

# Munich Security Report 2019

The Great Puzzle: Who Will Pick Up the Pieces?







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# Foreword

Dear Reader,

This year, the Munich Security Conference is marking not one, but two milestones. Ahead of the 55th edition of the Munich Security Conference, we are delighted to launch the fifth edition of the Munich Security Report. First published in 2015, this report compiles key insights and analyses, illuminating major developments in and critical challenges to international security. As such, it serves as a conversation starter for both our main conference and for security professionals and the interested public around the globe.

When looking at the current state of international affairs, it is difficult to escape the feeling that the world is not just witnessing a series of smaller and bigger crises, but that there is a more fundamental problem. Indeed, we seem to be experiencing a reshuffling of core pieces of the international order. A new era of great power competition is unfolding between the United States, China, and Russia, accompanied by a certain leadership vacuum in what has become known as the liberal international order. While no one can tell what the future order will look like, it is becoming obvious that new management tools are needed to prevent a situation in which not much may be left to pick up.

In the midst of this global strategic puzzle, the Munich Security Report aims to help make sense of today's security environment by presenting condensed information on key regions and issues on the international security agenda. We do not pretend to cover all crucial topics in this report (and certainly do not claim that those not discussed here are not important). Instead, we try to focus on a few actors, regions, and issues of significance and, each year, bring in a new perspective. This year's report sheds light on the actors of the "second row": the middle powers called on to do more to preserve the liberal international order. However, while several of these countries' leaders have advocated stronger cooperation, they also continue to face multiple domestic and international challenges that limit their room for maneuver. In addition, the report covers developments in key regions from the Western Balkans to the Sahel and overarching security issues from arms control to transnational organized crime.

This report would not have been possible without the generous support of numerous renowned institutions, friends, and partners who made 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,

A handwritten signature in blue ink, which appears to read "Wolfgang Ischinger".

Ambassador Wolfgang Ischinger  
Chairman of the Munich Security Conference



# The Great Puzzle: Who Will Pick Up the Pieces?

“The democratic alliance that has been the bedrock of the American-led liberal world order is unraveling. At some point, and probably sooner than we expect, the global peace that that alliance and that order undergirded will unravel, too.”<sup>84</sup>

**ROBERT KAGAN,**  
12 JULY 2018

“What we see today is that international rules and multilateral mechanisms are under attack, and the international landscape is filled with uncertainties and destabilizing factors.”<sup>85</sup>

**WANG YI,**  
28 SEPTEMBER 2018

In early 2019, it is difficult to evade the increasingly widespread feeling that the world is not just witnessing a seemingly endless series of smaller and bigger crises, but that there is a more fundamental problem – and that, as Robert Kagan put it, “things will not be okay.”<sup>1</sup>

Germany’s four-term Chancellor Angela Merkel concedes that “the well-trying and familiar framework of order is under strong pressure at the moment.”<sup>2</sup> According to Foreign Minister Heiko Maas, the situation is even worse: “That world order that we once knew, had become accustomed to, and sometimes felt comfortable in – this world order no longer exists.”<sup>3</sup> Many also believe that what is known as the liberal international order has been damaged to such a degree that it is hard to return to the status quo ante. As French President Emmanuel Macron puts it, this is not “an interlude in history before things return to normal [...] because we are currently experiencing a crisis of the effectiveness and principles of our contemporary world order, which will not be able to get back on track or return to how it functioned before.”<sup>4</sup>

This is thus the great puzzle: Are we witnessing a great reshuffling of the pieces of the international order? Will the defenders of the post-1945 international order be successful in preserving its main elements and piecing at least some of them back together? Or will the world continue to move closer to, as former Russian Foreign Minister Igor Ivanov has warned of, a “perfect storm,” the cumulative effect of several crises happening simultaneously that could destroy the old international system before we have even begun to build a new one?<sup>5</sup>

## The Return of Great Power Competition?

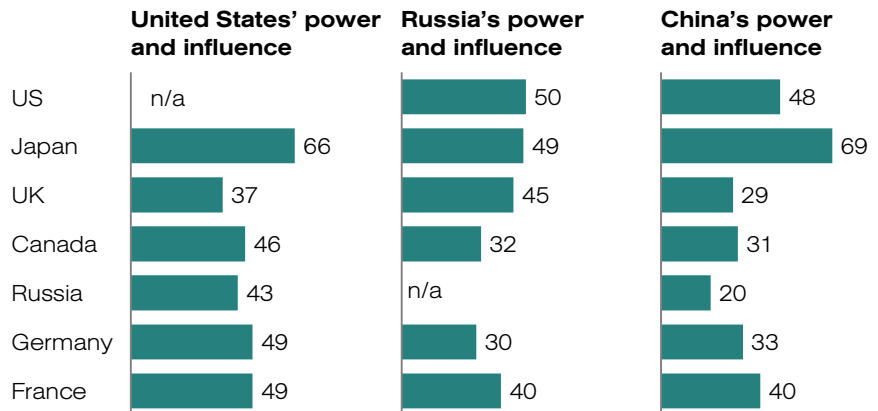
If one believes the major strands of thinking in the capitals of the world’s great powers,<sup>6</sup> the world is entering a new era of great power competition. Although some Western analysts warned of a comeback of authoritarian great powers as the most significant challenge for the West and the liberal world order more than a decade ago,<sup>7</sup> this scenario has only recently become commonplace among policymakers and observers in Washington, replacing terrorism as the key security concern that has shaped US strategy for almost two decades.<sup>8</sup> Now, the core assumption of the most recent National Security Strategy and National Defense Strategy of the United States is: “[...] we are heading into an era of sustained big-power competition for which the West, collectively, is underprepared.”<sup>9</sup>

US strategic documents have singled out China and Russia as the two most important challengers, and many key administration officials have emphasized this threat perception in public speeches. In his resignation letter to President Trump, Secretary of Defense James Mattis reiterated his core concerns: “It is clear that China and Russia [...] want to shape a world consistent with their authoritarian model – gaining veto authority over other nations’ economic, diplomatic, and



**WHAT CITIZENS IN SELECTED COUNTRIES THINK: DO YOU THINK THAT ... IS A MAJOR THREAT TO YOUR COUNTRY?**

Opinion poll, 2018, percent

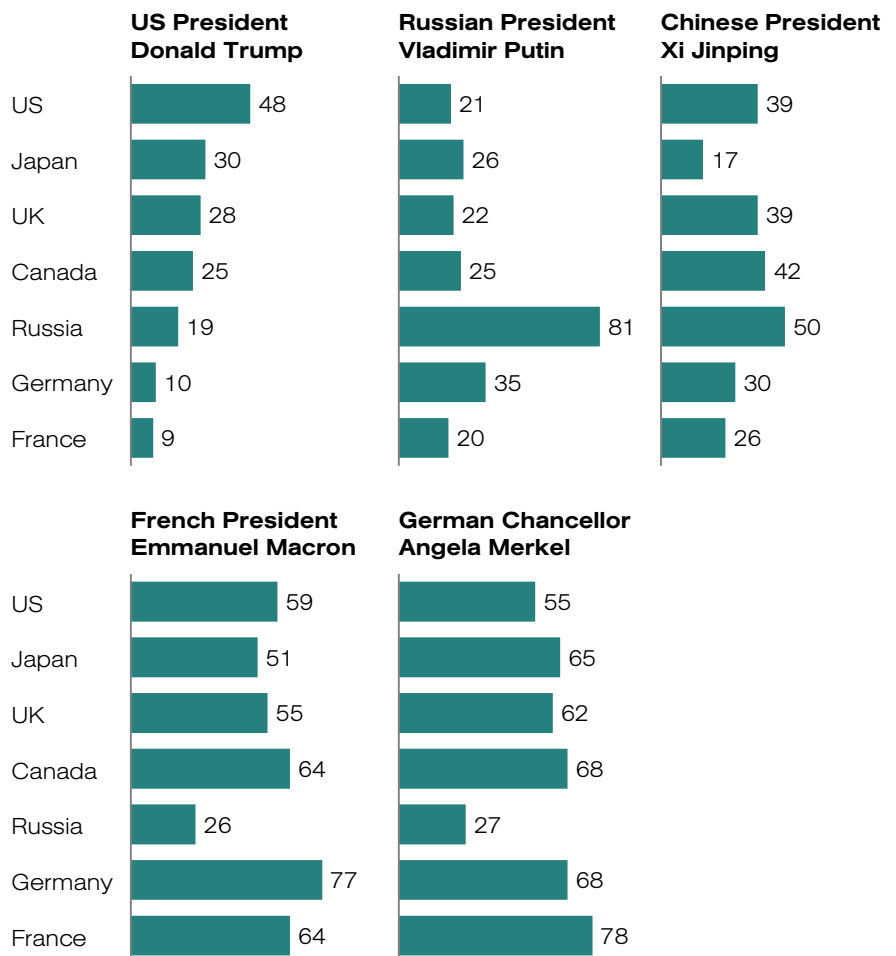


Source: Pew Research Center<sup>98</sup>



**WHAT CITIZENS IN SELECTED COUNTRIES THINK: DO YOU HAVE CONFIDENCE IN ... TO DO THE RIGHT THING REGARDING WORLD AFFAIRS?**

Opinion poll, 2018, percent



Source: Pew Research Center<sup>99</sup>



“Russia and China represent a coherent model – political stability founded on authoritarianism and brute force, harnessed to certain aspects of market competition – that threatens the basic principles of our functioning. In different ways, Russia and China want to break the West. Moscow wants to splinter and shatter it. Beijing to supplant it.”<sup>86</sup>  
**WESS MITCHELL,**  
**5 JUNE 2018**

“The changes we are encountering in the world are unseen in a century. Changes create opportunities, but more often than not, they are accompanied by risks and challenges. Mankind has once again reached a crossroads. Which direction should we choose? [...] The interests of all countries and indeed, the future of mankind hinge on the choice we make.”<sup>87</sup>  
**XI JINPING,**  
**17 NOVEMBER 2018**

security decisions – to promote their own interests at the expense of their neighbors, America, and our allies.”<sup>10</sup> Having concluded that previous US policy underestimated the challenge posed by these authoritarian great powers, the Trump administration has decided to adopt a more confrontational posture and approach them from a position of strength.

Since Trump took office, US-China relations have arguably “deteriorated further and faster than at any point since the establishment of official ties in 1979.”<sup>11</sup> But the sense that China has defied US expectations and become “the most dynamic and formidable competitor in modern history” is now widely shared in Washington.<sup>12</sup> In a landmark speech in October, Vice President Mike Pence spelled out the rationale behind the clear shift in US strategy toward China: “America had hoped that economic liberalization would bring China into a greater partnership with us and with the world. Instead, China has chosen economic aggression, which has in turn emboldened its growing military.”<sup>13</sup> Pence accused Beijing not only of “meddling in America’s democracy,” but of attempting “to erode America’s military advantage on land, at sea, in the air, and in space.” He made clear that the United States would oppose Chinese assertiveness: “We will not be intimidated, and we will not stand down.”<sup>14</sup> Many read Pence’s speech as the announcement of a new cold war.<sup>15</sup> For sure, the Trump administration argued in its National Security Strategy: “Competition does not always mean hostility, nor does it inevitably lead to conflict [...]”<sup>16</sup> But critics fear that the hostility will be the unavoidable consequence of a mindset shaped by competition. At the very least, the Trump administration seems willing to accept that the result could be a cold war.<sup>17</sup>

The same could be said about China where President Xi Jinping has consolidated his power and seems bent on turning China into a global power, well aware of the fact that this will put it on collision course with Washington.<sup>18</sup> It is far from certain that China will change its course due to the new US posture.<sup>19</sup> Strategic thinking in China is increasingly based on the assumption that the United States is a superpower in decline, which will eventually have to give up its dominance. The Communist Party sees itself on the winning side of history. In an editorial published after the adoption of a constitutional amendment that erased presidential term limits, the Global Times noted: “[...] some key parts of the Western value system are collapsing. Democracy, which has been explored and practiced by Western societies for hundreds of years, is ulcerating. [...] The country must seize the day, seize the hour. [...] Our country must not be disturbed by the outside world or lose our confidence as the West grows increasingly vigilant toward China.”<sup>20</sup> For the time being, the Chinese leadership is trying to portray China as a responsible power continuing its peaceful rise and as “a champion of multilateralism.”<sup>21</sup> A few weeks after Pence’s speech, Xi emphasized: “History has shown that confrontation, whether in the form of a cold war, a hot war, or a trade war, will produce no winners.”<sup>22</sup> But it is hard to overlook Beijing’s increasing assertiveness abroad and the consolidation of Xi’s power at home that comes with an ever more effective and far-reaching surveillance and repression system.<sup>23</sup>

While China is certainly the more important long-term challenge for the United States, Russia is the more immediate security concern. In contrast to China, Moscow’s long-term prospects as a geopolitical challenger to the United States do not look very promising. Its economy has suffered from a volatile currency, a drop in oil prices, and the sanctions imposed by the EU and the United States as a response to Russia’s actions against Ukraine. 2018 was the fifth year in a row that came with decreasing disposable personal incomes.<sup>24</sup> Against this background, Vladimir Putin’s approval





“Just think of it, we have 146 million people in Russia, whereas the NATO countries’ population is 600 million, and you think our goal is to rule the world? This is a cliché imposed on public opinion in Western countries in order to resolve intra-bloc and domestic political issues.”<sup>88</sup>

**VLADIMIR PUTIN,**  
20 DECEMBER 2018

ratings have significantly declined.<sup>25</sup> At the same time, the Russian government has aggressively used its limited but significant leverage as a disruptive force and scored some impressive short-term victories in recent years, taking the rest of the world by surprise in Ukraine and Syria. Other recent examples of Moscow’s increasing assertiveness under Vladimir Putin’s leadership, who was reelected for a fourth term in May 2018, are the Skripal Affair, an escalation of hostile cyber activities, attempts to interfere in democratic elections in various countries, or the most recent confrontation in the Kerch Strait.<sup>26</sup> One may interpret Russian actions as an attempt to demonstrate that it is still more powerful than the West believes and that it will remain an indispensable power whose interests cannot be neglected.<sup>27</sup> In this effort, Putin’s advisor Vladislav Surkov recently noted in a side remark, “war is a means of communication.”<sup>28</sup> As Russia expert Bobo Lo puts it: “Policymakers in Moscow condemn the ‘demonization’ of Russia, yet revel in the knowledge that it is back on the world stage, disliked by some but ignored by none.”<sup>29</sup>

In response to Russian behavior, the Trump administration and US Congress have increased pressure on Moscow – the President’s meandering position notwithstanding. As then Assistant Secretary of State Wess Mitchell put it, the United States “will raise the costs of Russian aggression until President Putin chooses a different path.”<sup>30</sup> Yet, as things stand, the Kremlin is not sending signals of détente either. The Russian leadership has given up on its rapprochement with the West and seems to embrace its role as an outcast. According to Surkov, “Russia’s epic westward quest is finally over.” Instead of “[r]epeated and invariably abortive attempts to become part and parcel of the Western civilization,” Russia is now “destined to a hundred years (or possibly two hundred or three hundred) of geopolitical loneliness.”<sup>31</sup>

“One core belief I have always held is that our strength as a nation is inextricably linked to the strength of our unique and comprehensive system of alliances and partnerships. While the US remains the indispensable nation in the free world, we cannot protect our interests or serve that role effectively without maintaining strong alliances and showing respect to those allies.”<sup>89</sup>

**JAMES MATTIS,**  
20 DECEMBER 2018

Given the deterioration in relations between Russia and the West, the coming months may decide the fate of crucial arms control treaties. As nuclear experts warn: “After almost three decades of steady arms reductions between the two largest nuclear powers, both states may shift direction in 2019 and find themselves in a renewed arms race.”<sup>32</sup> For some years now, the Russian government has invested in new military capabilities, including a new ground-launched cruise missile that, according to the United States and its NATO allies, violates the Intermediate-Range Nuclear Forces (INF) Treaty.<sup>33</sup> In response, President Trump has announced his intention to withdraw from the treaty, meaning that both the US and Russia would then again be allowed to produce and deploy ground-launched intermediate-range nuclear missiles, reviving fears of a new Euromissile crisis.<sup>34</sup> For the Kremlin, this is a comfortable situation: while the Trump administration is blamed for renegeing on the treaty, Moscow seems to speculate that NATO would be unable to reach consensus on deploying new US missiles (that would still need to be developed) in Europe, putting Russia at an advantage: “[...] an arms race in intermediate-range missiles may begin in Europe, but it will be one-sided: only Russia will be racing.”<sup>35</sup> Another element which limited dangerous competition between Russia and the United States is likewise imperiled: it appears unlikely that they can extend the New START Treaty covering strategic nuclear weapons beyond 2021, when it is set to expire. As some observers have argued, the remaining arms control treaties, still following a bipolar logic, are unraveling, while there is not yet a new multilateral framework for arms control that would be fit for the emerging international system, which is “more complex, less predictable, and potentially more dangerous.”<sup>36</sup> Although President Trump has hinted at the possibility that “President Xi and I, together with President Putin of Russia, will start talking about a meaningful halt to what has become a major and uncontrollable Arms Race [sic],”<sup>37</sup> he and his counterparts are



currently building up their arsenals. As Putin noted at his annual press conference, “all of us are now witnessing the disintegration of the international system for arms control and for deterring the arms race.” According to him, the development of new technologies, such as hypersonic missiles, is a necessary response to the US decision to withdraw from the Anti-Ballistic Missile (ABM) Treaty and the development of a missile defense system: “This is just the preservation of parity, and nothing more.”<sup>38</sup> The long-delayed US missile defense review, released in mid-January 2019, will likely fuel the widespread fear in Moscow that Russia will one day not be able to penetrate US missile defenses and thus be subject to a potential first strike without an assured second-strike capability.<sup>39</sup> As in the case of US-China relations, both Russia and the United States, claiming they only respond to the other’s actions and calling on the opponent to change their ways, seem to believe that they can control the risk of increasing tensions.

### From Pax to Crux Americana: The End of US Benign Hegemony?

“America shouldn’t be doing the fighting for every nation on Earth not being reimbursed, in many cases, at all. If they want us to do the fighting, they also have to pay a price – and sometimes that’s also a monetary price – so we’re not the suckers of the world. We’re no longer the suckers, folks.”<sup>40</sup>

**DONALD TRUMP,  
26 DECEMBER 2018**

The challenge posed by China and Russia notwithstanding, it could be argued that the United States’ position in the world – and with it the global order the US has shaped – “may be threatened more by the rise of populist politics at home than the rise of other powers abroad.”<sup>40</sup> In material terms, the United States remains in a league of its own. Its defense budget still dwarfs the military spending of most other powers. Moreover, standard measures, such as gross domestic product or military spending, distort the real balance of power by systematically exaggerating the wealth and military capabilities of populous but poor countries that have to spend a lot of their resources on policing, protecting, and serving their people and thus have less capacity for power projection abroad.<sup>41</sup> While China and Russia may have made progress and even excel at some key capabilities, the US military will remain second to none for a long time. Most importantly, however, the United States can rely on resources that China and Russia are lacking. To begin with, the US has a vast network of allies across the globe. As James Mattis noted a few weeks before leaving office: “[...] history is clear: Nations with allies thrive. America’s alliances are a durable, asymmetric advantage that no competitor in the world can match.”<sup>42</sup> Although China and Russia have developed all sorts of measures to influence other states or have tried to undermine Western cohesion, they have not been able to build large, supportive coalitions by themselves – and are unlikely to do so in the future. Moreover, the ideational balance of power may be even more advantageous to the US and its Western allies. A closer look at the “distribution of ideas and identities” in various countries across the globe suggests that the US-led Western hegemonic order may prove to be more stable than expected. At the very least, a group of scholars concludes that the “dominant elements of Chinese identity are unlikely to form the basis of a compelling alternative international vision or hegemonic order that will appeal to other great powers” – a necessary condition for a successful counterhegemonic coalition promoting a different order.<sup>43</sup> While the United States thus theoretically enjoys a favorable material and ideational balance of power and should be well prepared for an era of increasing competition, the problem is that Washington seems to risk squandering its competitive advantages.

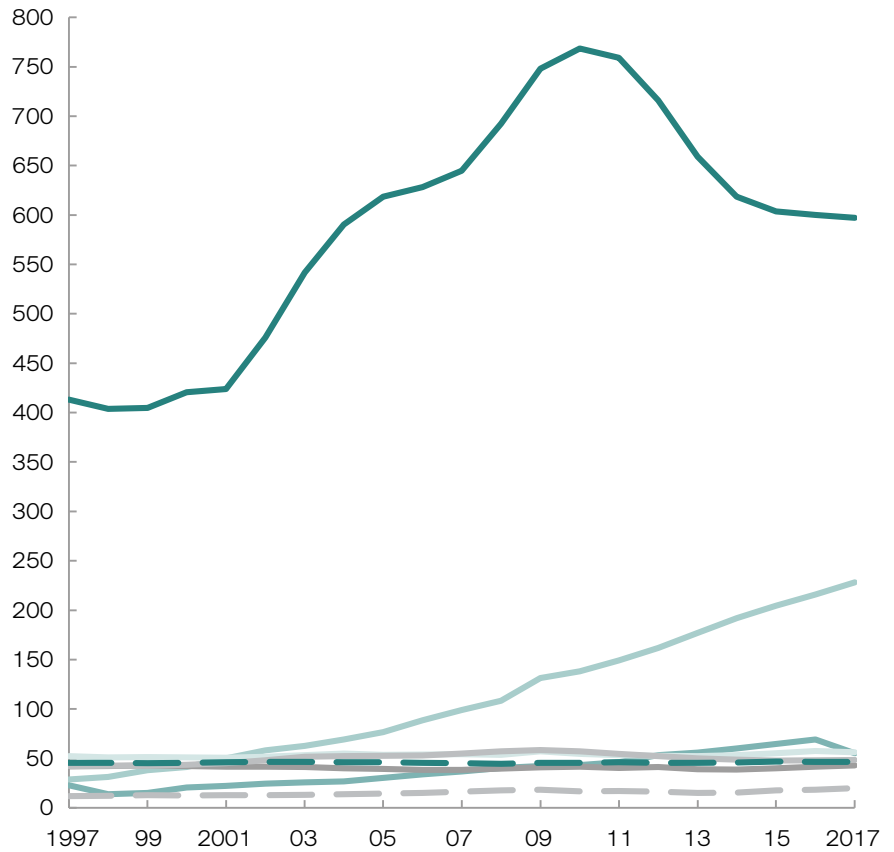
For sure, Europeans appreciate messages from the US administration that speak to the traditional hallmarks of the transatlantic partnership and promise to renew the US commitment to “the West as a community of democratic nations united by history, culture, and shared sacrifice,” a “community that has to be mobilized and strengthened for the era of geopolitical competition.”<sup>44</sup> They would also like



**DEFENSE SPENDING OF SELECTED COUNTRIES OVER TIME**

Defense spending, 1997-2017, constant 2016 USD billions

- US
- Russia
- China
- France
- Germany
- UK
- Japan
- Canada

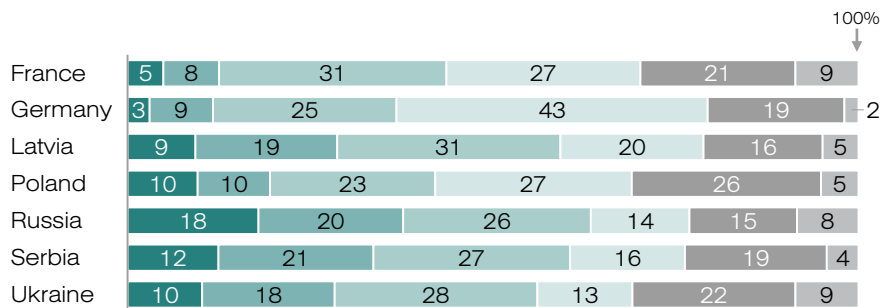


Source: Stockholm International Peace Research Institute<sup>100</sup>

**WHAT CITIZENS IN SELECTED COUNTRIES THINK: THINKING ABOUT THE NEXT FIVE YEARS, WHICH DEVELOPMENTS DO YOU SEE REGARDING THE INTERNATIONAL POLITICAL SITUATION?**

Opinion poll, 2018, percent

- Will improve
- Will remain unchanged
- Will deteriorate
- Will somewhat improve
- Will somewhat deteriorate
- Do not know/no answer



Source: Friedrich Ebert Foundation<sup>101</sup>





“Critics in places like Iran and China – who really are undermining the international order – are saying the Trump administration is the reason this system is breaking down. They claim America is acting unilaterally instead of multilaterally, as if every kind of multilateral action is by definition desirable. Even our European friends sometimes say we’re not acting in the world’s interest. This is just plain wrong.”<sup>91</sup>

**MIKE POMPEO,**  
4 DECEMBER 2018

to believe that the US is not retreating from the world, as Secretary of State Mike Pompeo and others have pointed out again and again.<sup>45</sup>

Yet, this is certainly not the prevailing perception in most parts of the world. According to Pew’s Global Attitudes Survey, only 14 percent of the global respondents believe that the United States is now doing more to help address major global problems compared to a few years ago. The view that the United States is doing less is particularly widespread among its closest allies in North America and Europe.<sup>46</sup> Their concerns have continued to grow since the tumultuous NATO summit in Brussels in July 2018, when Trump reportedly threatened to “go it alone” if the rest of the alliance failed to dramatically increase their defense spending.<sup>47</sup> Uncertainty about the United States’ role is felt in other regions as well. In December, Trump announced the withdrawal of US troops from Syria, ignoring the advice of key officials such as Mattis. While critics feared that this decision would leave a vacuum, likely quickly filled by Iran, Russia, Turkey, and others, and would abandon allies who have fought together with US forces, Trump just remarked that the Iranian leaders “can do what they want” in Syria.<sup>48</sup> He also ordered his military leaders to plan for a withdrawal of about half the US troops from Afghanistan.<sup>49</sup> America’s allies in Asia are likewise worried: after meeting with Kim Jong-un in Singapore, Trump declared a halt of US-South Korean military exercises and expressed his willingness to pull US troops out of South Korea.<sup>50</sup> It is no wonder then that allies across the world depending on US security guarantees are getting nervous.

