

Munich Security Report 2020

Westlessness





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Foreword

Dear Reader,

As a prelude to the 56th Munich Security Conference, I am delighted to present the Munich Security Report in its sixth edition. Once again, the report will serve as a conversation starter for our flagship event. It has become, much to our satisfaction, a go-to resource for security professionals and the interested public around the globe. A unique collection of insights and analyses, building on some of the best research in the field, it sheds light on major developments in and critical challenges to international security.

In 2019, concrete security challenges seem to have become inseparable from what some would describe as the decay of the Western project: today, the West as we know it is contested both from within and from without. Part of the challenge is that we have lost a common understanding of what it means to be part of the West. All this occurs against the backdrop of the relative rise of the non-Western world and a mounting number of global challenges and crises that would require a concerted Western response. The 2020 Munich Security Conference will provide a prime opportunity not only for discussing the state of international peace and security but also for revisiting the Western project in particular.

This Munich Security Report sets out to make sense of what we refer to as “Westlessness” and of today’s security environment by presenting a concise analysis of selected actors, regions, and issues on the international security agenda. As with previous editions, this report explicitly covers only selected topics – we do not and cannot claim that those not discussed here are not also important. Rather, we try to highlight a limited sample of actors, regions, and issues of significance, redefining our areas of focus each year. For example, while the report’s 2019 edition placed particular emphasis on middle powers of the “second row,” the 2020 edition returns to examining the United States, China, Russia, and Europe. In addition, we cover developments in key regions from the Mediterranean to the Middle East and South Asia, as well as broader security issues from space and climate to right-wing extremism.

The Munich Security Report 2020, like its predecessors, would not have been possible without the generous support of numerous renowned institutions, friends, and partners who made available their research and data – much of it previously unpublished or updated specifically for this report. I would like to thank them all and wish you an interesting and thought-provoking read!

Sincerely yours,

Ambassador Wolfgang Ischinger
Chairman of the Munich Security Conference



Westlessness

“Let us hold on to the conviction that ‘the West’ is more than a point on the compass!”¹⁴⁴

**FRANK-WALTER
STEINMEIER,**

1 SEPTEMBER 2019

A century ago, Oswald Spengler published his book *The Decline of the West* (“Der Untergang des Abendlandes”), in which he predicted the impending decay and ultimate fall of Western civilization.¹ Today, “the West” is the subject of a new declinist literature, as a cottage industry of politicians, pundits, and public intellectuals has produced speeches, books, reports, and articles discussing the decay of the Western project.²

In the past, the Munich Security Conference (MSC) was often referred to as a kind of “family reunion” of the West. While it has evolved to bring in a much broader spectrum of the international community, it continues to provide a prime opportunity to take the temperature of not just the state of international peace and security in general but of the West in particular. Judging from the reporting on last year’s conference, the West is indeed in serious trouble. The New York Times even labeled the gathering a “requiem for the West.”³ And while the MSC has traditionally been a venue for the coordination of Western policies, in recent years “the focus has shifted to the schisms within the West.”⁴ Those rifts were on full display when Chancellor Angela Merkel and Vice President Mike Pence took to the stage and offered different responses to key challenges – from the future of the Iran deal or the pipeline project Nord Stream 2 to NATO defense spending and transatlantic trade imbalances. To a certain degree, such policy disagreements have always existed, and the Munich Security Conference has been known as a key venue for an open and frank exchange of different views. Today, however, it is evident that something more fundamental is at play. Listening to Merkel and Pence, it appeared that the small and crowded ballroom of the Bayerischer Hof was home to two different worlds. The audience came away with the distinct impression that there was no common understanding of what the West represents.

Far-reaching power shifts in the world and rapid technological change contribute to a sense of anxiety and restlessness. The world is becoming less Western. But more importantly, the West itself may become less Western, too. This is what we call “Westlessness.”

Westlessness in the West

“We cannot ensure the defense of the West if our allies grow dependent on the East.”¹⁴⁵

MIKE PENCE,

16 FEBRUARY 2019

Despite its widespread use as a shorthand for a community of mostly North American and European liberal democracies as well as a normative project, the “West” is a concept that is not always easy to pin down.⁵ The “West” has never been a monolithic concept but rather an amalgam of different traditions, the mix of which changed over time.⁶ Yet, for the past decades, the answer to the question what it was that kept the West together was straightforward: a commitment to liberal democracy and human rights, to a market-based economy, and to international cooperation in international institutions. Today, the meaning of the West is increasingly contested again. We are witnessing “the decay of ‘the West’ as a relatively cohesive geopolitical configuration



SELECTED LEADERS'
COMMENTS ON "THE
WEST" AND THE
INTERNATIONAL ORDER

"We were used to an international order that had been based on Western hegemony since the 18th century [...]. Things change. And they have been deeply affected by the mistakes made by Westerners in certain crises, by American decisions over the last several years which did not start with this administration, but have led us to re-examine certain involvements in conflicts in the Middle East and elsewhere, and to rethink fundamental diplomatic and military strategy and on occasion elements of solidarity which we thought were forever inalienable even though we had developed them together during periods of geopolitical significance, which have however now changed. And it is also the emergence of new powers whose impact we have probably underestimated for far too long."¹⁶⁰

EMMANUEL MACRON,
27 AUGUST 2019

"The West is not a closed entity. I just defined the West largely in terms of certain ideas about society and the role of the individual in these societies. However, it's an open system. If others want to adopt this way of life, we will not turn them away. **What is generally described as the West [...] still exists and is worth continuing to fight for.** However, it does not go unchallenged, and it is thus up to us to show that this system can create prosperity, ideally for all members of a society. We don't always succeed and we see a lot of dissatisfaction, tension, upheaval. This raises the question time and again of what role the individual should play and how their rights should be safeguarded, how the majority sees all this. **We need to face up to this rivalry between systems.**"¹⁶¹

ANGELA MERKEL,
30 MAY 2019

"Our union is based on values. [...] And now that our union has grown and grown older, we, just like every individual, need to remember our most fundamental values. For what would be the ultimate point of our work, the ultimate point of our union, if it did not promote the values we believe in? [...] **Now more than ever it's time to stand up for common, principle-based solutions, and a world order where might does not come before right. But the EU can only be a strong voice for democracy in the world if all of us Member States stand up for the principles of democracy at home.** [...] For every democratic principle that is weakened in the EU, the EU's voice in the world is equally weakened. Therefore, the EU must stand up for our fundamental values."¹⁶²

STEFAN LÖFVÉN,
3 APRIL 2019

"Our globalized, borderless world asks us to be guardians not just for our people, but for all people. There may have been a time when being unified under common challenges was an easier concept than it is today. But undeniably, **we are living in a time where our greater reliance on one another has collided with a period of greater tribalism.** [...] Whether it's class, race, country or coin flipping – there has always been a tendency to form us vs other. But [...] what if we change what 'us' means? If instead of fierce nationalism or self-interest, we seek to form our tribes based on concepts that can and should be universal. What if we no longer see ourselves based on what we look like, what religion we practice, or where we live. But by what we value. Humanity. Kindness."¹⁶³

JACINDA ARDERN,
24 SEPTEMBER 2019



anchoring a normative model of global order in which commitments to human rights, democracy, and the rule of law are central.”⁷

“With the rise of populist nationalist parties, there is an assertion of national identities based on ethnicities again, hostility to immigrants, to outsiders and economic policies based on protectionism. It’s not a threat to ‘democracy’ if democracy simply means majorities for certain policies. It’s a threat more to the liberal order, which are protections through the rule of law, through constitutions that prevent abusive use of political power.”¹⁴⁶

FRANCIS FUKUYAMA,
25 SEPTEMBER 2019

The contemporary “spiritual disunity of the West”⁸ is due to the rise of an illiberal and nationalist camp within the Western world. For this increasingly vocal group, the West is not primarily a community bound by liberal-democratic values and open to everyone sharing these values. Rather, it is a community held together by ethnic, cultural, or religious criteria. Such an understanding of the West distinguishes itself from a liberal or “open” understanding of the West. Proponents of this “closed”⁹ interpretation believe that the (white Christian) West today is threatened by “outsiders” with different religious beliefs or cultural backgrounds. The proponents of this school of thought see Western societies as weak or even suicidal – undermining themselves by societal liberalization, the empowerment of women, and immigration. Their perception that the West is under attack paves the way for what they perceive as legitimate self-defense. In its moderate version, this school of thought calls for walls and borders,¹⁰ the rejection of refugees, or the opposition to political correctness and gender mainstreaming. Radicals such as the leader of the Spanish populist right party Vox, Javier Ortega Smith, attempt to stoke fear of Islam as the main antagonist to the Western way of life: “Our common enemy, the enemy of Europe, the enemy of liberty, the enemy of progress, the enemy of democracy, the enemy of family, the enemy of life, the enemy of the future is an invasion, an Islamic invasion... What we know and understand as civilization is at risk.”¹¹ In its most extreme variant, this stream of thinking has led white nationalists (→ **Right-wing Extremism**) to attack synagogues and mosques in the West – or to kill citizens and politicians with different political beliefs. Drawing on books such as Patrick Buchanan’s “The Death of the West,”¹² right-wing terrorists believe that they are defending “the West” against its enemies.¹³

For sure, only a small minority is willing to use violence to defend its understanding of the West. But more moderate variations of this stream of thinking are represented in most Western political systems these days. In some countries, government representatives regularly make use of similar racist tropes. In Europe, Hungary’s Prime Minister Viktor Orbán has presented himself as a pioneer in leading the opposition to a “liberal” Europe, redefining “Christian democracy” as essentially “illiberal democracy.” At home, this means a defense of traditional family values against “liberal decadence.” Internationally, according to Orbán, illiberal democrats must oppose liberal elites who “are advocating a world without nations again, [who] want open societies, and [who] are fabricating a supranational world government. [...] The stronghold of the new internationalism is Brussels, and its means is immigration.”¹⁴ Orbán and others reject liberal internationalism and advocate a new nationalism that they present as the only way to protect their nations’ sovereignty (while gladly accepting EU money to further their private interests).¹⁵ In this context, a nostalgia-inspired return to homogeneous nation-states becomes a powerful force. As Donald Trump put it in his address to the UN General Assembly in 2019: “The future does not belong to globalists. The future belongs to patriots.”¹⁶

For those defending the long dominant liberal definition of the West, in contrast, it is precisely the rise of illiberalism and the return of nationalism that put the West at risk. For them, it threatens to eat away at the foundations of the West and its collective identity as a community of liberal democracies. Defenders of the “open” West feel less threatened by immigration or societal change but rather



SELECTED LEADERS'
COMMENTS ON "THE
WEST" AND THE
INTERNATIONAL ORDER

"Americans, Poles, and the nations of Europe value individual freedom and sovereignty. **We must work together to confront forces, whether they come from inside or out, from the South or the East, that threaten over time to undermine these values and to erase the bonds of culture, faith and tradition that make us who we are. [...] The fundamental question of our time is whether the West has the will to survive. [...]** We can have the largest economies and the most lethal weapons anywhere on Earth, but if we do not have strong families and strong values, then we will be weak and we will not survive. [...] **Our own fight for the West does not begin on the battlefield – it begins with our minds, our wills, and our souls.** Today, the ties that unite our civilization are no less vital, and demand no less defense, than that bare shred of land on which the hope of Poland once totally rested. Our freedom, our civilization, and our survival depend on these bonds of history, culture, and memory."¹⁶⁴

DONALD J. TRUMP,
6 JULY 2017

"[...] liberal democracy has been transformed into liberal non-democracy. **The situation in the West is that there is liberalism, but there is no democracy.** [...] Liberal democracy is liberal, while Christian democracy is, by definition, not liberal: It is, if you like, illiberal. And we can specifically say this in connection with a few important issues – say, three great issues. Liberal democracy is in favour of multiculturalism, while Christian democracy gives priority to Christian culture; this is an illiberal concept. Liberal democracy is pro-immigration, while Christian democracy is anti-immigration; this is again a genuinely illiberal concept. And liberal democracy sides with adaptable family models, while Christian democracy rests on the foundations of the Christian family model; once more, this is an illiberal concept. [...] We are on the threshold of a great moment, and we'll see whether or not it comes to fulfilment. The opportunity is here. Next May we can wave goodbye not only to liberal democracy and the liberal non-democratic system that has been built on its foundations, but also to the entire elite of '68."¹⁶⁵

VIKTOR ORBÁN,
28 JULY 2018

"There is also the so-called liberal idea, which has outlived its purpose. Our Western partners have admitted that some elements of the liberal idea, such as multiculturalism, are no longer tenable. [...] **So, the liberal idea has become obsolete. It has come into conflict with the interests of the overwhelming majority of the population.** Or take the traditional values. I am not trying to insult anyone, because we have been condemned for our alleged homophobia as it is. But we have no problems with LGBT persons. God forbid, let them live as they wish. But some things do appear excessive to us. They claim now that children can play five or six gender roles. I cannot even say exactly what genders these are, I have no notion. Let everyone be happy, we have no problem with that. But this must not be allowed to overshadow the culture, traditions and traditional family values of millions of people making up the core population."¹⁶⁶

VLADIMIR PUTIN,
27 JUNE 2019



fear that the West is abandoning its principles and becoming similar to those traditionally seen as adversaries. They are deeply concerned about “democracy in retreat” and the increase in attacks on the rule of law or the freedom of the press.¹⁷ They are also worried about illiberal forces within the West who might increasingly act as “Trojan horses” on behalf of illiberal powers from abroad.¹⁸ To Mike Pence’s warning that “we cannot ensure the defense of the West if our allies grow dependent on the East,”¹⁹ they might answer that it is also difficult to defend “the West” if some of our allies increasingly behave like “the East.” From this perspective, the most dangerous development for NATO, sometimes understood as the “executive arm” of the West, is neither the rise of other great powers nor instability in its neighborhood but rather the rise of illiberalism and the instability of the West’s collective identity.²⁰

“There is a deep current of thought that was structured in the period between 1990 and 2000 around the idea of the ‘end of history,’ of a limitless expansion of democracy, of the triumph of the West as a universal value system. That was the accepted truth at the time, until the 2000s, when a series of shocks demonstrated that it wasn’t actually so true.”¹⁴⁷

**EMMANUEL MACRON,
7 NOVEMBER 2019**

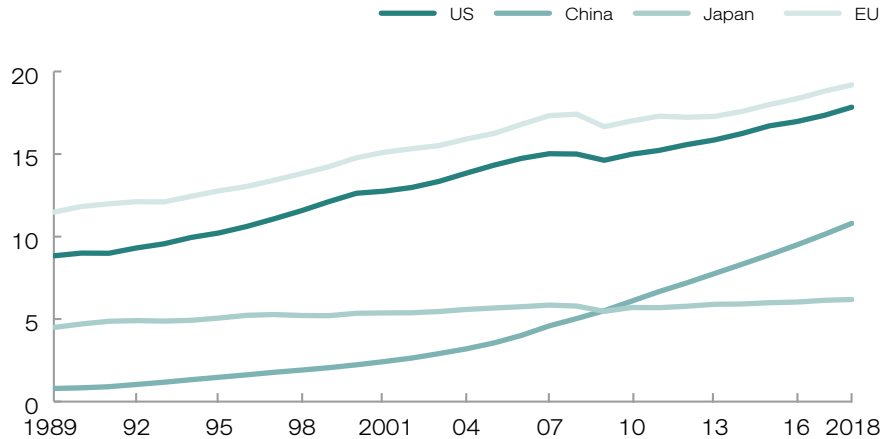
But the defenders of an open, liberal West, caught on the wrong foot, so far seem unable to find an adequate answer to the illiberal-nationalist challenge, which researchers describe as having both cultural and economic causes.²¹ Part of the reason for the seeming liberal inability to successfully confront nationalist populism may be found in the long almost unshakable conviction that all obstacles to liberalization were only minor setbacks, as liberalism’s eventual triumph was seen as inevitable. In the long run, liberal-democratic values would take hold everywhere: Europe would soon be “whole, free, and at peace,” Russia and China would over time adopt liberal values and become “responsible stakeholders” in the Western-led liberal world order. Critics of “liberalization” were sometimes seen as “backward.” In that sense, the liberal triumphalism of the post-Cold War period lacked necessary self-reflection. Too often, its champions demanded what Ivan Krastev and Stephen Holmes call “modernization by imitation and integration by assimilation” and overlooked the perspective of those on the receiving end.²² As Pippa Norris and Ronald Inglehart have argued, the rise of authoritarian populism is the result of a “cultural backlash” against long-term processes of cultural change.²³ Its effect can be witnessed all across the West. In Central and Eastern Europe, in particular, the cultural backlash even enabled what amounts to an “illiberal counterrevolution.”²⁴ Other scholars maintain that liberalism did not deliver economically for everyone. Critics of the economic and financial liberalization have long pointed out that this type of globalization disproportionately benefitted elites but came at a cost for significant parts of the population in the West: “Many middle- and working-class voters in the United Kingdom, the United States, and elsewhere have come to believe – with a good deal of justification – that the system is rigged.”²⁵ In particular, the financial and economic crisis and its repercussions shook the trust in the superiority of the liberal model.²⁶

The reactions to the crisis have further contributed to the resistance against a system allegedly run by liberal experts and international institutions, which in the eyes of some amounts to a “new authoritarianism” itself.²⁷ Too often, Western politicians have presented their policies as without alternative, as the result of economic necessities or financial inevitability. Given the rise of “technocratic” politics, for many citizens, elections became meaningless. While global voter turnout between the 1940s and 1980s was comparatively stable (it only fell slightly from 78 to 76 percent), it has since dropped to just 66 percent in the period between 2011 and 2015. In Europe, the decline has been particularly significant.²⁸ But political disenchantment has found other outlets, as people across the globe took to the streets to protest their governments, to demand more action against climate change, or to rein in corruption. For some observers, the story of the year 2019 thus was “the tsunami of protests that swept across



PERFORMANCE OF THE WORLD'S LEADING ECONOMIC POWERS OVER TIME

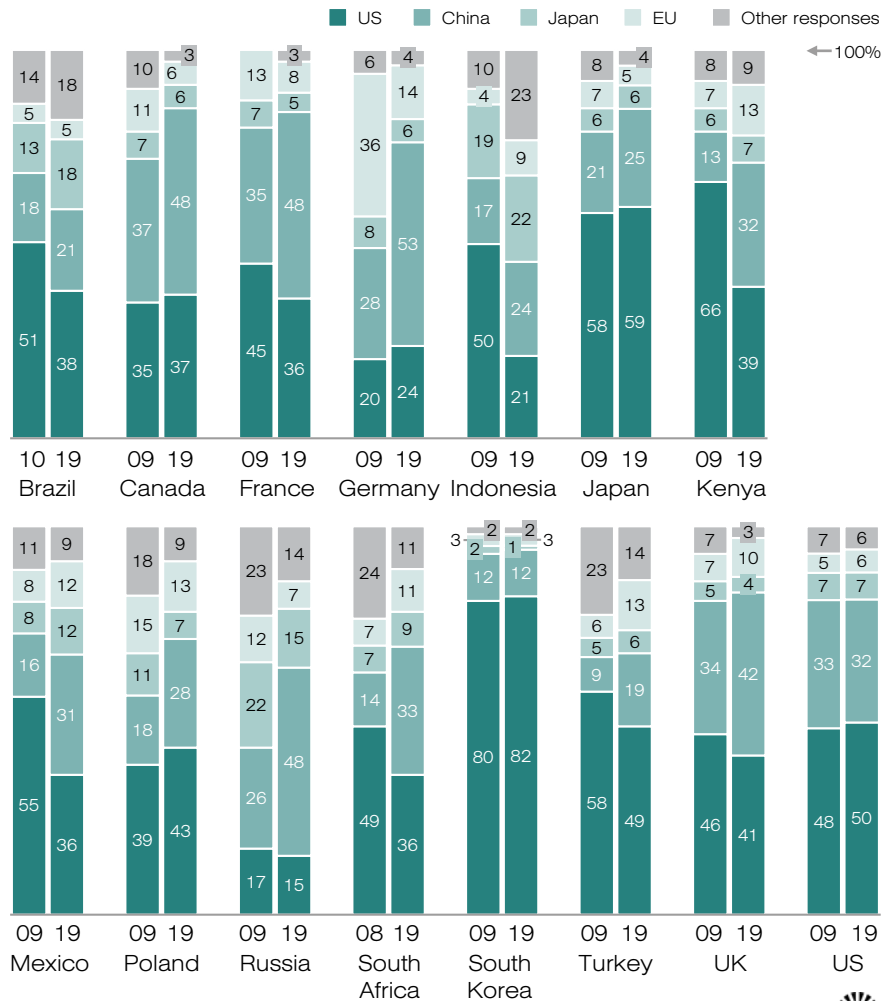
Gross domestic product, 1989-2018, constant 2010 USD trillions



Source: World Bank¹⁶⁷

WHAT CITIZENS IN SELECTED COUNTRIES THINK: WHICH ONE OF THE FOLLOWING IS THE WORLD'S LEADING ECONOMIC POWER?

