january-2018-a19c/59-6-02-brands-9797>, pp. 7-40.
6. This is illustrated by such diverse actions as China's refusal to respect the jurisdiction of the Permanent Court of Arbitration in the South China Sea dispute, the dismissal of recommendations of the Venice Commission by the Polish government, or the increasingly widespread resistance of African leaders against the International Criminal Court. See, e.g., Barbara Bodalska, "Venice Commission Active on Poland, Expects the Same From Warsaw," *Euractiv*, 5 December 2017, <https://www.euractiv.com/section/justice-home-affairs/news/venice-commission-awaits-warsaws-response/>; Jane Perlez, "Tribunal Rejects Beijing's Claims in South China Sea," *The New York Times*, 12 July 2016, <https://nyti.ms/2jHhL8O>; Kurt Mills and Alan Bloomfield, "African Resistance to the International Criminal Court: Halting the Advance of the Anti-Impunity Norm," *Review of International Studies*, Vol. 44, No. 1, 8 December 2017, <https://www.cambridge.org/core/journals/review-of-international-studies/issue/0C6DE903D4724ED131E8CE9438530B7B>, pp. 101-127.
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- Guasti, "The Illiberal Turn or Swerve in Central Europe?," *Politics and Governance*, Vol. 5, No. 4, 29 December 2017, <https://www.cogitatiopress.com/politicsandgovernance/article/view/1156>, pp. 166-176.
10. See, e.g., Susan Rice, "When America No Longer Is a Global Force for Good," *The New York Times*, 20 December 2017, <https://nyti.ms/2oWnZGg>. The instruments used or strategies pursued by the United States were often not in line with its own moral ambitions. In other parts of the world, the liberal world order was sometimes a mere euphemism for Western dominance or even imperialism. See Inderjeet Parmar, "The US-led Liberal Order: Imperialism by Another Name?," *International Affairs*, Vol. 94, No. 1, 1 January 2018, <https://academic.oup.com/ia/article/94/1/151/4762690>, pp. 151-172.
  11. As Ted Piccone noted in reaction: "Putin, and his band of brothers ranging from Erdoğan of Turkey to Al Sissi of Egypt and Duterte of the Philippines, are popping the champagne as we speak." Ted Piccone, "Tillerson Says Goodbye to Human Rights Diplomacy," *The Brookings Institution*, 5 May 2017, <https://www.brookings.edu/blog/order-from-chaos/2017/05/05/tillerson-says-goodbye-to-human-rights-diplomacy/>.
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  13. The spokesman of the Egyptian foreign ministry, for instance, seemed to copy Trump-speak when he complained about "deplorable CNN coverage" on Twitter. See "Egypt's Government Follows Trump's Example With a Trumpian Tweet Attacking CNN," *The Week*, 27 November 2017, <http://theweek.com/speedreads/739647/egypts-government-follows-trumps-example-trumpian-tweet-attacking-cnn>. And after CNN had reported on "slave camps" in Libya and the US called for sanctions, the *Libyan Express* complained about the US policy of double standards, asking why one should believe a source the US president had consistently described as "fake news." "US President Tells the World 'CNN is Fake News' But Adopts Its Slavery Claims on Libya," *Libyan Express*, 29 November 2017, <http://www.libyanexpress.com/us-president-tells-the-world-cnn-is-fake-news-but-adopts-its-slavery-claims-on-libya/>.
  14. Tobias Bunde, Benedikt Franke, Quirin Maderspacher, Adrian Oroz, Lukas Schwemer, Lisa Marie Ullrich, Lukas Werner, Kai Wittek, "Munich Security Report 2017: Post-Truth, Post-West, Post-Order?," Munich, 2017, <https://www.securityconference.de/debatte/munich-security-report/>.
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  17. For an excellent overview of Trump's foreign policy decisions on China, see Evan Osnos, "Making China Great Again," *The New Yorker*, 8 January 2018, <https://www.newyorker.com/magazine/2018/01/08/making-china-great-again>.
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  21. See Christopher Walker and Jessica Ludwig, "The Meaning of Sharp Power: How Authoritarian States Project Influence," *Foreign Affairs*, 16 November 2017, <https://www.foreignaffairs.com/articles/china/2017-11-16/meaning-sharp-power>; Thorsten Benner, "An Era of Authoritarian Influence? How Democracies Should Respond," *Foreign Affairs*, 15 September 2017, <https://www.foreignaffairs.com/articles/china/2017-09-15/era-authoritarian-influence>.
  22. As the political scientist John Ruggie famously noted, "it was less the fact of American hegemony that accounts for the explosion of multilateral arrangements than of American hegemony." John Ruggie, "Multilateralism: The Anatomy of an Institution," in: John Ruggie (ed.), *Multilateralism Matters: The Theory and Praxis of an Institutional Form*, Columbia University Press (New York), 1993, p. 8.



23. G. John Ikenberry, "The Plot Against American Foreign Policy. Can the Liberal Order Survive?," *Foreign Affairs*, Vol. 96, No. 3, May/June 2017, <https://www.foreignaffairs.com/issues/2017/96/3>, pp. 2-9, p. 4.
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category, availability figures for technical availability and deployability (e.g., considering training) were applied; transit times were also considered. This provided a realistic estimate number of weapon systems required to sustain a mission. On each weapon system category, procurement prices were estimated based on OEM and ministry of defense publications, together with the number of weapon systems, resulting in the estimated equipment investment required to sustain one additional mission. See also David Bachmann, Tobias Bunde, Quirin Maderspacher, Adrian Oroz, Gundbert Scherf, and Kai Wittek, "More European, More Connected, and More Capable," Munich Security Conference, November 2017, <https://www.securityconference.de/debatte/european-defence-report/>.

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