Moreover, the US effort to rally “the noble nations of the world to build a new liberal order”<sup>51</sup> and to oppose authoritarian great powers would be far more credible if President Trump and his administration did not display an irritating enthusiasm for strongmen across the globe,<sup>52</sup> suggesting that this administration is living in a “post-human rights world.”<sup>53</sup> For long-time transatlantic allies, it is still hard to stomach when Trump praises illiberal leaders from Brazil to the Philippines and defies his intelligence agencies in declaring his support for Saudi Arabia after the murder of journalist Jamal Khashoggi,<sup>54</sup> while reserving his harshest criticism for Canada, Germany, or the European Union.

“The rules-based international order is being challenged. Quite surprisingly, not by the usual suspects but by its main architect and guarantor, the US [...]. We will not stop trying to convince our American friends and President Trump that undermining this order makes no sense at all.”<sup>92</sup>

**DONALD TUSK,**  
8 JUNE 2018

The disdain for international institutions and agreements has repeatedly pitted the US against its major allies in recent years. What these allies see as the only way to tackle global problems, Trump rejects as “the ideology of globalism.”<sup>55</sup> On many issues of high importance to them – from the Paris climate agreement and the Iran nuclear deal to the INF Treaty – many of Washington’s traditional allies have tried to make the case for renewed US commitment. At best, they have just felt ignored. At worst, they have felt treated as competitors or rivals, rather than allies and partners with legitimate concerns and interests. According to Heiko Maas, “[...] this shakes our certainty that we and the US are allies in the fight for multilateralism and a rules-based world.”<sup>56</sup> After the tumultuous G7 summit in Canada, officials reportedly referred to it as the G6+1.<sup>57</sup>

Thus, after two years in office, the Trump administration has triggered a reassessment of transatlantic relations in Europe: “The era of America’s benign hegemony may be over, with Europe extremely ill prepared.”<sup>58</sup> Initially hopeful that the so-called “axis of adults”<sup>59</sup> in the US administration would rein in some of Trump’s actions, many European policymakers have now become disillusioned, as many administration officials had urged them to focus on the policy and ignore the tweets.<sup>60</sup> Many key officials have left, and US policy is increasingly looking like



Trump's tweets. In the past year alone, Trump changed his entire national security cabinet: National Security Advisor H. R. McMaster, Secretary of State Rex Tillerson, Ambassador to the United Nations Nikki Haley, and Secretary of Defense James Mattis all resigned or were forced out.<sup>61</sup> Probably most importantly, the departure of Mattis has caused concern in allied capitals. For some, this "makes it painfully clear to America's allies that they will increasingly have to fend for themselves."<sup>62</sup> In any case, with President Trump under increasing domestic pressure and a national security team that is much closer to his views, there is reason to expect even more turmoil in the second part of his term.<sup>63</sup>

### The Rest of the West to the Rescue?

"[...] patriotism is the exact opposite of nationalism: nationalism is a betrayal of it. In saying 'our interests first and who cares about the rest!' you wipe out what's most valuable about a nation, what brings it alive, what leads it to greatness and what is most important: its moral values."<sup>93</sup>

**EMMANUEL MACRON,**  
11 NOVEMBER 2018

In this context, both analysts and policymakers have called on the major liberal-democratic allies of the United States to compensate for the lack of stable US leadership. Countries usually mentioned are the other members of the G7 – Canada, France, Germany, Italy, Japan, and the United Kingdom – as well as Australia, South Korea, and the European Union as a whole.<sup>64</sup> These actors have benefitted enormously from what is known as the liberal international order, underwritten by US power. Some of them are so perfectly adapted to this order – not only in security, political, and economic terms, but also intellectually – that it is hard for them to reckon and come to terms with a changing world. Yet, as Ivo Daalder and James Lindsay note: "If they settle for complaints and laments, they will have more than Trump to blame for the passing of the rules-based order."<sup>65</sup>

To different degrees, though, leaders in these countries seem to have understood that they need to do more, both in their immediate neighborhood as well as on the global level. While few agree with how the message is delivered, most foreign policy specialists in these countries agree that the current US administration (and its predecessors) has a point when calling for more equitable burden sharing. But many ask themselves how they can do so if there is no consensus with the United States anymore on what burden it is that needs to be shared. Are they just picking up the pieces of what is left of Western leadership?

"The truth is that authoritarianism is on the march – and it is time for liberal democracy to fight back."<sup>94</sup>

**CHRYSTIA FREELAND,**  
13 JUNE 2018

Various leaders in the liberal-democratic middle powers have called for stronger collaboration among themselves to preserve core features of the international order. Heiko Maas has repeatedly talked about an "alliance of multilateralists," which he defines as "a network of partners who stand up together for the preservation and further development of the rules-based order, who defend multilateralism and who are willing to use political capital to this end because they understand what multilateralism truly means."<sup>66</sup> Others sang the same tune: while British Secretary of State Jeremy Hunt argued that "Britain's post-Brexit role should be to act as an invisible chain linking together the democracies of the world, those countries which share our values and support our belief in free trade, the rule of law, and open societies,"<sup>67</sup> Canadian Foreign Minister Chrystia Freeland argued, "we must be energetic, ambitious and creative in finding more ways to work together, in finding ways for like-minded liberal democracies to act on our values and fight for the multilateral order."<sup>68</sup>

Although there was probably never a good moment for this test of political and military maturity, this is certainly one of the worst in recent history, as some of the following chapters discuss: some of the candidates for an increased role as guardians of the liberal order are willing but incapable, others are at least moderately capable but unwilling or unable to bring their capabilities to the fore.



“Europe’s role in fostering peace and stability depends on its ability to act in concert and to speak with one voice on the international stage. [...] A great many global conflicts are taking place on Europe’s doorstep. And it is not the case that the United States of America will simply protect us. Instead, Europe must take its destiny in its own hands. That is our job for the future.”<sup>95</sup>

**ANGELA MERKEL,**  
10 MAY 2018

“[Europe must not become] a plaything of great powers, must assume greater responsibility for its security and its defense, and must not accept a subordinate role in world politics.”<sup>96</sup>

**EMMANUEL MACRON,**  
18 NOVEMBER 2018

## Europe: Strategic Autonomy or Nonstrategic Dependency?

The European Union is particularly ill-prepared for a new era of great power competition. Nonetheless, increasing uncertainty about the future role of the United States has led to a renewed discussion of Europe’s “strategic autonomy.” Few terms have triggered more misunderstandings, however. While some refer to it as a form of hedging or even emancipation from the US, for many, it just entails more European responsibility.<sup>69</sup> In a way, the Europeans have just listened to what President Trump has repeatedly stressed: “[...] the United States cannot continue to be the policeman of the world. We don’t want to do that.”<sup>70</sup> But in the tense atmosphere of the transatlantic debates of 2018, even European efforts to plan for scenarios where the United States is unwilling to take the lead were seen as first steps toward “decoupling.”

The same must be said about proposals for a “European army.” Both Emmanuel Macron and Angela Merkel have recently talked again about this long-term vision and triggered another round of quite familiar arguments in favor and against using the term.<sup>71</sup> Public opinion, however, is generally very supportive of European defense cooperation. According to the most recent Eurobarometer survey, more than three quarters of Europeans support a common defense and security policy.<sup>72</sup> A November 2017 poll conducted in six major European countries found that while an average of just 20 percent of respondents said that European armed forces should be fully integrated and operate under a unified European command by 2040, 75 percent in total were in favor of significant cooperation between national armies.<sup>73</sup> The latter idea is closer to what German Defense Minister Ursula von der Leyen has labeled an “army of Europeans”<sup>74</sup> that is, according to her, “already taking shape.”<sup>75</sup> Von der Leyen and others point out the numerous decisions made by EU member states to enhance European defense cooperation, including the introduction of the European Defence Fund (EDF), the Permanent Structured Cooperation (PESCO), and the Coordinated Annual Review on Defence (CARD), as well as far-reaching bilateral cooperation agreements, such as in the case of Dutch and German land forces.<sup>76</sup>

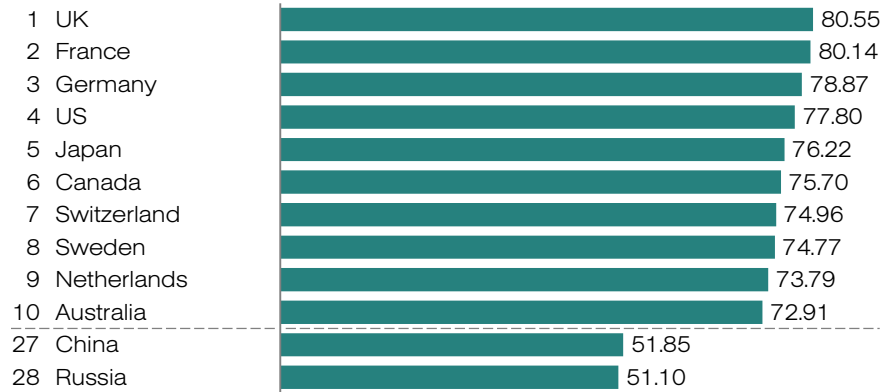
While these are all welcome steps that could pave the way to a more capable European Union in the long run, short-term challenges abound. As a recent study jointly conducted by the International Institute for Strategic Studies and the German Council on Foreign Relations found, EU members face significant gaps in the capabilities that would be needed to meet the EU level of ambition and would be quickly exhausted if they had to supply concurrent operations.<sup>77</sup> While the Europeans continue to call for “strategic autonomy” or a truly European foreign policy in soap box speeches, they collectively remain – as of today – closer to what one might call nonstrategic dependency, at least in the military sphere. There is still a long way to go to reach what Jean-Claude Juncker called “Weltpolitikfähigkeit” at last year’s Munich Security Conference.<sup>78</sup> And “Weltpolitikfähigkeit,” or the ability to play a meaningful role in world politics, is badly needed.

Although most strategic thinkers in Europe agree that a strong transatlantic partnership will remain the best security guarantee for Europe, this preferred option may not be available in the future. At the same time, a realistic Option B does not exist yet.<sup>79</sup> As a result, many European governments have been walking a thin line, trying to preserve Option A, while hedging and investing in Option B without making Option A less likely. Or as von der Leyen put it at the Munich Security Conference in 2018: “We want to remain transatlantic – while



**COMPARISON OF SOFT POWER RESOURCES**

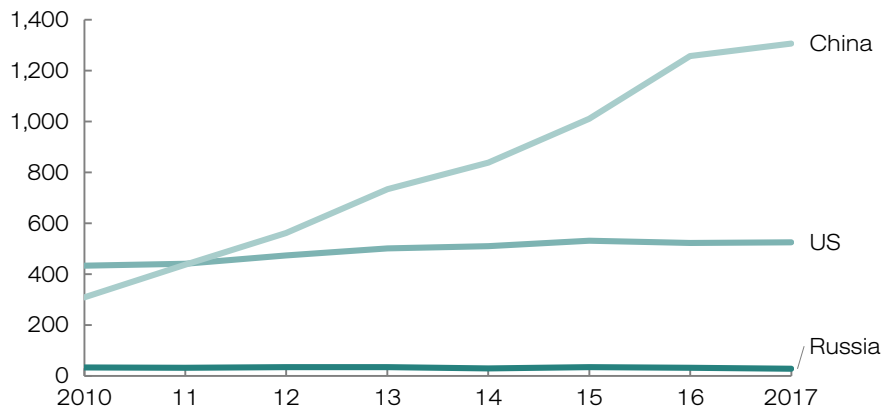
Soft power index score, 2018\*



\* Framework based on 70% predetermined criteria (government, digital, culture, enterprise, engagement and education) and 30% polling data across several dimensions  
Source: Portland Communications<sup>102</sup>

**PATENT FILINGS**

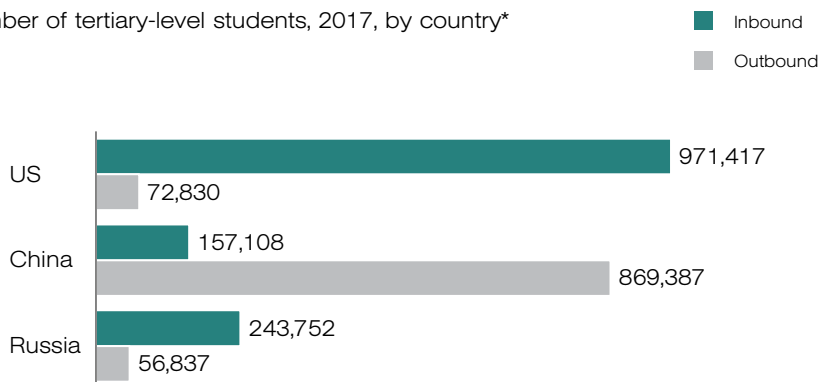
Resident and abroad patent filings, 2010-17, thousands



Source: WIPO Statistics Database<sup>103</sup>

**FLOW OF TERTIARY-LEVEL STUDENTS**

Number of tertiary-level students, 2017, by country\*



\* Figures for the US and Russia only available for 2016  
Source: UNESCO Institute for Statistics<sup>104</sup>



“For years we have been hearing Americans complain that we are not doing enough to defend ourselves. Now we are trying to do more. And that does not suit them either. [...] We are doing more because we have to do more. We cannot depend on allies alone.”<sup>87</sup>

**JEAN-CLAUDE JUNCKER,  
17 FEBRUARY 2018**

also becoming more European.”<sup>80</sup> Given the rapid pace of change, European policymakers need to come up with long-term strategic approaches and make available the necessary resources if Europe is to be more than just “a theater of serious strategic competition”<sup>81</sup> for other actors.

### Managing the New Interregnum

In his Prison Notebooks, the Italian philosopher Antonio Gramsci wrote: “The crisis consists precisely in the fact that the old is dying and the new cannot be born; in this interregnum a great variety of morbid symptoms appear.”<sup>82</sup> In a way, this is an apt description of world order today.

The post-Cold War period – and the general optimism associated with it – has come to an end. Many of the certainties that most people in the Western world took for granted have been questioned or even undermined. But it is unclear what kind of new order will emerge, whether core principles of the old one can be preserved, whether we will see a world with competing orders, and whether the transition period will be peaceful.

What seems clear, in contrast, is that the interregnum will be a phase of prolonged instability and uncertainty. Given the prevailing strategic outlooks in Washington, Beijing, and Moscow, expectations of a new era of great power competition are seeming to turn into a self-fulfilling prophecy. If everyone prepares for a hostile world, its arrival is almost preordained. But it is far from certain what exactly great power competition in the 21st century will look like and where it will be particularly intense and risky. The emergence of new technologies and tools of statecraft, new interdependencies, and vulnerabilities will affect how great powers will compete. This also means that we likely need new tools in order to manage it.

Most importantly, this new uncertainty means that world leaders carry a huge responsibility. In recent months, Chancellor Merkel has repeatedly referred to earlier periods, in which politicians, believing in the stability of the prevailing order and having not experienced the previous war, thought they could just make a few more demands and act a bit more aggressively – “[...] and, suddenly, the whole order was ruined and war broke out.” As Merkel stressed: “My lesson from this is that in the times we are living in we carefully think about our next steps, that we act prudently, and that we are clear in our language.”<sup>83</sup> Unfortunately, these are qualities that seem to be in short supply at present.





## THE INTERNATIONAL CRISIS GROUP'S 10 CONFLICTS TO WATCH IN 2019

Each year, the International Crisis Group publishes a list of 10 conflicts to watch for the year ahead. For 2019, they warn of a “new era of limit testing.” With US leadership of the international order fading, “more leaders are seeking to bolster their influence by meddling in foreign conflicts.”

1

**Yemen:** If one place has borne the brunt of international lawlessness over the past year, it is Yemen. The humanitarian crisis there – the world’s worst – could deteriorate further in 2019 if the key players do not seize the opportunity of a partial ceasefire and encourage a series of confidence-building steps.

2

**Afghanistan:** In 2018, by one tally, the war killed more than 40,000 combatants and civilians – a higher toll than at any time since the Taliban were ousted from Kabul more than 17 years ago. With Taliban fighters now effectively controlling half the country, the US decision in mid-December that half of US forces in Afghanistan would leave brought further unease.

3

**US-Chinese tensions:** The standoff is not a deadly conflict, no matter how bitter the trade war has become. Still, rhetoric is increasingly bellicose. If relations, already at their lowest ebb since the Tiananmen protests almost three decades ago, continue to deteriorate, the rivalry could have graver geopolitical consequences than all the other crises.

4

**Saudi Arabia, the US, Israel, and Iran:** Much like 2018, 2019 presents risks of confrontation – deliberate or inadvertent. The first three share a common view of the government in Tehran as a threat that has been emboldened for too long and whose regional aspirations need curbing. The risk of an accidental clash originating in Yemen, in the Persian Gulf, in Syria, or in Iraq cannot be discounted.

5

**Syria:** As 2018 came to a close, it looked as if the Syrian conflict would continue along the same path. The announcement of a withdrawal of US troops upended that balance, increased the odds of a bloody conflict involving Turkey, its Syrian allies, Syrian Kurds, and the Assad regime – and, in so doing, potentially gave ISIS a new lease on life by fueling the chaos in which it thrives.

6

**Nigeria:** Nigerians will go to the polls in spring 2019 to elect a new president, a new federal legislature, state governors, and lawmakers. Nigerian elections are traditionally violent affairs, and conditions this time around are particularly combustible, with general insecurity remaining high across much of the country.

7

**South Sudan:** Since South Sudan’s civil war erupted five years ago, 400,000 people have died. An agreement between President Kiir and his main rival Riek Machar envisages elections in 2022, paving the way for another showdown. Meanwhile, a prolonged crisis in Sudan could be hugely destabilizing for South Sudan.

8

**Cameroon:** A crisis in Cameroon’s Anglophone areas is on the verge of escalating into civil war and destabilizing a country that was once considered an island of relative calm in a troubled region. As nearly ten separatist militias now battle government forces, the UN counts almost half a million Anglophones displaced.

9

**Ukraine:** The war in Ukraine continues to smolder with no end in sight, also fueling the wider geopolitical standoff between Russia and Western powers. The latest flash point is the Sea of Azov, where Russian and Ukrainian vessels clashed in November and Russia effectively blocked access to the Kerch Strait.

10

**Venezuela:** Home to enormous oil reserves, Venezuela ought to be the envy of its neighbors. Instead, Latin America is watching apprehensively as the country’s implosion – an economy in freefall, with a devastating social impact, and the government’s dismantling of institutions – threatens to provoke a regional crisis.

Source: International Crisis Group<sup>105</sup>





# Actors





# France and Germany: European Amis

“We need a Europe which defends itself better alone, without just depending on the United States, in a more sovereign way.”<sup>19</sup>

**EMMANUEL MACRON,**  
**6 NOVEMBER 2018**

Conventional wisdom on European integration has it that if France and Germany are able to agree on a specific policy, the rest of Europe will follow. In light of Brexit and Italy's populist disposition, Berlin and Paris are viewed by many as the last Europhiles standing,<sup>1</sup> themselves aspiring to be “a motivating force” in European integration.<sup>2</sup> However, even though public opinion in both countries remains enthusiastic about their respective neighbor and its leaders,<sup>3</sup> Franco-German consensus is often hard to reach. In times of great upheaval around them, Berlin and Paris have, for the most part, been unable to come up with bold policy initiatives that are agreeable to parliamentary majorities in both countries. Moreover, in today's Europe, Franco-German agreement, while still necessary, is no longer sufficient.

The roots of the couple's contrasting positions run deep in their domestic politics and divergent strategic cultures.<sup>4</sup> The current crisis of the transatlantic partnership is a bigger challenge for Germany than for France, which has always pursued a more independent approach. At the Munich Security Conference 2018, German Defense Minister Ursula von der Leyen framed the balancing act of wanting “to remain transatlantic – while also becoming more European.”<sup>5</sup> Yet Germany has done little to counter criticism of what some call “shortsightedness” in its restraint on military interventions,<sup>6</sup> as it again only briefly debated and then immediately ruled out engagement in Syria.<sup>7</sup> This stands in stark contrast to France with its global military reach and traditionally more ambitious foreign and security policy.<sup>8</sup> Contrasting models of European defense cooperation also illustrate different mindsets: for the French, European defense integration is a means to bolster their military power.<sup>9</sup> For the Germans, bolstering military power is the means and enhancing European integration is the end.<sup>10</sup>

“Part of the new transatlantic reality is that we need to take on more responsibility for our own security because we can no longer count on the other side of the Atlantic doing so for us. We need a real European security and defense union.”<sup>20</sup>

**HEIKO MAAS,**  
**13 JUNE 2018**

Following Germany's lengthy coalition negotiations, no shortage of Franco-German announcements appeared, including a new Elysée Treaty and new defense projects.<sup>11</sup> Leaders expressed renewed willingness to strengthen multilateralism and Europe's foreign and security policy,<sup>12</sup> notably through French President Emmanuel Macron's vision of “a Europe that protects.”<sup>13</sup> In the fall of 2018, both countries reinvigorated proposals for a European army,<sup>14</sup> yet different ideas persist about what this – and “more Europe” in general – would mean in practice. With its advances often unrequited across the Rhine, Paris appears increasingly frustrated with the gap between Berlin's words and actions.<sup>15</sup>

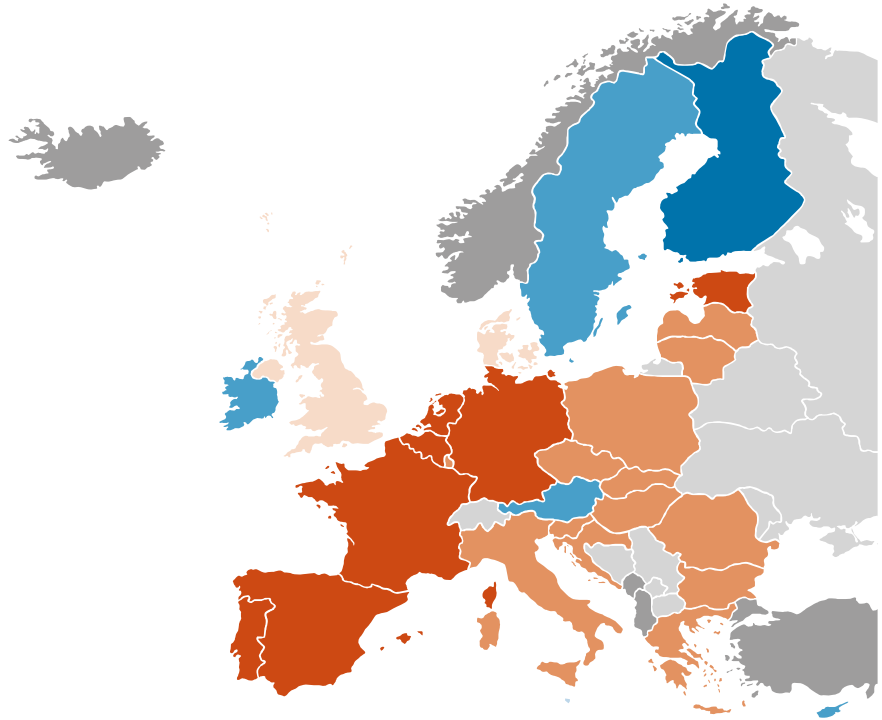
In terms of practical implementation, French and German outlooks converged to a certain extent due to the interlinked security and migration challenges to Europe's South – yet, although the two work together in the Sahel,<sup>16</sup> French public debate continues to be marked by a conviction that France is “paying the price of blood” for Europe.<sup>17</sup> Conversely, in Germany, suspicions that France is using others to pursue its interests in Africa remain hard to overcome.<sup>18</sup> With domestic contexts in both capitals unlikely to become less complicated, the coming year will show whether the tandem can work out its differences or whether another window of opportunity has been missed.