Opinion polls, 2009 and 2019, percent



Source: Pew Research Center¹⁶⁸



six continents and engulfed both liberal democracies and ruthless autocracies,”²⁹ driven by economic inequalities and a perceived loss of democratic control.³⁰

Widespread democratic disenchantment provides an opportunity for illiberal politicians to exploit the public demand for an “alternative.” Liberals may rightly believe that the illiberal nationalists do not offer an appropriate solution for tackling the world’s most important problems. Slogans like “make America great again” or “take back control” are misleading, as they suggest to recreate a past that never was and promise what cannot be achieved.³¹ But illiberal populists have a clear message that resonates with many: “Like it or not, global populism has a clear, marketable ideology, defined by toughness, nationalism, and nativism: ‘America first’ is a powerful slogan.”³² Defending the liberal international order or multilateralism, in contrast, makes for a much less convincing rallying cry for most people. It is defensive and creates the impression that it ignores real grievances.

Westlessness in the World

“Our brave troops have now been fighting in the Middle East for almost 19 years. [...] As a candidate for President, I pledged a new approach. Great nations do not fight endless wars.”¹⁴⁸
DONALD TRUMP,
5 FEBRUARY 2019

The contemporary crisis of the West is not confined to the Western world. It is arguably one of the key forces affecting world politics today. As the limits of Western power to shape events abroad have become obvious, Western support for “liberal order building”³³ has suffered.

This is particularly evident when looking at today’s conflicts. Instead of engaging directly, Western countries have increasingly relied on training missions, helping others to take care of their own security, or supporting domestic actors with defensive weapons, in both cases reducing casualties of their own troops. In the early post-Cold War period, brutal ethnic conflicts and genocidal actions triggered debates about “humanitarian intervention” and later led to the establishment of the international community’s “responsibility to protect” (R2P). Today, ongoing atrocities in the Syrian war, for instance, are met with indifference, and international law is often used as a protective shield for dictators again: “Where the years after the Cold War saw growing civilian protection internationally and a surge in accountable government nationally, so today we see the reverse.”³⁴ As Anne Applebaum notes, the “crisis of Western values” at home has “a bloodier, more violent face” abroad.³⁵

To be sure, the “liberalism of imposition”³⁶ of the post-9/11 era has produced questionable results.³⁷ For almost two decades, the international community has spent considerable blood and treasure in Afghanistan. Some progress notwithstanding, sustainable peace has not been achieved (→ **South Asia**). Even more significantly, the decision to intervene in Iraq continues to haunt the United States and its allies. Recent events have only underscored the continued instability of Iraq and the wider region, while the predicted “democratization” of the region turned out to be a pipedream (→ **Middle East**). And in Libya, Western powers were able to prevent a massacre yet unable to lay the ground waste for a post-conflict settlement. Almost nine years after the intervention, the country is plagued by ongoing violence and instability (→ **Mediterranean**).

Given this balance sheet, it is hard to disagree with those who are wary of “endless wars” fought in far-away places. Majorities of US veterans and the wider population now say that the wars in Afghanistan and Iraq were not worth fighting.³⁸ According to a study from Brown University’s Costs of War Project, war-related spending for the post-9/11 wars amounts to USD 4.9 trillion.³⁹ That it is time to end these wars is one of the few political messages in the United



States these days on which politicians from the right and from the left can agree.⁴⁰ It is also something that resonates with voters and elites in Europe, traditionally more reluctant to engage in robust peace enforcement and crisis management operations. But one may argue that the pendulum has swung back too far. After all, increasing Western reluctance to engage in violent conflicts abroad does not mean that these conflicts disappear. On the contrary, they may become bloodier – and also more consequential for the West itself. As some observers have warned, it is important to “avoid overlearning the supposed lessons of past interventions” and find a “subtler alternative” to “blunt anti-interventionism.”⁴¹

“Westlessness” is on full display in various conflicts today. As Robert Malley, the president of the International Crisis Group, notes, “local conflicts serve as mirrors for global trends.” For him, today’s wars “tell the story of a global system caught in the early swell of sweeping change, of regional leaders both emboldened and frightened by the opportunities such a transition presents.”⁴² The events of recent months have only underlined the fact that Western countries, by now, seem to have largely ceded the initiative to deal with today’s most violent conflicts to others. And while Western politicians keep repeating the mantra that there are no military solutions to political conflicts, other actors are implementing them, with no concern for legal or ethical considerations. As our Advisory Council member David Miliband has stressed: “The number of civilians directly killed by the tactics of war is rising, also the number of humanitarians killed, and the numbers of civilians killed indirectly not by tactics but by war strategies.”⁴³ This is most visible in Syria, where the Assad regime and Russian forces have deliberately targeted hospitals and schools and war crimes have become a daily business.⁴⁴ A few days before Christmas, Russia and China vetoed a UN Security Council resolution that would have allowed cross-border humanitarian deliveries to millions of Syrian civilians.⁴⁵ In his reaction to Russia’s 14th veto since the beginning of the conflict in 2011, US Secretary of State Mike Pompeo did not mince words: “To Russia and China, who have chosen to make a political statement by opposing this resolution, you have blood on your hands.”⁴⁶ Today, the conflict has become one of the main showcases for what Miliband has called “the age of impunity.”⁴⁷

“Take India, Russia and China for example. They have a lot more political inspiration than Europeans today. They take a logical approach to the world, they have a genuine philosophy, a resourcefulness that we have to a certain extent lost. And so all of that has a major impact on us and reshuffles the cards.”¹⁴⁹

EMMANUEL MACRON,
27 AUGUST 2019

But Western reluctance to intervene early in the conflict and the ensuing humanitarian disaster in Syria is just one example of retreat. Recently, China, Iran, and Russia have held their first joint naval exercises in the Indian Ocean and Gulf of Oman, widely interpreted as a message to the United States and the world.⁴⁸ Although the Europeans briefly debated a naval mission in the Strait of Hormuz, not much came out of it in the end (→ **Middle East**). In Libya, Turkey and Russia act more decisively⁴⁹ – whereas Europe is more directly affected by the instability on the opposite shore of the Mediterranean (→ **Mediterranean**). While Western actors seem to punch far below their weight today, Russia has established itself – with comparatively limited means – as an actor that cannot be ignored (→ **Russia**). As French President Emmanuel Macron noted, “Russia has maximized all its interests: it has returned to Syria, it has returned to Libya, it has returned to Africa, it is present in every crisis because of our weaknesses or mistakes.” For him, “the failure to intervene in response to the use of chemical weapons in Syria [...] was already the first stage in the collapse of the Western bloc. Because at that point, the major regional powers said to themselves: ‘the West is weak.’”⁵⁰



Critics often blame the United States for the lack of Western assertiveness, as Washington is said to abandon its traditional role as a guardian of the international order (→ **United States**). For some, recent events underline “a rapid decline in the ability and willingness of the United States to shape events in the Middle East – leaving a gap that is being filled by other powers, such as Russia, Iran, and Turkey.”⁵¹ In an unusually blunt statement, Angela Merkel asked: “Is it good for the Americans to want to pull out of Syria immediately and quickly, or is that not also a way to strengthen the opportunities for Iran and Russia to gain influence there?”⁵² Others complain that “these days, neither friend nor foe knows quite where America stands.”⁵³ President Trump’s decision to withdraw US troops from Northern Syria, although repeatedly hinted at, came as a shock to many and triggered a new debate about the reliability of the Trump administration.⁵⁴ The lack of consultation and deconfliction among allies, when it finally happened almost overnight, was a key reason for Emmanuel Macron’s assertion that we are experiencing “the brain death of NATO.”⁵⁵

“The patriotism of the 21st century must also have a global dimension, if it is not to become, as has many times been the case, a common national egoism. [...] [O]ur life can change into hell, if we do not find [...] adequate solutions to global threats, such as: armed conflicts and terrorism, nuclear proliferation, or the destruction of our environment.”¹⁵⁰
DONALD TUSK,
26 SEPTEMBER 2019

While Europeans have been quick to criticize the United States, their own approach is, as critics point out, “even more impotent and inward-looking than that of the United States.”⁵⁶ The few proposals that were launched recently, such as the new German defense minister’s call for a safe zone in northern Syria and for a European naval mission in the Strait of Hormuz, were more consequential for the debate in Berlin and other European capitals than for the situation in the region itself. While appreciated by some as honest attempts to address the deteriorating security situation in the region,⁵⁷ the proposals did not gain traction due to a lack of domestic consensus and international support. In effect, they underlined the European inability to jointly shape Europe’s neighborhood – and the lack of realistic options at this stage of the Syrian war. In contrast to the United States, however, European countries are directly affected by what is happening in the Middle East or Northern Africa. After all, the humanitarian consequences of the Syrian war that caused millions of people to flee their homes significantly contributed to the crisis in the West by mobilizing illiberal forces to exploit xenophobic fears. Given the dire situation in Europe’s southern neighborhood, in particular the lack of hope among the young generation (→ **Mediterranean**), it may only be a matter of time until similar scenarios occur. Thus, even if one did not see the human suffering in the region as sufficient for more decisive European action, a narrow understanding of self-interest would seem to suggest that Europe should be more proactive.

There is one reason that will make Western engagement in conflicts even more difficult in the future. In the post-Cold War era, Western-led coalitions were free to intervene almost anywhere. Most of the time, there was support in the UN Security Council, and whenever a military intervention was launched, the West enjoyed almost uncontested freedom of military movement.⁵⁸ This has changed dramatically. First, the UN Security Council fell victim to the increasing tensions among the great powers, failing to come up with meaningful resolutions and address the most important matters of international peace and security. Second, Western military superiority in international conflicts is no longer a given. Rose Gottemoeller, until recently NATO’s Deputy Secretary General, has warned that the “nearly unrivaled global superiority in military technology” that NATO enjoyed for decades is endangered, with other countries making great strides to catch up or even surpass the West in major technologies such as space capabilities, artificial intelligence, or hypersonic missiles.⁵⁹ The proliferation of anti-access/area denial (A2AD) capabilities in particular makes for an increasingly contested operational environment in many conflict theaters. In Syria, for instance, Western militaries



THE INTERNATIONAL CRISIS GROUP'S 10 CONFLICTS TO WATCH IN 2020

For 2020, the International Crisis Group highlights ten conflicts to watch, which in many ways reflect global trends. As the global system is “caught in the early swell of sweeping change,” the circumstances of these conflicts point to “shifts in great powers’ relations, the intensity of their competition, and the breadth of regional actors’ ambitions.”

- 1 **Afghanistan:** More people are being killed as a result of fighting in Afghanistan than in any other current conflict in the world. Yet there may be a window in 2020 to set in motion a peace process through a possible agreement between the United States and the Taliban. This would only be the first step in a long settlement process – but it almost certainly offers the only hope of calming today’s deadliest war.
- 2 **Yemen:** This conflict has become a critical fault line in the Middle East-wide rivalry between Iran on the one hand and the United States and its regional allies on the other. Thus, the opportunity for peace presented by recent talks between the Saudis and Houthis could evaporate soon, in particular if heightening US-Iranian tensions spill into Yemen.
- 3 **Ethiopia:** The country’s transition under Prime Minister Abiy Ahmed remains a source of hope but also carries the risk of violent unraveling. As ethnic strife recently has surged, some warn that the country could fracture as Yugoslavia did in the 1990s, with disastrous consequences for an already troubled region. Broad international support to avert such an outcome will be crucial in 2020.
- 4 **Burkina Faso:** The latest country to fall victim to the instability plaguing the Sahel region, Burkina Faso is combatting an Islamist militant insurgency, which started in its north but has spread to many other rural areas while struggling with public unrest in its capital. Better intelligence sharing with neighbours, tighter border controls, and policies aimed at winning over villagers are key to preventing the turmoil from spreading.
- 5 **Libya:** Foreign powers have dramatically stepped up involvement in Libya, which has been an arena for outside competition since the overthrow of Muammar al-Qaddafi in 2011. Prospects of those powers pressing their Libyan allies into negotiations instead appear dim – a more destructive stalemate or takeover of Tripoli that could give rise to prolonged militia fighting appear the more likely result for 2020.
- 6 **The United States, Iran, Israel, and the Persian Gulf:** 2020 has already brought to boiling point tensions between the United States and Iran that rose dangerously in 2019. A diplomatic breakthrough to de-escalate tensions between the Gulf States and Iran or between Washington and Tehran seems unlikely, as each side is waiting for the other to make the first concession.
- 7 **The United States and North Korea:** Prospects for diplomacy seem to be dimming after Pyongyang conducted renewed tests to improve its missile technology in late 2019. In 2020, any chance for a deal between the United States and North Korea will depend on whether both steer clear of renewed high-level pageantry and high-drama provocations – and whether they empower their negotiators to get to work.
- 8 **Kashmir:** After falling off the international radar for years, a flare-up between India and Pakistan in 2019 over the disputed Kashmir region brought the crisis back into sharp focus. New Delhi seems to have no roadmap for what comes next. The gravest danger is the risk that a militant attack sets off an escalation, as insurgents in Kashmir are lying low but remain active. If a new crisis emerges, foreign powers will have to throw their full weight behind preserving peace on the disputed border.
- 9 **Venezuela:** Having headed off a civil-military uprising in April 2019, President Nicolás Maduro’s government weathered a regional boycott and a stack of US sanctions. But his government remains isolated and bereft of resources, while seven million Venezuelans are in need of humanitarian aid and public services are collapsing.
- 10 **Ukraine:** A new Ukrainian president has brought fresh energy to efforts to end the six-year-old conflict between Kyiv and Russia-backed separatists in the country’s eastern Donbas region. Yet if peace seems slightly more plausible now than a year ago, it is far from preordained – recent plans for a more comprehensive ceasefire and disengagement might collapse and fighting could escalate.



would have had to engage sophisticated Russian air defense capabilities.⁶⁰ In the Indo-Pacific, China's "formidable array of precision missiles and other counter-intervention systems to undercut America's military primacy" have brought about a new environment (→ **China**), in which "the United States' longstanding ability to uphold a favourable regional balance of power by itself faces mounting and insurmountable challenges."⁶¹ With increasing military footprints of China and Russia in various parts of the world, interventions will arguably become even riskier in the future.

"Westlessness" is not only reflected in conflict trends but also in the development of international institutions. For quite some time, China in particular has invested in "parallel" institutions that partly complement, but partly challenge institutions traditionally dominated by the West.⁶² Beijing may become also more successful in securing key posts in international institutions and thus shifting the international agenda according to its values and priorities.⁶³ To be sure, it is only fair if hitherto underrepresented countries and regions catch up – and the West could actively support candidates from non-Western democracies.⁶⁴ Yet, more often than in the past, international institutions are being instrumentalized by autocratic states. One of the most prominent examples is the abuse of Interpol's "red notice" system to persecute civil society activists or critical journalists.⁶⁵

"Multilateralism is not just a way of regulating world affairs through cooperation between states. It is also a certain idea of the world order and of mankind, based on the legacy of the Enlightenment, rationality, adherence to the rule of law and the search for shared progress. [...] To give up on multilateralism because some disengage and others exploit international organizations for their own ends would be to agree to live in a world with no safety net."¹⁵¹

**JEAN-YVES LE DRIAN AND
HEIKO MAAS,
12 NOVEMBER 2019**

At the same time, decreasing support of key Western countries means that a number of international institutions considered core pillars of the liberal international order are struggling. This includes the United Nations, an organization that will celebrate its 75th anniversary this year. In October, when only 129 out of 193 member states had paid their dues, UN Secretary General António Guterres sounded the alarm, warning that the organization was facing major disruptions to operations if member states did not pay "urgently and in full."⁶⁶ By the end of the year, this figure rose to 146.⁶⁷ In a not so subtle snub at the United States that is notoriously late with its payments,⁶⁸ China's Vice Foreign Minister Le Yucheng read out some "straightforward facts," presenting China as a true champion of multilateralism: "China firmly safeguards the UN-centered international order. It is now the second largest funding contributor to the UN regular budget and UN peacekeeping assessments. We always pay our contributions in full and on time. We never, not even for one single time, repudiate our funding obligations. Nor have we ever been in arrears."⁶⁹ What is more, Western disunity also means that China and others can sometimes unfairly benefit from international institutions, most importantly in the international trading system.⁷⁰ Dissatisfied with the World Trade Organization (WTO)⁷¹ and its alleged failure to set and enforce rules for fair competition, the United States has implemented unilateral tariffs on Chinese imports and dealt with Beijing "almost entirely in bilateral rather than multilateral negotiations" instead of agreeing to a transatlantic push for reforms of the WTO. Much to the dissatisfaction of the Europeans, Washington has continued to block the reappointment of members of the Appellate Body, essentially bringing the WTO's dispute settlement mechanism to an end – at least temporarily.⁷² Given the crisis of multilateralism, many Western (and non-Western) countries have joined the "Alliance for Multilateralism," officially launched by Germany and France in September 2019.⁷³ Critics calling it "a new alliance to nowhere" and "pure posturing"⁷⁴ notwithstanding, the response the initiative has received at least provides an opportunity to use the momentum and prove its added value.⁷⁵ Yet, it is still an open question whether the initiative "aspire[s] to consolidate a league of like-minded, democratic states to defend a liberal vision of the international order [or whether] its purpose [is] more practical: to bridge differences among countries with divergent regime types and values."⁷⁶



“I’m a politician and I’m used to be criticised for having good rhetoric [...], but bad substance. In NATO it’s the opposite. We have bad rhetoric, but extremely good substance.”¹⁵²

JENS STOLTENBERG,
3 DECEMBER 2019

Finally, those institutions that undoubtedly represent the West and a liberal vision of the international order, NATO and the European Union, are struggling as well. For both of them, the rise of illiberalism in its member states presents huge challenges. This is particularly pronounced for the EU as a “legal community” that requires a healthy rule of law in its member states.⁷⁷ But it also affects the long-term prospects for NATO, the self-professed “alliance of liberal democracies.”⁷⁸ Both institutions, however, are struggling to respond to this threat. While the EU at least has mechanisms to deal with the erosion of core values (even if their effectiveness is uncertain), NATO does not and cannot expel a member state either. Perhaps, most importantly, the champions of these two core institutions have been slow to understand the magnitude of the challenges they face. Ongoing debates about funding both in NATO and the EU suggest that many have still not understood what is at stake: if NATO and the EU were to disband, debates about spending 2 percent on defense of GDP or about slight increases to the EU budget would, in retrospect, be seen as petty and short-sighted.

Both the EU and NATO, however, have demonstrated a willingness to prove the doomsayers wrong. Although Brexit will certainly weaken the EU’s foreign policy clout (→ **European Union**), the negotiation process has shown that its members are able to speak with one voice and defend the core achievements of the EU that may have been taken for granted for too long. While only a minority of NATO members have reached the 2 percent goal, the allies have significantly raised defense spending and strengthened their collective defense efforts since 2014. Recently, they have also agreed on a process to tackle the political dimension of NATO that, as the debate on Macron’s comments about the lack of strategic consultation made clear, requires immediate attention, too.⁷⁹

Less Westlessness? Toward a Common Western Strategy for an Era of Great-Power Competition?