**DIFFERENT DEGREES OF EUROPEAN DEFENSE COOPERATION**

Memberships of different defense cooperation formats in Europe

- EU, Permanent Structured Cooperation (PESCO), European Intervention Initiative (EI2), NATO
- EU, PESCO, EI2
- NATO
- EU, PESCO, NATO
- EU, PESCO
- None of the above
- EU, EI2, NATO\*
- EU (only Malta)



\* The UK will presumably exit the EU by March 2019; Denmark has an opt-out on the EU's Common Security and Defence Policy  
 Source: Jacques Delors Institute Berlin<sup>21</sup>

**CONTRASTING CHARACTERISTICS OF EUROPEAN DEFENSE INITIATIVES**

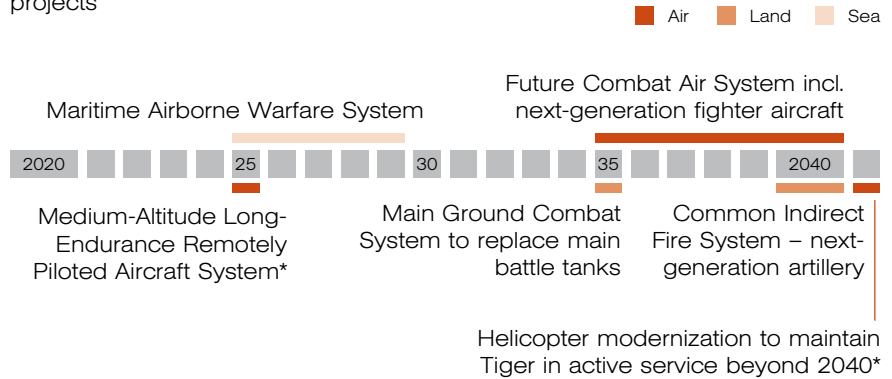
<b>EI2</b>		<b>PESCO</b>
France	<b>Primary political driver</b>	Germany
Strengthen European crisis management	<b>Objective</b>	Strengthen EU crisis management
Narrow: strategic foresight and planning	<b>Functional focus</b>	Broad: operational readiness and capabilities
Flexible, pragmatic, nonbinding	<b>Modus operandi</b>	Permanent, structured, binding
Exclusive: 10 members (including non-EU)	<b>Membership</b>	Inclusive: 25 members (only EU)
Intergovernmental: "light" Paris-based secretariat	<b>Governance</b>	EU: council in PESCO format, Brussels-based secretariat

Source: Jacques Delors Institute Berlin<sup>22</sup>



**SELECTED FRANCO-GERMAN DEFENSE PROJECTS**

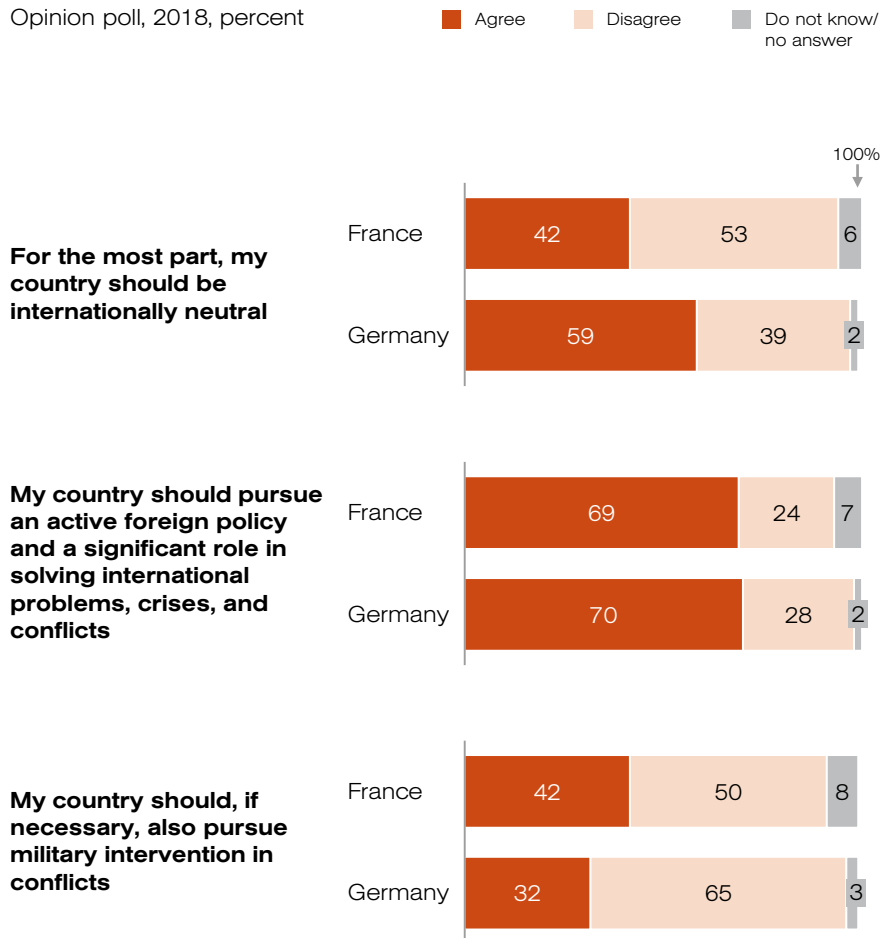
Estimated timeline for delivery of intended joint Franco-German procurement projects



\* Featured on the PESCO project list published in November 2018  
 Source: Munich Security Conference, based on IISS Military Balance Blog; European Council; Jane's; Defense News<sup>23</sup>

**WHAT CITIZENS IN FRANCE AND GERMANY THINK: ATTITUDES TOWARDS FOREIGN AND SECURITY POLICY**

Opinion poll, 2018, percent



Source: Friedrich Ebert Foundation<sup>24</sup>



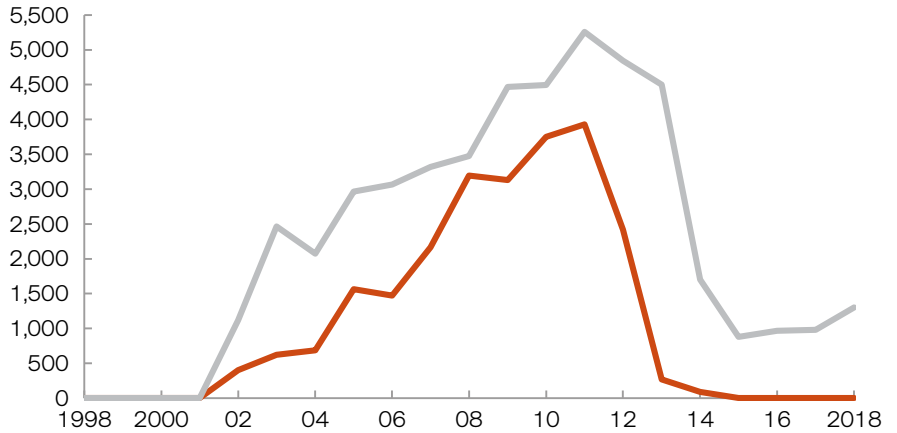


**SELECTED FRENCH AND GERMAN MILITARY DEPLOYMENTS OVER TIME**

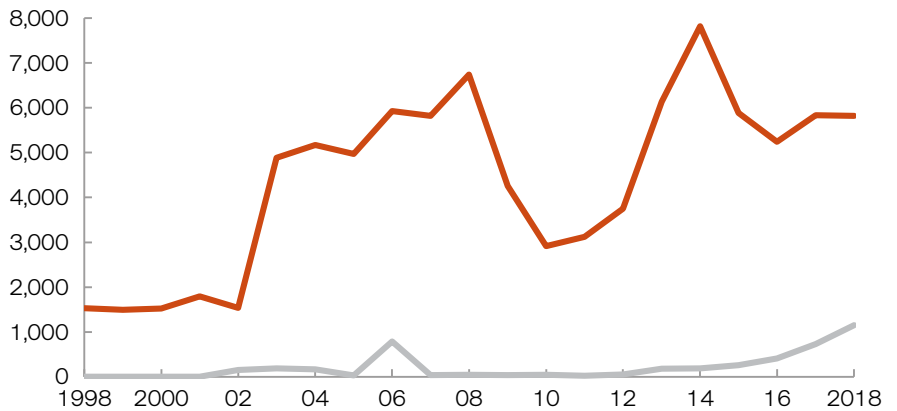
Deployments\* in selected regions, 1998-2018

— France  
— Germany

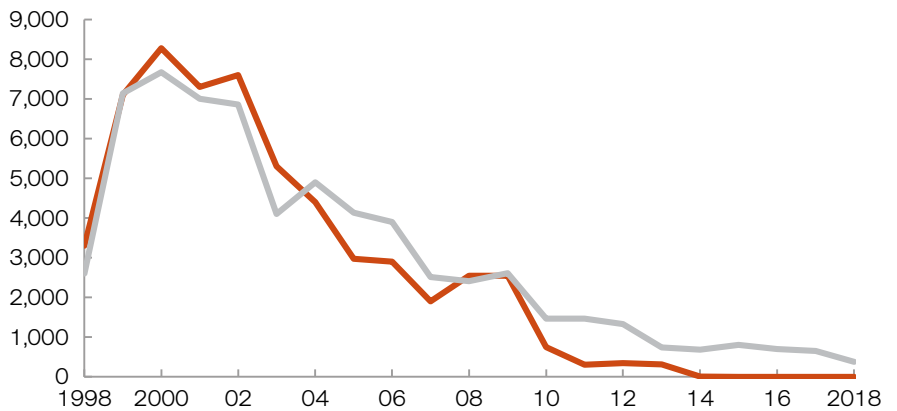
**Afghanistan**



**Sub-Saharan Africa**



**Western Balkans**



\* Including as part of observer missions  
Source: The International Institute for Strategic Studies<sup>25</sup>





# United Kingdom: Fix It or Brexit?

“As we leave the European Union, we will continue to stand side by side to defend against threats to the global rules-based system.”<sup>21</sup>

**THERESA MAY,**  
**24 OCTOBER 2018**

“[...] Brexit is Britain’s moment. Britain’s moment to look up, be more ambitious, redefine our place in the world.”<sup>22</sup>

**GAVIN WILLIAMSON,**  
**7 AUGUST 2018**

“France wants to maintain a strong, special relationship with London but not if the cost is the European Union’s unraveling.”<sup>23</sup>

**EMMANUEL MACRON,**  
**27 AUGUST 2018**

In 2018, relations between the United Kingdom and the European Union were marked by complex negotiations in Brussels and government crises in London. As one observer put it, “the United Kingdom is in a mess of its own creation, and there’s no way out.”<sup>21</sup> While the impending divorce prompted a reassessment of UK foreign policy in the spirit of a “Global Britain,”<sup>22</sup> critics argue that the United Kingdom’s current inward focus exemplifies the sort of distraction that prevents many middle powers from stepping up to defend a multilateral order in turmoil.<sup>3</sup> At the same time, the United Kingdom has been described as trying to find a way to reconcile its transatlantic focus with its European heritage.<sup>4</sup> However, relations with Washington hardly offer the “lifeline” that leading Brexiteers hoped for, putting into question how their foreign policy ambitions are to play out in practice.<sup>5</sup> While the United Kingdom remains a permanent member of the United Nations Security Council and is involved in multilateral operations across the world, its renewed emphasis on bilateral relationships, notably with France, mirrors a broader trend away from institutionalized cooperation.<sup>6</sup>

British and European leaders did express an urgent need for continued partnership, reflecting a realization that in today’s international system, single-player options are limited.<sup>7</sup> As Prime Minister Theresa May stressed at the Munich Security Conference 2018, “Europe’s security is our security.”<sup>8</sup> The United Kingdom has an important role for European security as a nuclear power with an excellent diplomatic service and a strong defense-industrial base<sup>9</sup> and one of the few NATO allies meeting the 2 percent defense-spending target.<sup>10</sup> Europe’s post-Brexit defense and security architecture has also come under scrutiny with regards to future strategic autonomy,<sup>11</sup> given UK control of a key share of military enablers, such as transport and logistics capabilities.<sup>12</sup> However, London’s security “bargaining chip” has so far failed to ease negotiations.<sup>13</sup> This is largely because the stakes are high for the EU-27, and the predominant Continental view is that the United Kingdom already received a very good deal in general<sup>14</sup> and that “cherry-picking,” for a nonmember, is unwarranted.<sup>15</sup> One example of the United Kingdom not achieving desired results is the European Commission’s offer of a limited observer role in the agencies responsible for the Galileo space program.<sup>16</sup>

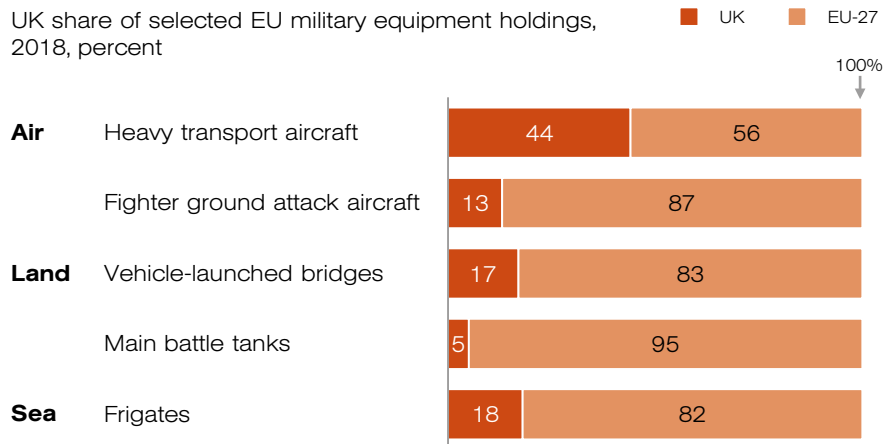
There also remains uncertainty about economic ramifications and possible knock-on effects on government resources during the transition period.<sup>17</sup> Analysts warned of Brexit taking up policy “bandwidth,”<sup>18</sup> as the focus on exiting the EU required a combination of additional resources and reprioritization.<sup>19</sup> At the same time, Brexit presents a silver lining in the eyes of some observers for developing the EU’s Common Security and Defence Policy, on which London was notoriously reluctant.<sup>20</sup> As such, the year ahead will only provide a first glimpse of future relations. What has become clear, however, is that Brexit proceedings will continue to inflict wounds on both sides of the Channel for years to come.





**UK SHARE OF SELECTED EUROPEAN KEY MILITARY CAPABILITIES**

UK share of selected EU military equipment holdings, 2018, percent

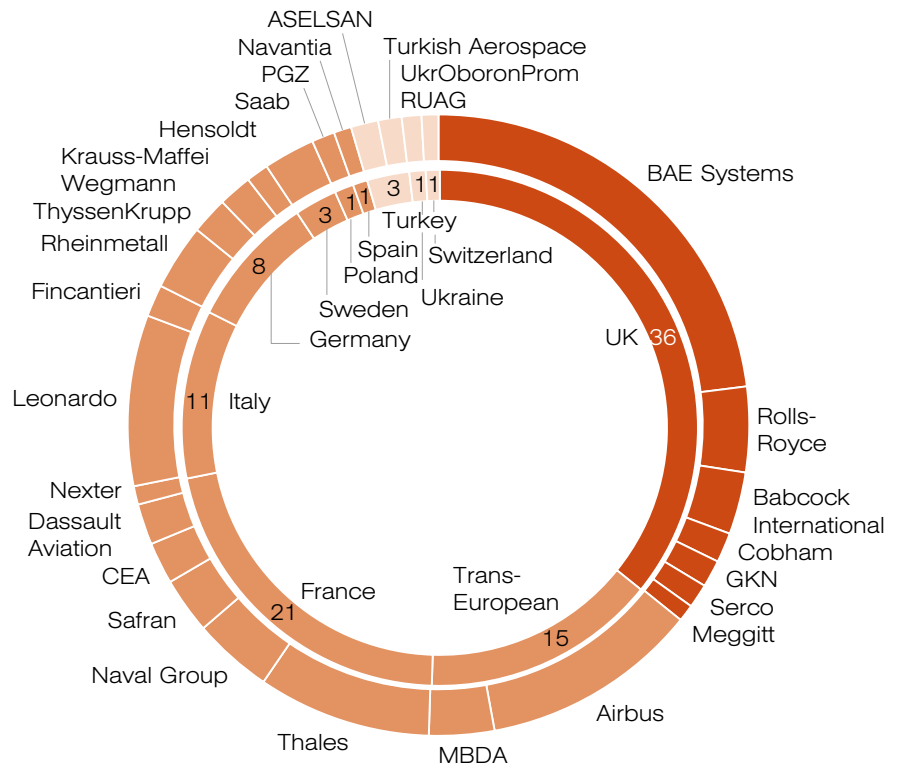


Source: The International Institute for Strategic Studies; German Council on Foreign Relations<sup>24</sup>



**SIGNIFICANCE OF UK DEFENSE COMPANIES IN EUROPE**

Defense-related company turnover as a share of the sum of major Europe-based defense companies' turnover, 2017, percent



Source: Stockholm International Peace Research Institute, design inspired by The International Institute for Strategic Studies<sup>25</sup>



# Canada: Maplelateralism

“Canadians, we’re polite, we’re reasonable, but we also will not be pushed around.”<sup>16</sup>

**JUSTIN TRUDEAU,**  
9 JUNE 2018

Canada has often been touted as one of the “last liberals” in a world of growing protectionism and intolerance.<sup>1</sup> Indeed, almost nine in ten Canadians believe their multicultural nation can serve as a role model for other countries.<sup>2</sup> A fifth of Canada’s population is foreign-born and, in 2018 alone, the country accepted close to 300,000 immigrants, around one percent of its population.<sup>3</sup> Underscoring its role as a trading nation, Ottawa advanced and ratified a revised Trans-Pacific Partnership Agreement after the US had withdrawn from the original pact.<sup>4</sup> The Canadian government also made a point of not holding back criticism on human rights violations abroad. However, when Ottawa criticized Saudi Arabia for arresting a human rights activist in August, it could not count on much international support with backing from its allies conspicuously absent.<sup>5</sup>

On security policy, the Trudeau government has yet to convince the world that “Canada is back.”<sup>6</sup> Last spring, its troop contributions to UN peacekeeping missions reached an all-time low, although the recent deployment to the UN’s MINUSMA mission in Mali could have brought the promised trend reversal.<sup>7</sup> Compared to its NATO allies, Canada is a reluctant spender, trailing behind 17 alliance members in terms of GDP share spent on defense.<sup>8</sup> However, Canada’s 2017 Defense Policy Review heralded a tipping point by announcing a defense budget increase of more than 70 percent by 2027.<sup>9</sup> Ottawa also holds a leadership role in the alliance, heading NATO’s Enhanced Forward Presence battle group in Latvia and having recently assumed command of a new training and capacity-building mission in Iraq.<sup>10</sup> Taken together, such visible efforts have masked some of Canada’s shortcomings on defense, successfully shielding it from some of the harsher criticism from US President Donald Trump.

“We do not want to live in a world where two or three great powers carve up the spoils for themselves, leaving the rest no choice but to choose sides and be satisfied with the scraps.”<sup>17</sup>

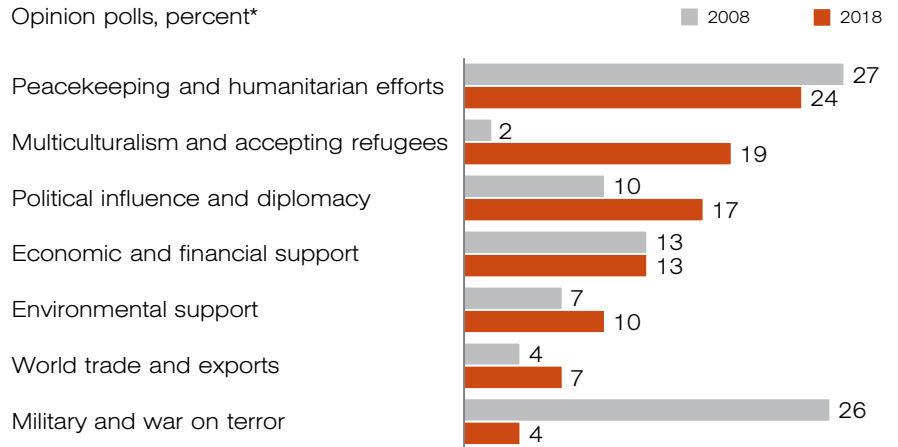
**CHRYSTIA FREELAND,**  
8 DECEMBER 2018

Nonetheless, just like its European or Asian allies, Ottawa is struggling to come to terms with the current US administration. In many ways, this appears as one of the biggest foreign policy challenges to Canada since World War II.<sup>11</sup> Indeed, given that more than two-thirds of its trade is with its southern neighbor, Canadian foreign policy has mostly been busy with business.<sup>12</sup> In particular, Washington’s tariffs on Canadian steel and aluminum in the name of national security have strained the relationship – Foreign Minister Chrystia Freeland characterized the US decision as “absurd and frankly insulting to Canadians” in light of the two countries’ long-standing alliance.<sup>13</sup>

This spat with the United States has somewhat limited Canada’s attempts to position itself as a champion of the multilateral order. Months of negotiations over a revised North American Free Trade Agreement tied down the Trudeau government’s diplomatic resources as it juggled a number of foreign policy initiatives.<sup>14</sup> A case in point is Canada’s current bid for a rotating seat on the UN Security Council, which – if successful – would boost Ottawa’s international standing and policy clout.<sup>15</sup> As a middle power, Canada knows that the best way to retain its sovereignty in a changing world is through strong multilateral commitment. Yet, like many of its peers, Ottawa is struggling to find its place between the moral high ground and a fast-changing geopolitical environment.



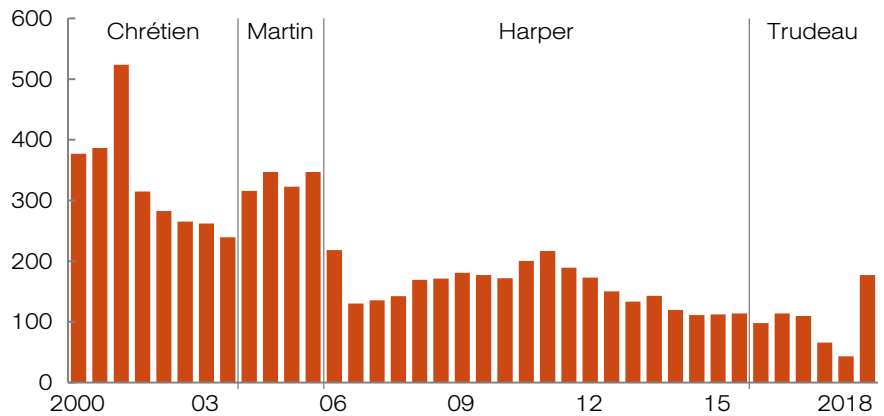
**WHAT CANADIAN CITIZENS THINK: IN WHAT WAYS DO YOU THINK CANADA'S ROLE IN THE WORLD HAS GROWN?**



\* Displayed categories result from unprompted survey responses  
 Source: The Environics Institute for Survey Research<sup>18</sup>

**CANADIAN UNIFORMED PERSONNEL IN UN PEACEKEEPING MISSIONS**

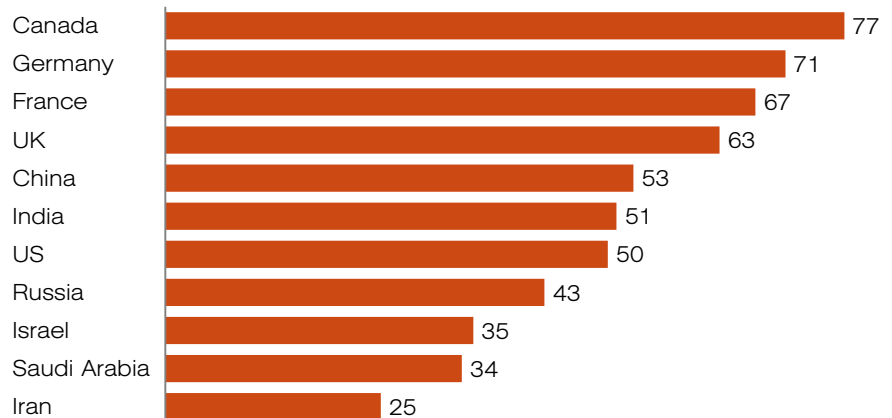
Total Canadian uniformed personnel in UN peacekeeping missions, by government, 2000-18, six-month averages



Source: Walter Dorn, based on UN data<sup>19</sup>

**WHAT CITIZENS AROUND THE WORLD THINK: WHICH COUNTRY WILL HAVE A POSITIVE INFLUENCE ON WORLD AFFAIRS OVER THE NEXT DECADE?**

Opinion poll, November 2018, percent



Source: Ipsos<sup>20</sup>



# Japan: Tokyo Adrift?

“The United States has been the biggest and foremost contributor to the liberal international order. Now we need to help our indispensable partner United States through burden-sharing and cooperation.”<sup>21</sup>

**TARŌ KŌNO,**  
16 FEBRUARY 2018

Analysts frequently name Japan as one of the middle powers that could act as a stabilizing force of an embattled liberal international order.<sup>1</sup> Indeed, Japan is a leading beneficiary of stability and open trade and a top backer of the United Nations and myriad other multilateral institutions.<sup>2</sup> As such, it is heavily invested in the rules-based order stewarded thus far by the United States, the country's only treaty ally.<sup>3</sup> Tokyo has made strong overtures to the Trump administration in the hope of preventing US disengagement from the Pacific<sup>4</sup> – but it is also hedging against it.

With an unpredictable North Korea and an increasingly assertive China in its immediate vicinity, Japan's security policymakers are under growing stress. With North Korea's last ballistic missile tests landing off Japan's coast,<sup>5</sup> Pyongyang is seen as the more immediate military threat.<sup>6</sup> Beijing poses the longer-term strategic challenge. October 2018 marked Prime Minister Shinzō Abe's first state visit with President Xi in seven years,<sup>7</sup> amid a momentary détente both in public opinion and at government level. Nonetheless, the two countries' relations are marked by suspicion and competition at nearly every level.<sup>8</sup> Japan is at the forefront of countering China's regional influence: outspending China, despite the “Belt and Road” initiative, in terms of regional infrastructure projects;<sup>9</sup> impeding its acquisition of critical technologies;<sup>10</sup> spearheading the Comprehensive and Progressive Trans-Pacific Partnership, which entered into force in December 2018; or pushing for strategic cooperation in the “Quad” with Australia, India, and the United States.<sup>11</sup> Meanwhile, Japan's Self-Defense Forces (JSDF) have, to the point of exhaustion, fended off continual needling from China<sup>12</sup> since the territorial dispute over the Senkaku Islands escalated in late 2012.

“In just over five years, the security environment surrounding Japan has become increasingly uncertain at a pace far faster than before and has become severe.”<sup>22</sup>

**SHINZŌ ABE,**  
14 OCTOBER 2018

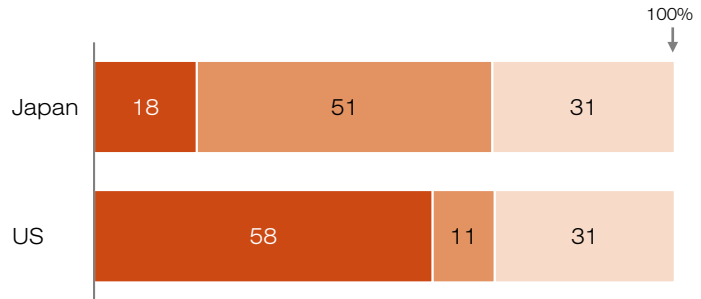
Abe has consistently pursued the “normalization” of Japan's defense. He has overseen lifting its ban on arms exports and bringing the exercise of collective self-defense into accordance with the pacifist Article 9 of the Constitution,<sup>13</sup> which states that “land, sea, and air forces, as well as other war potential, will never be maintained. The right of belligerency of the state will not be recognized.”<sup>14</sup> Even spending only around one percent of the world's third-largest GDP on defense, the JSDF have more soldiers than Germany and more ships than France.<sup>15</sup> In December, Abe's cabinet passed a five-year plan to significantly increase defense spending.<sup>16</sup> Yet, the elusive “crown jewel” in Abe's efforts remains the revision of Article 9, a move opposed by Japan's neighbors<sup>17</sup> and much of its public.<sup>18</sup> Regarding the role Tokyo can and should play as a security actor, the tension between multilateralism, pacifism, and demands for Japan to concentrate its resources on the issues closest to home appears to be growing.<sup>19</sup> Like in many of its Western allies, attention is turning inwards in the face of demographic challenges, tepid GDP growth, towering debt, and dissatisfaction with political elites.<sup>20</sup> Thus, despite Abe's best efforts, those counting on Japan to anchor security in East Asia may yet have to temper their expectations.



**WHAT JAPANESE AND US CITIZENS THINK: HOW DO YOU FEEL ABOUT JAPAN EXPANDING ITS MILITARY POWER?**

Opinion polls, June 2018, percent

Support Oppose Do not know/no answer

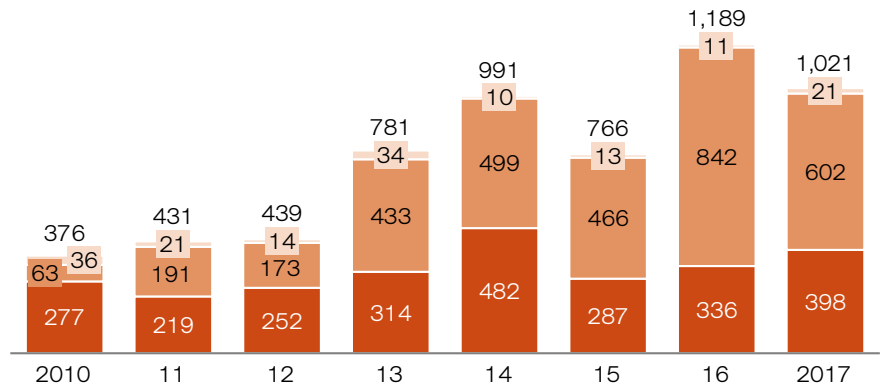


Source: The Genron NPO<sup>23</sup>

**THE JAPANESE AIR SELF-DEFENSE FORCE'S ALERTNESS TO INCURSIONS**

Emergency take-offs by Japanese fighter jets in response to aircraft approaching Japanese airspace, by aircraft origin, 2010-17

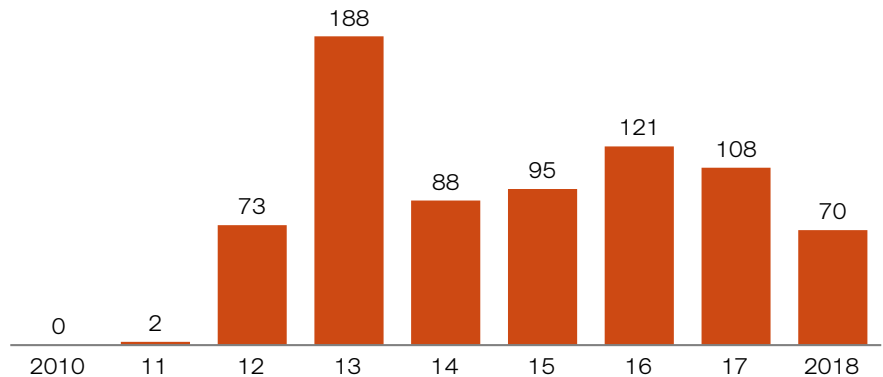
Other China Russia



Source: Ministry of Defense of Japan<sup>24</sup>

**THE SENKAKU ISLANDS DISPUTE AND INCURSIONS INTO JAPANESE TERRITORIAL WATERS**

Number of Chinese vessels identified entering into Japanese territorial waters surrounding the Senkaku Islands, 2010-18



Source: Japan Coast Guard<sup>25</sup>





# Regions





# Western Balkans: With Friends Like These...

“The EU is aware that it has strong competitors in the Balkans. There is no vacuum in international relations. If one pulls out or doesn’t want to act, somebody else will.”<sup>19</sup>

**SRĐAN DARMANOVIĆ,**  
MAY 2018

“[F]or those of you who are inside [the EU] it’s easy to forget how cold it is outside.”<sup>20</sup>

**NIKOLA DIMITROV,**  
10 JULY 2018

“The European Union perspective of the Western Balkans [...] remains the most powerful stabilizing force for the region, and we have an interest and responsibility to make good use of it.”<sup>21</sup>

**FEDERICA MOGHERINI  
AND JOHANNES HAHN,**  
12 JUNE 2018

Full Euro-Atlantic integration of the Western Balkans will not happen anytime soon – that was the message of the EU-Western Balkans Summit 2018.<sup>1</sup> EU leaders recognize the strategic importance of this missing piece in the “jigsaw of Europe.”<sup>2</sup> However, the lack of political and economic progress in the region as well as enlargement fatigue within the European Union have diminished the belief in the inevitability of EU accession on both sides.<sup>3</sup> At the same time, the region remains fragile: in December 2018, Kosovo – against NATO’s wishes – decided to set up its own army, which Serbia answered by threatening an armed intervention.<sup>4</sup> In Sarajevo, fears of escalating ethnic tensions have risen as Serb nationalist Milorad Dodik won a seat in the country’s presidency.<sup>5</sup> Meanwhile, the people of the Western Balkans express their discontent both through protests and with their feet as young people, especially, are leaving the region.<sup>6</sup>

The negative developments in the Western Balkans are being reinforced as other actors increase their influence, in particular China and Russia.<sup>7</sup> The latter has been a traditional player in the region, but now views the Balkans as a key part of a new “great game,” which may help distract and weaken the European Union.<sup>8</sup> Moscow has been accused of employing measures to destabilize the Western Balkans, including active efforts to foment ethnic conflict and to exacerbate frustration with the European Union by means of anti-Western propaganda.<sup>9</sup> In 2018, Russia was said to have tried to sabotage the most encouraging regional development of the year: the Greek-Macedonian name agreement that would remove major obstacles to Macedonia’s integration into NATO and the European Union.<sup>10</sup>

The most recent addition to the regional power game is China. All Western Balkan states – except Kosovo – are embedded in Beijing’s Belt and Road Initiative through the 16+1 format.<sup>11</sup> They have welcomed the much-needed aid, trade, and investment flows, which are increasing steadily and in some areas rival the European Union’s economic influence.<sup>12</sup> While Beijing supports EU accession of the region, its activities have raised suspicion within the European Union that China may exploit its economic heft for political gains.<sup>13</sup> In addition, Chinese projects do not necessarily conform to EU standards of sustainability or transparency.<sup>14</sup> China’s economic outreach thus poses risks to the region, notably in terms of debt, because much of the investment comes in the form of loans.<sup>15</sup>

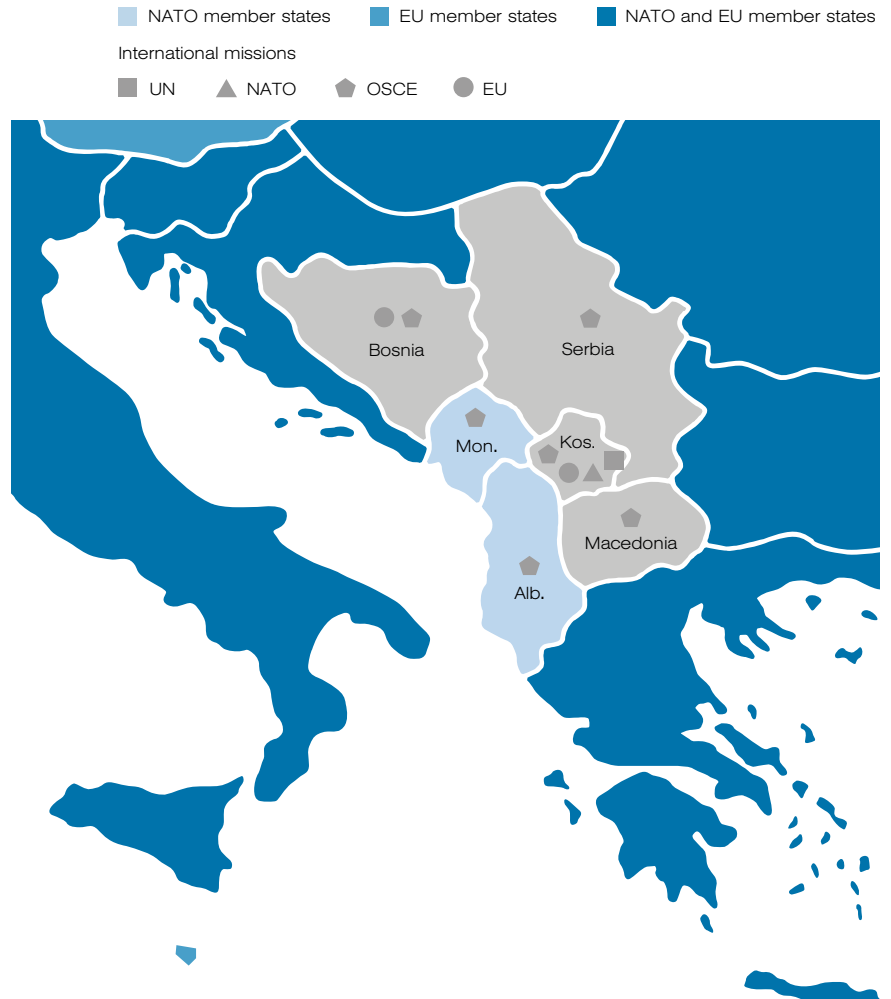
The European Union has only recently woken to the risks of these developments.<sup>16</sup> In early 2018, the European Commission adopted a new strategy that regards enhanced engagement with the region as a “geostrategic investment.”<sup>17</sup> Both NATO and the European Union are now actively pushing back against Russian propaganda, and the European Union has launched a series of European connectivity projects to compete with those of China.<sup>18</sup> The coming year will give some indication as to whether the region itself also still believes in a European future.





**EU AND NATO MEMBERSHIP AND PEACE OPERATIONS IN SOUTHEAST EUROPE**

Individual membership and operations per country, 2018



Source: Munich Security Conference, based on Center for International Peace Operations (ZIF)<sup>22</sup>

**MANDATES OF PEACE OPERATIONS IN THE WESTERN BALKANS**

Selected mandates of peace operations, 2018, based on a total number of 10 missions

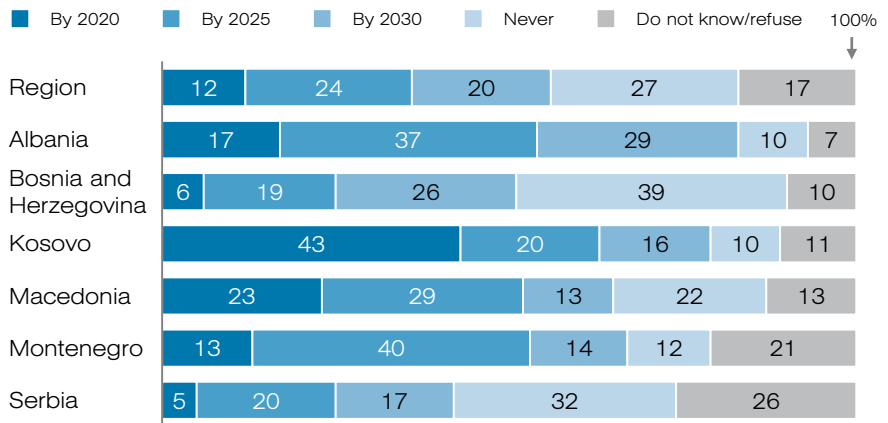


Source: Center for International Peace Operations (ZIF)<sup>23</sup>



**WHAT CITIZENS IN WESTERN BALKAN COUNTRIES THINK: WHEN DO YOU EXPECT EU ACCESSION TO HAPPEN?**

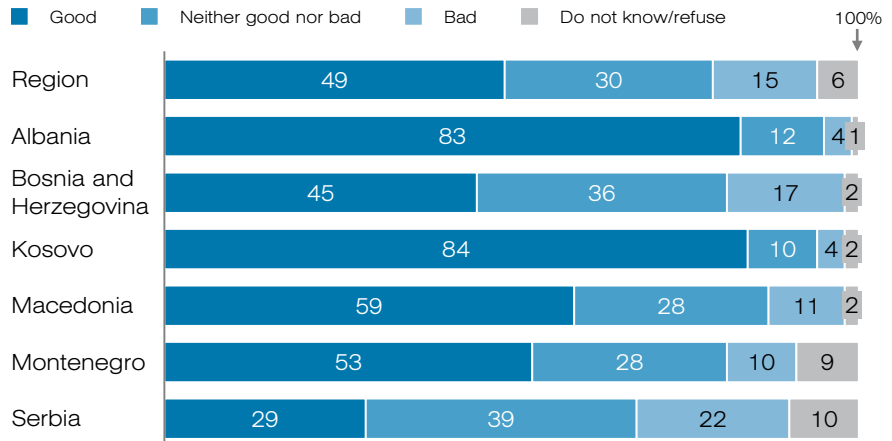
Opinion poll, 2018, percent



Source: Regional Cooperation Council<sup>24</sup>

**WHAT CITIZENS IN WESTERN BALKAN COUNTRIES THINK: WOULD EU MEMBERSHIP BE GOOD OR BAD FOR YOUR COUNTRY?**

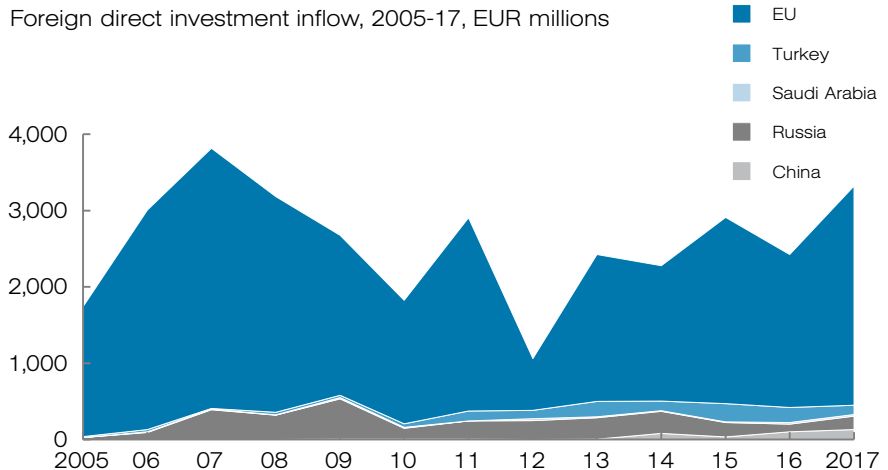
Opinion poll, 2018, percent



Source: Regional Cooperation Council<sup>25</sup>

**FOREIGN DIRECT INVESTMENT IN THE WESTERN BALKANS**

Foreign direct investment inflow, 2005-17, EUR millions



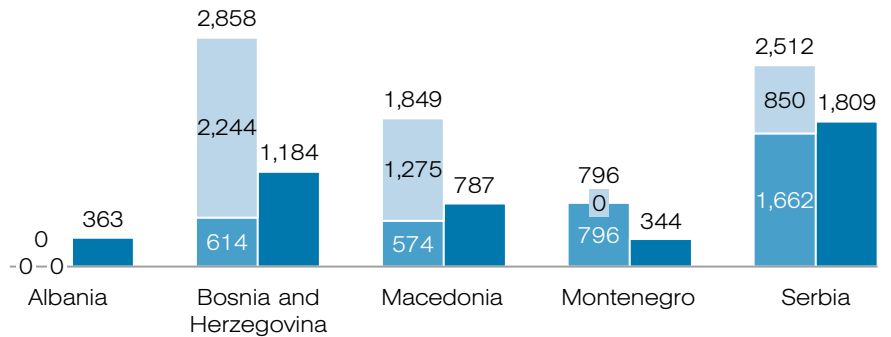
Source: The Vienna Institute for International Economic Studies<sup>26</sup>



**HOW DO THE EU AND CHINA COMPARE ON INFRASTRUCTURE FUNDS AND LOANS IN WESTERN BALKAN 16+1 COUNTRIES?**

Infrastructure funds and loans to the Western Balkans, 2013-18, EUR millions

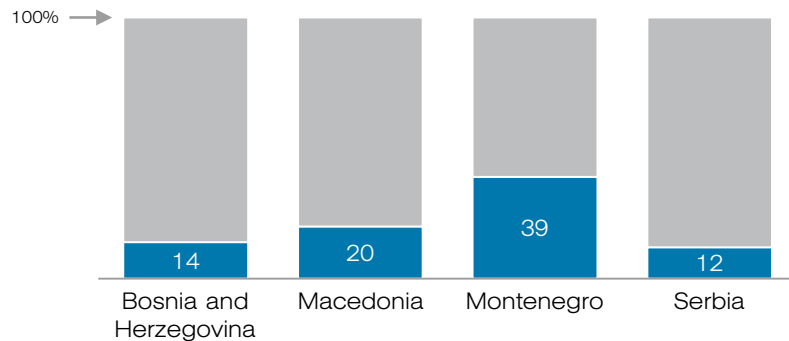
■ Announced Chinese infrastructure loans  
■ Committed Chinese infrastructure loans  
■ Committed European infrastructure funds and loans



Source: Mercator Institute for China Studies (MERICS)<sup>27</sup>

**HOW MUCH DO WESTERN BALKAN 16+1 COUNTRIES OWE TO CHINA?**

Share of committed Chinese infrastructure loans in relation to other externally held debt, 2018, percent\*



\* Most recent data from respective national banks: Bosnia and Herzegovina (2017), Macedonia (2018), Montenegro (2017), Serbia (2018)

Source: Mercator Institute for China Studies (MERICS)<sup>28</sup>

**EXAMPLES OF CHINESE INFLUENCE IN WESTERN BALKAN 16+1 COUNTRIES**

**Media (Serbia):** The Communist Party of China (CCP) promotes “positive” China coverage through bolstering state media cooperation with Serbian media outlets, orchestrating, for example, joint symposiums on ‘sound journalism.’ Serbian media have also regularly published opinion pieces by Xi Jinping.

**Economy (Montenegro):** A EUR 809 million loan for the construction of the first stretch of a highway to Serbia has sent Montenegro’s debt soaring to an unsustainable 80 percent of GDP, raising widespread concerns about Beijing subjecting Montenegro to “debt-trap diplomacy.”

**Think tanks (Macedonia):** The CCP has promoted increasingly dense think tank exchanges between state-led Chinese institutions and partners from Macedonia as well as other Balkan countries, such as the China-CEEC Think Tank Network, and uses these exchanges to popularize Chinese core interests.

Source: Mercator Institute for China Studies (MERICS)<sup>29</sup>





# Eastern Europe: State(s) of Uncertainty

“We do not want to find ourselves on the new fault line of civilizations, in the middle of a standoff between the Western and the Eastern blocks – this is crucial.”<sup>18</sup>

**ALEXANDER LUKASHENKO,**  
1 NOVEMBER 2018

Few states are affected as dramatically by the unfolding geopolitical competition between Russia and the West as the so-called “in-betweens” – the countries “physically caught between” them, namely Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine.<sup>1</sup> Closer alignment with Russia – economically weaker than the West and politically coercive – is not an attractive option to them. Even Belarus, Moscow’s closest ally, has tried to cautiously distance itself from Russia on some issues and has called for a “multi-vector foreign policy.”<sup>2</sup> Yet those who seek closer ties with the West are regularly reminded by Moscow that it will not accept their attempts to leave its geopolitical orbit.<sup>3</sup> Meanwhile, neither the European Union’s Eastern Partnership nor NATO’s open door policy currently feature a serious accession prospect for these countries.<sup>4</sup> As a result, the states in the region are left in limbo about their security status and overall future.<sup>5</sup>

This “state of uncertainty”<sup>6</sup> comes at a significant cost for the region. Economically, sanctions hit directly and indirectly.<sup>7</sup> Politically, transformation processes are stalled or even reversed, thus perpetuating weak and instable governance.<sup>8</sup> Most importantly, the region is afflicted by frozen conflicts or actual war, with more to come, should tensions between the East and West escalate.<sup>9</sup>

“[T]he current leadership of Ukraine is actually not interested in resolving this crisis, let alone by peaceful means. They are a party of war, and while they remain in power, all these tragedies and the war will continue.”<sup>19</sup>

**VLADIMIR PUTIN,**  
1 DECEMBER 2018

It has been a decade since Russia intervened in Georgia, a war that ended with Abkhazia and South Ossetia being cut off from Georgian territory. The ensuing frozen conflict registered increased saber rattling in 2018 – with accusations from Tbilisi that Moscow had reinforced its presence in the breakaway regions.<sup>10</sup>

Ukraine has arguably suffered most from the breakdown of the post-Cold War security order in Europe: almost five years ago, Russia annexed Crimea and has since backed an armed conflict in the eastern part of the country. Since then, more than 10,000 people have been killed on both sides and the Minsk agreement is violated on a regular basis.<sup>11</sup> In November, martial law was briefly imposed for the first time since World War II, sparking fears that democracy in Ukraine may be in danger.<sup>12</sup> Any initiative for conflict resolution – including a UN mission – appears unlikely before the Ukrainian presidential and parliamentary elections scheduled for spring 2019.<sup>13</sup> Instead, the conflict is spreading to the Azov Sea, where, in November, 24 Ukrainian seamen were detained by Russia, which now asserts exclusive territorial claims over the area despite a 2003 treaty with Ukraine that guarantees both countries freedom of movement in the area.<sup>14</sup> Moscow is continuing to militarize Crimea, having stationed 28,000 forces there and upgraded its Black Sea fleet.<sup>15</sup> This aims at deterring NATO and establishing an anti-access/area-denial zone in the Black Sea Basin.<sup>16</sup> In turn, NATO has reinforced its deterrence and defense stance in the region.<sup>17</sup> For the time being, rapprochement in Western-Russian relations – and thus relief for the “in-between states” – seems unlikely.



## RUSSIAN FORCES IN CRIMEA



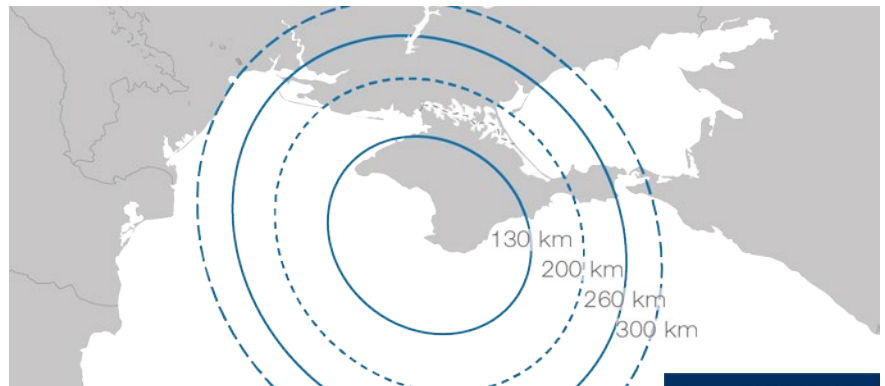
- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>1. 39th Helicopter Regiment</li> <li>2. 43rd Mixed Aviation Regiment</li> <li>3. 37th Mixed Aviation Regiment</li> <li>4. 31st Air Defence Division</li> <li>5. 8th Artillery Regiment</li> <li>6. 126th Naval Infantry Brigade</li> <li>7. 318th Mixed Aviation Regiment</li> <li>8. 38th Fighter Regiment</li> <li>9. 12th Surface-to-Air Missile Regiment</li> <li>10. One battalion from 11th Anti-Ship Missile Brigade</li> <li>11. Black Sea Fleet HQ:<br/>11th Anti-Submarine Warfare Ship Brigade<br/>41st Missile Boat Brigade<br/>68th Area Protection Ship Brigade</li> <li>12. 810th Naval Infantry Brigade<br/>127th Independent Reconnaissance Brigade</li> <li>13. 1096th Surface-to-Air Missile Regiment</li> </ul> | <ul style="list-style-type: none"> <li>14. 15th Independent Coastal Missile Brigade<br/>4th Independent Chemical, Biological, Radiological Regiment</li> <li>15. 219th Independent Electronic Warfare Regiment</li> <li>16. 171st Airborne Battalion</li> <li>17. 18th Surface-to-Air Missile Regiment</li> <li>18. 11th Anti-Ship Missile Brigade</li> <li>19. 382nd Naval Infantry Battalion</li> <li>20. 7th Mountain Airborne Division</li> </ul> |
|--|---|
- Navy
  - Air force
  - Airborne troops
  - Main railroads
  - Main roads
  - De facto boundary between Russian-occupied Crimea and mainland Ukraine

Source: The International Institute for Strategic Studies<sup>20</sup>

## RUSSIAN MISSILE SYSTEMS IN CRIMEA

Potential ranges of Russian missile systems in Crimea (from notional locations)

- S-400 family
- 3K55 Bastion
- 3K60 Bal family



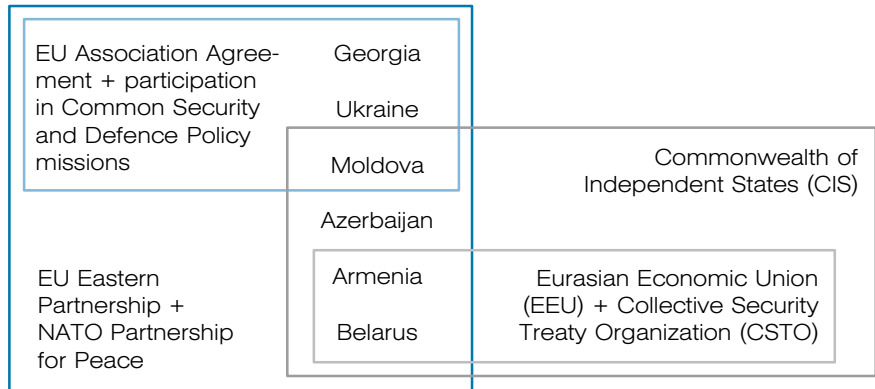
Source: The International Institute for Strategic Studies<sup>21</sup>