“Because we are noticing how great the pressure is on our traditional and, to us, familiar order, this raises the question of whether we are going to break up into a lot of individual puzzle pieces and think that each of us can best solve the problem single-handedly. As German Chancellor, I can only respond: if so, our chances are poor.”¹⁵³

ANGELA MERKEL,
16 FEBRUARY 2019

In a period shaped by the relative decline of the West and the relative rise of the non-Western world, it would seem even more important to have a common Western strategy.⁸⁰ Alas, recent years have seen estrangement and diverging positions on crucial policy challenges – ranging from arms control and global trade to climate change or the role of international institutions. Unsurprisingly, others are keen on exploiting these rifts for their own purposes. At last year’s Munich Security Conference, representatives from China, Iran, and Russia were quick to point out transatlantic differences and offer themselves as the seemingly better partners to Europe.⁸¹

So what are the odds for a joint Western strategy for a new era of “great-power competition,” the key term the strategic community in Washington has used to describe the contemporary strategic environment?⁸² Interestingly, Europeans have recently adopted similar language emphasizing a more competitive environment. Emmanuel Macron has warned that Europe, “if it can’t think of itself as a global power, will disappear, because it will take a hard knock.”⁸³ In a similar vein, the new President of the European Commission, Ursula von der Leyen, announced that her Commission would be a “geopolitical Commission.”⁸⁴ Her successor as German Defense Minister, Annegret Kramp-Karrenbauer, also noted in one of her first major speeches that we “are currently witnessing a return of great-power competition for spheres of influence and supremacy [as well as] authoritarian challenges to our open society.”⁸⁵



“The EU has the option of becoming a player, a true geostrategic actor, or being mostly the playground.”¹⁵⁴

JOSEP BORRELL,
9 DECEMBER 2019

While analyses on both sides of the Atlantic Ocean may seem to converge, it is unclear whether this is sufficient for a joint grand strategy to be built on them. The United States, too, has to think through the implications of “great-power competition.”⁸⁶ After all, competition is “more of a condition than a strategy.” The question is “how the United States competes: with what tools, on what issues, and at what costs.”⁸⁷ For the European Union, the task is disproportionately more complex, in part because it was created to overcome great-power competition. Its “natural” tendency in its external relations thus was to export those ideas and institutional mechanisms that have transformed intra-European relations. The EU, in other words, is new to the great-power game.⁸⁸ European leaders seem to accept that they need to acquaint themselves with the rules of this game – and make the EU “weltpolitikfähig,” or “able to act credibly on the global stage,” as former Commission President Jean-Claude Juncker put it.⁸⁹ Yet, the prime challenge will be to agree on a common transatlantic or broader Western approach, as the ongoing difficulties in dealing with Russia, China, or Iran demonstrate.

Russia has perhaps been the most immediate and blunt challenge to the West (→ **Russia**). Despite ongoing debates about burden-sharing and defense spending, NATO members have significantly invested in their common defense since Russia’s annexation of Crimea in 2014. And even if few Europeans agreed with Donald Trump’s decision to withdraw from the Intermediate-Range Nuclear Forces (INF) Treaty, NATO members have been able to uphold their basic consensus.⁹⁰ In general, Moscow has made it easy for them, as it has repeatedly provoked Europeans by attempting to interfere in European elections, spreading ridiculous historical distortions, conducting a poison attack in Salisbury, or allegedly assassinating a former Chechen fighter in a Berlin city park.⁹¹ It has also done very little, if anything, to ease the confrontation in Eastern Ukraine, thus leaving the European Union no choice but to extend the sanctions repeatedly.

“While the Europeans have allowed themselves to be involved in a senseless confrontation with Russia and are sustaining billions in losses from the sanctions that have been handed down from overseas, the world continues to change rapidly. In practical terms, the EU no longer has the monopoly on the regional integration agenda. The balance of power is being modified on the huge Eurasian continent, primarily due to the new centers in the Asia Pacific region.”¹⁵⁵

SERGEI LAVROV,
16 FEBRUARY 2019

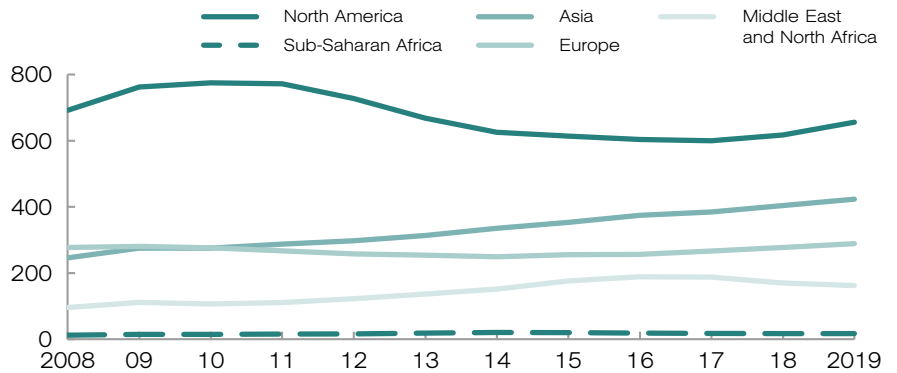
Still, many Europeans are skeptical whether an intensified confrontation with Russia is in Europe’s interest. Time and again, politicians are speculating about an incremental relaxation of sanctions. It seems as if it is Moscow that has the “strategic patience” that European politicians claim for themselves. As *The Economist* noted, Russia’s “undeserved readmission to the Council of Europe created the dangerous precedent of rehabilitation without reform.”⁹² In recent months, French President Emmanuel Macron made headlines by suggesting to “build a new architecture based on trust and security in Europe, because the European continent will never be stable, will never be secure, if we do not ease and clarify our relations with Russia.”⁹³ For the French President, Europe has to prepare for a world, in which the United States may not care about European interests to the extent it used to.⁹⁴ Macron’s initiatives drew criticism from almost all parts of the Alliance.⁹⁵ For the vast majority, the reason why an “architecture based on trust” does not exist is found in Moscow, not in the West.

Meanwhile, other Europeans have argued that even if Russia cannot be a reliable political partner for the time being, a stable economic partnership with Russia is both possible and desirable. According to this logic, even during the height of the Cold War, the Soviet Union was a reliable source of energy, and further European economic disengagement would further alienate Russia from Europe.⁹⁶ For a bipartisan majority in the United States (and other NATO member states), in contrast, in particular one such economic project, the Nord Stream 2 pipeline, is detrimental to European security. For critics, the pipeline demonstrates that Germany is only pursuing a “European” foreign policy when it suits its interests.⁹⁷



EVOLUTION OF DEFENSE SPENDING AROUND THE GLOBE

Defense spending by region, 2008-19, constant 2015 USD billions

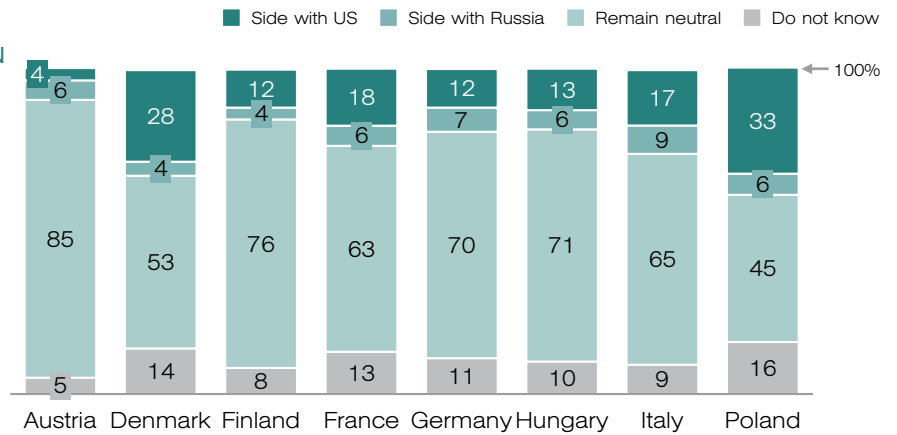


Source: International Institute for Strategic Studies (IISS)¹⁷⁰



WHAT CITIZENS IN EU MEMBER STATES THINK: WHOSE SIDE SHOULD YOUR COUNTRY TAKE IN A CONFLICT BETWEEN THE US AND RUSSIA?

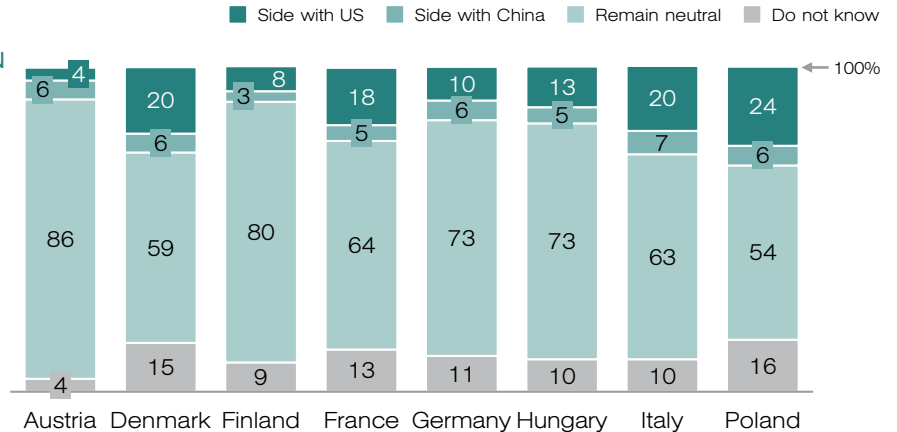
Opinion poll, 2019, percent



Source: European Council on Foreign Relations (ECFR)¹⁷¹

WHAT CITIZENS IN EU MEMBER STATES THINK: WHOSE SIDE SHOULD YOUR COUNTRY TAKE IN A CONFLICT BETWEEN THE US AND CHINA?

Opinion poll, 2019, percent



Source: European Council on Foreign Relations (ECFR)¹⁷²



According to Senator Tom Cotton, the pipeline “would enhance Russia’s ability to blackmail countries like Poland and the Baltic States by threatening their energy supplies, while deepening NATO members’ reliance on Russia.”⁹⁸ In November, the US Congress introduced sanctions targeted at companies involved in Nord Stream 2. While many foreign policy specialists and lawmakers in Europe are opposed to the pipeline project, too, many are poised to defend it because they disagree with what they see as illegitimate US interference.⁹⁹ In addition, the EU built infrastructure and diversified supply to protect against overdependence on Russia, while Berlin helped broker a gas transit deal via Ukraine.¹⁰⁰ As Chancellor Merkel put it: “A Russian gas molecule is a Russian gas molecule, whether it comes via Ukraine or via the Baltic Sea. That means that the question of how dependent we are on Russian gas cannot be resolved by asking which pipeline it flows through.”¹⁰¹ Many Germans also have a hard time understanding why the US Senate with a Republican majority is able to sanction Nord Stream 2 because it believes it gives Russia too much influence over Europe, while being quite reluctant to take necessary measures to guard against repeated Russian interference in US elections.¹⁰² For many critics, the United States uses security concerns “as a smokescreen for its own economic interests,” as it considers cheap gas from Russia a competition for US shale gas exports to Europe.¹⁰³ In sum, both sides see the other as acting against the spirit of the transatlantic partnership.

“[W]e did an awful lot that accommodated China’s rise in the hope that communist China would become more free, more market-driven, and ultimately, hopefully more democratic. [...] Today, we’re finally realizing the degree to which the Chinese Communist Party is truly hostile to the United States and our values, and its worse deeds and words and how they impact us.”¹⁵⁶

MIKE POMPEO,
30 OCTOBER 2019

A similar dynamic is at play when it comes to Western approaches toward China (→ **China**). At first sight, there has been at least some rhetorical convergence between Europe and the United States. China’s more assertive policies and increasing awareness of them in the Western world have drawn ever more criticism, as more people are beginning to suspect what an international order dominated by China would look like – in stark contrast to Chinese rhetoric of “peaceful coexistence,” which claims that “China will never seek hegemony, expansion or sphere of influence no matter how the international landscape evolves and how much development China achieves.”¹⁰⁴ Key examples catching international attention include the detention of two Canadian citizens widely seen as an “act of diplomatic hostage-taking in revenge” for the arrest of a Huawei representative in Vancouver,¹⁰⁵ or new reports about an expanding surveillance state¹⁰⁶ and the “re-education camps” for millions of Uighurs in Xinjiang.¹⁰⁷ Unsurprisingly, public opinion in both North America and Europe has become markedly more critical of China. In 2017, Americans with an unfavorable view of China (47 percent) only slightly outnumbered those with a favorable view (44 percent). Two years later, only about a quarter viewed China favorably (26 percent), while the percentage of those having an unfavorable view reached a new high (60 percent). And 81 percent of Americans said that China’s growing military power is a bad thing for the United States.¹⁰⁸ A similar trend, though on a lower level, is visible in Western Europe. Whereas the population in Central and Eastern Europe has a slightly more favorable view of China on balance, pluralities or majorities in almost all Western European countries see China unfavorably.¹⁰⁹

Western governments have also begun to change their rhetoric. In December, NATO, for the first time, mentioned the need to jointly address “China’s growing influence and international policies” in its London Declaration.¹¹⁰ And as the EU-China Strategic Outlook of March 2019, a joint communication by the European Commission and the High Representative, put it, “there is a growing appreciation in Europe that the balance of challenges and opportunities presented by China has shifted.”¹¹¹ In the same document, the Europeans noted that “China is, simultaneously, in different policy areas, a cooperation partner with whom



“Having caught up with the world in great strides, we are now marching forward at the forefront of the times with boundless energy!”¹⁵⁷

XI JINPING,
30 SEPTEMBER 2019

“We solely depend on our own people. That is why 40 years of so-called ‘maximum pressure – namely demonization, war, sanctions and terror [...] has failed to ‘bring Iran to its knees’; nor has it affected our people’s decision-making calculus”¹⁵⁸

MOHAMMAD JAVAD ZARIF,
17 FEBRUARY 2019

the EU has closely aligned objectives, a negotiating partner with whom the EU needs to find a balance of interests, an economic competitor in the pursuit of technological leadership, and a systemic rival promoting alternative models of governance.¹¹² Yet, while perceptions draw closer, Western countries do not see eye to eye on how they should be translated into specific policies.

For Europe, the 5G debate foreshadows the potential implications of a “G2” world, in which Europe is merely an object of US-Chinese rivalry.¹¹³ What some initially dismissed as a technical matter has turned out to be an issue of grand strategy. In essence, Europe may be forced to make a choice, as it will no longer be possible to be a full-fledged US ally while engaging in a far-reaching economic partnership with China. Some analysts have even argued that “Europe’s reluctance to side with the United States puts liberal democracy in danger” and that it sitting on the fence is what China wants to achieve.¹¹⁴ Although many factors suggest that the Europeans will side with the United States if they have to make a choice,¹¹⁵ America’s European allies “feel like they have been relegated to observer status.” Instead of being consulted, they just receive instructions, further undermining the relationship: “Europeans are tired of taking orders from Mr. Trump’s America, which makes them more inclined to ignore American directives on issues like Huawei.”¹¹⁶ As critics note, “calling on Europe to get tough on China, even as the US gets tough on Europe,” may not be the most promising strategy.¹¹⁷ Moreover, Europe is under immense pressure and facing real economic costs, as Chinese representatives have been clear that an exclusion of Huawei from European markets would have severe consequences.¹¹⁸ What if US-China tensions came to a head? According to a report by the European Council on Foreign Relations, clear majorities in Europe would want to remain neutral in case of a conflict between China and the United States.¹¹⁹ After all, this may be what China can realistically achieve: “China can’t win Europe over, but it can neutralize it by fracturing the continent and co-opting some pieces.”¹²⁰

Finally, the United States and its European allies have disagreed about the best way to deal with Iran and prevent it from acquiring nuclear weapons since Donald Trump took office. While Europe wanted to stick to the Joint Comprehensive Plan of Action (JCPOA), commonly known as the Iran Deal, the Trump administration decided to withdraw from it because it felt the deal had unfairly benefitted Tehran, contributed to Iran’s aggressive behavior in the Middle East and would end restrictions after just 15 years. Yet, despite Trump’s stated intent to “be working with our allies to find a real, comprehensive, and lasting solution to the Iranian nuclear threat,”¹²¹ Iran’s potential path to a nuclear weapon is shorter now than it was at the beginning of the US “maximum pressure” campaign. According to nuclear experts, Iran’s “breakout time has been reduced from about 8-12 months to 6-10 months [and] will decrease further as Iran increases its stock of enriched uranium and installs more centrifuges.”¹²² Moreover, after the US strike killing Iranian general Qassem Suleimani, Iran has announced that it would end the restrictions (after just five years), thus “again bringing [Israel and the United States] closer to the potential of open conflict with Tehran that was avoided by the accord.”¹²³ Now that their worst predictions are becoming reality,¹²⁴ the Europeans are running out of good options,¹²⁵ even if they “cannot afford to be bystanders in unfolding developments that may lead to another disastrous military conflict on Europe’s doorstep.”¹²⁶ Not only is there no common Western strategy toward Iran today, a military escalation in the region would cost many lives and further weaken the West, distracting the United States and its allies from the great-power competition effort.¹²⁷



Moreover, escalation dynamics between the United States and Iran should be a reminder that major interstate war is not necessarily a thing of the past. In contrast, a more competitive environment and the return of more intense great-power competition may make war more likely again. As political scientists Tanisha Fazal and Paul Poast point out, “it strains credulity that the better angels of our nature are winning when humanity is armed to the teeth. Global military expenditures are higher today than during the late Cold War era, even when adjusted for inflation.” According to them, “deterrence may hold, but there is a real possibility that it will fail.”¹²⁸ This suggests that new efforts for renewing arms control and transparency measures are badly needed – particularly regarding comparatively new or intensifying challenges in the realm of space, artificial intelligence, or technology (**→ Space**). Yet, after the end of the INF Treaty, it is unlikely that New START, the treaty limiting US and Russian strategic nuclear forces, will be extended, while even the Open Skies Treaty has come under scrutiny.¹²⁹ Beyond the Euro-Atlantic region, regional tensions translate in additional arms races: conflicts involving North Korea, India and Pakistan (**→ South Asia**), as well as Iran all hold significant potential for nuclear escalation. In the overall picture of great-power competition, these trends may mark “the dawn of a dangerous new nuclear age.”¹³⁰

Dealing with the implications of this new era will require cooperation with non-democracies. Some of the world's most important challenges (**→ Climate Change**) cannot be solved by the West alone. But Western countries would do well to treat the relations among liberal democracies as something special and worth preserving. The cohesion of the West needs a convincing narrative that sets the community of liberal democracies apart from illiberal autocracies¹³¹ and could also be reflected in special institutional arrangements.¹³² This may take the form of a “non-monolithic form of international order: a thin network of global cooperation on certain key issues, a thicker ‘club model’ of economic integration among liberal democracies, and a set of national policies to support international openness.”¹³³ If done smartly, this is possible without provoking a counter-alliance of non-democracies. The West thus needs a “dual-track strategy” for the new era of great-power competition, cooperating with autocratic states where it is in its best interests but at the same time strengthening Western cohesion for an even more competitive environment.¹³⁴

Requiem or Renaissance? The Future of the West

These days, it is hard to escape the impression that the West is in retreat, in decline, and under constant attack – both from within and from without. Yet, there are still many reasons for liberal optimism. Despite a frightening illiberal *zeitgeist*, autocratic governments are not necessarily on a never-ending winning streak. After all, a closer look reveals that those countries that Western strategists have identified as the main challengers are facing their own domestic crises that may easily dwarf the challenges that Western countries have to deal with. Russia remains “a ‘one-crop economy’ with corrupt institutions and serious demographic and health problems.”¹³⁵ And China’s increasingly authoritarian policies and Xi’s “imperious style” have also triggered a new wave of criticism at home – both among intellectuals and the party cadres.¹³⁶ For them, it may become ever more difficult to deal with large-scale discontent at home.¹³⁷ In contrast, Western countries, at least in theory, possess the necessary ideational, material, and institutional resources for a revitalization that will provide them with long-term advantages in a competitive environment.¹³⁸



Most importantly, liberal ideals are still powerful, autocrats' proclamations of the death of liberalism notwithstanding. While the liberal triumphalism of the early Cold War period exaggerated the ease with which liberal values would take over the whole globe, a requiem for the West as a set of ideas is premature. Quite strikingly, people outside the traditional world remind us of the unabated power of Western ideals. In Hong Kong, millions of people take to the streets to demand their democratic rights. And in Lebanon, citizens protest by singing Beethoven's *Ode to Joy*.¹³⁹ People may be dissatisfied with how liberal ideas have been translated into political practice. But liberal ideas themselves will always be attractive.