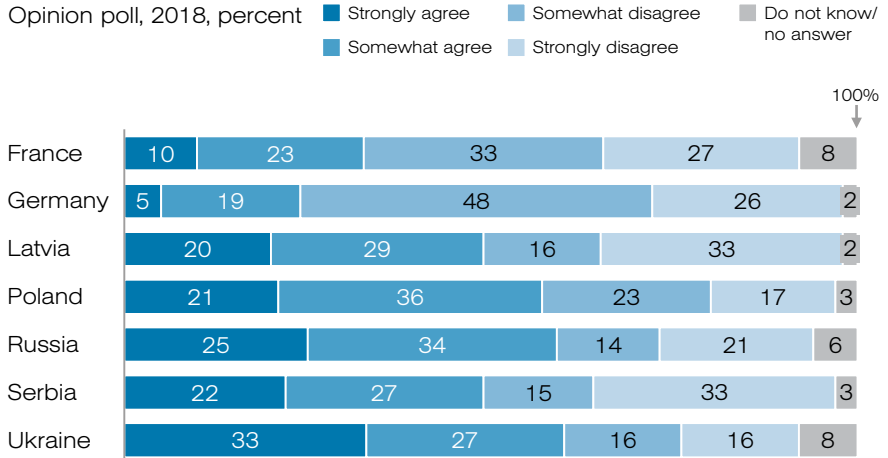
**MEMBERSHIP IN EURO-ATLANTIC REGIONAL INTEGRATION INITIATIVES**

Individual membership by country, 2018



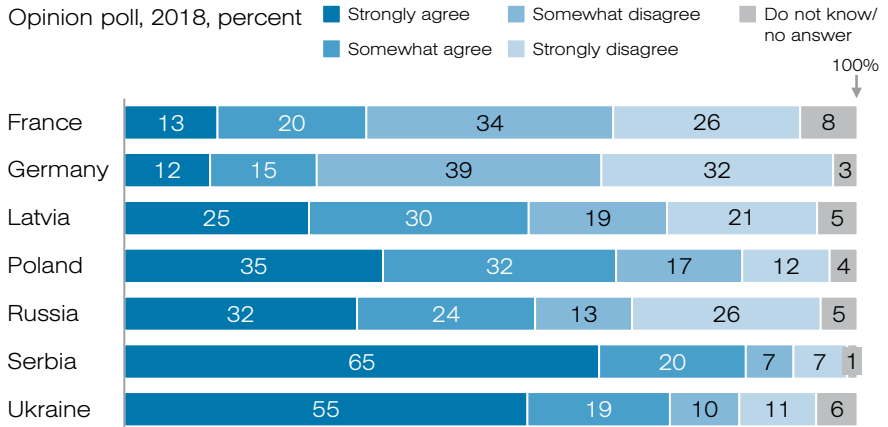
Source: Munich Security Conference<sup>22</sup>

**WHAT CITIZENS IN SELECTED COUNTRIES THINK: IN VIEW OF INCREASING TENSIONS BETWEEN RUSSIA AND THE WEST, I THINK NEW WARS IN EUROPE ARE LIKELY**



Source: Friedrich Ebert Foundation<sup>23</sup>

**WHAT CITIZENS IN SELECTED COUNTRIES THINK: IN MY OPINION, MY COUNTRY DOES NOT HAVE THE STATUS IN THE WORLD IT DESERVES IN COMPARISON WITH OTHER COUNTRIES**

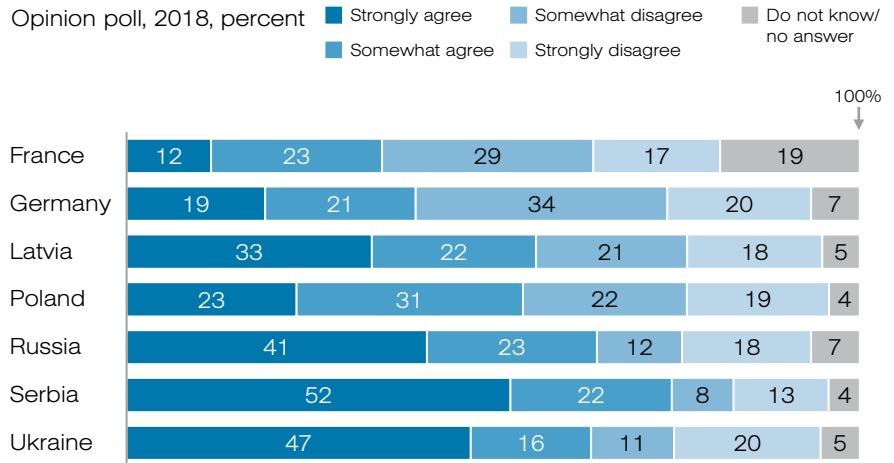


Source: Friedrich Ebert Foundation<sup>24</sup>



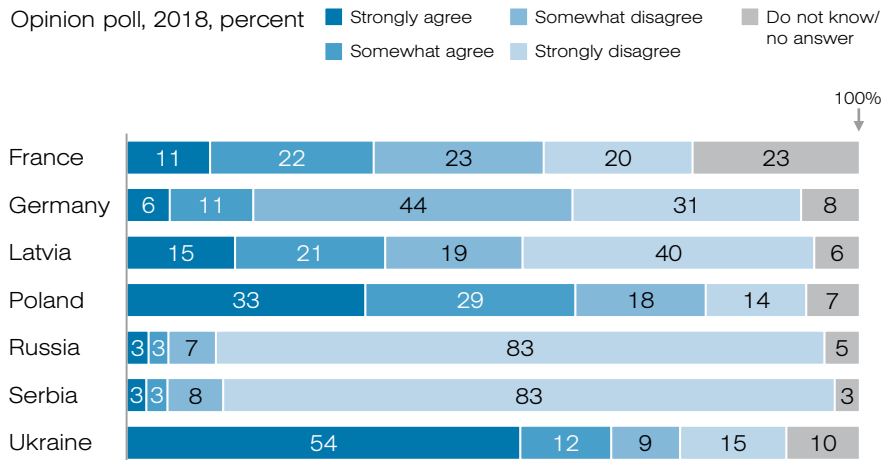


**WHAT CITIZENS IN SELECTED COUNTRIES THINK ABOUT THE CONFLICT IN UKRAINE: THE CRISIS IS A DOMESTIC MATTER AND SHOULD BE LEFT UP TO UKRAINE**



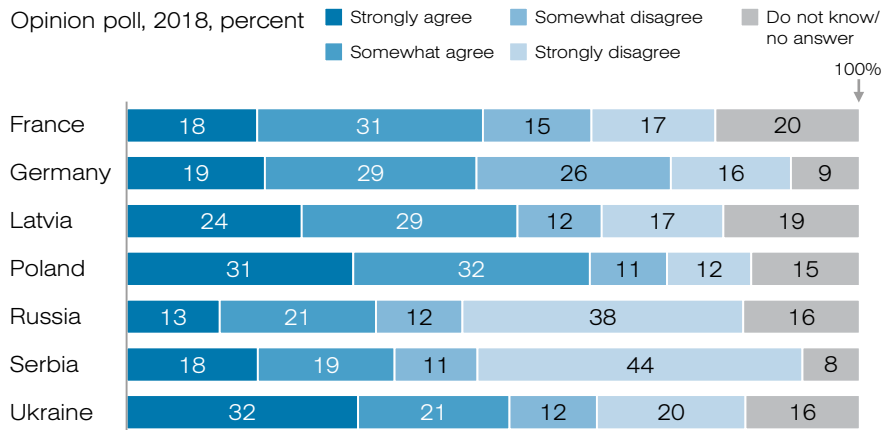
Source: Friedrich Ebert Foundation<sup>25</sup>

**WHAT CITIZENS IN SELECTED COUNTRIES THINK ABOUT THE CONFLICT IN UKRAINE: SANCTIONS AGAINST RUSSIA SHOULD BE WIDENED**



Source: Friedrich Ebert Foundation<sup>26</sup>

**WHAT CITIZENS IN SELECTED COUNTRIES THINK ABOUT THE CONFLICT IN UKRAINE: THE CRISIS SHOULD BE SOLVED WITH THE AID OF A UN MISSION, BY THE BLUE HELMETS**



Source: Friedrich Ebert Foundation<sup>27</sup>



# The Sahel: Traffick Jam

“As we look to the wider Sahel region, we see a toxic combination of challenges. Poverty. Climate change. Unemployment. Demographic change. Deficits in governance. And, of course, terrorism, violent extremism and chronic insecurity.”<sup>20</sup>

**ANTÓNIO GUTERRES,**  
**27 SEPTEMBER 2018**

“The security situation in the Sahel is still very difficult. We are facing very grave threats, firstly from terrorist organizations, but not just them. There are also organizations trafficking drugs, people and arms. So the G5 Sahel has to fight organized crime as well as terrorism. One country can't face all that alone.”<sup>21</sup>

**MAHAMADOU ISSOUFOU,**  
**5 JULY 2018**

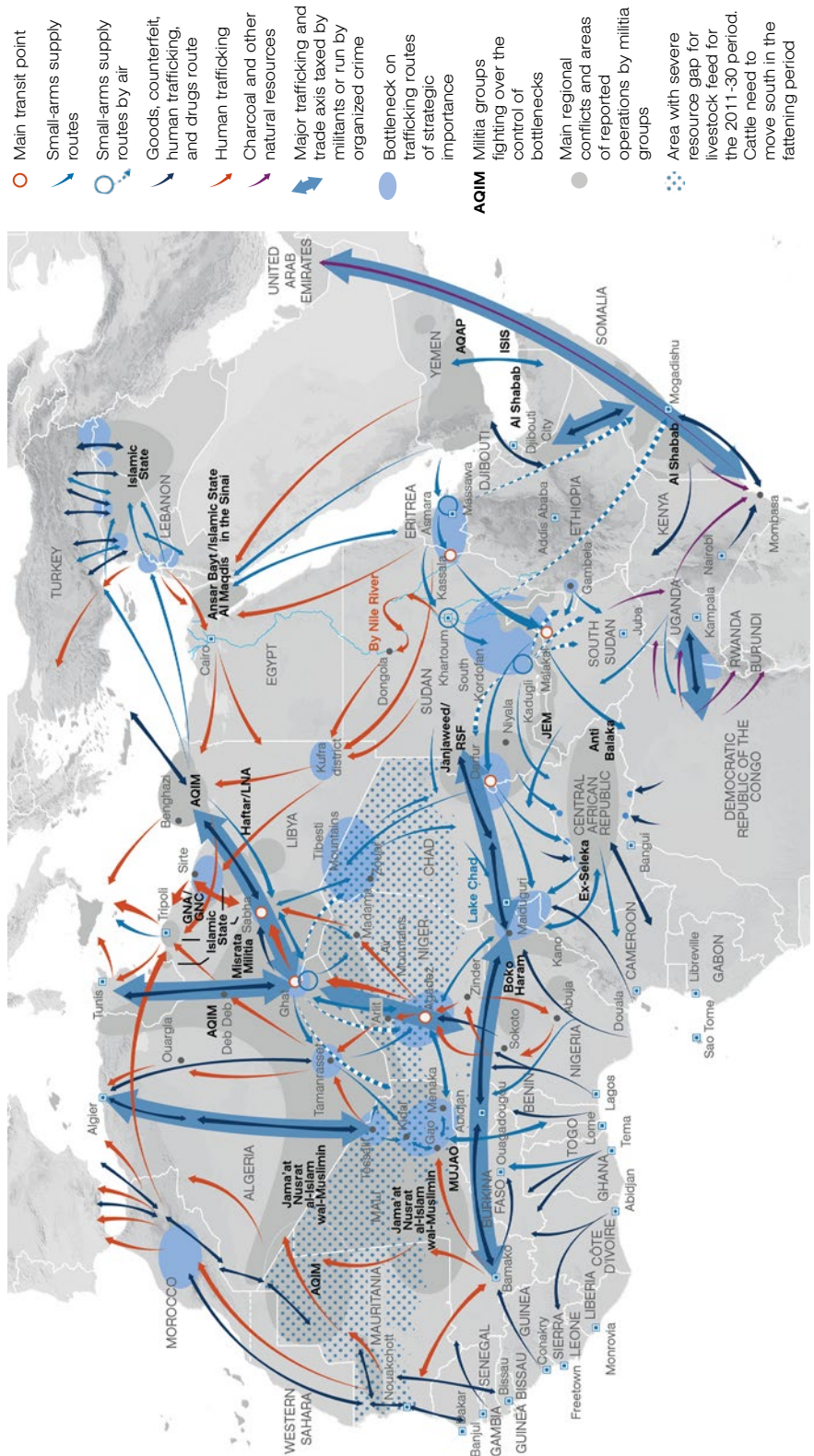
The Sahel region<sup>1</sup> or “African arc of instability”<sup>2</sup> faces an interrelated set of security challenges, which exacerbate each other and have prompted some observers to describe the states in the region as the most vulnerable in the world.<sup>3</sup> Although both the United States and the European Union have recognized the importance of the Sahel in their respective regional security strategies,<sup>4</sup> for a long time the region did not feature high on the international agenda. This has changed since the French-led intervention in 2013 in Mali, which put the Sahel and its security challenges in the international spotlight.

A major challenge to security provision in the region is the area's sheer size: the western part from Mauritania to Chad alone covers five million square kilometers, roughly half the land area between Lisbon and Moscow. With the security presence in the Sahel's sparsely populated and rural areas being limited, transnational criminal groups are thriving.<sup>5</sup> They engage in illicit activities such as human trafficking, smuggling of weapons, counterfeiting, and drugs – not only funding organized crime but also extremist groups.<sup>6</sup> Disputes over trade routes often end in violence, hindering travel and legal commerce and thereby harming economic conditions in the Sahel.<sup>7</sup> Further aspects of human security, such as the effects of climate change, environmental degradation, rapid population growth, and urbanization add more layers of vulnerability to an already fragile region.<sup>8</sup> Overall, security continues to deteriorate across much of the Sahel.<sup>9</sup> Since 2016, the number of reported violent events, fatalities, and violence against civilians linked to militant Islamic group activity has doubled every year, reaching an estimated 1,500 in 2018.<sup>10</sup> It now exceeds the level of violent activity seen in the region in 2012, prior to the French-led intervention in Mali. This surge in activity reflects greater operational capacity of militant Islamist groups in the region.<sup>11</sup>

Violent extremism also has potential spill-over effects outside the region itself, including into Europe.<sup>12</sup> In a broad regional response, a multitude of different missions with both local and international institutions are now involved in the Sahel, making it a highly militarized area,<sup>13</sup> and many observers perceive a “security traffic jam.”<sup>14</sup> In addition to the Multidimensional Integrated Stabilization Mission in Mali (MINUSMA), which is the most dangerous UN mission worldwide, with 117 fatalities as of November 2018,<sup>15</sup> the French-led Operation Barkhane,<sup>16</sup> and the EU's four military and police training missions (EUTM and EUCAP in Mali and Niger, respectively), the so-called G5 was established in 2014 as an intergovernmental regional partnership.<sup>17</sup> In 2017, the G5 states launched their Sahel Cross-Border Joint Force to counter terrorism, human trafficking, and organized crime in their shared cross-border regions.<sup>18</sup> The force, together with the other EU missions in the region, also represents a growing strategic convergence between France and Germany, which support the initiative via bilateral projects.<sup>19</sup> It remains to be seen whether states in the region can use the current momentum not only for immediate counterterrorism operations, but for deeper regional integration and stabilization.



## SELECTED TRANSNATIONAL TRAFFICKING IN THE SAHEL REGION

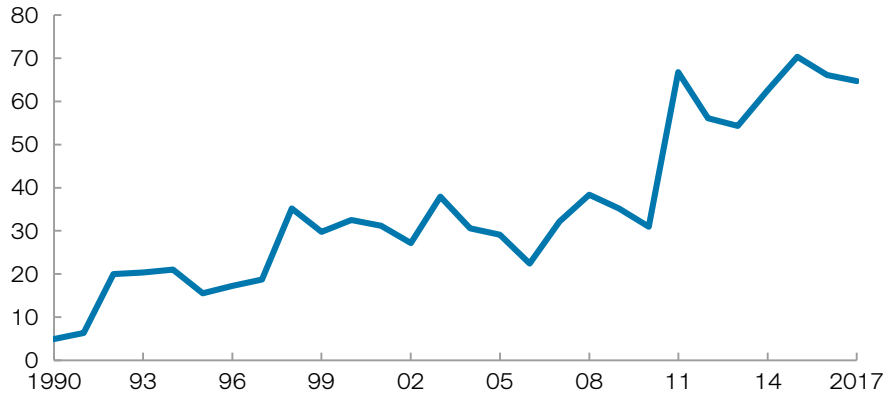


Source: Adapted from a map produced by RHIPTO Norwegian Center for Global Analyses<sup>22</sup>

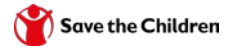


**CHILDREN AFFECTED BY CONFLICT IN THE SAHEL REGION**

Affected children, 1990-2017, millions



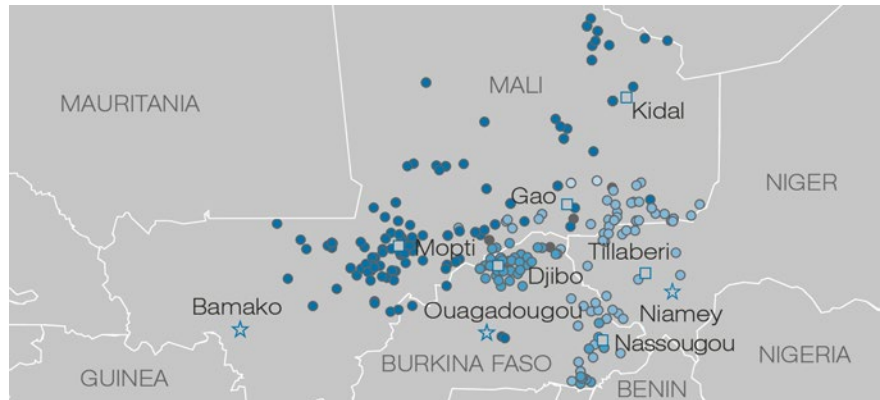
Source: Save the Children<sup>23</sup>



**SELECTED ACTIVE MILITANT ISLAMIST GROUPS IN THE SAHEL REGION**

Violent events, 2018, by militant Islamist groups

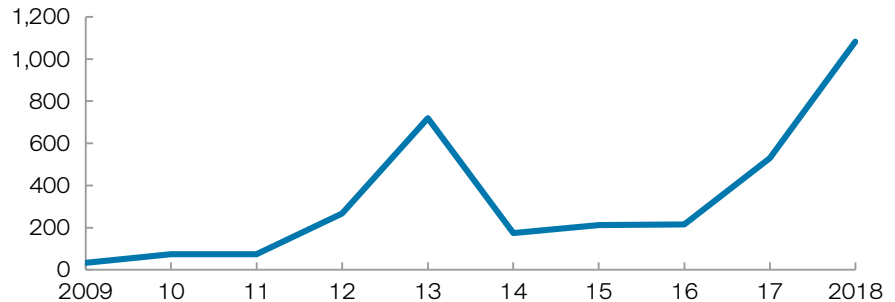
■ Jama'at Nusrat al Islam wal Muslimeen 
 ■ Ansaroul Islam 
 ■ Islamic State in the Greater Sahara  
■ Katiba Salaheddine 
 ■ Unknown 
  Key towns 
 ★ Capital



Source: Africa Center for Strategic Studies<sup>24</sup>

**EVOLUTION OF MILITANT ISLAMIST VIOLENCE IN THE SAHEL REGION**

Fatalities related to violent events involving militant Islamist groups in the Sahel, 2009-18



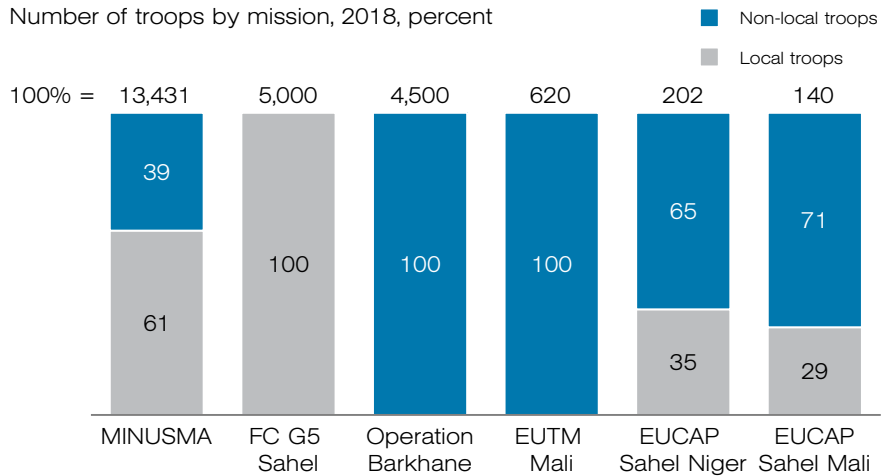
Source: Africa Center for Strategic Studies<sup>25</sup>





**MAJOR SECURITY EFFORTS IN THE SAHEL REGION**

Number of troops by mission, 2018, percent



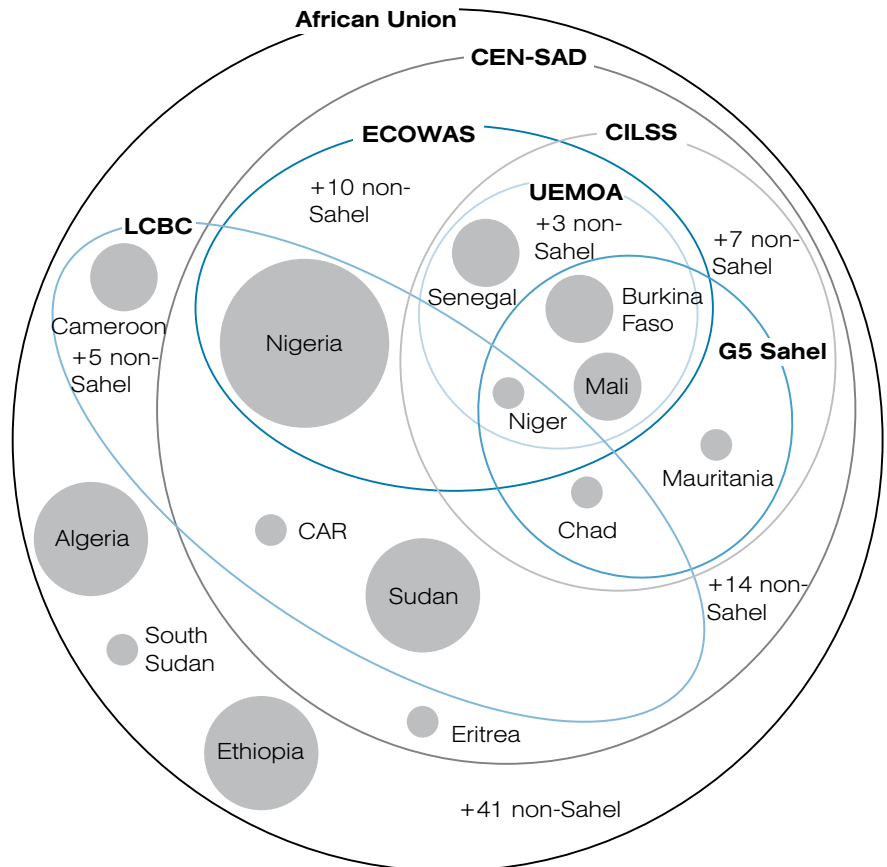
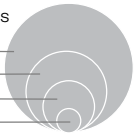
Source: Munich Security Conference, based on Africa Center for Strategic Studies<sup>26</sup>

**MEMBERSHIP OF SAHEL COUNTRIES IN SELECTED REGIONAL ORGANIZATIONS**

- CEN-SAD:** Community of Sahel-Saharan States
- CILSS:** Permanent Interstate Committee for Drought Control in the Sahel
- ECOWAS:** Economic Community of West African States
- LCBC:** Lake Chad Basin Commission
- UEMOA:** West African Monetary and Economic Union

GDP (2017), USD billions

- >200
- 75-200
- 10-75
- <10



Source: Munich Security Conference, based on World Bank and respective organizations' websites<sup>27</sup>



# Middle East: Leaving From Behind

“We have been closely involved in the Geneva and Astana processes, and are the sole stakeholder that can work simultaneously with the United States and Russia. We will build on those partnerships to get the job done in Syria.”<sup>21</sup>  
**RECEP TAYYIP ERDOGAN,**  
**7 JANUARY 2019**

“When I became President, ISIS was going wild. Now ISIS is largely defeated and other local countries, including Turkey, should be able to easily take care of whatever remains. We’re coming home!”<sup>22</sup>  
**DONALD TRUMP,**  
**22 DECEMBER 2018**

The Middle East is undergoing a major transformation. The United States is withdrawing from its traditional leadership role, trying to increasingly extricate itself from direct political involvement in various crises, and is instead relying on regional partners to safeguard its interests.<sup>1</sup> Simultaneously, regional powers are ramping up their military capabilities.<sup>2</sup> Today, seven out of the top ten countries that spend the highest GDP share on defense are located in the Middle East.<sup>3</sup> What is more, between 2013 and 2017, the value of Middle Eastern countries’ arms purchases doubled compared to the previous five years, thus bearing the risk of an arms race and military confrontation.<sup>4</sup>

In the aftermath of the murder of Jamal Khashoggi, numerous US politicians and governments of other countries are reevaluating their partnership with Saudi Arabia,<sup>5</sup> especially with regard to the Kingdom’s military campaign in Yemen.<sup>6</sup> The US Senate even passed a resolution urging the cessation of any military support to countries involved in the war, thus contradicting White House positions.<sup>7</sup> Irrespective of the Senate’s criticism, the Trump administration continues to pursue a policy with redoubled support for traditional partners such as Saudi Arabia, Israel, and Egypt on the one hand, yet return to a confrontational stance towards Iran, notably through withdrawal from the Iran nuclear deal, on the other hand.<sup>8</sup> However, studies indicate that the reimposition of US sanctions against Iran has not had the dramatic effect on Iranian attitudes that the White House had hoped for.<sup>9</sup>

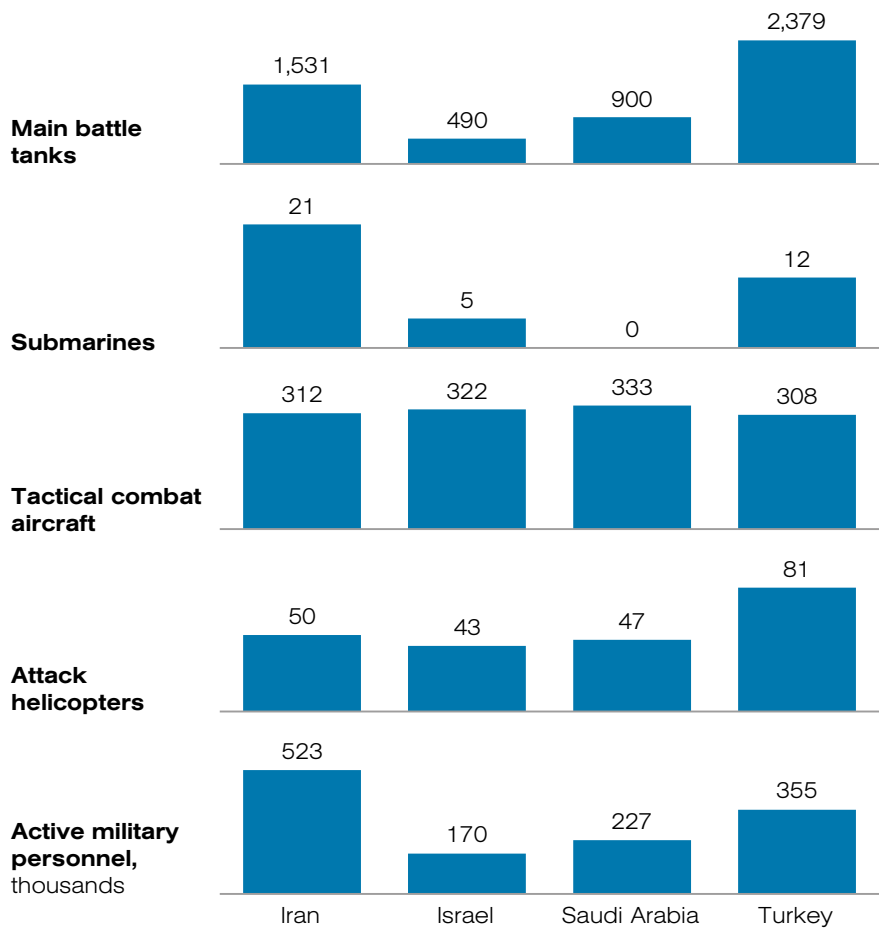
In Syria, strategic decisions by the White House have worried allies in the region and beyond.<sup>10</sup> Experts warn that the President’s decision to hastily withdraw US troops from Syria will likely have tremendous geopolitical consequences.<sup>11</sup> It not only forsakes Kurdish forces, who have paid a heavy price in the fight against ISIS with some 4,000 dead and 10,000 wounded since 2014,<sup>12</sup> but has also allowed Russia, Iran, and Turkey to decide the future course of the war both militarily and at the negotiating table.<sup>13</sup> Meanwhile, the European Union sees its influence mostly sidelined.<sup>14</sup> This becomes particularly clear when looking at the fate of Idlib, the last rebel stronghold, which now depends largely on Turkey and Russia and their de-escalation agreement aiming to prevent a major military offensive against the town.<sup>15</sup>

The war in Yemen continues to be “the world’s worst humanitarian crisis” with 24 million people in need of humanitarian assistance.<sup>16</sup> Although the Swedish government brokered a ceasefire agreement under UN auspices for the port city of Hodeida, a major point of entry for imports to Yemen,<sup>17</sup> there are still 250,000 people on the brink of starvation,<sup>18</sup> as the deal is aimed at preventing a deterioration of the situation rather than improving it.<sup>19</sup> It will be there and in the other crisis areas in the region where the United States’ ability to impose a regional order without actively intervening will be tested.<sup>20</sup>



**THE MILITARY STRENGTH OF IRAN, ISRAEL, SAUDI ARABIA, AND TURKEY**

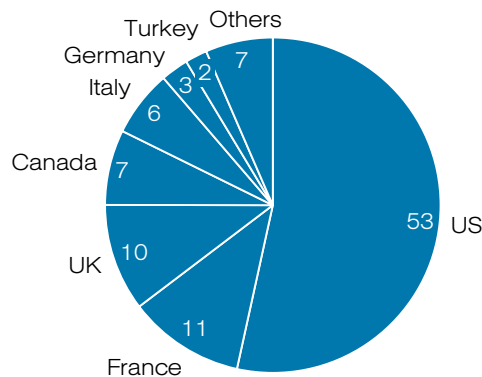
Selected key military capabilities, 2018



Source: The International Institute for Strategic Studies<sup>23</sup>

**ARMS SUPPLIERS TO GCC MEMBER STATES**

Market share of total arms imports by value, 2014-18, percent



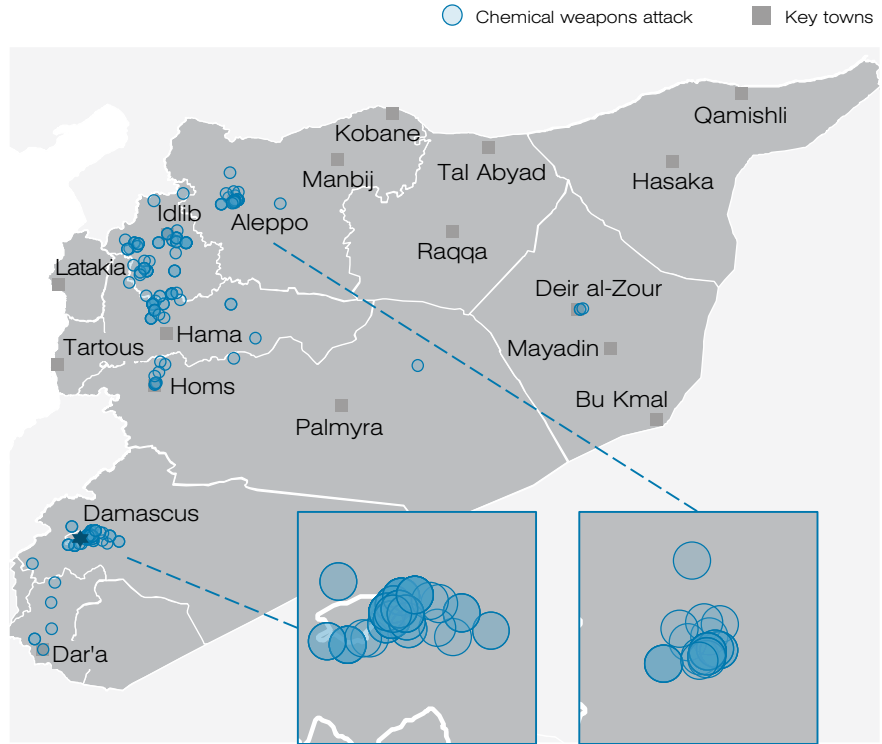
Source: Jane's Markets Forecast<sup>24</sup>





**THE USE OF CHEMICAL WEAPONS IN THE SYRIAN CONFLICT**

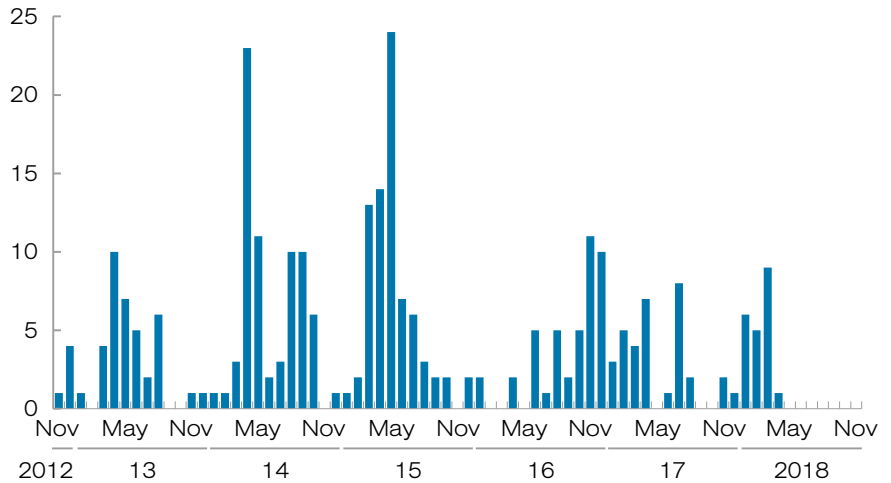
Chemical weapons attacks by the Assad regime, Nov 14, 2012 - Nov 30, 2018



**NOTE**

The map above illustrates 286 incidents of chemical weapons attacks attributed to the Assad regime between 14 November 2012 and 30 November 2018 that have been categorized as either "credibly substantiated," "confirmed," or "forensically confirmed." In total, 292 out of 471 investigated incidents have been categorized in this way. For further details, please consider the cited study by the Global Public Policy Institute.

Incidents of chemical weapons attacks in Syria, Nov 2012 - Nov 2018



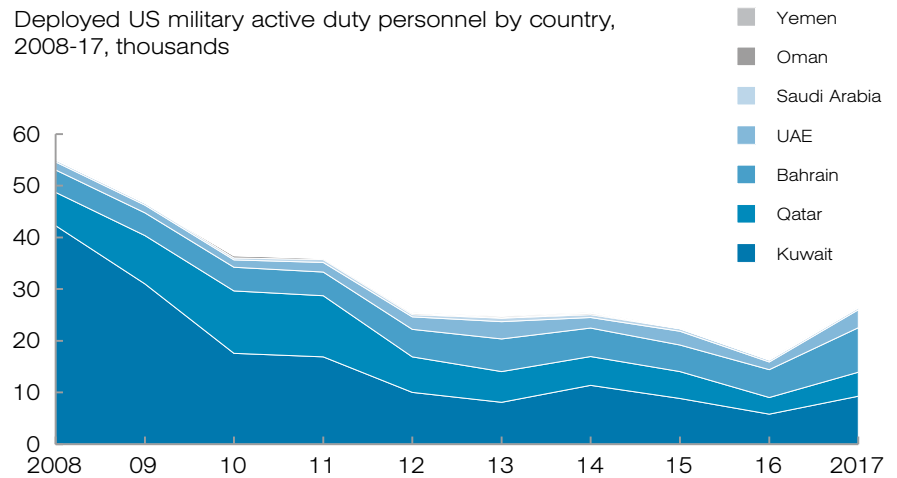
Source: Global Public Policy Institute (GPPi)<sup>25</sup>





**US MILITARY PRESENCE IN THE GULF REGION**

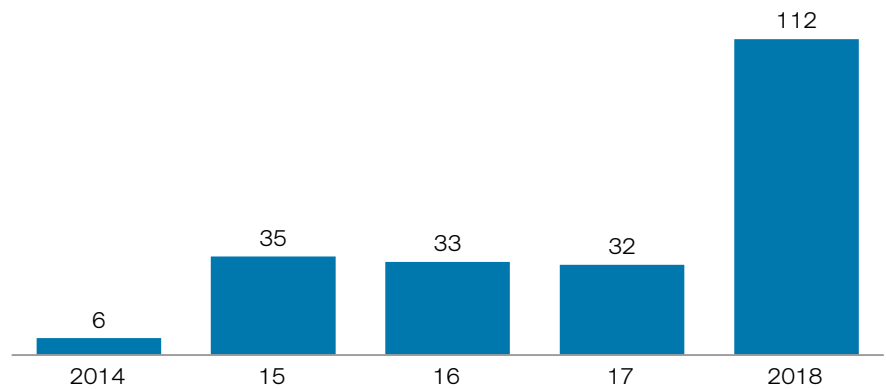
Deployed US military active duty personnel by country, 2008-17, thousands



Source: Munich Security Conference, based on Defense Manpower Data Center<sup>26</sup>

**THE FREQUENCY OF ISRAELI AIR STRIKES IN SYRIA**

Total number of recorded Israeli air strikes in Syria, 2014-18



Source: Conflict Monitor by IHS Markit<sup>27</sup>



**THE HUMANITARIAN CRISIS IN YEMEN**

**75 percent** of the population need humanitarian assistance

Basic food prices have increased by **98 percent** and fuel prices by **110 percent** between 2015 and 2018

An estimated **85,000** children under the age of five have died from extreme hunger – **5.2 million** children are at risk of famine

More than **1.1 million** suspected cholera cases between April 2017 and July 2018

**Key figures on the Yemen crisis**

Source: United Nations; Save the Children; World Health Organization<sup>28</sup>







# Issues





# Armament: A Hello to Arms

“We’re increasing arsenals of virtually every weapon. We’re modernizing and creating a brand new nuclear force. And frankly, we have to do it because others are doing it. If they stop, we’ll stop. But they’re not stopping. So if they’re not gonna stop, we’re gonna be so far ahead in nuclear like you’ve never seen before.”<sup>16</sup>

**DONALD TRUMP,**  
**12 FEBRUARY 2018**

“Of course, we will need to take some steps to ensure our safety. And they should not whine later that we are allegedly trying to gain certain advantages. We are not. We are simply trying to maintain the balance and ensure our security.”<sup>17</sup>

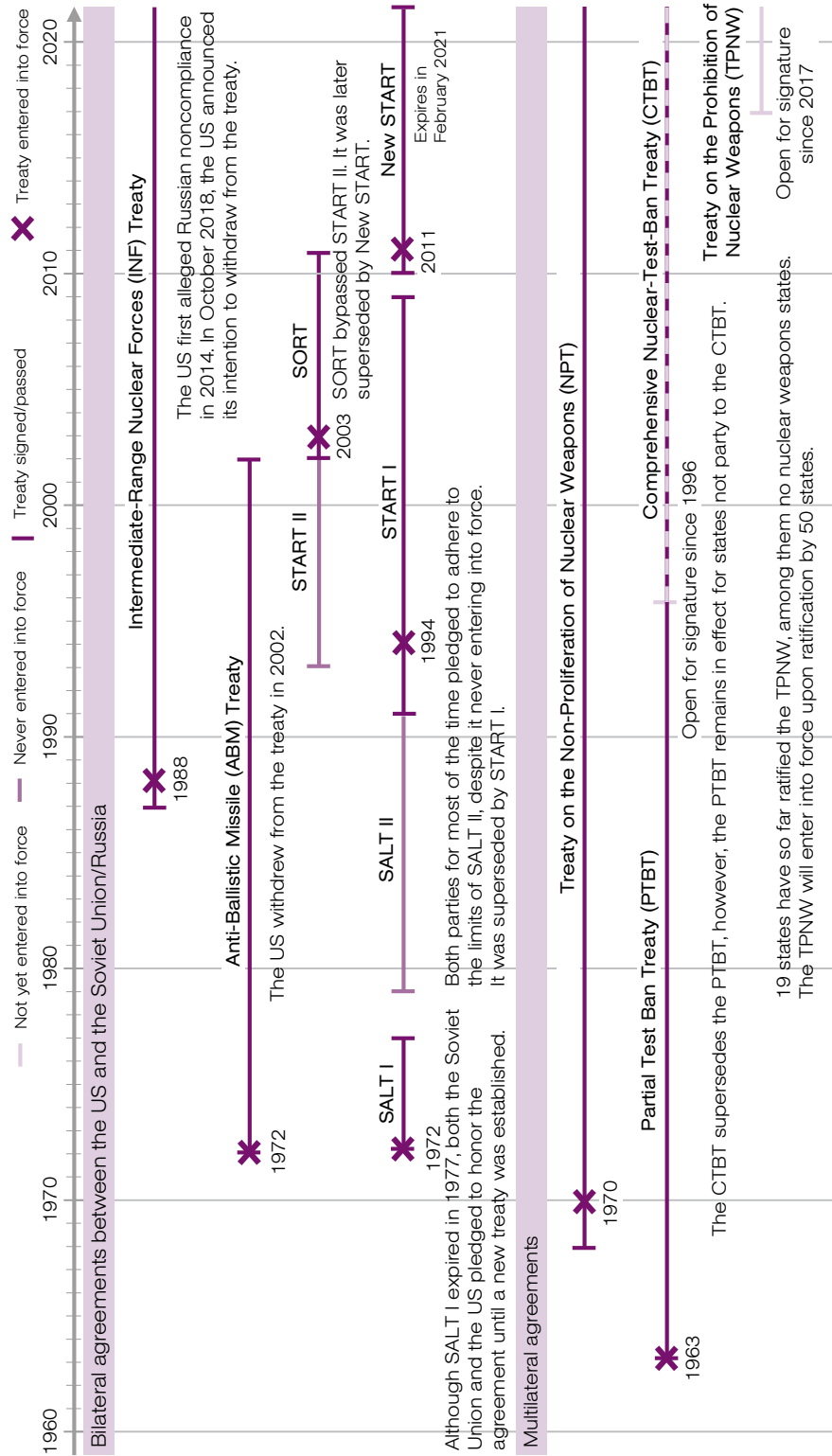
**VLADIMIR PUTIN,**  
**20 DECEMBER 2018**

The Cold War gave rise to controls on the proliferation of weapons of mass destruction and to mutual arms reduction between the world’s two major nuclear powers. Today, an emerging multipolar security landscape and accelerating technological progress have triggered a crisis of arms control. Russia’s alleged violations of the INF Treaty,<sup>1</sup> US President Donald Trump’s subsequent threat to abrogate it, and the absence of efforts to prevent the expiration of New START in 2021<sup>2</sup> demonstrate the difficulty of carrying over arms control mechanisms into the current geopolitical climate. Numerous experts have already warned of a future without any US-Russian nuclear treaties,<sup>3</sup> which, among other risks, would also increase distrust in the nuclear powers’ commitment to gradual disarmament.<sup>4</sup> Debates leading up to the Nuclear Ban Treaty<sup>5</sup> and the 2020 review conference of the Non-Proliferation Treaty (NPT) have already revealed significant international frustration about the lack of progress under Article VI of the NPT.<sup>6</sup> If anything, the role of nuclear weapons seems to be growing. Beyond the US and Russia, all of the nine nuclear weapons states are adding to or upgrading their arsenals,<sup>7</sup> apparently intent on gaining an edge in a period of new uncertainty. Further, both a failure to contain North Korea’s nuclear program and the precarious state of the Iran nuclear deal could eventually trigger a proliferation domino effect.

This state of affairs gives little cause for believing that effective arms control mechanisms for newer and potentially game-changing weapons technologies are within reach. Hypersonic missiles, with an unprecedented combination of speed and maneuverability, could virtually bypass any current missile defenses and radically reduce the warning time for a targeted actor.<sup>8</sup> A race to deploy functional hypersonic systems is already ongoing, with Russia leading the way.<sup>9</sup> Meanwhile, heavy unmanned aerial vehicles (UAVs) with operational ranges of thousands of kilometers, such as the US-made Predator drone, already feature in the arsenals of 30 countries.<sup>10</sup> China is becoming a leading no-strings-attached exporter of strike-capable drones.<sup>11</sup> With regard to such arms as well as, for instance, lethal autonomous weapons or cyber weaponry, rapid technological progress renders it difficult to ascertain which characteristics and capabilities will be militarily decisive. This further complicates placing effective quantitative or qualitative constraints on their development or proliferation.<sup>12</sup>

Against the backdrop of increasingly multipolar geopolitics, it is all but impossible for bilateral deals to both establish parity between two parties and also adequately address threat perceptions that increasingly involve third parties.<sup>13</sup> Thus, the “bilateral era” of arms control seems on its way out.<sup>14</sup> However, it is not only the old bilateral deals but also newer multilateral instruments of arms control that are at risk of unraveling. The many government bureaucracies in which the portfolio of arms control has lain relatively dormant for years<sup>15</sup> must reinvigorate their search for solutions – or risk the concept becoming a relic of a bygone era.

A TIMELINE OF  
SELECTED NUCLEAR  
ARMS CONTROL  
AGREEMENTS



Source: Centre for International Security Policy at the Hertie School of Governance<sup>18</sup>



**TPOLOGY OF CURRENT DRONE SYSTEMS**

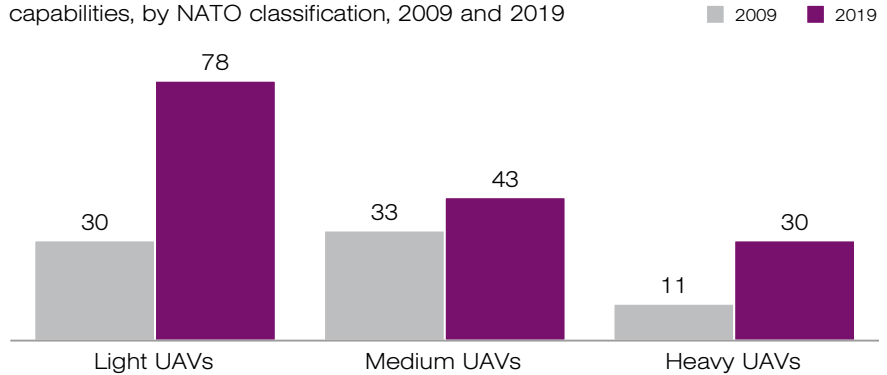
Categories of military unmanned aerial vehicles (UAVs), based on NATO classification

	<b>Light UAVs</b>	<b>Medium UAVs</b>	<b>Heavy UAVs</b>
<b>Weight</b>	<150 kg	150-600 kg	>600 kg
<b>Max. flight time</b>	~1-3 h	~10 h	~24 h
<b>Max. range</b>	~80 km	~100-200 km	Up to ~22,000 km
<b>Typical uses</b>	Surveillance/ reconnaissance	See Light UAVs; targeting support; communications	See Light UAVs; airstrike; strategic intelligence
<b>Typical equipment/ armament</b>	Camera; radar; light explosives (in "loitering munitions")	Electro-optical/ infrared sensors; laser designators	See Medium UAVs; missiles, precision-guided bombs, etc.