“For the West, the cold reality is not that autocracy will triumph and democracy will fail, but rather that the 500-year-long era of Western global supremacy is coming to an end.”¹⁵⁹

TONY BARBER,
6 NOVEMBER 2019

Moreover, despite the relative decline of Western economic strength, the combined powers of the world's liberal democracies will remain second to none for a long time to come. The members of the D10, an informal group of nine key democratic countries and the EU, alone accounted for 57 percent of global GDP in 2018.¹⁴⁰ If they are able to muster their combined political, economic, and military power they can maintain a version of the liberal order – and even improve it.

As recent years have made all too clear, Western liberal democracies are far from perfect. Checks and balances have been weakened, democratic values and traditions undermined. A revitalization of the West in the world must start at home. But, in contrast to autocratic regimes, liberal democracies have built-in mechanisms that allow for course corrections and democratic renewal.¹⁴¹ There may be bugs in the system, but it is not the system itself that is the bug.

Defenders of the West would do well to pursue what Thomas Kleine-Brockhoff calls “robust liberalism” – a modern liberalism that, being aware of its limits, stays clear of overreach but is more determined to defend the core of the liberal project.¹⁴² The West should be able to defend the liberal international order while accepting that global power shifts will bring competing models with which the liberal order will have to coexist.¹⁴³ The transatlantic partners will have to reach out even more proactively to like-minded states across the world and think about new ways to ramp up cooperation among liberal democracies, revitalizing the West for the 21st century. The West may then continue to “decline” successfully, allowing the next generation of Spenglerians to reexamine the future of the West in the 22nd century.





Actors





United States: Divided We Stand?

“[O]ur nation is stronger today than it ever was before. It is its strongest now.”¹⁸

DONALD TRUMP,
4 JULY 2019

“NATO [...] only works if the guarantor of last resort functions as such. I'd argue that we should reassess the reality of what NATO is in the light of the commitment of the United States.”¹⁹

EMMANUEL MACRON,
7 NOVEMBER 2019

Building on solid support both among his voters and in the Republican Party,¹ President Trump has already left a lasting impact on US foreign policy. Scholars have highlighted that his approach is in line with a longstanding tradition in US foreign policy – one that does not hesitate to apply force in pursuit of US interests but avoids long-term military commitments.² Trump's criticism of the overreach of the post-Cold War period with its costly military operations clearly resonates with significant parts of the US electorate.³

For 2019, Hal Brands has characterized the track record of Trump's foreign policy as a series of “reckless choices, bad deals, and dangerous provocations.”⁴ US efforts to address the largest challenge to its national interest – China – are a case in point. Contrary to the president's initial claim that “trade wars are good, and easy to win,”⁵ a staggering exchange of reciprocal tariff hikes lowered global economic output by 0.8 percent in 2019, according to IMF estimates.⁶ The Trump administration has used this kind of coercive economic statecraft with unprecedented frequency⁷ – raising concerns among experts that such excessive implementation of sanctions could soon dull their efficacy.⁸ Moreover, US initiatives seeking to stem North Korea's nuclear program, to thwart Iranian regional ambitions, or to combat Venezuela's dictatorial regime were not only of limited success – some of them backfired.⁹ And rather than ending what President Trump and others have referred to as “endless wars,” US troops in the Middle East have mostly been shifted from one conflict to another.¹⁰ In particular, the swift decision to shuffle US forces in Syria caught partners by surprise and has left them wondering whether Washington will have their back.¹¹ Indeed, long-standing US allies in Europe and Canada are troubled by Washington's hostile framing of trade imbalances, and some are questioning whether the United States will stand by its military commitments.¹² In a similar fashion, US partners in East Asia feel frustrated by what they see as US disinterest in the face of increasing tensions in the region.¹³

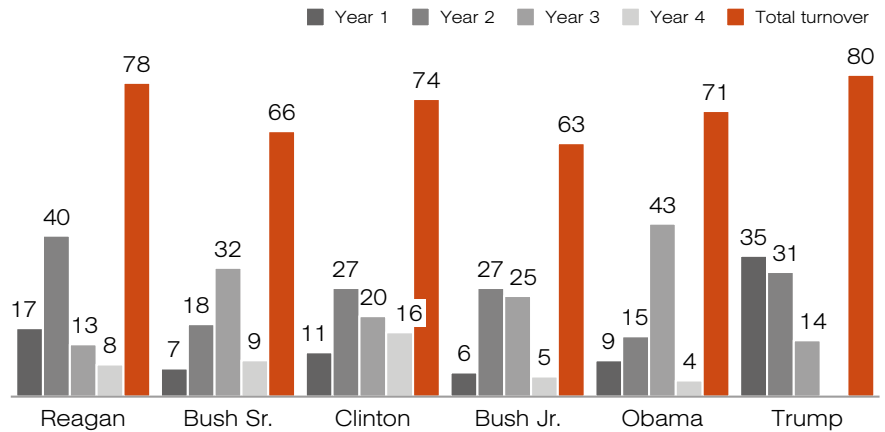
Domestic issues are compounding US foreign policy challenges. A large turnover in senior foreign and defense policy positions has left Washington's foreign policy apparatus impaired.¹⁴ More importantly, growing polarization is taking a toll on the country's international clout.¹⁵ Specifically, the partisan divide has hampered support for the use of military force and widens the magnitude of future policy swings from one administration to another.¹⁶ Washington's allies and adversaries alike may well interpret this as an increasing inability by the United States to make credible long-term foreign policy commitments.

In the near term, a course correction seems unlikely. The impeachment of President Trump and the noise surrounding the 2020 presidential elections will likely deepen political polarization further. And as US grand strategists ponder the United States' future role in the world, growing domestic rifts risk forcing the US foreign policy machinery into a major “strategic time-out.”¹⁷



COMPARISON OF TURNOVER IN US PRESIDENTS' "A TEAM" DURING FIRST TERM IN OFFICE

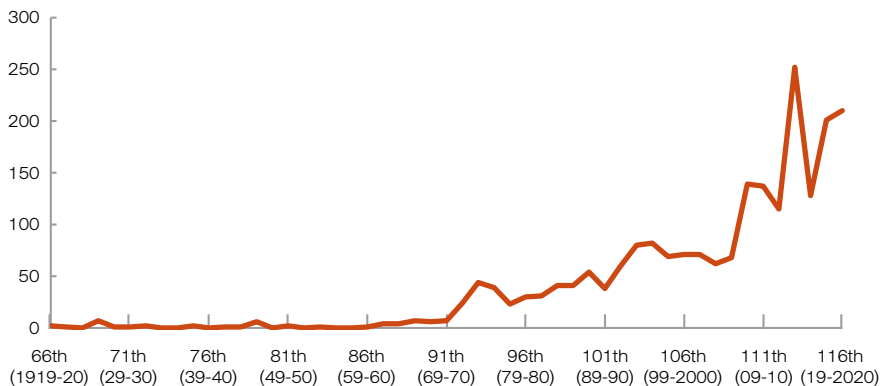
Turnover among senior-level advisors by administration, year to year, percent



Source: The Brookings Institution²⁰

FREQUENCY OF EFFORTS TO BLOCK LEGISLATION THROUGH FILIBUSTERS IN THE SENATE

Cloture motions filed in the US Senate, 66th-116th Congress

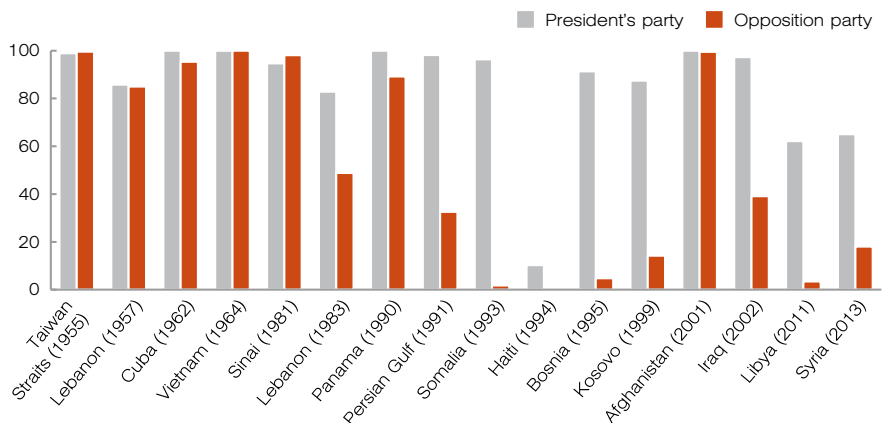


Source: The Brookings Institution²¹



BIPARTISAN SUPPORT IN THE HOUSE OF REPRESENTATIVES FOR THE USE OF MILITARY FORCE

Share of party members who voted for resolutions authorizing or otherwise supporting the President's use of military force, by roll call, percent

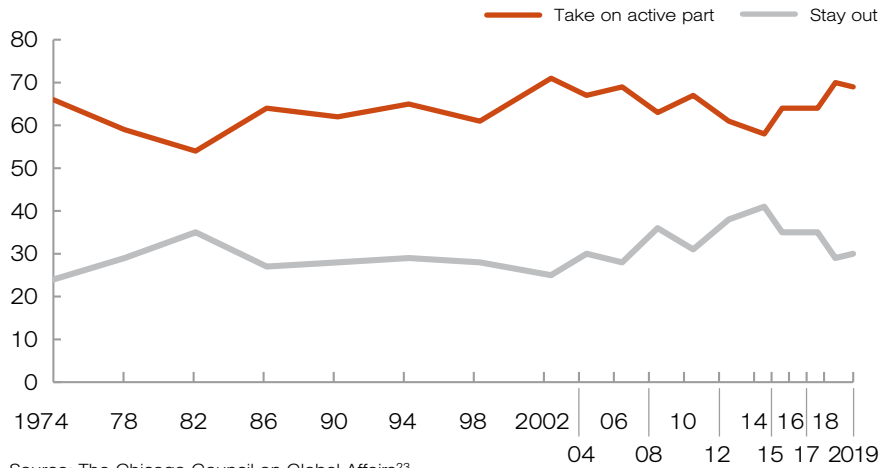


Source: Kenneth Schultz²²



WHAT CITIZENS IN THE US THINK: WILL IT BE BEST FOR THE FUTURE OF THE COUNTRY IF WE TAKE AN ACTIVE PART IN WORLD AFFAIRS OR IF WE STAY OUT OF WORLD AFFAIRS?

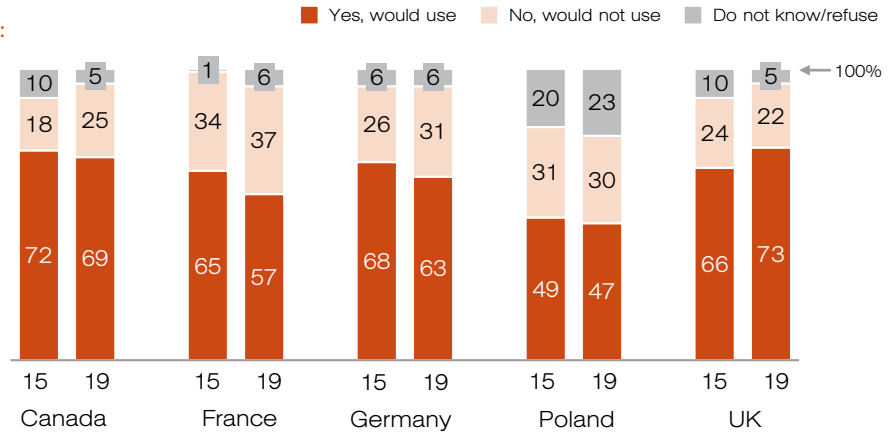
Opinion polls, selected years, percent



Source: The Chicago Council on Global Affairs²³

WHAT CITIZENS IN SELECTED NATO MEMBER STATES THINK: DO YOU THINK THE US WOULD OR WOULD NOT USE MILITARY FORCE TO DEFEND A NATO ALLY?

Opinion polls, 2015 and 2019, percent

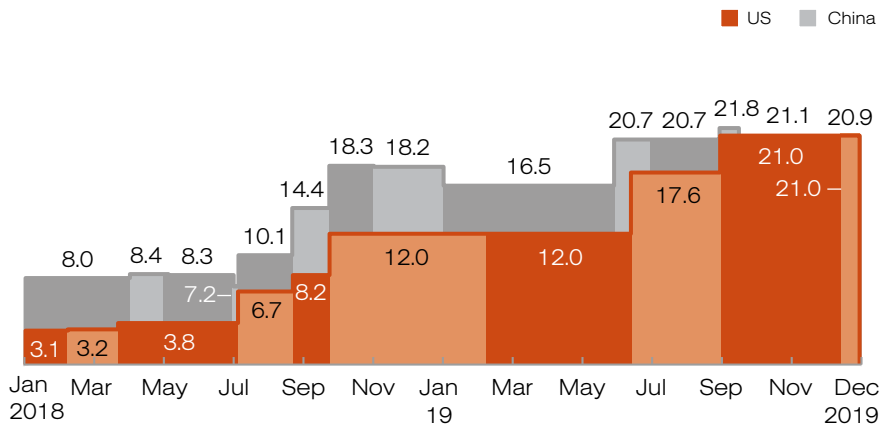


Source: Pew Research Center²⁴



EVOLUTION OF TARIFFS IN THE "TRADE WAR" BETWEEN CHINA AND THE US

Average tariff rate, 2018-19, percent

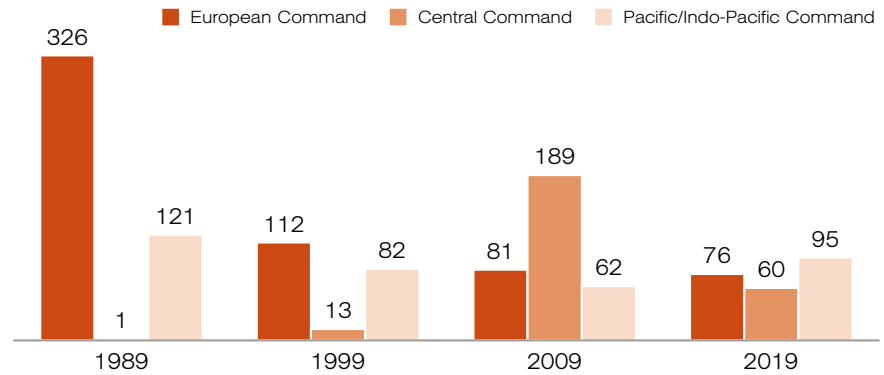


Source: Peterson Institute for International Economics²⁵



THE SCALE OF THE US MILITARY PRESENCE IN SELECTED REGIONS OVER TIME

US forward-deployed personnel, by combatant command, selected years, thousands

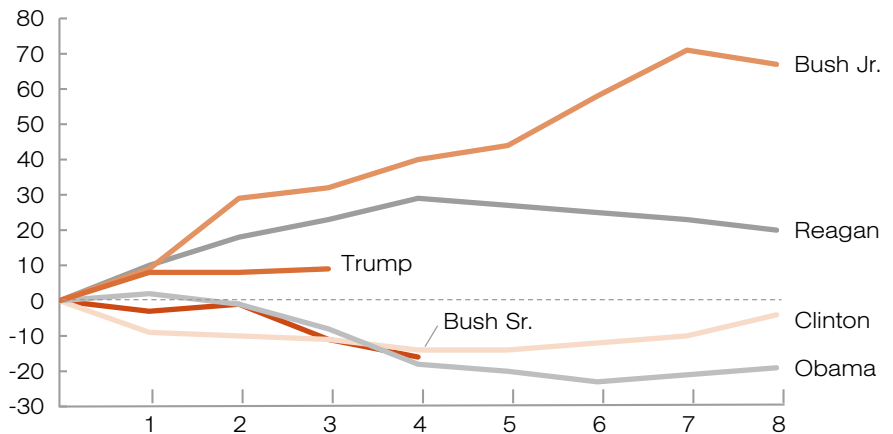


Source: The International Institute for Strategic Studies (IISS)²⁶



EVOLUTION OF THE US DEFENSE BUDGET UNDER RECENT ADMINISTRATIONS

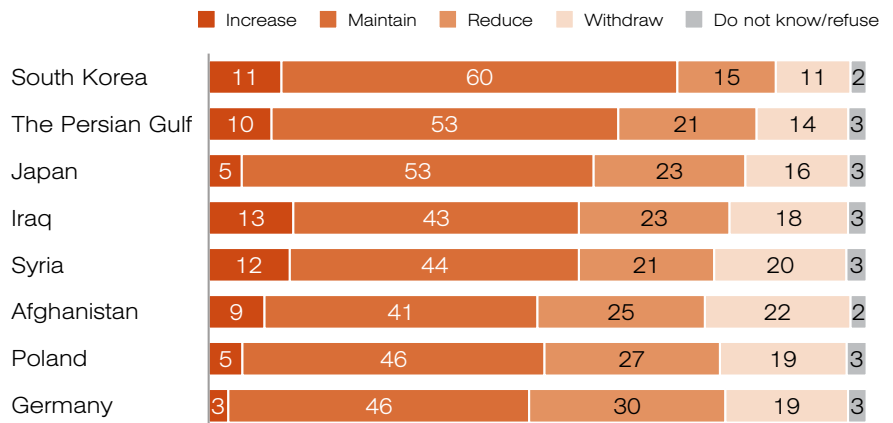
Annual real growth rates in Department of Defense total obligation authority, by year of presidential administration, 1989-2020, percent



Source: Center for Strategic and Budgetary Assessments (CSBA)²⁷

WHAT CITIZENS IN THE US THINK: SHOULD THE US INCREASE, MAINTAIN, REDUCE, OR WITHDRAW ITS MILITARY FORCES FROM THE FOLLOWING COUNTRIES?

Opinion poll, 2019, percent



Source: The Chicago Council on Global Affairs²⁸



China: Meddle Kingdom

“There is no force that can shake the status of this great nation. No force can stop the Chinese people and the Chinese nation forging ahead.”¹⁴

XI JINPING,
1 OCTOBER 2019

With the 70th anniversary of the People's Republic, 2019 was a both momentous and challenging year for China's leadership. The anniversary festivities on 1 October gave President Xi opportunity to flaunt China's continuing rise towards normative, economic, and military power on par with the West. The cabinet released a white paper in July 2019 denouncing “growing hegemonism, power politics, unilateralism” and provocations in China's neighborhood by the United States¹ – with the clear message: China is prepared to push back. In the same spirit, Beijing is continuously developing capabilities to project its power in the Asia-Pacific. It has upgraded outposts in the South China Sea, is constructing a third aircraft carrier, and has developed a “credible” sea-based nuclear deterrent and ballistic missiles that could target the US base on Guam.² These moves are also the backdrop for military posturing and hardening rhetoric toward Taiwan, with vows to take “all necessary means” to quell “separatist forces.”³

Beyond military hardware, the leaps China is making in other technological spheres are also being felt around the world. In 2019, it completed prestigious spacefaring projects and cemented itself as a pioneering space power.⁴ Looming Chinese superiority in foundational emerging technologies like artificial intelligence, quantum computing, and connectivity technology has caused consternation in the West – and, particularly in the case of 5G, an intense debate over how to balance close economic ties with China against growing security concerns.⁵ Meanwhile, Beijing is steadily exporting surveillance technology and “know-how” in the field of internet regulation.⁶ The growing concern is that the future holds a technological segregation of the world into those countries operating on Western technologies and norms and those running on Chinese ones.⁷

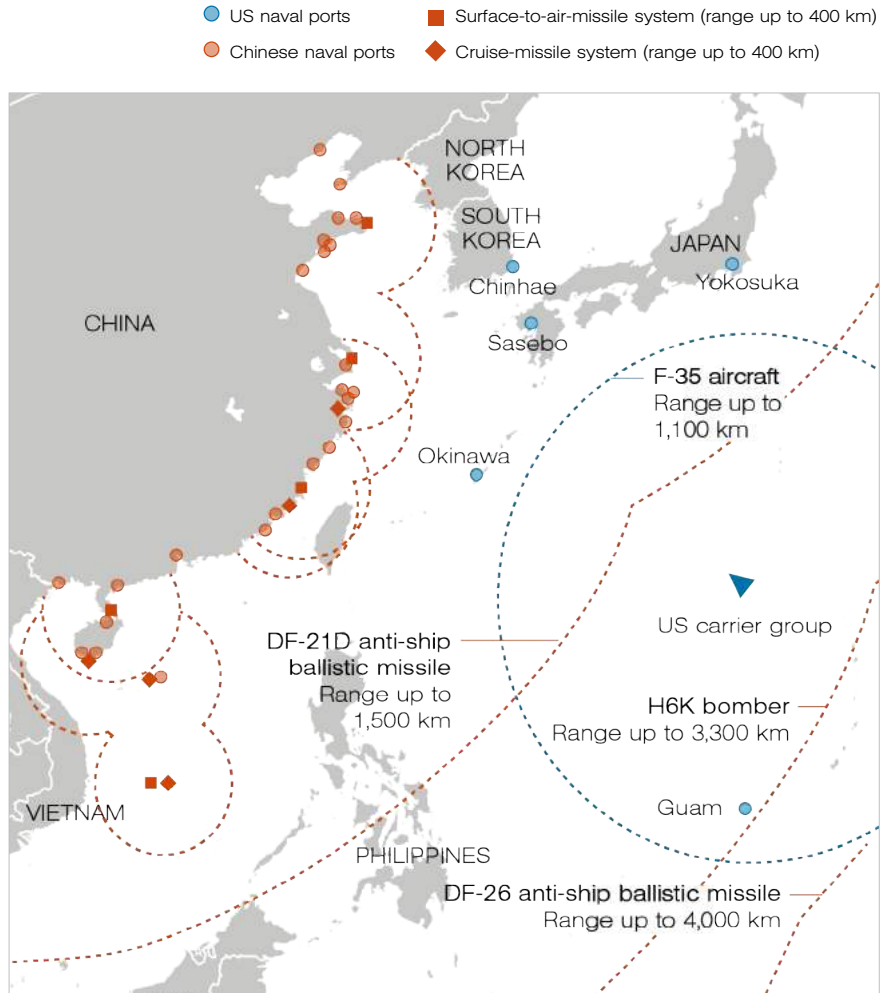
“Far too many American multinational corporations have kowtowed to the lure of China's money and markets by muzzling not only criticism of the Chinese Communist Party, but even affirmative expressions of American values.”¹⁵

MIKE PENCE,
24 OCTOBER 2019

Internally, too, China's leadership – and Xi in particular – is tightening its grip. To date, Xi's anti-corruption purge has targeted 2.7 million party officials.⁸ The party is also increasingly reinserting itself into China's economy, for instance by strengthening party committees within enterprises.⁹ But these moves do not come without cost. Resistance to Xi's centralization of power is reportedly growing.¹⁰ China's economic growth hit a 30-year low in 2019, struggling to stay abreast of rising debt levels and demographic change.¹¹ If growth suffers under the new political rigidity, this dissatisfaction may be compounded. In Hong Kong, the backlash¹² against a Beijing power grab is already boiling over. The Chinese reaction to the protracted and incendiary protests has come under scrutiny from abroad, but foreign governments have been largely noncommittal. A growing list of interventions – from manufacturing international praise for the mass internment of China's Uighurs, to arbitrarily jailing Canadians in retribution for Canada arresting a Huawei executive, or censuring the US National Basketball Association¹³ – has shown countries how far China will go to stifle criticism not only at home but also abroad. Beijing faces a steep challenge if it wants to square domestic repression, shows of military force, and heightening nationalism with its narrative of China's “peaceful rise” for international audiences.



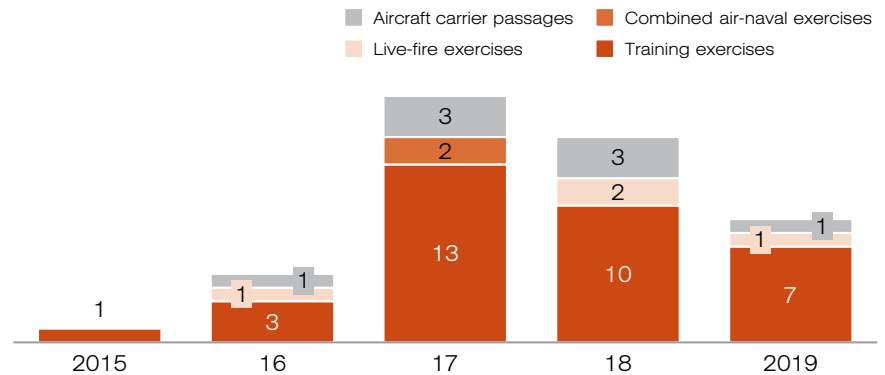
CHINA'S CAPABILITIES FOR ANTI-ACCESS/ AREA DENIAL (A2AD) IN THE EAST AND SOUTH CHINA SEAS



Source: Munich Security Conference, based on The Economist and Center for Strategic and Budgetary Assessments (CSBA)¹⁶

CHINESE MILITARY POSTURING IN THE WATERS AROUND TAIWAN

Chinese air force and naval activities in proximity to Taiwan, 2015-19



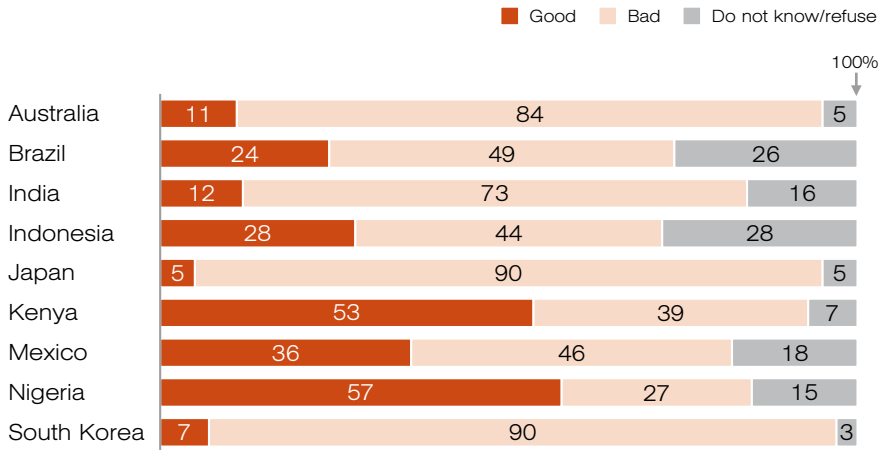
Source: Mercator Institute for China Studies (MERICS)¹⁷





WHAT CITIZENS IN SELECTED COUNTRIES THINK: IS CHINA'S GROWING MILITARY POWER GOOD OR BAD FOR YOUR COUNTRY?

Opinion poll, 2019, percent



Source: Pew Research Center¹⁸

POLICIES TOWARD HUAWEI 5G TECHNOLOGY IN OECD COUNTRIES

Huawei involvement in telecommunications networks, November 2019

	Countries with trial/pilot deployments of Huawei 5G technology	Countries without trial/pilot deployments of Huawei 5G technology
Full exclusion of Huawei technology from 5G networks	Australia Japan New Zealand	Israel US
Partial exclusion* of Huawei technology from 5G networks; full exclusion being considered	Denmark Estonia France Netherlands UK	Canada Czech Republic
Partial exclusion of Huawei technology from 5G networks	Mexico Norway	Ireland
Full exclusion being considered	Germany Poland	Sweden
Partial exclusion being considered	Italy Latvia	Lithuania
No restrictions in place or being considered	Austria Belgium Finland Greece Hungary	Chile Luxembourg Slovak Republic Slovenia Switzerland

* E.g., exclusion from core networks, government networks, military networks, or networks of certain regions or certain carriers

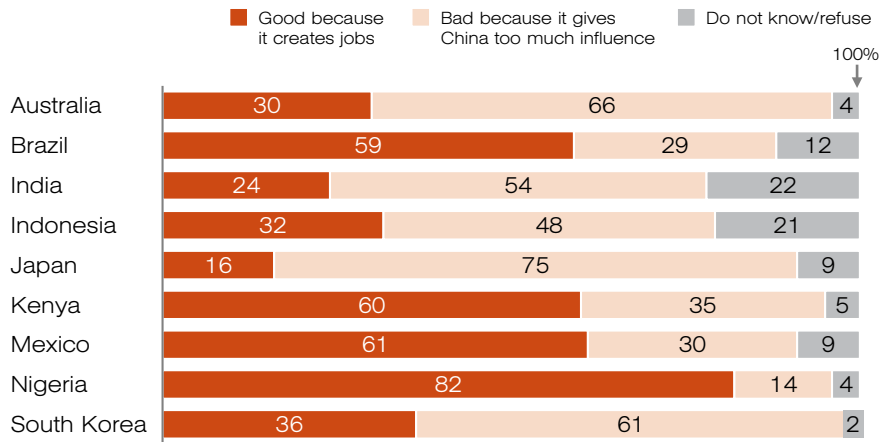
Source: Mercator Institute for China Studies (MERICS)¹⁹





WHAT CITIZENS IN SELECTED COUNTRIES THINK: IS CHINESE INVESTMENT IN YOUR COUNTRY A GOOD OR A BAD THING?

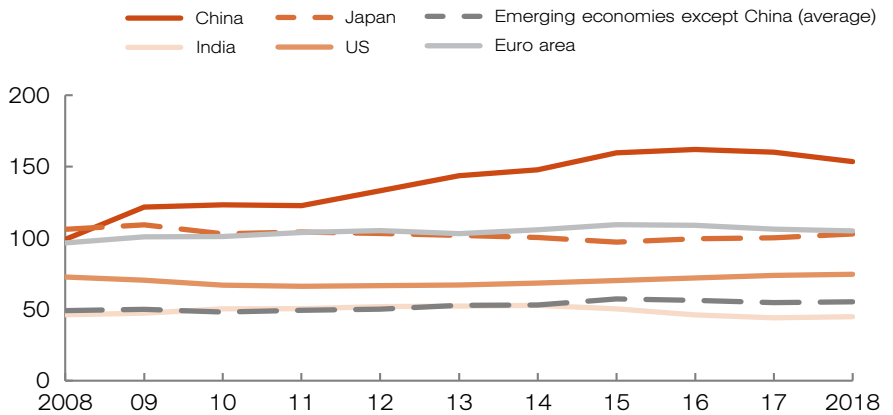
Opinion poll, 2019, percent



Source: Pew Research Center²⁰

CORPORATIONS AND CHINA'S DEBT-FUELED ECONOMIC GROWTH

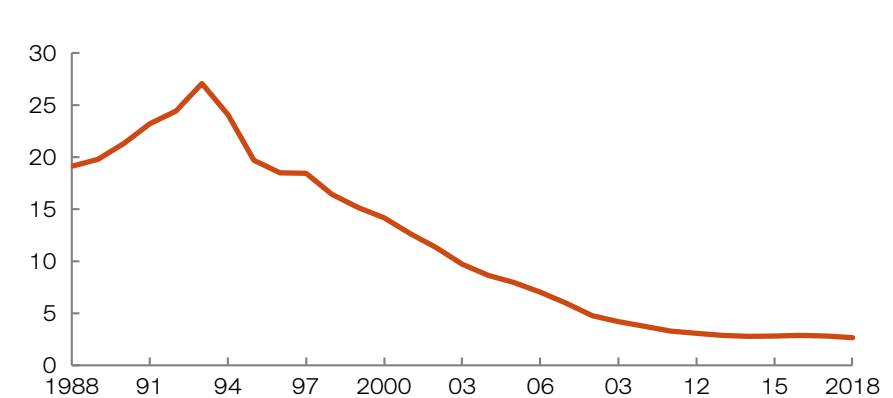
Total credit to nonfinancial corporations in relation to GDP, 2008-18, percent



Source: Munich Security Conference, based on Bank for International Settlements²¹

HONG KONG'S DECLINING SHARE OF CHINA'S ECONOMY

GDP of Hong Kong as share of China's GDP, 1988-2018, percent



Source: Munich Security Conference, based on World Bank²²



Russia: Putemkin's State

"Pushing Russia away from Europe is a major strategic error."²⁴

EMMANUEL MACRON,
27 AUGUST 2019

Playing a weak hand well, Russia scored several diplomatic wins in 2019. Despite no substantial change in the Kremlin's foreign policy, the past year saw Russia's readmission into the Council of Europe, a NATO member state receiving the Russian-built S-400 air-defense system, and the cementation of Moscow's "status as a power broker in the Middle East."¹ Most significantly, however, it featured a "diplomatic overture"² by French President Emmanuel Macron, who urged Europeans to "rethink the fundamentals"³ of their relations with Russia.⁴ Yet, many European leaders view Macron's outreach as a rather "undeserved détente."⁵ They find it is at odds with Russia's persistent destabilization of Ukraine,⁶ its challenge to nuclear stability, Moscow's ongoing efforts to "discredit and damage Western liberal institutions and values,"⁷ and Russian involvement in extraterritorial killings.⁸

"I am pleased to note that Russian-Chinese relations have reached an unprecedentedly high level."²⁵

VLADIMIR PUTIN,
5 JUNE 2019

In light of a protracted crisis of trust in Western-Russian relations, the Kremlin has accelerated its outreach to other world regions, including to Latin America, the Middle East, and Africa.⁹ Most significant, however, is Moscow's "pivot to the east,"¹⁰ towards Beijing. Russia has revived arms sales to China,¹¹ invited Beijing to participate in the Vostok-2018 military exercise,¹² and in July 2019 joined China in conducting air patrols over the East China Sea.¹³ According to Beijing, bilateral trade between both countries increased by 27 percent in 2018.¹⁴ Yet, the strongest asset of the Sino-Russian alignment seems to be the close personal bond with China's Xi Jinping, whom Putin calls his "dear friend"¹⁵ and has already met about 30 times.¹⁶ While Western governments anxiously eye the new alignment, it is hard to deny the considerable power asymmetry between the two countries that has unfolded in the areas of commerce and trade,¹⁷ but is also becoming more salient in the military realm as well as in space, cyberspace, and artificial intelligence.¹⁸ When adding China's growing footprint in the Russian Far East and in Central Asia to the picture, Sino-Russian ties face some tough tests.

"In the world today, the China-Russia relationship is the closest, strongest, most mature, and most stable one between two major countries."²⁶

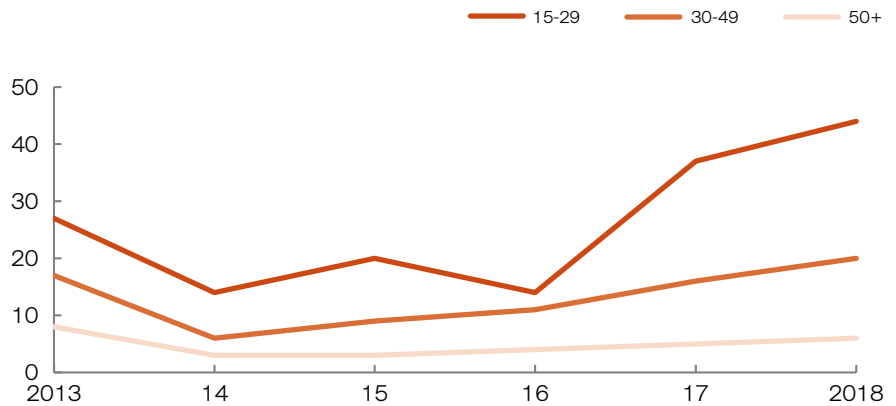
WANG YI,
24 DECEMBER 2019

On the domestic front, Putin may still be "firmly in charge."¹⁹ Yet, he is currently "facing the biggest political challenge since his return to the Kremlin in 2012."²⁰ In summer 2019, when the Kremlin banned opposition candidates from running for the Moscow City Council, protests erupted and resulted in the largest sustained political demonstration in the past seven years.²¹ The regime reacted with mass arrests, but in the elections on 8 September, Kremlin-backed candidates were still dealt a serious blow. In light of ongoing economic stagnation, no growth in disposable incomes,²² and a highly unpopular pension reform, support for Putin has plummeted.²³ These developments and the government reshuffle of early 2020 suggest that the domestic foundations for Russia's global power projection may slowly be wearing thin. Moscow has long been punching well above its weight. In 2019, however, it still landed numerous hits.



WHAT CITIZENS IN RUSSIA THINK: WOULD YOU LIKE TO MOVE PERMANENTLY TO ANOTHER COUNTRY?

Opinion polls, 2013-18, by age group, positive responses in percent

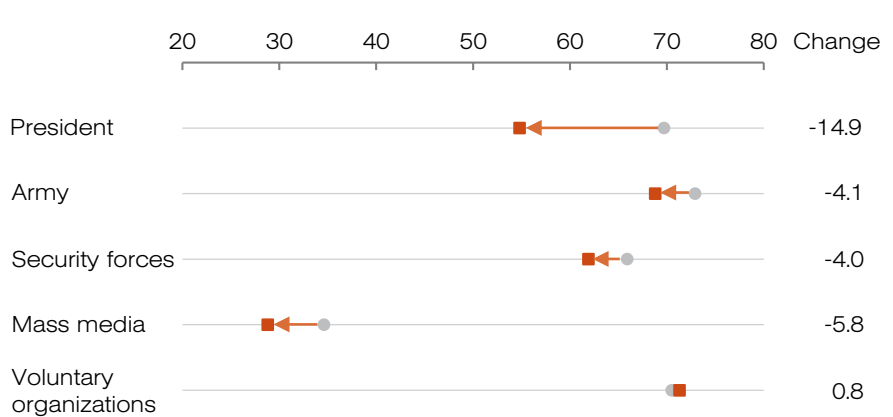


Source: Gallup World Poll²⁷



WHAT YOUTHS IN RUSSIA THINK: HOW MUCH TRUST DO YOU HAVE IN...

Opinion polls, 2018-19, "fully trust/rather trust" in percent

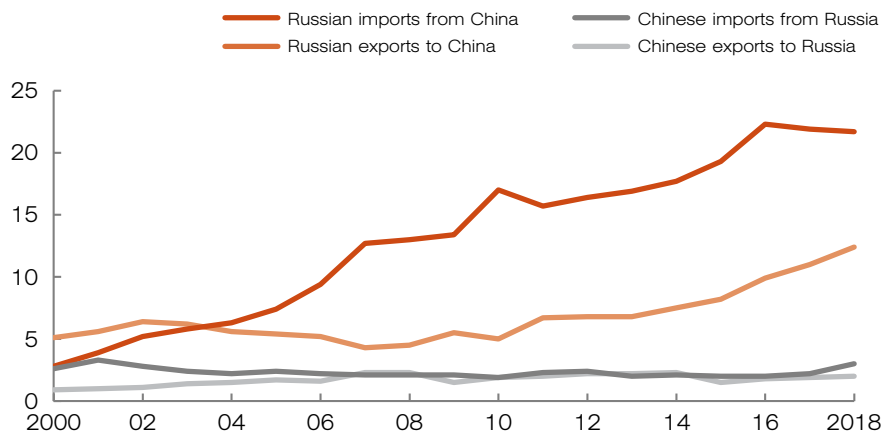


Source: Centre for East European and International Studies (ZOIS)²⁸



SINO-RUSSIAN TRADE IN GOODS AND ITS SIGNIFICANCE FOR EACH COUNTRY

Reciprocal trade as share of each country's total trade, 2000-18, percent



Source: United Nations Comtrade Database²⁹



Europe: Eurovision Contest

“Europe needs more confident thinking. And we have reason to be confident. Because we speak from a position of strength – the economic power of 500 million consumers, representing 20 percent of the global GDP.”²²

**CHARLES MICHEL,
20 NOVEMBER 2019**

The debate about Europe’s strategic direction picked up steam in 2019. Amid increasing great-power competition and a growing risk of getting caught in the crossfire, Europeans are hotly debating how Europe can assert itself as a global player in its own right.¹ From the US-China “trade war”² and Washington’s use of secondary sanctions, to Chinese inroads into European critical infrastructure, Europe’s ability to safeguard its security and prosperity and conduct an independent foreign policy with the necessary means is already being challenged on various fronts. Against this backdrop, French President Emmanuel Macron warned insistently that if Europe did not learn the language of power, it would “disappear geopolitically”³ or have others determine its fate. All this comes at a time when the United Kingdom, one of the European Union’s “few economic, diplomatic, and military heavyweights,”⁴ continues its painful long goodbye from the Union.