Source: Munich Security Conference, based on Center for the Study of the Drone at Bard College<sup>19</sup>

**PROLIFERATION OF DRONE SYSTEMS WORLDWIDE**

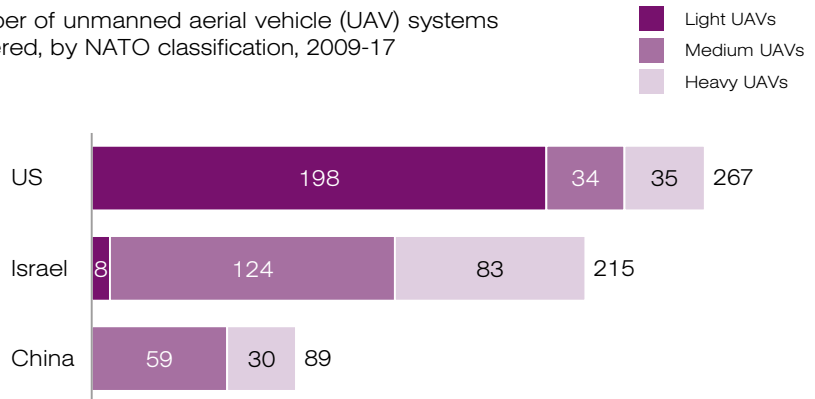
Number of countries with unmanned aerial vehicle (UAV) capabilities, by NATO classification, 2009 and 2019



Source: Center for the Study of the Drone at Bard College<sup>20</sup>

**DRONE SALES BY MAJOR EXPORTERS**

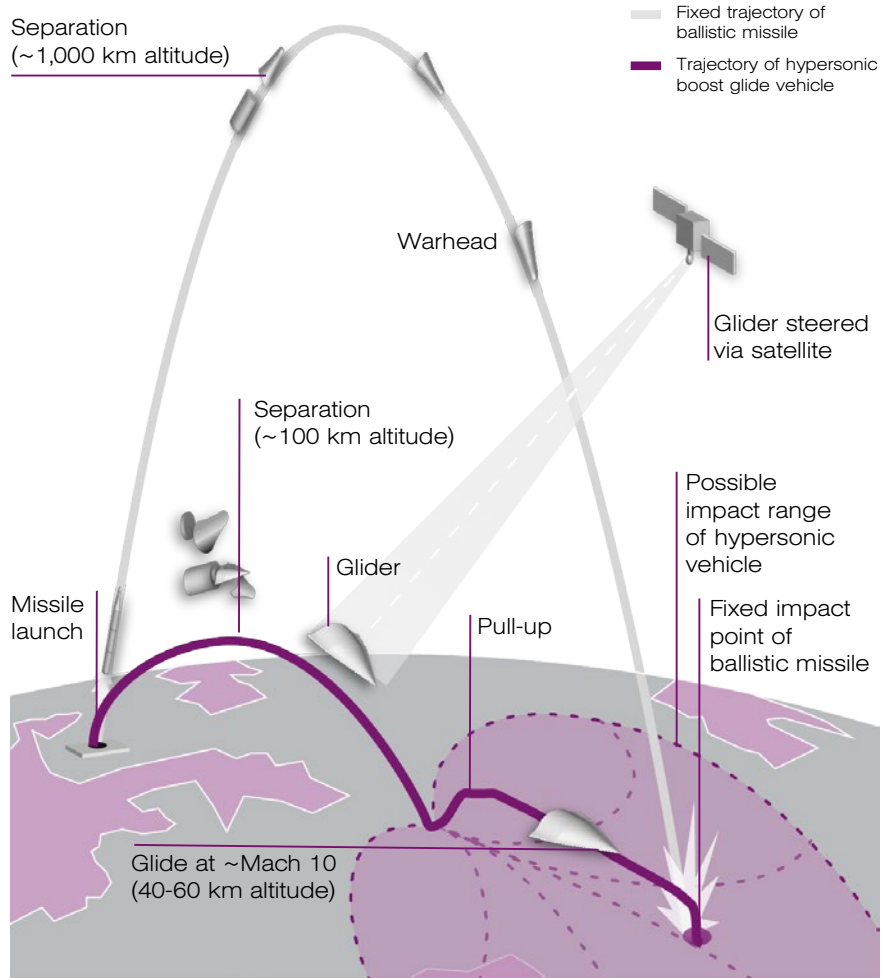
Number of unmanned aerial vehicle (UAV) systems delivered, by NATO classification, 2009-17



Source: Munich Security Conference, based on Stockholm Peace Research Institute (SIPRI)<sup>21</sup>



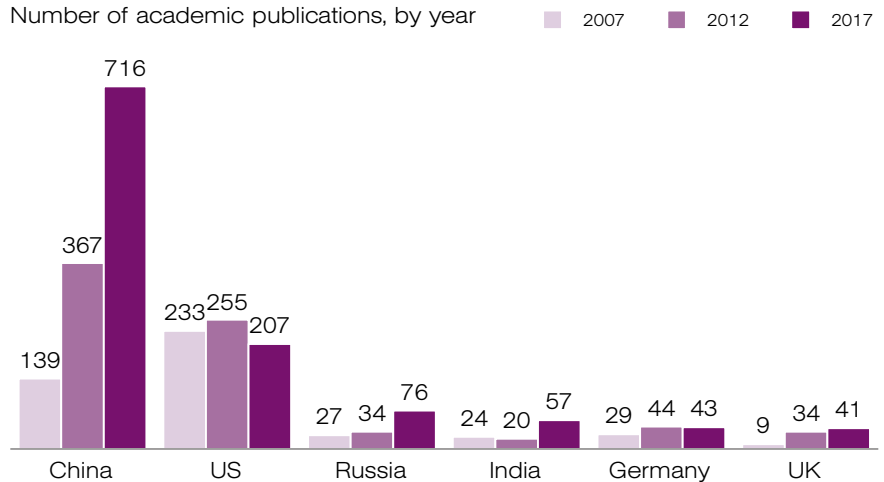
### HYPERSONIC VEHICLES AND BALLISTIC MISSILES IN COMPARISON



Source: German Aerospace Center (DLR)<sup>22</sup>

### LEADERSHIP IN RESEARCH ON HYPERSONIC TECHNOLOGIES

Number of academic publications, by year



Source: RAND Corporation, based on Scopus data<sup>23</sup>



# Trade: Tariffic Prospects

“When a country (USA) is losing many billions of dollars on trade with virtually every country it does business with, trade wars are good, and easy to win.”<sup>16</sup>

**DONALD TRUMP,**  
2 MARCH 2018

At their inaugural summit in 2008, G20 leaders underscored the “critical importance of rejecting protectionism” and vowed to uphold the principle of free trade going forward.<sup>1</sup> However, “covert protectionism” has been common practice for years, with governments exploiting loopholes in existing World Trade Organization (WTO) rules.<sup>2</sup> Over the past decade, economists have observed a steady increase of such trade-distorting policies, of which subsidies – rather than tariffs – are the preferred instrument to protect domestic industry.<sup>3</sup> Lately, these underlying trade tensions have burst into the open, embodied by US President Donald Trump’s repeated threats to impose tariffs on friends and foes alike, reminding pundits of the destructive protectionist policies of the 1930s.<sup>4</sup> As an increasing number of leaders around the globe fantasize about economic autarky, *The Economist* concluded: “The world trade system is under attack.”<sup>5</sup>

In particular, the WTO is struggling to hold its own. The current US administration deems the body incapable of dealing with shortcomings of the global trade system, in particular citing Chinese trade practices as unfair to US business interests.<sup>6</sup> For years, the United States and other nations have been criticizing what former WTO Director-General Pascal Lamy labeled an “opaque, trade-distorting subsidization” of China’s own economy.<sup>7</sup> Rather than doubling down on multilateral solutions, Washington exhibits belligerence towards the WTO, thereby undermining some of the best available tools to settle these trade disputes.<sup>8</sup>

“History shows that, while it is tempting to sail alone, countries must resist the siren call of self-sufficiency – because as the Greek legends tell us, that leads to shipwreck. [...] We need to fix the system, not destroy it.”<sup>17</sup>

**CHRISTINE LAGARDE,**  
1 OCTOBER 2018

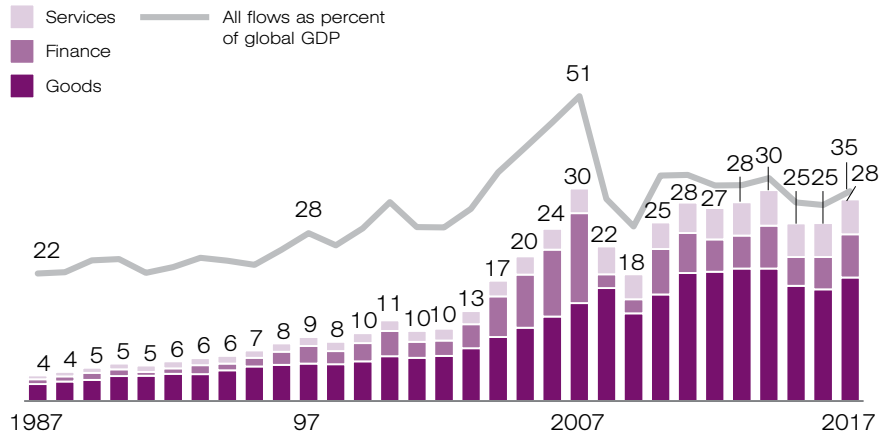
Yet, the Sino-American skirmish goes far beyond trade, as national security concerns increasingly shape the agenda.<sup>9</sup> Indeed, the new attitude emerging in Washington views Beijing as deliberately trying to push the United States back, thus requiring a strong American response towards “its most dynamic and formidable competitor in modern history.”<sup>10</sup> All things considered, demanding reforms and threatening to withdraw from the WTO can be seen as part of Washington’s new approach to address China’s rise before it becomes too powerful to contain.<sup>11</sup> In fact, economic interdependence aside, analysts discern that there are few factors that “compel the two countries to exercise mutual restraint,” spelling possibly more trouble in the future.<sup>12</sup>

Even though looming trade wars dominated last year’s headlines, 2018 also saw unprecedented steps in creating some of the world’s largest trading blocs to date. With the United States on the sidelines, 11 Pacific littoral states concluded the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, which will bolster rules-based trade in Asia and beyond.<sup>13</sup> Likewise, the EU and Japan forged an unprecedented free trade agreement, which European Council President Donald Tusk dubbed a “clear message” against protectionism.<sup>14</sup> This was matched by an African Union initiative establishing the African Continental Free Trade Area, which – once ratified by its 55 member countries – would comprise more than 1.2 billion people.<sup>15</sup> 2019 will tell whether these agreements will enhance further trade liberalization or, by contrast, divide the globe even further into competing trade regions.



**EVOLUTION OF GLOBAL TRADE FLOWS**

Flows of goods, services, and finance, 1987-2017, USD trillions, nominal

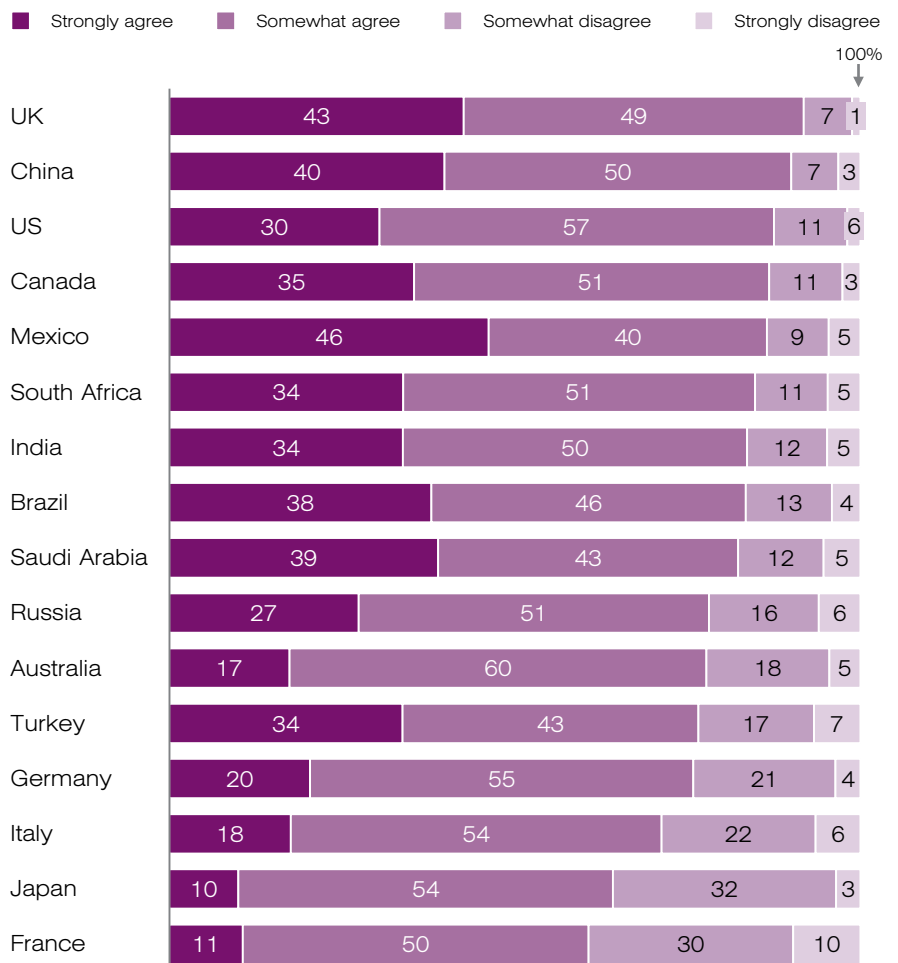


Source: McKinsey Global Institute, based on IMF and WTO<sup>18</sup>

McKinsey&Company

**WHAT CITIZENS IN SELECTED COUNTRIES THINK: IS FREE TRADE BENEFICIAL TO MY COUNTRY'S ECONOMY?**

Opinion poll, November 2018, percent



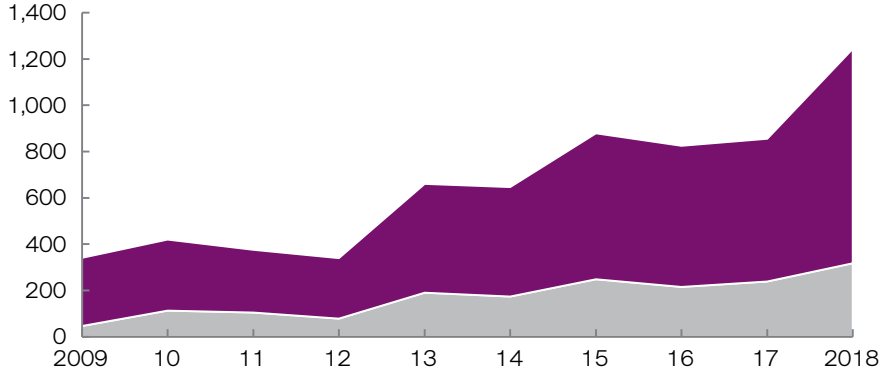
Source: IPSOS<sup>19</sup>



**TRADE INTERVENTIONS SINCE THE GREAT RECESSION**

Number of initiatives implemented by WTO members, 2009-18

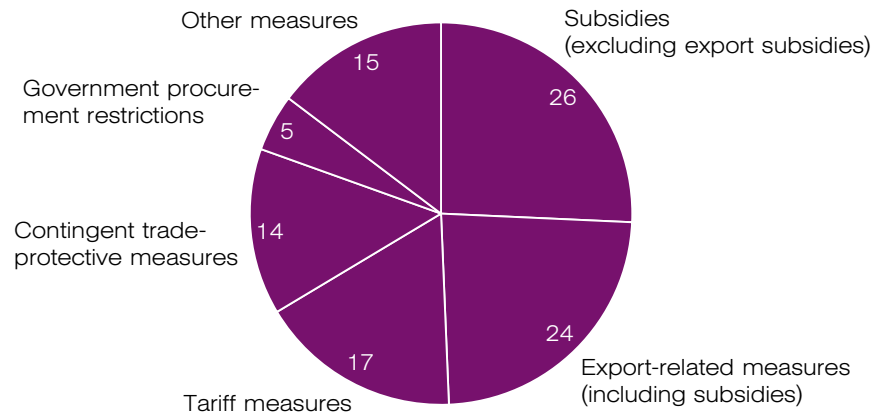
■ Harmful  
■ Liberalizing



Source: Global Trade Alert<sup>20</sup>

**POLICY INSTRUMENTS MOST USED TO DISTORT TRADE**

Share of trade policy measures used by WTO members, 2009-18, percent

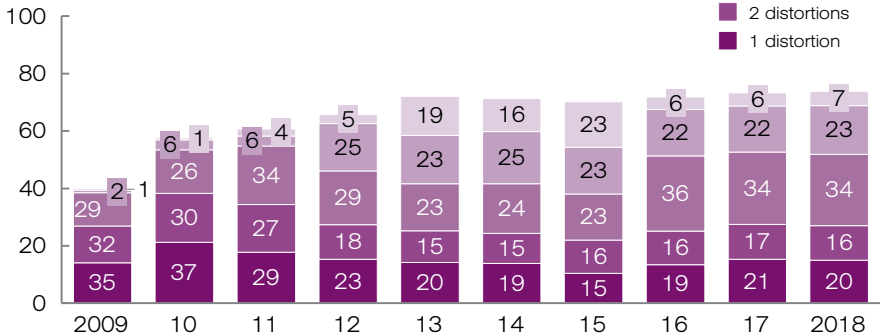


Source: Global Trade Alert<sup>21</sup>

**SHARE OF GLOBAL EXPORTS AFFECTED BY TRADE DISTORTIONS**

Number of trade distortions faced, 2009-18, percent of global exports affected

■ 11+ distortions  
■ 6-10 distortions  
■ 3-5 distortions  
■ 2 distortions  
■ 1 distortion



Source: Global Trade Alert<sup>22</sup>



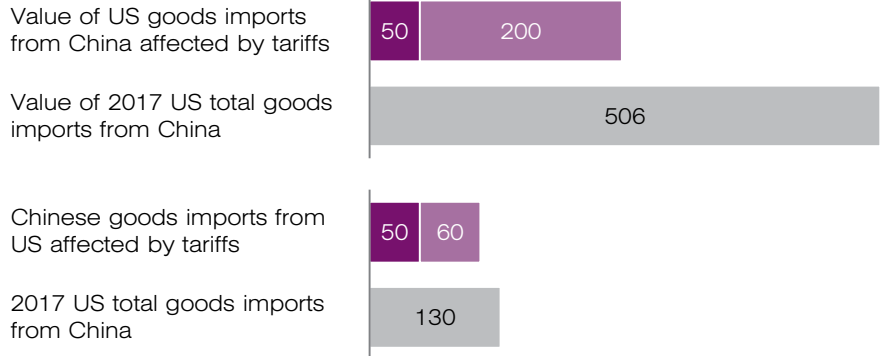




**TRADE AFFECTED BY TARIFFS IN THE US-CHINA TRADE DISPUTE**

Goods imports, based on 2017 values, USD billions

■ Tariffs applied 15 June 2018  
 ■ Tariffs applied 24 September 2018  
 ■ Total goods imports 2017

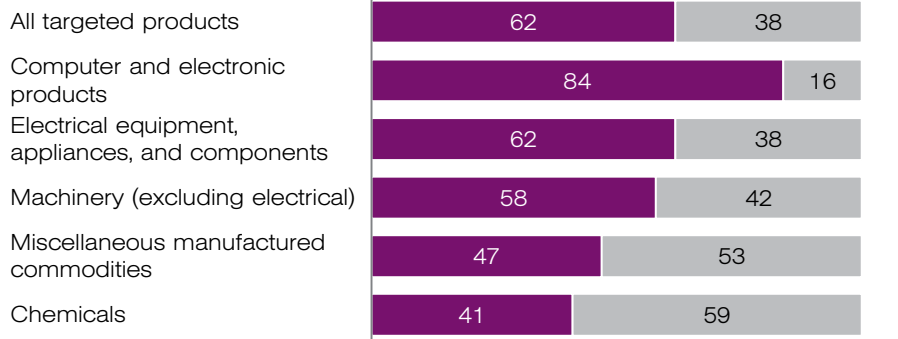


Source: Munich Security Conference, based on Bloomberg and US Census Bureau<sup>23</sup>

**US TARIFFS ON CHINESE AND NON-CHINESE FIRMS PRODUCING IN CHINA**

Share of targeted US imports from China, 2017, percent

■ Non-Chinese multinational corporations  
 ■ Domestic Chinese firms

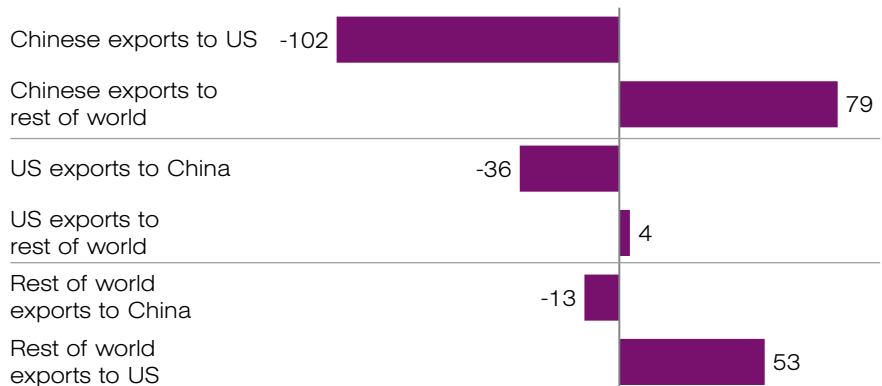


Source: Peterson Institute for International Economics<sup>24</sup>



**LONG-TERM ECONOMIC IMPACT OF THE US-CHINA TRADE DISPUTE**

Simulated changes in total export volume, 2011 base year, USD billions



Source: Oxford Economics, based on GTAP simulation<sup>25</sup>





# Transnational Organized Crime: The Smuggle Is Real

“As societies globally become more interconnected and international in outlook, organized crime is now also more connected and internationally active than ever before.”<sup>17</sup>

**CATHERINE DE BOLLE,**  
3 DECEMBER 2018

“[C]riminal threats share a common denominator: the dire effects they have on our public security, long-term stability, economic systems and governance structures; ultimately stifling economic development and depriving society of a better future.”<sup>18</sup>

**JÜRGEN STOCK,**  
26 NOVEMBER 2018

“[T]errorism is ever more interlinked with international organized crime and the trafficking of people, drugs, arms and corruption.”<sup>19</sup>

**ANTÓNIO GUTERRES,**  
25 SEPTEMBER 2018

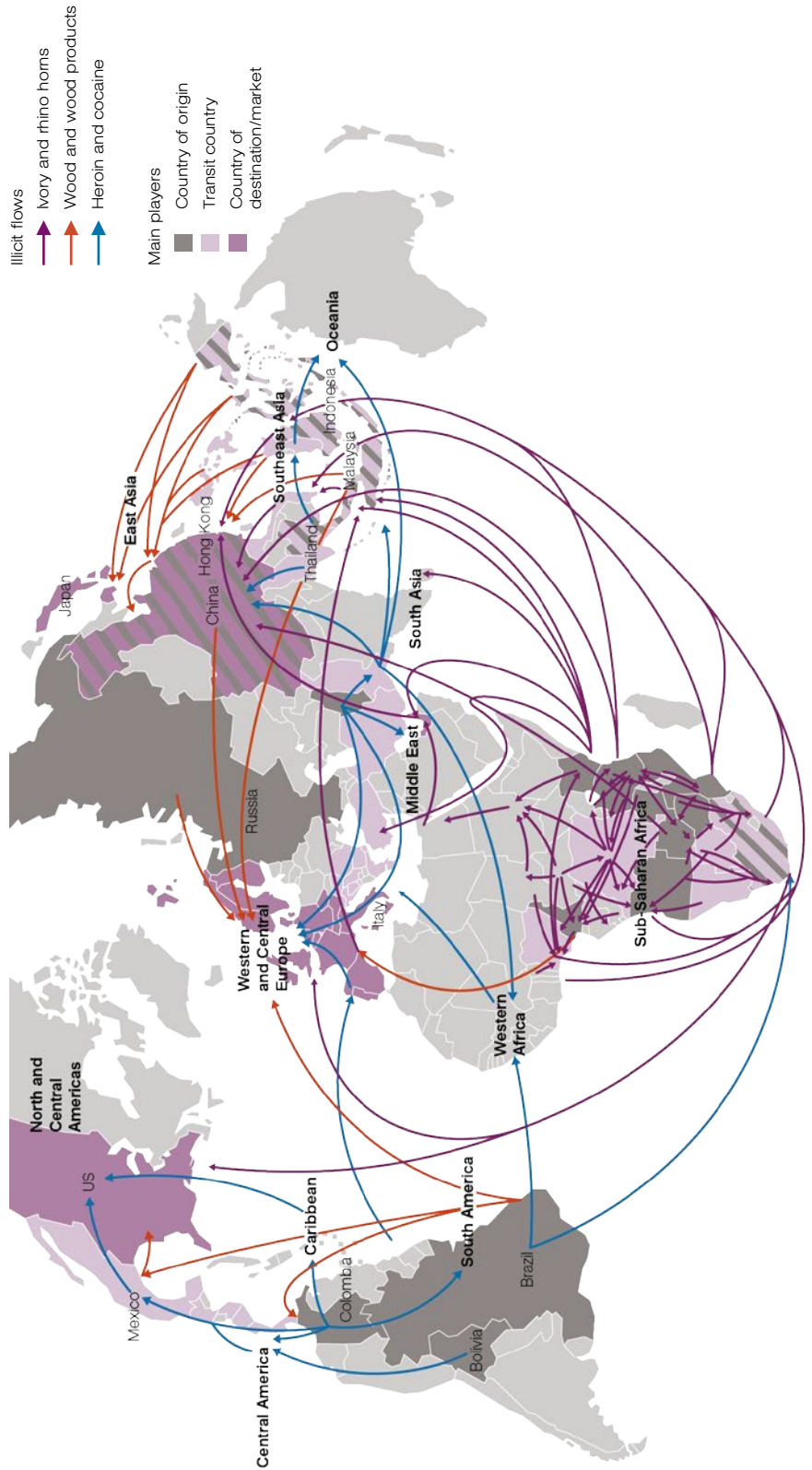
Globalization has been good for crime: the eased flow of money, goods, and people allows criminal networks to operate across the world. While its precise extent is difficult to quantify – criminals do not report their income – estimates put the annual value of transnational crime at USD 1.6 to 2.2 trillion.<sup>1</sup> These proceeds come at a massive human cost: in 2017, the number of homicides in Mexico – a hotspot for drug smuggling – rose to 29,168, with 75 percent of these deaths related to organized crime.<sup>2</sup> Meanwhile, an estimated 49,000 people in the United States died of overdoses involving opioids largely sourced from Afghanistan and China.<sup>3</sup> To put these numbers into perspective: the Syrian war claimed 39,000 victims that same year.<sup>4</sup>

Transnational organized crime (TOC) is a major force in the emergence and continuation of armed conflict.<sup>5</sup> Not only do TOC groups employ tactics as violent as those in Mexico, but other armed groups – including ideologically motivated ones – also use criminal tactics to sustain themselves: at its height, ISIS smuggled vast amounts of oil from Syria into neighboring countries.<sup>6</sup> TOC further undermines human security by putting a strain on already scarce resources, for example, through illegal fishing.<sup>7</sup> Moreover, it weakens state structures by fostering corruption, tying up funds in law enforcement needed for other public services, and depriving the state of tax and customs revenues.<sup>8</sup> As a result, TOC poses a major obstacle to development.<sup>9</sup>

The Internet has become the latest criminal sphere, boosting existing types of crime and creating entirely new ones, such as ransomware.<sup>10</sup> Estimates put the yearly cost of cybercrime at close to USD 600 billion.<sup>11</sup> Anonymity, speed, and connectivity make the Internet, and the Dark Net in particular, a perfect vehicle for TOC. This is also of increasing interest to nation states, such as North Korea, that use criminals as proxies or employ criminal tactics themselves in order to raise funds.<sup>12</sup>

The variety and sheer volume of illicit flows – be it drugs, antiquities, or even people – are an enormous challenge to law enforcement. Moreover, combating TOC groups requires major cross-border cooperation because these groups increasingly resemble loose global networks rather than hierarchical mafia-like structures.<sup>13</sup> International operations against TOC can be successful, as the near-eradication of piracy off the coast of Somalia has shown.<sup>14</sup> However, they rarely address the root causes of criminal behavior, such as economic hardship, and thus risk having at best temporary success. Emblematically, the Taliban largely fund themselves with proceeds from heroin production and trade. Yet efforts to eradicate Afghan poppy fields – the lifeline of local farmers – alienated the population and, consequently, failed.<sup>15</sup> Many experts thus call for comprehensive harm reduction policies rather than purely militarized responses to combating TOC.<sup>16</sup> One thing is clear: where there is demand, supply will follow. Decision makers will have to address both sides of this equation.