Making Europe “weltpolitikfähig,”⁵ as her predecessor called it, is also a core concern for Ursula von der Leyen and the “geopolitical”⁶ Commission she is heading. Strengthening the EU where it “has a real competitive edge,”⁷ namely in the economic realm, will be front and center to this effort.⁸ The Commission also seeks to accelerate moves “towards a genuine European Defence Union.”⁹ On the growing challenge from China, the EU has already become more outspoken, for the first time calling Beijing “an economic competitor” and “systemic rival.”¹⁰ Moreover, it has boosted efforts to present Beijing with a united European front.¹¹ Yet, despite the recent “5G wake-up call,”¹² Europe’s China policies still lack coherence and remain oddly decoupled from the US approach.¹³

“My Commission will be a geopolitical Commission committed to sustainable policies.”²³

**URSULA VON DER LEYEN,
10 SEPTEMBER 2019**

China is not the only file on which Europeans’ shared concern does not translate into a sufficient “sense of cohesion and strategic purpose.”¹⁴ From how to deal with rule of law infringements in Hungary and Poland to devising a European distribution system for refugees, little strategic consensus exists on how to strengthen the EU and its values – despite the EU managing to position itself in selected areas, including as a norm-setter in the digital space.

“Germans and other Europeans need a renewed sense of cohesion and strategic purpose to become more than an appendage to a Eurasia reshaped by China and Russia.”²⁴

**ROBERT ZOELICK,
29 OCTOBER 2019**

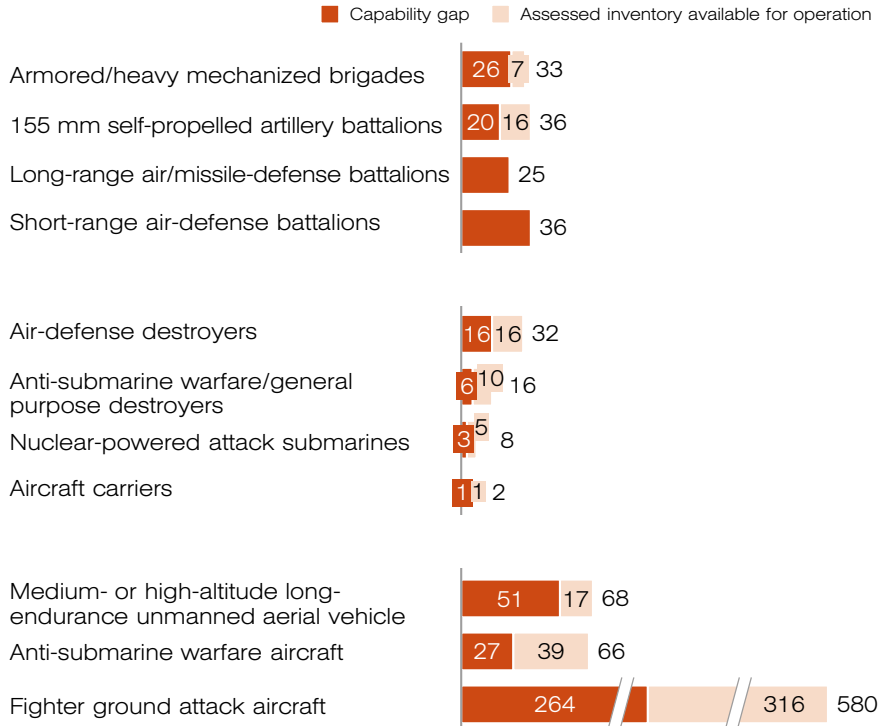
The lack of coordination and fundamental differences over Europe’s strategic direction between France and Germany, the duo that was supposed to spearhead the empowerment project, certainly has not helped: after a promising restart in Franco-German relations,¹⁵ disagreement has been especially pronounced on EU enlargement to the Western Balkans, which France recently blocked with a veto,¹⁶ on the right approach toward Russia,¹⁷ and on Europe’s relations with NATO. While Macron fears that it will weaken the EU if the Union is not deepened before new members accede,¹⁸ Chancellor Angela Merkel is more concerned about other powers exploiting the void the EU leaves to its East.¹⁹ Similar frictions emerged after Macron depicted NATO as braindead,²⁰ leaving Germany – and Eastern EU member states – alarmed that France wants to strengthen the EU at the expense of transatlantic relations.²¹ For now, competing visions of Europe’s place in the world frustrate efforts to build a more competitive Europe.



GAPS OF SELECTED EUROPEAN CAPABILITIES IN A NATO ARTICLE 5 SCENARIO WITHOUT THE US

In this hypothetical scenario, the US has withdrawn from NATO. Tensions between Russia and NATO members Lithuania and Poland escalate into war, resulting in the Russian occupation of Lithuania and some Polish territory seized by Russia. Invoking Article 5, the European members of NATO direct the Supreme Allied Commander Europe (SACEUR) to plan Operation "Eastern Shield" to reassure Estonia, Latvia, Poland, and other frontline NATO member states by deterring further Russian aggression. European NATO also prepares and assembles forces for Operation "Eastern Storm," a military operation to restore Polish and Lithuanian government control over their territories.

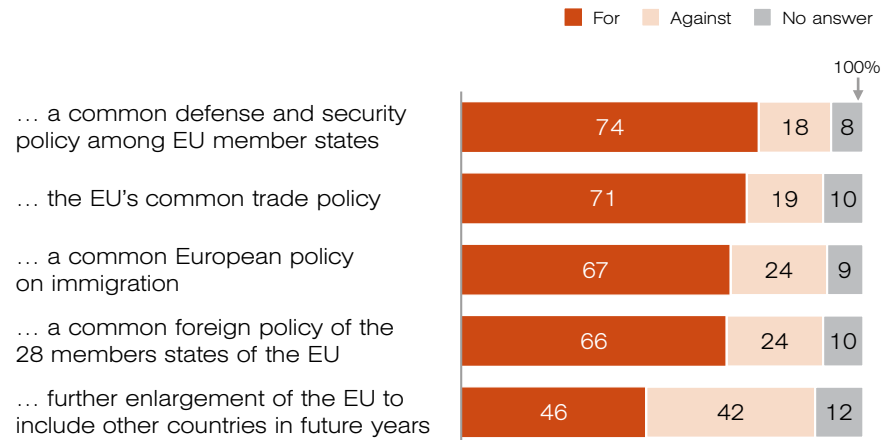
Estimated force requirements and inventory available for operation, scenario based on 2019 data



Source: The International Institute for Strategic Studies (IISS)²⁵

WHAT CITIZENS IN EU COUNTRIES THINK: WHAT IS YOUR OPINION ON ...

Opinion poll, 2019, percent



Source: Eurobarometer²⁶



TOWARD QUALIFIED MAJORITY VOTING (QMV) IN EU COMMON FOREIGN AND SECURITY POLICY (CFSP)

European Commission proposal for a gradual extension of QMV to EU foreign policy, September 2018

QMV in CFSP implementation

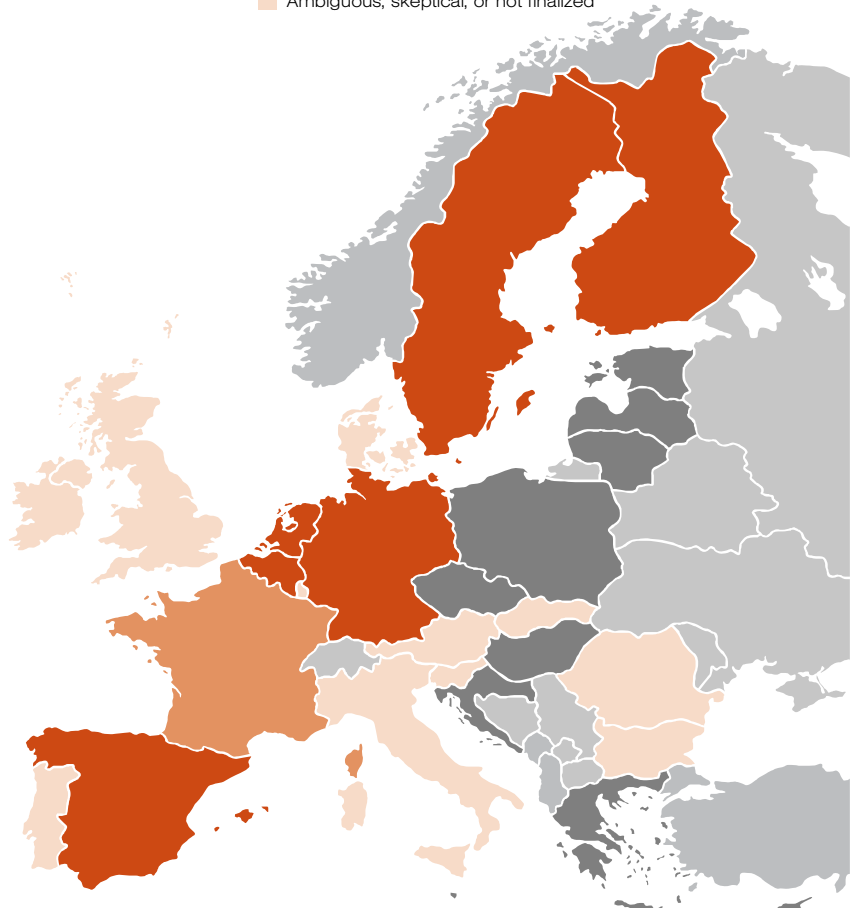
QMV in selected CFSP issue areas

Enabling clause: Art. 31(2) Treaty of the European Union (TEU)	Legal basis	Passerelle clause: Art. 31 (3) (TEU)
Initial decision for action by unanimity in European Council or Council	Political threshold	Decision for permanent passage to QMV by unanimity in European Council
QMV for implementation of thematic or regional strategies, civilian crisis management missions, and for amending listings of all EU sanctions regimes	"Juncker Proposal"	Passage to QMV in three issue areas: sanctions, human rights positions, and civilian crisis management
General safeguards: Emergency brake: return to unanimous European Council decision for "vital and stated reasons of national policy" Excluded: "decisions having military or defense implications"		

Source: Jacques Delors Centre, Hertie School; graph based on European Commission²⁷

EU MEMBER STATES' POSITIONS ON EXTENSION OF QMV TO CFSP VIA PASSERELLE CLAUSE

- In favor
- In favor of extension to CFSP and taxation
- Opposed
- Ambiguous, skeptical, or not finalized
- Non-members

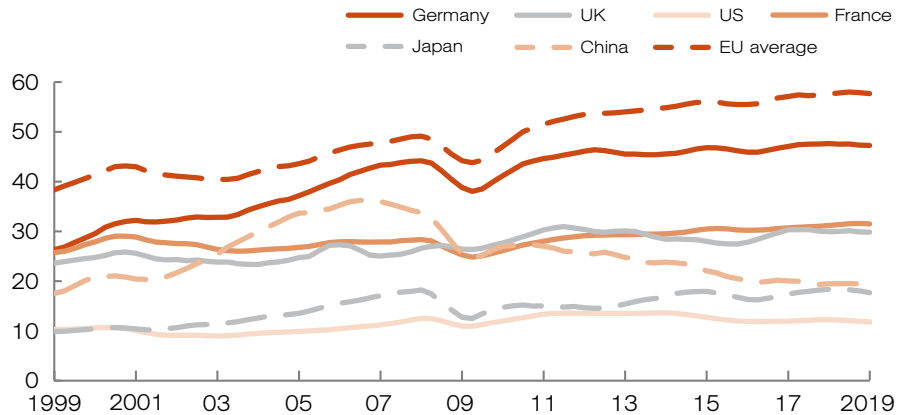


Source: Jacques Delors Centre, Hertie School²⁸



SELECTED COUNTRIES' EXPORTS AS SHARE OF GDP OVER TIME

Exports as share of GDP, September 1999-September 2019, percent

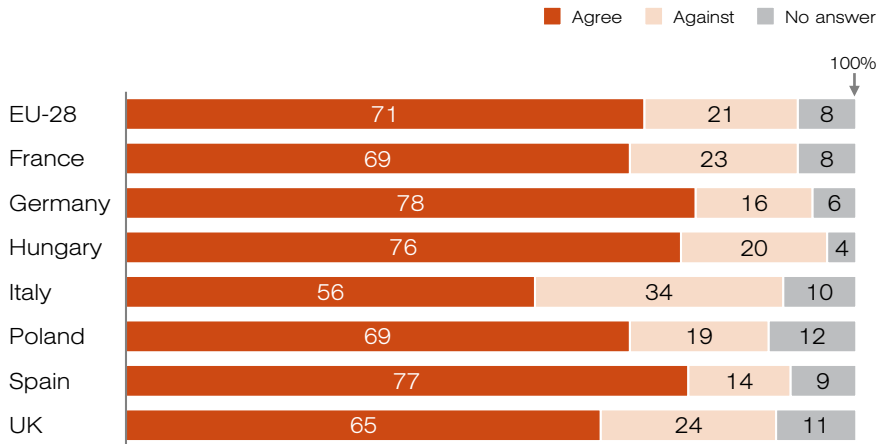


Source: Oxford Economics; Haver Analytics²⁹



WHAT CITIZENS IN EU MEMBER STATES THINK: THE EU IS MORE EFFECTIVE IN DEFENDING THE TRADE INTERESTS OF ITS MEMBER STATES THAN MEMBER STATES ON THEIR OWN

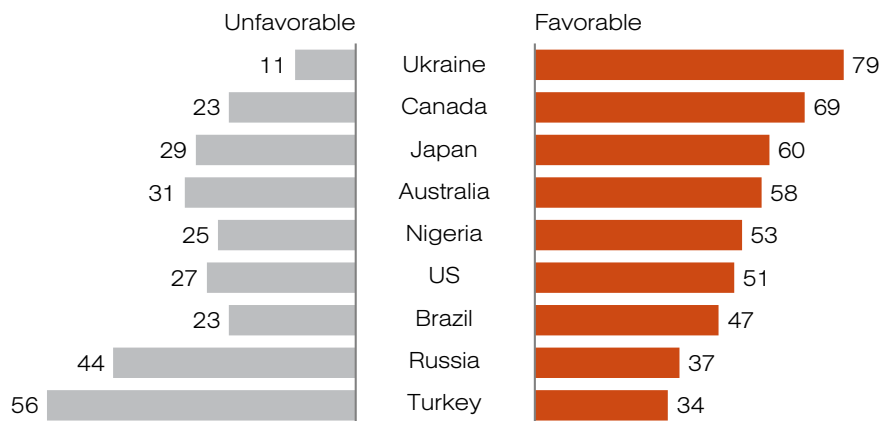
Opinion poll, 2019, percent



Source: Eurobarometer³⁰

WHAT CITIZENS IN SELECTED COUNTRIES THINK: DO YOU HAVE A FAVORABLE OR UNFAVORABLE OPINION OF THE EU?

Opinion poll, 2019, percent



Source: Pew Research Center³¹





Regions





Mediterranean: Nightmare Nostrum

“The tragedy of the Mediterranean cannot be allowed to continue. We cannot turn a blind eye to the high numbers of people dying on Europe’s doorstep.”²²

FILIPPO GRANDI,
19 JANUARY 2019

“The aspirations of the Arab Spring have too often been betrayed.”²³

JOHANNES HAHN,
27 MARCH 2019

For observers of the Southern Mediterranean, 2019 was a year of déjà vu: eight years after people rose up in the Middle East and North Africa (MENA), popular unrest again shook the states of the region. What accompanied the protests, namely government repression, violence, and displacement, looked equally familiar. Meanwhile, Western attempts to help stabilize the region and contain the by-products of instability, including organized crime, terrorism, and mass migration, are increasingly confronting their limits. With Europe underusing its many levers of influence, European leverage in its Southern neighborhood seems to decline.¹

Across the region, people keep yearning for change.² In social and economic terms, little has been achieved since 2011: growth remains stagnant, corruption pervasive, and youth unemployment rates some of the highest in the world.³ On the political side, it does not look much brighter: Tunisia remains the Arab Spring’s only democratic success story, yet is at constant risk of backsliding.⁴ Other countries saw autocratic revivals or plunged into instability and war.⁵

Meanwhile, Libya is turning into a “crisis of Syrian proportions.”⁶ Another humanitarian catastrophe seems imminent since in December Khalifa Haftar and his Libyan National Army launched their “decisive battle”⁷ for Tripoli, while the UN-backed Tripoli government secured the military support of Turkey to fend off Haftar’s offensive.⁸ Against this background, efforts to negotiate a ceasefire, fully implement the UN arms embargo, and return to the UN-sponsored political process, which Germany seeks to advance through an international conference, face dire prospects.⁹ Besides Haftar’s belief that military victory is still possible¹⁰ and the significant involvement by outside powers,¹¹ efforts to end the fighting are impeded by a “pervasive war economy”¹² that created many spoilers to peace.¹³ As the European Union in particular is lacking “unity of purpose,”¹⁴ the West gradually cedes leverage over a Libyan solution to others.

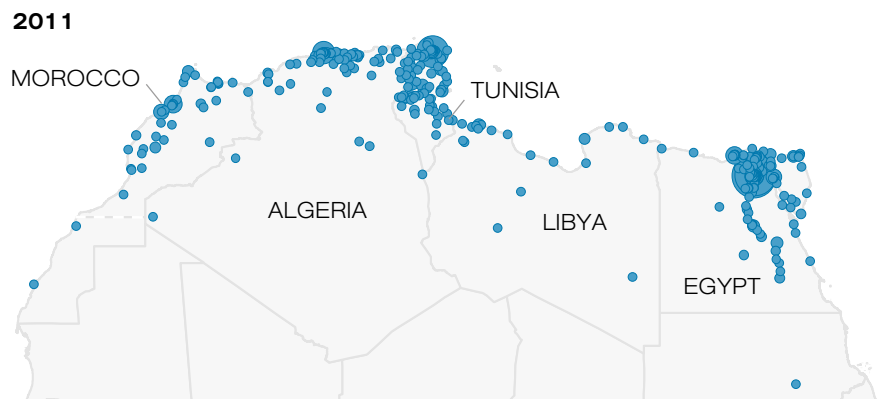
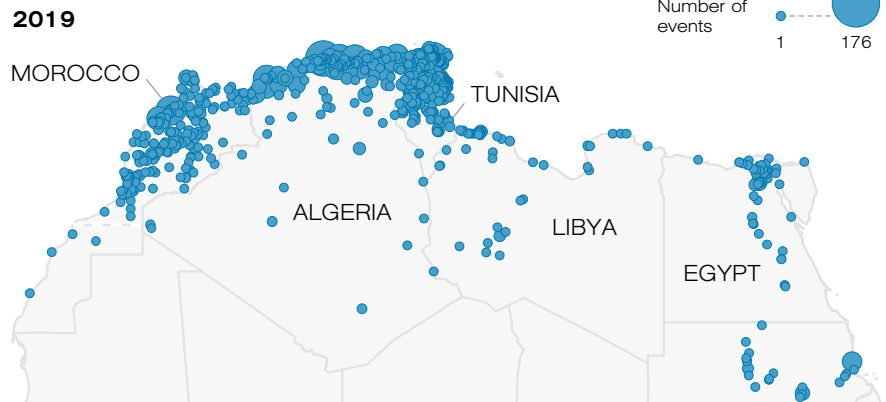
Torn by instability, Mediterranean states continue to be a source, recipient, and transit hub for displaced people – many of them destined for Europe.¹⁵ Although the number of maritime crossovers and migrant deaths in the Mediterranean Sea sharply declined in recent years,¹⁶ the depiction of the Sea as a “watery graveyard”¹⁷ has not lost its truth. In fact, on the Central and Western Mediterranean routes, the rate of deaths and disappearances per sea arrival is again on the rise.¹⁸ What is more, European efforts to enlist Libya and other countries in migration control come at significant costs, as migrants divert to other, potentially more dangerous routes,¹⁹ and those intercepted are often detained under dreadful conditions.²⁰

These developments forcefully remind both European and MENA leaders of the limits of “piecemeal containment.”²¹ Without the sweeping political and economic reforms that people rightly demand, lasting stability will not be attained – and the next iteration of uprisings is only a matter of time.



PROTESTS AND RIOTS IN NORTH AFRICA

Number of protest and riot events, 2011 and 2019*



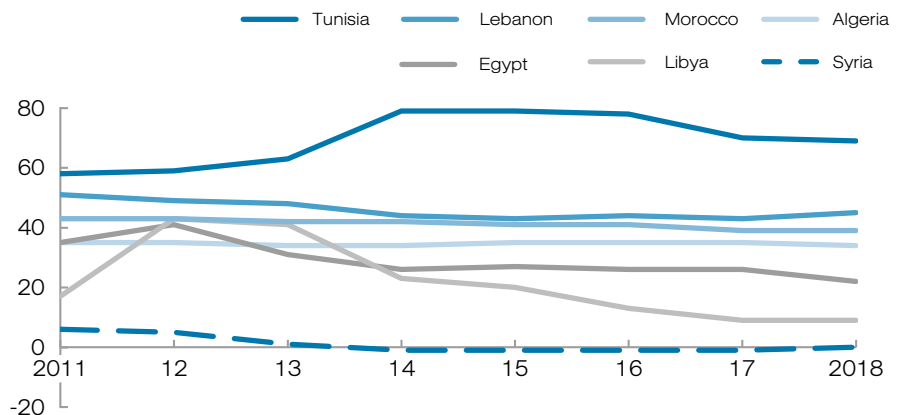
* For 2019 only until 23 November

Source: Armed Conflict Location & Event Data Project (ACLED)²⁴



DEVELOPMENT OF CIVIL AND POLITICAL LIBERTIES SINCE THE ARAB SPRING

Freedom in the World Index, 2011-18, aggregate scores*



* 0 = least free, 100 = most free

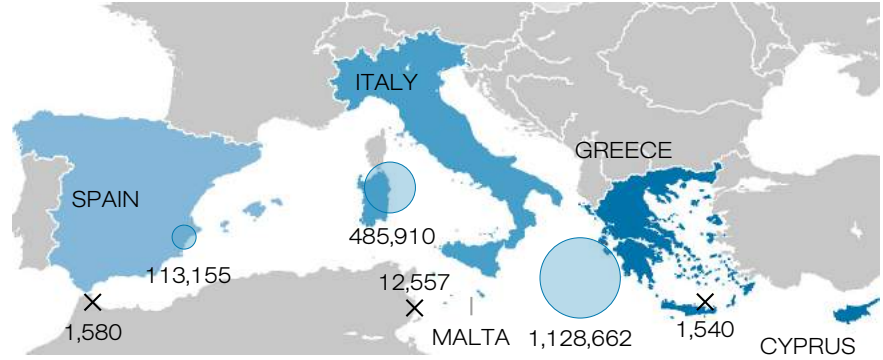
Source: Freedom House²⁵



MIGRATION ACROSS THE MEDITERRANEAN SEA SINCE 2015

Number of sea arrivals in the EU as well as deaths and disappearances of migrants in the Mediterranean Sea, 2015-19

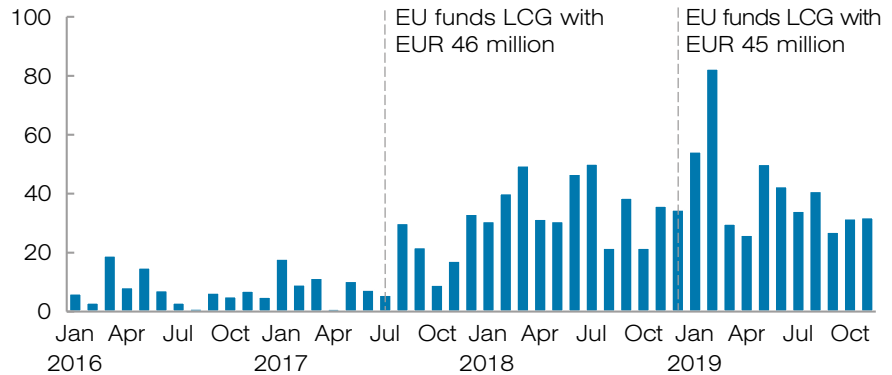
■ Western route ■ Central route ■ Eastern route ○ Arrivals ✕ Recorded deaths and disappearances



Source: International Organization for Migration (IOM), Missing Migrants Project²⁶

MIGRANT INTERCEPTIONS BY THE LIBYAN COAST GUARD (LCG)

Share of migrants intercepted per total departures on the Central Mediterranean route, 1 January 2016-30 November 2019, percent

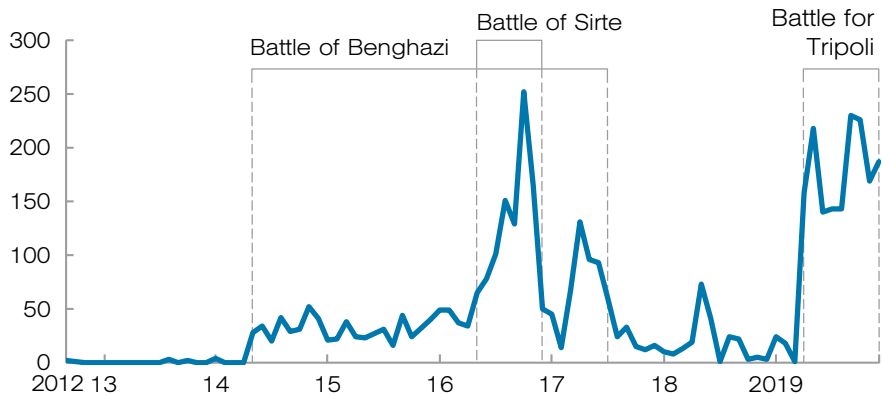


Source: Centre for International Security, Hertie School²⁷



AIR AND ARTILLERY STRIKES IN LIBYA BY ALL PARTIES

Number of air and artillery strikes, 1 September 2012-31 December 2019



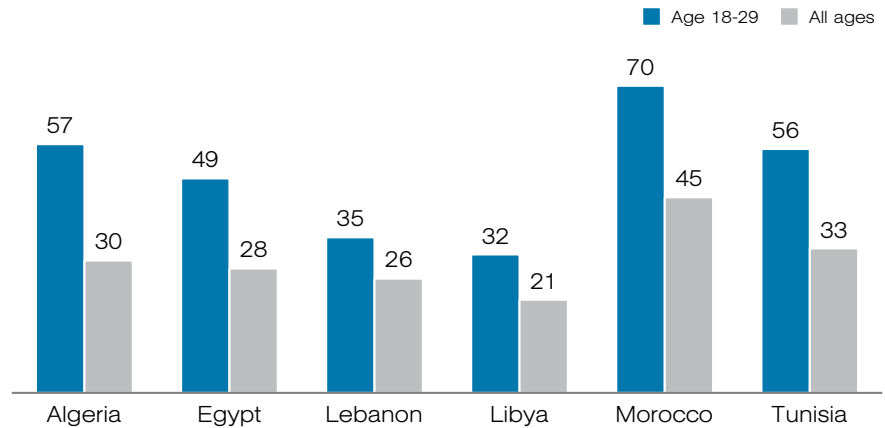
Source: Airwars²⁸





WHAT CITIZENS IN SELECTED NORTH AFRICAN COUNTRIES THINK: HAVE YOU EVER THOUGHT ABOUT EMIGRATING?

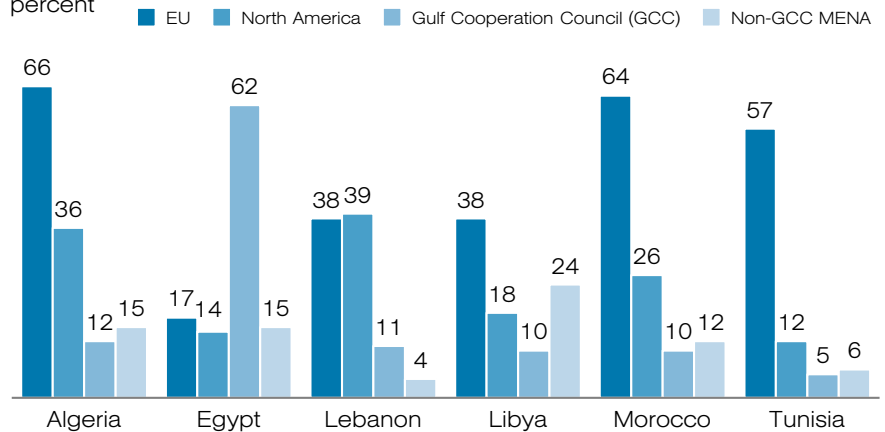
Opinion poll, 2018-19, positive responses by age group, percent



Source: Arab Barometer²⁹

WHAT CITIZENS IN SELECTED NORTH AFRICAN COUNTRIES THINK: WHICH COUNTRY WERE YOU THINKING OF EMIGRATING TO?

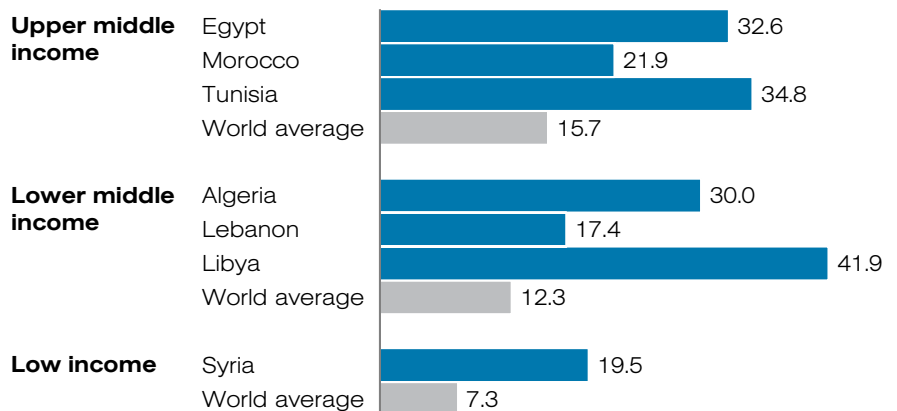
Opinion poll, 2018-19, responses aggregated by region, multiple answers, percent



Source: Arab Barometer³⁰

YOUTH UNEMPLOYMENT IN SELECTED ARAB SPRING COUNTRIES

Unemployment among ages 15-24, modeled ILO estimate, 2019, percent



Source: The World Bank; International Labour Organization (ILO)³¹



Middle East: Dire Straits

“President Trump believes that he can gain by defeating others. He can gain by bringing others to their knees. Maybe he can – not with Iran.”¹⁴

JAVAD ZARIF

29 OCTOBER 2019

“Iran’s leaders plunder the nation’s resources to enrich themselves and to spread mayhem across the Middle East and far beyond.”¹⁵

DONALD TRUMP

22 APRIL 2019

“With the US looking sometimes elsewhere, an entire grammar of deterrents needs to be reinvented. No place better exemplifies this than the Gulf.”¹⁶

FLORENCE PARLY

23 NOVEMBER 2019

2019 saw the Middle East dangerously close to a major regional confrontation.¹ The attack on the US Embassy in Baghdad by supporters of an Iran-backed militia group and the subsequent US drone strike that killed Iranian general Qassem Suleimani were only the most recent in a series of incidents with the potential to spark a war.² While that scenario was averted, the latest cycle of escalation nevertheless ended in mass casualties as Iran accidentally shot down a civilian airliner.³

Iran has been at the center of growing tensions: it has cemented its military and political influence in the region and has proven its ability to inflict significant damage on its opponents, including by means of allied and proxy groups like the Houthis in Yemen.⁴ The United States has increased its so-called maximum pressure campaign on Iran, sending 14,000 additional troops to the Persian Gulf and tightening sanctions to “bring Iran’s oil exports to zero and deny the regime its principal source of revenue.”⁵ Yet, so far, these efforts have failed to reach their goal.

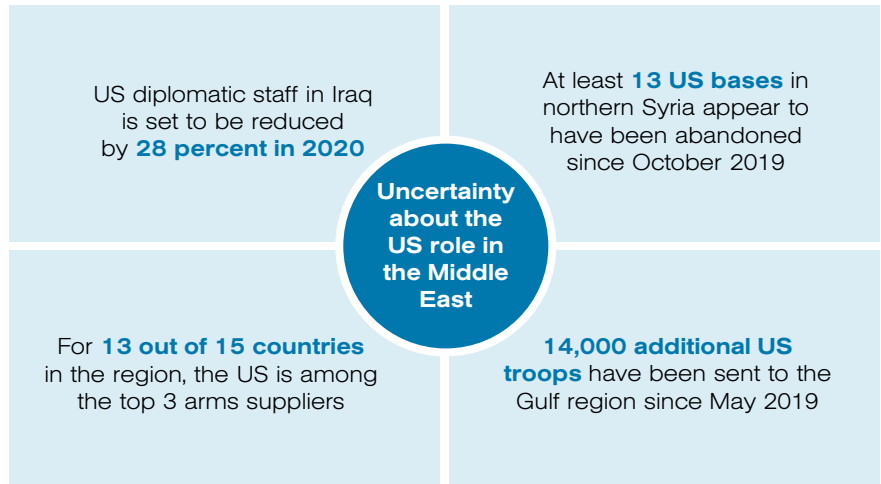
The Iranian economy is down but not out, and Tehran has responded with pressure of its own – on the US and its allies alike: it has started to gradually abandon its commitments under the Joint Comprehensive Plan of Action (JCPOA) in order to push the agreement’s European parties to deliver on the JCPOA’s promised economic benefits.⁶ After the Suleimani killing, Iran announced it would abandon all nuclear limits of the JCPOA.⁷ In the region itself, Washington’s allies have come under direct fire. In September, Saudi Arabian oil facilities were targeted in a major attack. Riyadh blamed Iran but did not retaliate.⁸ In contrast, Israel has escalated its air campaign against suspected Iranian missile production sites and shipments in Syria and reportedly Iraq.⁹ Meanwhile, Iran also faces societal backlash – from its own people and from other societies in the region: in Lebanon and Iraq, demonstrators also heavily criticized Iranian influence in their countries.¹⁰

Few nations joined the US maritime mission to secure freedom of navigation in the Strait of Hormuz, with France launching a separate European mission instead.¹¹ Where the United States has ceded strategic space in the region, others have been quick to move in. In Northern Syria, Turkey and Russia made fast territorial gains after the hasty second US attempt to leave the country.¹² Among US partners, this reinforced the impression that Washington is no longer willing to stand with its allies – in the Syrian case, first and foremost the Kurds. The events in Syria also caused a row within NATO, with French President Macron strongly lamenting the lack of coordination within the alliance.¹³

Meanwhile, regional actors have embarked on their own efforts to reduce the risk of all-out war: both the United Arab Emirates and Saudi Arabia have quietly started to engage with Iran and, in September, Riyadh and the Houthis entered into indirect peace talks on Yemen. However, as long as Washington and Tehran stay on collision course, détente in the Middle East remains unlikely.



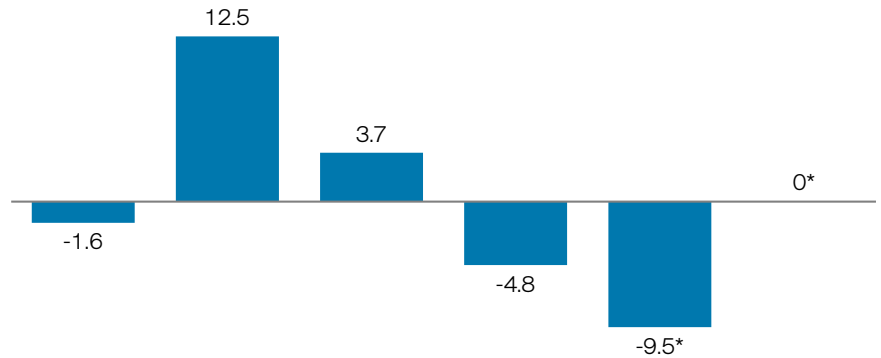
**MIXED MESSAGES:
THE US ROLE IN THE
MIDDLE EAST REGION**



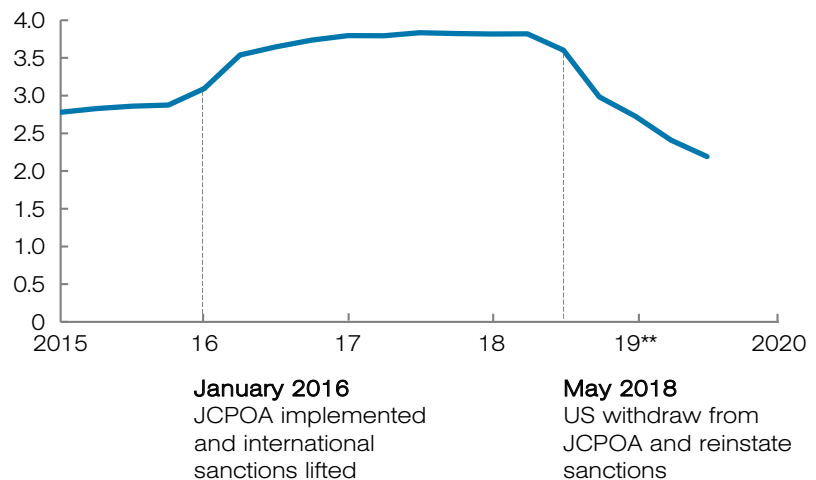
Source: CNN; IHS Markit; The New York Times; Stockholm International Peace Research Institute (SIPRI)¹⁷

**SANCTIONS AND
IRAN'S ECONOMY**

GDP growth rate, 2015-20, percent



Volume of crude oil production, 2015-19, million barrels per day



* Estimate

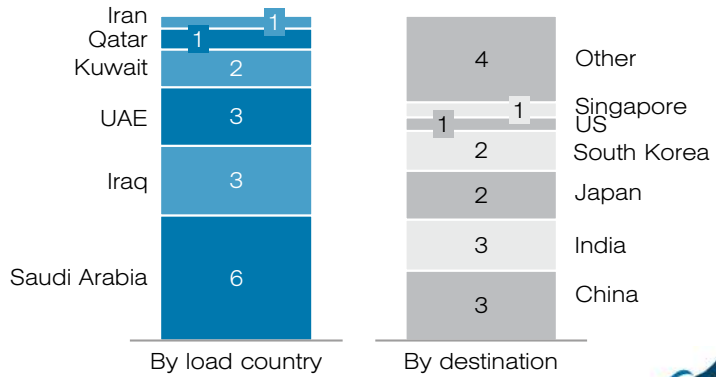
** Q1-Q3 2019

Source: Congressional Research Service; International Monetary Fund; Organization of the Petroleum Exporting Countries (OPEC)¹⁸



OIL TRANSPORTS THROUGH THE STRAIT OF HORMUZ

Average volume of crude oil flows, 1 January-2 December 2019, million barrels per day



Source: ClipperData¹⁹



IRANIAN INFLUENCE IN THE MIDDLE EAST

Local non-state partners of Iran throughout the region and level of state penetration, 2019



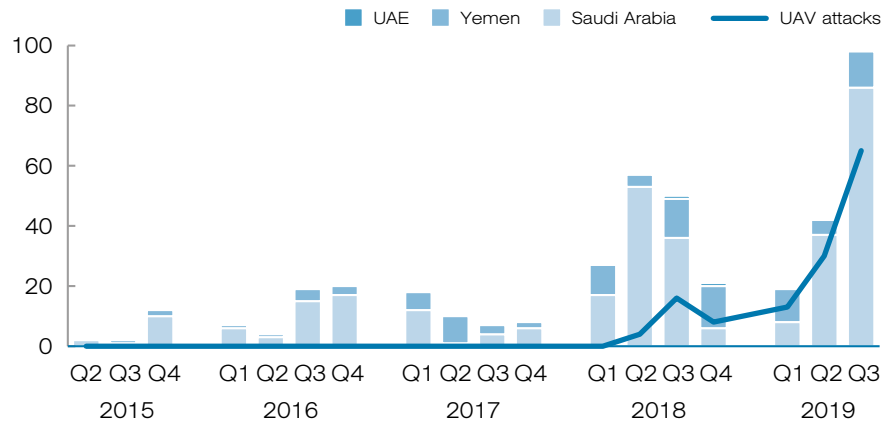
Local non-state partners Level of state penetration
■ High ■ Low
■ Medium-high ■ Nonexistent
■ Medium

Source: Munich Security Conference, based on the International Institute for Strategic Studies (IISS)²⁰

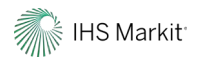


HOUTHJI MISSILE AND UNMANNED AERIAL VEHICLE (UAV) ATTACKS IN THE GULF REGION

Attacks by target country and number of UAV attacks, quarterly figures

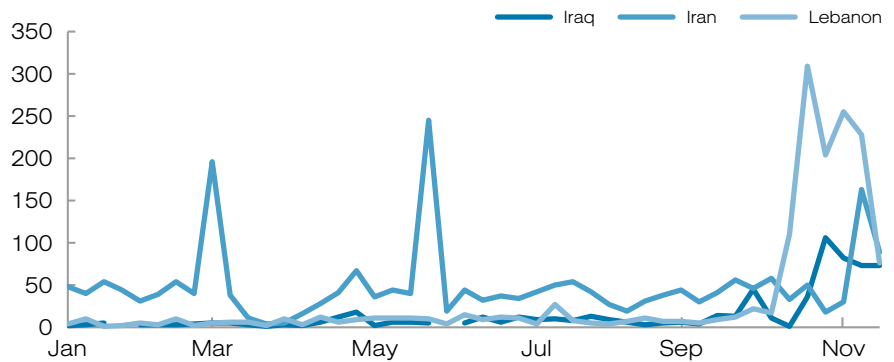


Source: IHS Markit²¹



FREQUENCY OF PROTESTS AND RIOTS IN IRAN, IRAQ, AND LEBANON IN 2019

Number of protests and riot events, by country, 1 January-23 November 2019

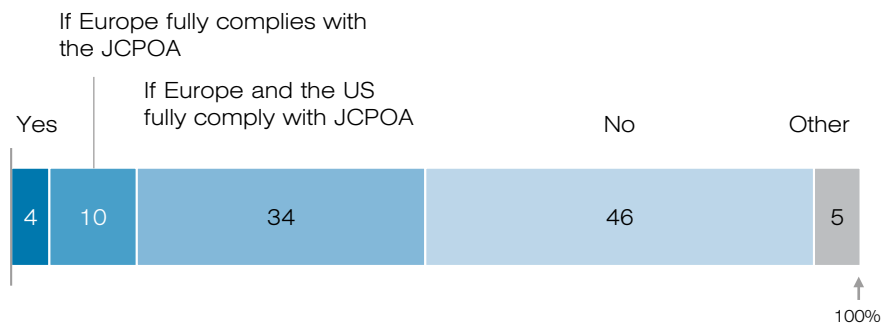


Source: Armed Conflict Location & Event Data Project (ACLED)²²



WHAT CITIZENS IN IRAN THINK: SHOULD IRAN NEGOTIATE A NEW DEAL WITH EUROPE THAT INCLUDES ITS MILITARY ACTIVITIES?