# SELECTED TRANSNATIONAL SMUGGLING NETWORKS

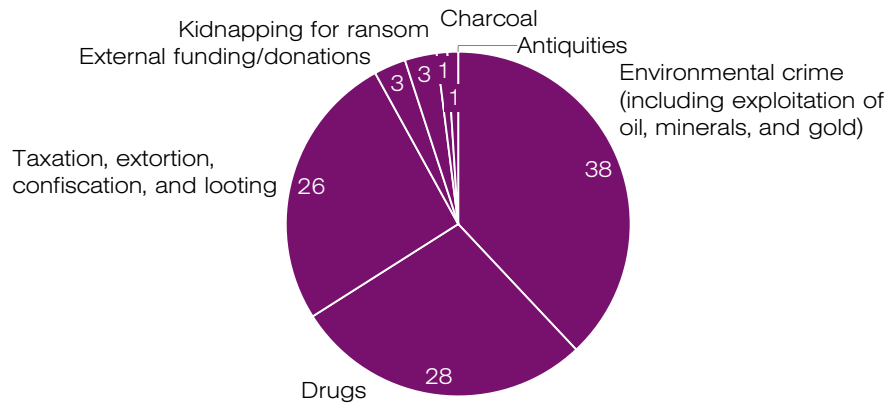


Source: Adapted from a map produced by RHIPTO Norwegian Center for Global Analyses<sup>20</sup>



**HOW MAJOR NON-STATE ARMED GROUPS FINANCE THEMSELVES**

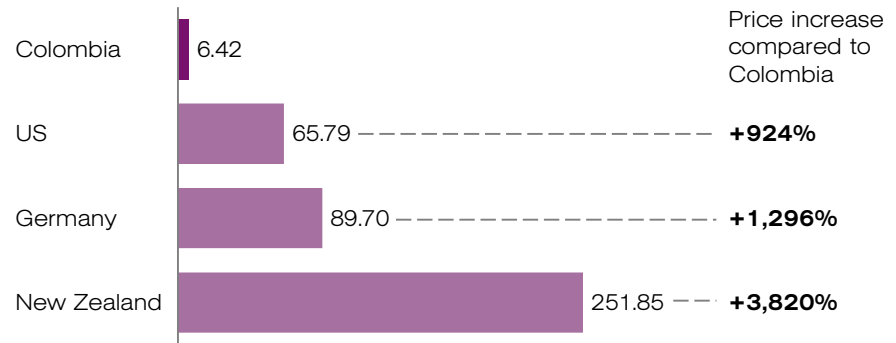
Types of illicit flows used for financing, 2018, percent



Source: RHIPTO<sup>21</sup>

**HOW PROFITABLE IS COCAINE?**

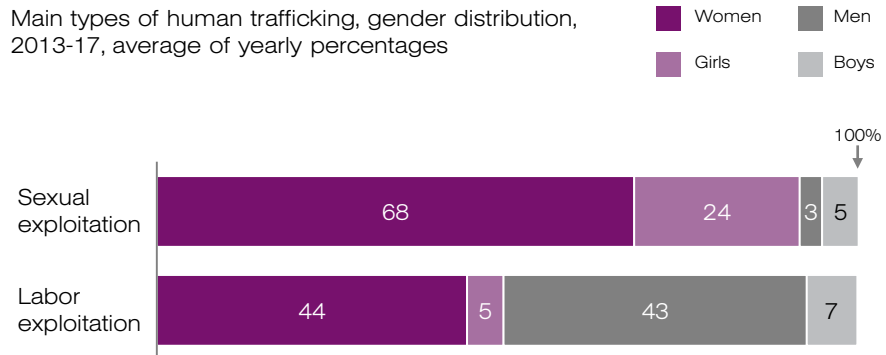
Retail price of one gram of cocaine by country, 2017, USD



Source: Munich Security Conference based on Global Drug Survey<sup>22</sup>

**WHO IS BEING TRAFFICKED FOR WHAT PURPOSE?**

Main types of human trafficking, gender distribution, 2013-17, average of yearly percentages

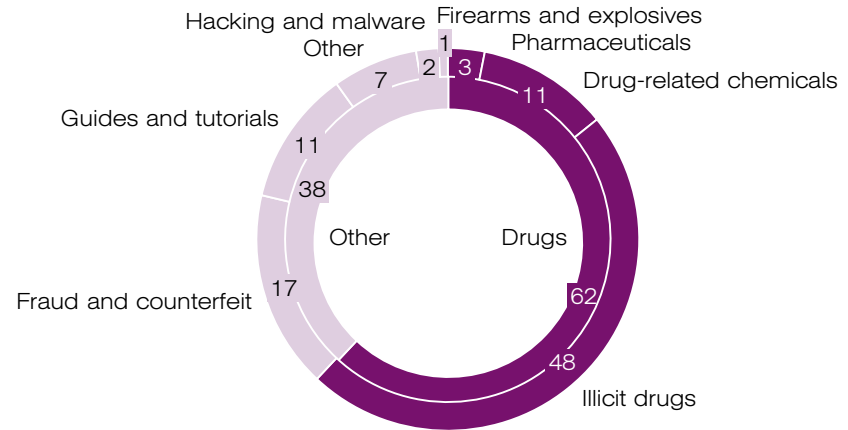


Source: Counter-Trafficking Data Collaborative<sup>23</sup>



**WHAT IS BEING SOLD ON THE DARK NET?**

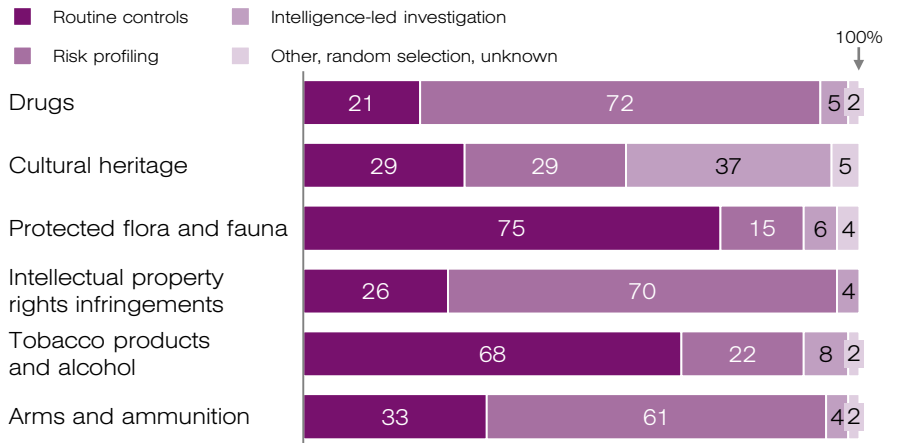
Goods sold on main Dark Net platforms, 2013-17, percent



Source: United Nations Office on Drugs and Crime; based on European Monitoring Centre for Drugs and Drug Addicts<sup>24</sup>

**HOW ARE SMUGGLED GOODS BEING DETECTED?**

Detection method by type of smuggled goods, 2017



Source: World Customs Organization<sup>25</sup>

**NORTH KOREA'S ILLICIT ACTIVITIES**

In 2018, North Korean hackers attempted to steal **USD 110 million** from Bancomex in Mexico

An estimated **100,000** North Koreans are forced to work abroad for the regime

North Korea allegedly sponsored the 2017 WannaCry ransomware attack that affected more than **300,000** computers in **150** countries

North Korea makes an estimated **USD 100 million** per year from counterfeit cigarette production and trade

**Key figures on North Korea's illicit activities**

Source: Center for Advanced Defense Studies; International Affairs Review; BBC; Bloomberg<sup>26</sup>



# Artificial Intelligence: Smarter Than You Think?

After decades of slow and uneven progress, artificial intelligence (AI) is once again top of mind among practitioners and researchers alike, as an increase in cheap computing power and ubiquitous data have contributed to key advances, e.g., in machine learning. Among the signs of a new “AI spring” are investments in AI at record levels, with more than USD 50 billion invested in AI-related companies in 2018 alone, twice the volume of investments made in 2017.

Several nations have made AI a strategic priority. The United States and China are leading investment in AI, with a second group of countries including Canada, Japan, Germany, and the United Kingdom following behind, albeit with a significant gap. Key enablers of AI-driven economic growth, such as investment and research, digital absorption, connectedness, and labor market structure, differ strongly by country – and will determine who will lead AI in the future.<sup>1</sup> Some countries with an underdeveloped digital infrastructure are likely to fall behind, creating significant digital inequalities that could have implications for the geopolitical balance for decades to come.<sup>2</sup>

In the past, defense was at the forefront of early AI developments. Today, the sector can also and must build on the progress of AI in the civilian world, where applications are wide-ranging and offer dual-use capabilities. Engagement with nontraditional players, as exemplified by the rise of digital-related defense innovation hubs, is increasing. Armed forces stand to be transformed significantly by AI, notably through the technology’s support of automated decision making and autonomy, responding to but at the same time driving the ever-increasing pace of armed conflict. AI also allows for entirely new military capabilities, such as swarm robotics. However, it also affects the operating model of armed forces themselves: AI will enable better logistical planning, more effective operations, and better training. One analysis suggests, for example, that nearly 40 percent of the tasks performed by uniformed active duty personnel in the US armed forces could be automated, equating to roughly 500,000 jobs.<sup>3</sup>

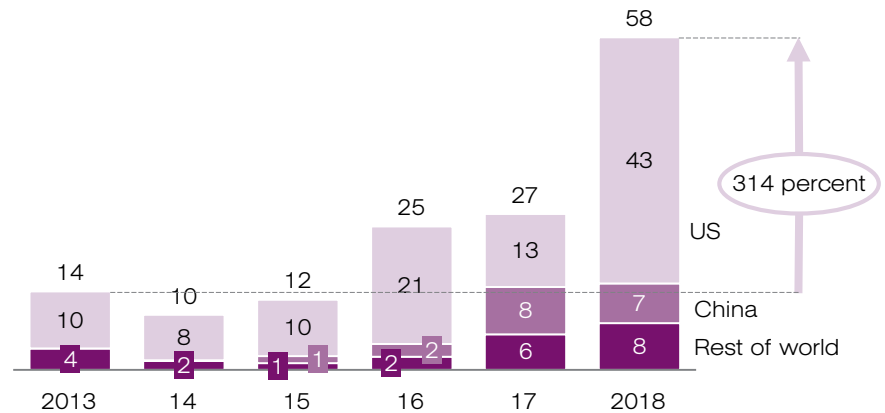
The inherent characteristics of AI – its reliance on software and algorithms rather than hardware, and its dual-use capabilities – are challenging the traditional notion of “arms control”. While the global availability of AI-enabled systems is a likely prospect, the arms control debate will need to focus on finding universal, internationally agreed-upon rules on the limits of applying AI-enabled autonomy, like a requirement of human involvement (human in/on the loop or meaningful human control) in the most critical applications. As condemning all potential use cases of AI in the military, ranging from recruiting all the way to fully autonomous systems, will not be likely, arms control in AI will have to focus on specific problematic use cases.<sup>4</sup>

**This page was prepared by the MSC’s knowledge partner McKinsey & Company.**



**INVESTMENTS IN ARTIFICIAL INTELLIGENCE BY THE UNITED STATES, CHINA, AND THE REST OF THE WORLD IN COMPARISON**

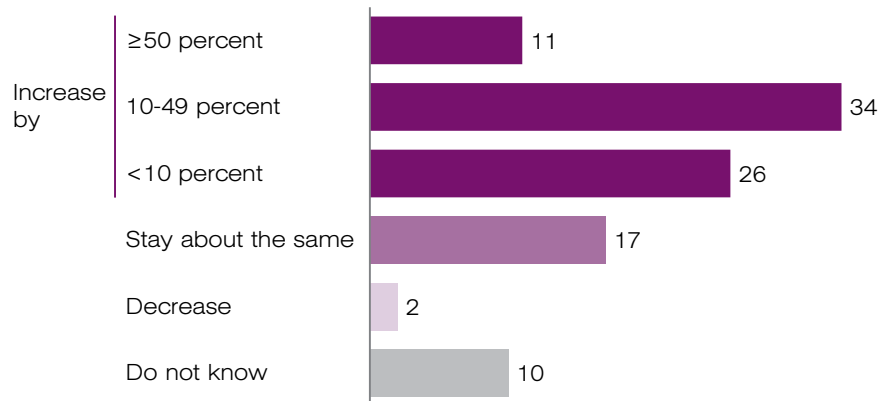
Total investment in artificial intelligence-related companies, 2013-18, USD billions



Source: McKinsey SILA, based on PitchBook Data, Inc.<sup>5</sup>

**WHAT TOP EXECUTIVES THINK: HOW DO YOU EXPECT YOUR ORGANIZATION'S INVESTMENT LEVEL IN ARTIFICIAL INTELLIGENCE TO CHANGE, IF AT ALL, OVER THE NEXT THREE YEARS?**

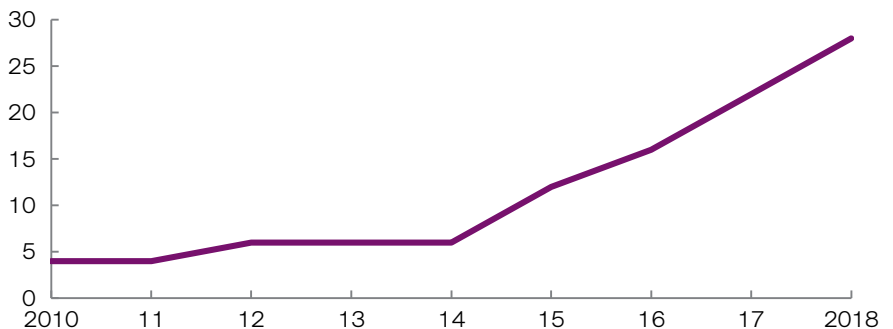
Opinion poll, February 2018, percent



Source: McKinsey Global Survey on Artificial Intelligence<sup>6</sup>

**MILITARIES AND MINISTRIES OF DEFENSE INCREASE ENGAGEMENT WITH INDUSTRY AND START-UPS ON INNOVATION**

Number of (digital-related) defense innovation hubs in NATO and EU countries, 2010-18



This page was prepared by the MSC's knowledge partner

**McKinsey&Company**

Source: McKinsey<sup>7</sup>







# Food for Thought





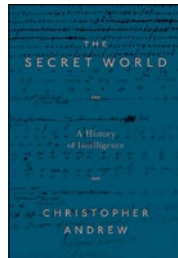
## Books



### MADELEINE ALBRIGHT: **Fascism**

#### A Warning

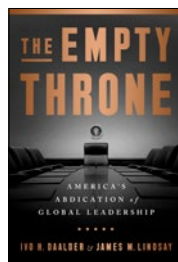
Drawing on personal anecdotes, the former US Secretary of State identifies political and social chaos, a divided and weak opposition, as well as compliant conservatives as historical drivers of fascism. Albright compares the historical view to current developments, cautioning against a reemergence of fascist thought in Western political culture.<sup>1</sup>



### CHRISTOPHER ANDREW: **The Secret World**

#### A History of Intelligence

Leading intelligence expert Andrew provides a comprehensive overview of the role of intelligence in history until now. His book offers valuable insights into a world that is usually concealed, raising the question of how intelligence has shaped major historical events such as the World Wars.<sup>2</sup>



### IVO DAALDER, JAMES LINDSAY: **The Empty Throne**

#### America's Abdication of Global Leadership

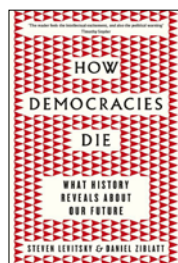
Daalder and Lindsay argue that the "America First" strategy is in fact endangering rather than enhancing long-term security and prosperity of the United States. By backtracking from global leadership, the US has given up its position as the main rule maker in a rules-based international order, ultimately only benefiting its adversaries.<sup>3</sup>



### ELIZABETH ECONOMY: **The Third Revolution**

#### Xi Jinping and the New Chinese State

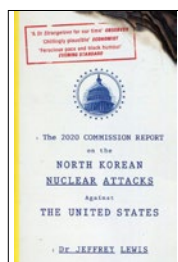
This book is an essential read to understand the profound political changes and reform efforts in China under Xi Jinping's leadership. Economy describes a growing domestic authoritarianism and a more ambitious foreign policy. She assesses China's future trajectory and moves beyond the apparent contradictions in Beijing's policy priorities.<sup>4</sup>



### STEVEN LEVITSKY, DANIEL ZIBLATT: **How**

#### Democracies Die

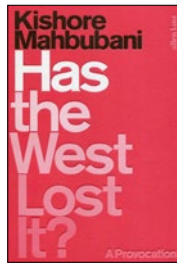
Drawing on historical examples, Levitsky and Ziblatt show that democracies tend to die in a gradual process that involves the steady weakening of critical institutions and the erosion of norms. They highlight the current dangers to Western democracy and identify possible pathways to counter the present rise of authoritarianism.<sup>5</sup>



### JEFFREY LEWIS: **The 2020 Commission Report on the North Korean Nuclear Attacks Against the United States**

#### A Speculative Novel

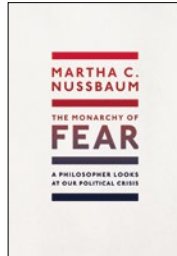
In his fictitious report, Lewis describes what a nuclear war between the United States and North Korea could look like based on current capabilities. Given current political tensions, this novel is an important warning of the dangers of misunderstanding the North Korean regime and poor communication within the US government.<sup>6</sup>



### **KISHORE MAHBUBANI: Has the West Lost It?**

#### **A Provocation**

Mahbubani challenges the West to rethink its alleged belief that it can only thrive by dominating others. Examining what he considers the biggest mistakes of the West, he proposes a minimalist and multilateral approach that focuses on long-term peace and stability in order to allow the West to maintain a key geopolitical role.<sup>7</sup>



### **MARTHA NUSSBAUM: The Monarchy of Fear**

#### **A Philosopher Looks at Our Political Crisis**

Nussbaum argues that “the political is always emotional.” According to her, the increasing exploitation of fear for political gain can currently be witnessed across the political spectrum in the United States. She offers a convincing roadmap to counter the dangerous development of politics becoming a blame game.<sup>8</sup>



### **BRUCE SCHNEIER: Click Here to Kill Everybody**

#### **Security and Survival in a Hyper-connected World**

This book provides a profound assessment of the hyper-connected world we live in, describing the still underestimated cybersecurity threats and the destructive power wielded by hackers. Schneier argues that today’s policymakers need to have a thorough understanding of technology and that technologists should be involved in policymaking.<sup>9</sup>



### **LOUISE I. SHELLEY: Dark Commerce**

#### **How a New Illicit Economy Is Threatening Our Future**

Technology has fundamentally changed illicit trade. Leading transnational crime expert Shelley uncovers how this has dramatically increased the destabilizing effects of the illicit economy on human security – from intensifying conflicts to spreading arms and contributing to environmental degradation.<sup>10</sup>



### **PETER SINGER, EMERSON BROOKING: LikeWar**

#### **The Weaponization of Social Media**

Social media has already become a weapon of war, and its use in this capacity is being perfected by several players – from presidents to terrorist groups. Singer and Brooking outline social media’s growing influence on policy, news, and war, and show how “likes” have become crucial to advancing one’s political agenda.<sup>11</sup>



### **REID WILSON: Epidemic**

#### **Ebola and the Global Scramble to Prevent the Next Killer Outbreak**

The Ebola outbreak from 2013 to 2016 took more than 11,000 lives, showing how unprepared the international health community was to deal with such a global catastrophe. Wilson calls for thorough reform to be better prepared for future epidemics, which could otherwise turn into pandemics threatening the lives of millions.<sup>12</sup>

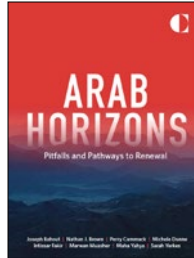


# Reports



## BILL & MELINDA GATES FOUNDATION: **Goalkeepers: The Stories Behind the Data**

The Bill and Melinda Gates Foundation's second Goalkeeper Report presents key findings regarding challenges to and prospects of international development politics. With a particular focus on family planning, HIV, education, and agriculture, the report covers a range of issues and offers policy recommendations.<sup>1</sup>



## CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE: **Arab Horizons: Pitfalls and Pathways to Renewal**

Assessing the unparalleled challenges which the Arab Middle East currently faces, the authors examine five specific issues – regional conflicts, political economy, education, refugees, and governance. They advocate the creation of a renewed policy framework to address these challenges.<sup>2</sup>



## CENTRE FOR EAST EUROPEAN AND INTERNATIONAL STUDIES (ZOIS): **Youth in Russia: Outlook on Life and Political Attitudes**

Based on recent survey results, this report provides insights on political attitudes of Russian youth – a group which, according to the report, could pose a “medium-term challenge to the regime” if their expectations on socioeconomic aspects are not addressed.<sup>3</sup>



## MERCATOR INSTITUTE FOR CHINA STUDIES (MERICS): **Guardians of the Belt and Road: The Internationalization of China's Private Security Companies**

Through the Belt and Road Initiative, China substantially expanded its global presence, while relying mostly on private security companies to protect Chinese companies and citizens abroad. Assessing the implications of this approach, this report elaborates new rules to regulate such companies' activities.<sup>4</sup>



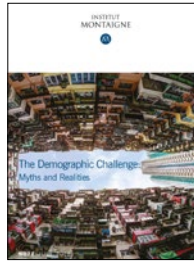
## GERMAN INSTITUTE FOR INTERNATIONAL AND SECURITY AFFAIRS (SWP): **While We Were Planning. Unexpected Developments in International Politics**

In the face of recent, rather unexpected events in international politics, this report explores the consequences of plausible future scenarios, from a nuclear-armed South Korea to Turkey leaving NATO, thus challenging previous assumptions to help prepare for uncertain times.<sup>5</sup>



## GLOBSEC POLICY INSTITUTE: **GLOBSEC Trends 2018. Central Europe: One Region, Different Perspectives**

Based on recent public opinion polls carried out in the Czech Republic, Hungary, Poland, and Slovakia, this GLOBSEC report presents an overview of political trends in the region. The report notably shines a light on the question of belonging with respect to Eastern and Western alliances.<sup>6</sup>



### INSTITUT MONTAIGNE: **The Demographic Challenge: Myths and Realities**

According to a broad conceptualization of demography, this issue relates to the most essential societal questions affecting resources, growth, and education. This report evaluates the challenges and geopolitical implications of the current, unparalleled population increase by providing a thought-provoking and balanced analysis.<sup>7</sup>



### ISTITUTO AFFARI INTERNAZIONALI (WITH IRIS, ELIAMEP, FOI, PISM, RUSI): **Boosting Defense Cooperation in Europe: An Analysis of Key Military Capabilities**

Part of the Europe-wide Permanent Monitoring and Analysis project, this report provides an insightful overview of European military resources and concrete numbers on the expenditures, capabilities, and cooperation of 31 European countries in four key areas.<sup>8</sup>



### THE INTERNATIONAL INSTITUTE FOR STRATEGIC STUDIES/GERMAN COUNCIL ON FOREIGN RELATIONS (DGAP): **Protecting Europe: Meeting the EU's Level of Ambition in the Context of Brexit**

The impact of the Brexit referendum on Europe's defense capabilities is far-reaching. This report analyzes the question of whether the EU will be able to live up to its own military ambitions, arguing that prospects are currently slim.<sup>9</sup>



### UNITED NATIONS OFFICE ON DRUGS AND CRIME: **World Drug Report 2018**

This report presents a comprehensive overview of current trends regarding the international drug market, including implications for drug consumers and producers. Given the issues' increasing complexity, the report calls on the international community for renewed commitments to combat these challenges.<sup>10</sup>



### WORLD BANK GROUP: **Groundswell: Preparing for Internal Climate Change**

Focusing on specific regions and country contexts, this World Bank report presents a comprehensive picture of the severe consequences that climate change and its implications will likely have with respect to internal migration, assessing three plausible future scenarios and their implications.<sup>11</sup>



### STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE: **Opposing Trends: The Renewed Salience of Nuclear Weapons and Nuclear Abolitionism**

Lately, nuclear weapons have received renewed attention. While some states increasingly bank on nuclear deterrence, others have highlighted the necessity of disarmament. To bridge this divide, this paper argues that policy makers' focus should shift to the shared goal of reducing nuclear threats.<sup>12</sup>







# Acknowledgments

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# Endnotes

Please note that all links were last checked on 23 January 2019. All quotes in British English have been changed to American English. Note that deviations from 100 percent in visualized data are due to rounding.

## The Great Puzzle: Who Will Pick Up the Pieces?

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## Regions

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25. See endnote 23.
26. See endnote 23.
27. See endnote 23.

### The Sahel: Traffick Jam

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for informational purposes only and should not be considered official designations. Due to the fluid nature of many groups, the listed affiliations may change. Note that Jama'at Nusrat al Islam wal Muslimeen (JNIM) is a coalition of the following militant Islamist groups, founded in March 2017 and led by the leader of Ansar Dine, Iyad Ag Ghaly: Ansar Dine, Azawad (MNLA), Macina Liberation Front (FLM), Katiba Serma, AQIM Sahara (a.k.a. al Furqan Battalion) and Al Mourabitoun.

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### Armament: A Hello to Arms

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5. Illustration provided to the Munich Security Conference by McKinsey SILA, based on data by PitchBook Data, Inc. Note that analysis includes venture capital, private equity, corporate/strategic mergers and acquisitions (M&A), initial public offering/liquidity, acquisitions financing, assets acquisition, corporate divestiture, leveraged recapitalization, and secondary transactions (open market and private). AI-related investments as defined by PitchBook Data, Inc. categorization. Israel's increase in investment in 2017 caused by Mobileye's M&A for USD 15.3 billion was excluded.



6. Illustration provided to the Munich Security Conference by McKinsey Global Survey. Note that the online survey was in the field from 6 to 16 February 2018, and garnered responses from 2,135 participants representing a wide range of regions, industries, company sizes, functional specialties, and tenures. To adjust for differences in response rates, the data are weighted by the contribution of each respondent's country to global GDP. Countries covered are: North America: United States and Canada; Asia: China, Japan, Singapore, Republic of Korea; Europe: Armenia, Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Macedonia, Malta, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom.
7. Illustration provided to the Munich Security Conference by McKinsey. Note that a "defense innovation hub" is defined as fulfilling the following criteria: government-founded, defense topics in focus, covers digital or related innovation topics, has active links to companies and start-ups, is not a purely internal program, has a cooperative and "hub" character, with focus on more mature solutions and not "basic" research. Each location is counted separately.

## Food for Thought

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