Opinion poll, December, 2019, percent



Source: Center for International and Security Studies at the University of Maryland (CISSM); IranPoll²³





South Asia: Cease-fire Fighters

“Two nuclear-armed countries will come face to face, as they did in February. Yet the United Nations has a responsibility to stop us from heading in that direction. That is precisely why the United Nations came into being in 1945.”¹⁶

IMRAN KHAN,
27 SEPTEMBER 2019

“The international troops have been here for almost 18 years now, a very long and painful time. I am aware that Afghanistan cannot be a millstone around the international community's neck forever.”¹⁷

ASHRAF GHANI,
7 OCTOBER 2019

Disillusioned with the results of almost two decades of state building in Afghanistan, the West, and the United States in particular, desires to hand over responsibility for regional security to South Asian actors. Yet, conflicts and rivalries between the main powers active in the region, namely India, Pakistan, and increasingly also China, picked up steam in 2019. With India having completed its nuclear triad and Pakistan intending to do so,¹ the risk of a regional nuclear arms race adds another delicate component to a worsening security situation.

In 2018, the United States entered direct talks with the Taliban about the conditions for a US retreat.² A significant reduction of US troops in Afghanistan³ – with or without a US-Taliban deal – will likely also entail a withdrawal of the other allies in NATO's Resolute Support Mission.⁴ In this scenario, neighboring Pakistan, which has long played an ambivalent role⁵ in Western counterterrorism efforts, would become the main lynchpin for efforts to prevent transnational terrorist groups from regaining strength.⁶

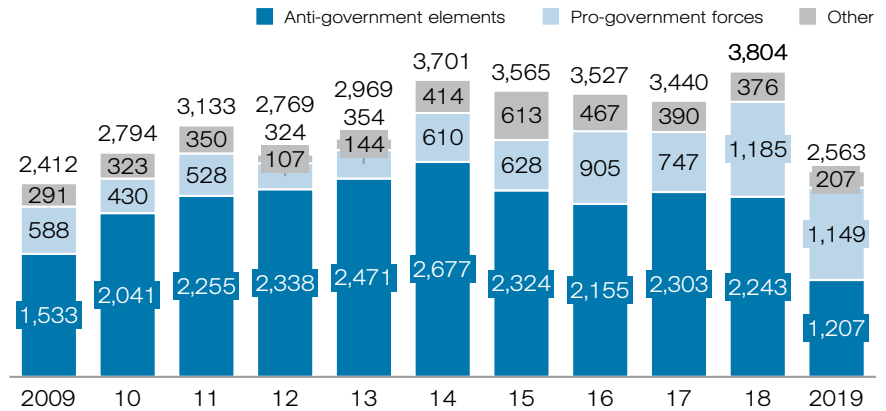
While the security situation in Afghanistan remains volatile,⁷ Kashmir, another regional hotspot, has reignited: in February 2019, a young Kashmiri Islamist committed a suicide attack in Indian-administered Jammu and Kashmir, killing 40 Indian soldiers. In response, both India and Pakistan attacked sites across the Line of Control that has divided Kashmir since 1948. The situation deteriorated further when India stripped the Muslim majority region of Jammu and Kashmir off its autonomy rights⁸ and imposed a security lockdown, during which Kashmiris suffered arrests, shortage of medicine, communication cuts and a rising death toll of both civilians and militant fighters.⁹ In this strained situation, any attack committed by the Kashmiri insurgency¹⁰ bears the risk of escalation, including into military confrontation between the two nuclear-armed powers. Increasing ethno-religious nationalism and anti-Muslim sentiment in India¹¹ heighten this risk, as they might induce Indian authorities to respond with particular force.¹²

China's growing role in the region adds another layer of complexity. With one of the main corridors of its Belt and Road Initiative running through Pakistani-administered Kashmir, Beijing has a strong stake in regional stability.¹³ Despite Chinese support for Pakistan on Kashmir,¹⁴ Beijing might thus exercise a moderating influence on its close economic partner. On the other hand, the China-Pakistan Economic Corridor stokes Chinese tensions with India. Meanwhile, the United States has sought closer relations with India, perceiving New Delhi as a crucial partner for efforts to counterbalance China. However, with substantial progress on closer US-Indian strategic alignment still lacking,¹⁵ the extent to which India can manifest its status as a regional – let alone global – ordering power will depend not least on the handling of its own territorial conflicts.



CIVILIAN DEATH TOLL BY CONFLICT PARTY IN AFGHANISTAN UNTIL THIRD QUARTER 2019

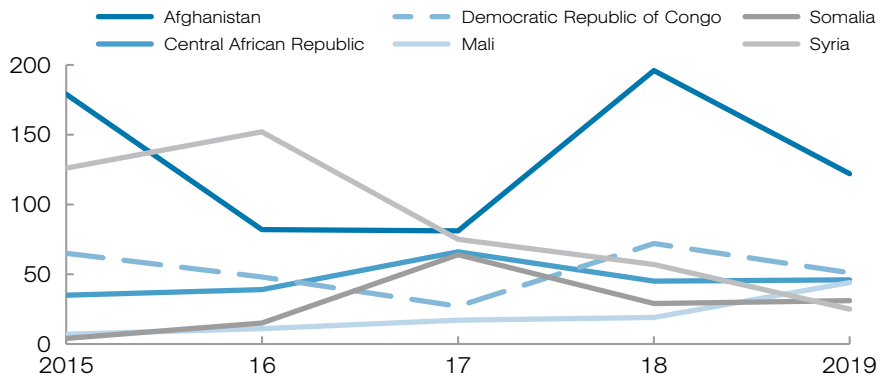
Number of civilian deaths by party to the conflict in Afghanistan, 1 January 2009-30 September 2019



Source: United Nations Assistance Mission in Afghanistan (UNAMA)¹⁸

STAFF OF NON-GOVERNMENTAL ORGANIZATIONS IMPACTED IN MAJOR ARMED CONFLICTS

Sum of NGO staff killed, injured, and abducted in selected countries, 1 January 2015-31 October 2019

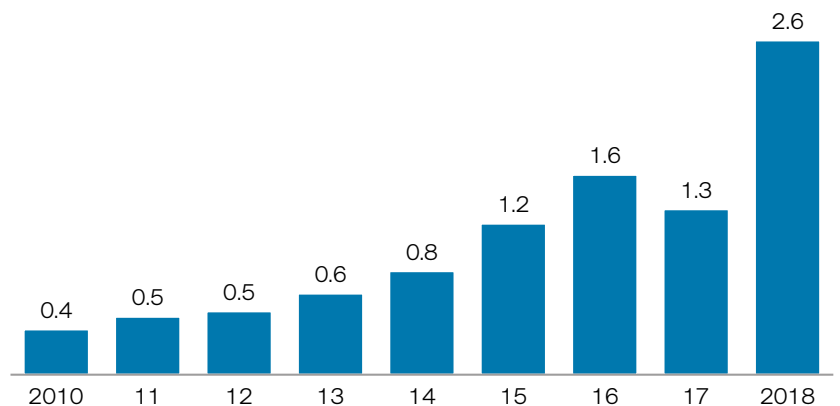


Source: International NGO Safety Organisation (INSO)¹⁹



CONFLICT-INDUCED DISPLACEMENT IN AFGHANISTAN

Number of internally displaced persons in Afghanistan caused by conflict, 2010-18, millions

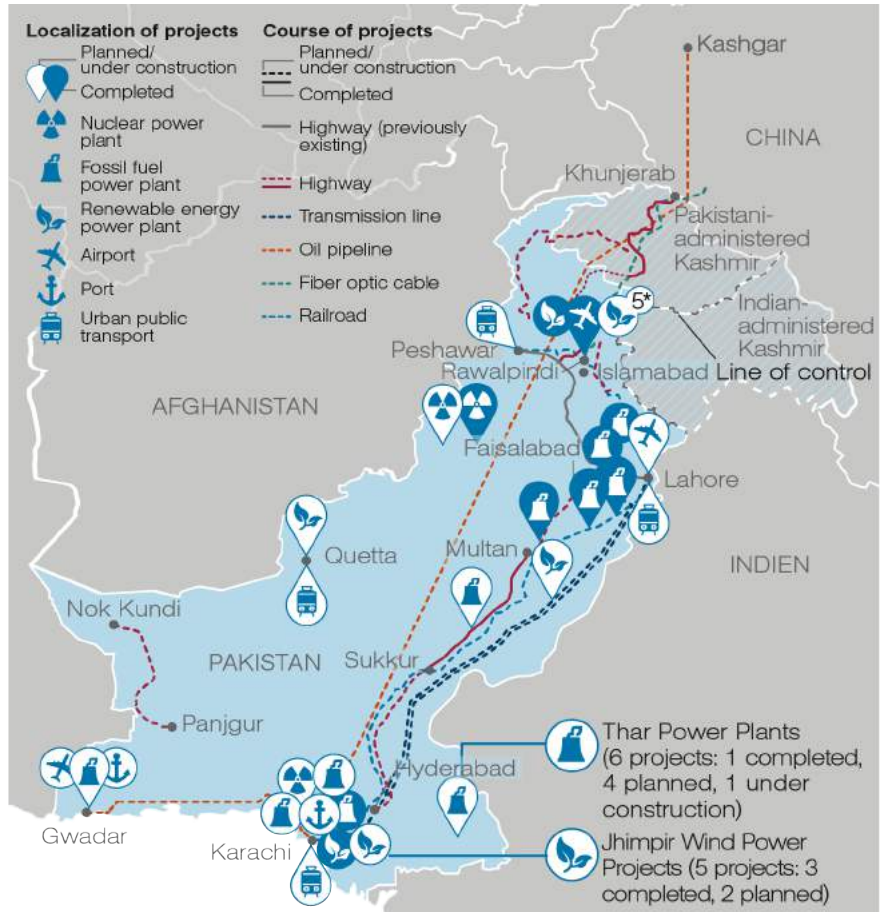


Source: Internal Displacement Monitoring Centre (IDMC)²⁰



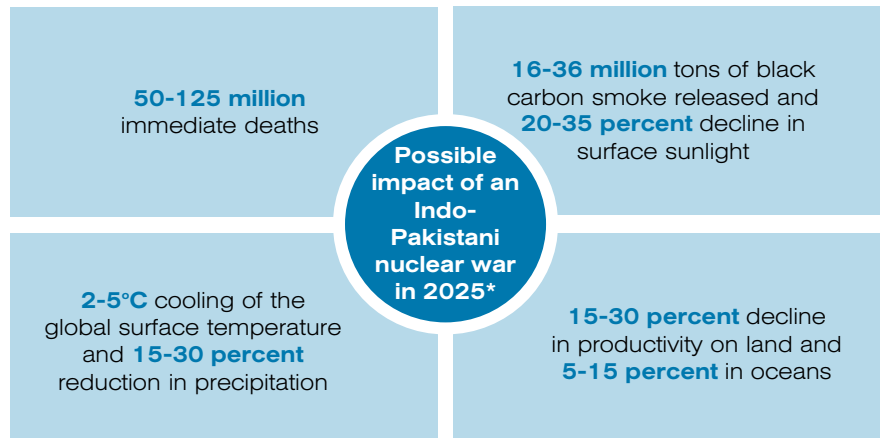
**SINO-PAKISTANI
INFRASTRUCTURE
COOPERATION**

Projects within the framework of the Belt and Road Initiative and the China-Pakistan Economic Corridor, November 2019



Source: Mercator Institute for China Studies (MERICS)²¹

**POSSIBLE IMPACT OF
A REGIONAL NUCLEAR
WAR BETWEEN INDIA
AND PAKISTAN**

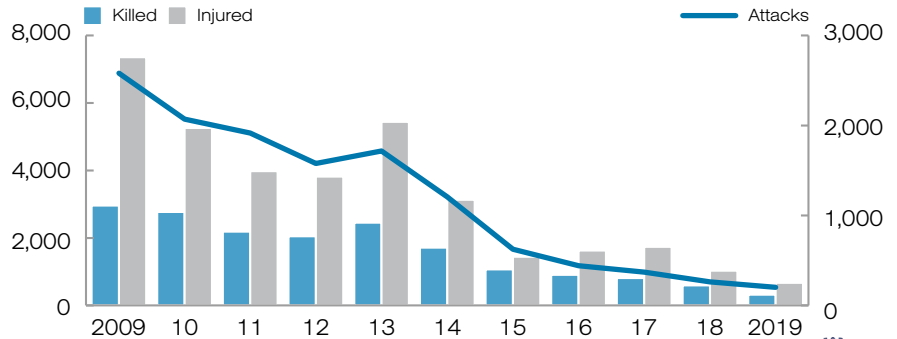


* Based on an estimate of nuclear arsenals in 2025, this scenario assumes that India uses 100 and Pakistan 150 strategic nuclear weapons with yields from 15 to 100 kilotons to attack urban centers
Source: Owen B. Toon et al.²²



EVOLUTION OF TERRORIST VIOLENCE IN PAKISTAN

Number of terrorist attacks in Pakistan and resulting casualties, 1 January 2009-10 November 2019

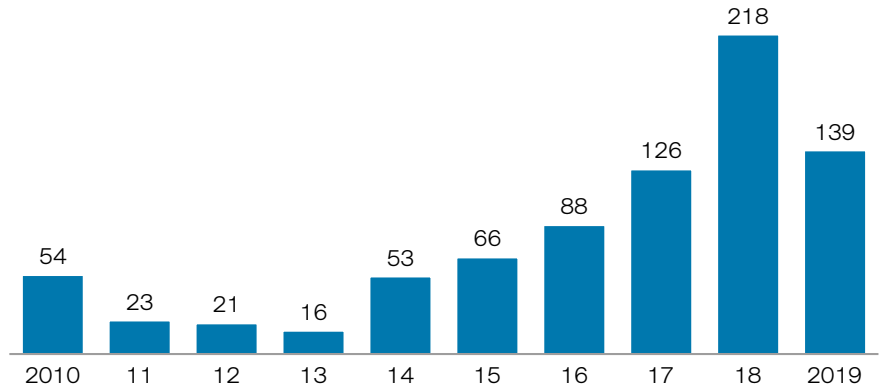


Source: Pak Institute for Peace Studies (PIPS)²³



MILITANT RECRUITMENT IN KASHMIR

Number of Kashmiris recruited* by militant armed groups, 2010-19

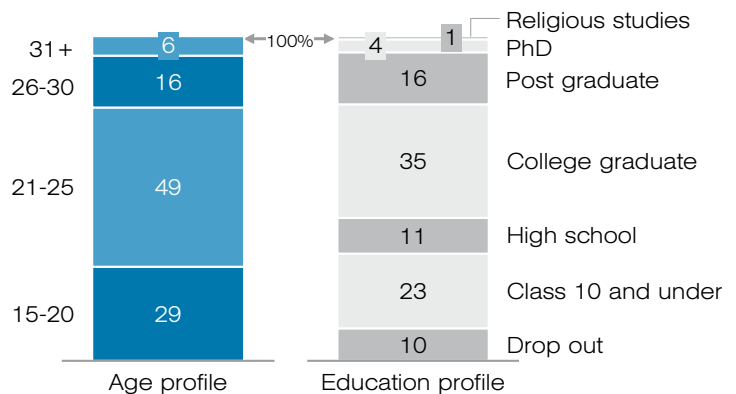


* Local Kashmiri recruits in Indian-administered Jammu and Kashmir excluding cross-border infiltrators

Source: Observer Research Foundation (ORF)²⁴

AGE AND EDUCATION PROFILES OF KASHMIRI MILITANT RECRUITS

Age and education profiles of militant Kashmiri recruits killed or arrested in encounters with Indian armed forces, percent



Source: Observer Research Foundation (ORF)²⁵





Issues





Space Security: One Small Misstep...

“Satellites can be jammed, hacked, or weaponized. Anti-satellite weapons could cripple communications and other services our societies rely on, such as air travel, weather forecast, or banking.”¹⁵

JENS STOLTENBERG,
20 NOVEMBER 2019

“SPACECOM will protect US vital interests in space, the next warfighting domain. I think that’s pretty obvious to everybody, it’s all about space.”¹⁶

DONALD TRUMP,
29 AUGUST 2019

Space exploration has always been intertwined with geopolitics and military interests. Military space activities have indeed led to many revolutionary civilian applications. The US Global Positioning System (GPS), for instance, has become the basis for multi-billion-dollar civilian industries. Today, over 2,000 satellites operated by around 75 countries orbit our planet,¹ enabling essential aspects of modern life – communication, navigation, science – regardless of national boundaries. Rapidly sinking production and launch costs have lowered the entry threshold for space activities.² As a result, the number of active satellites has increased by more than two-thirds since 2015,³ driven significantly by constellations of private mini-satellites. In the last ten years, private investment has risen from a negligible share to 15 percent of all space-related spending.⁴ This “democratization” has been possible because space has long been viewed as a global commons – a domain that all states rely on and that requires cooperation to use safely.

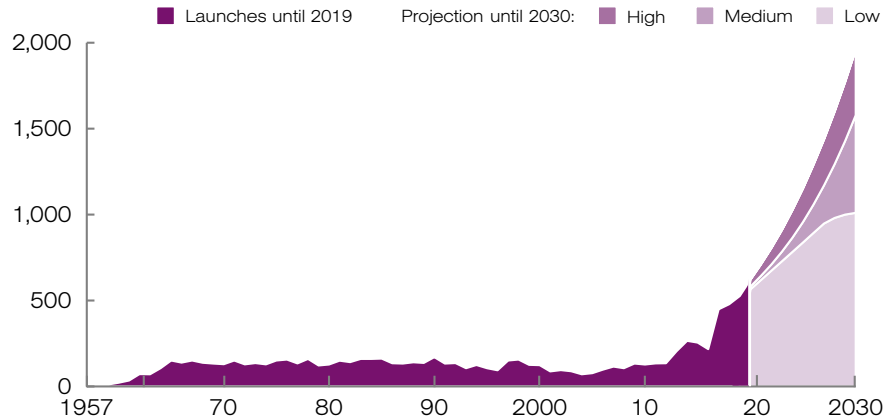
However, as numerous new state and non-state players gain access to the space arena, concern about the security of space assets, especially military ones, is rising. Established space powers like the United States have asserted that “space is no longer a sanctuary. It is now a warfighting domain.”⁵ The US, which invests three times more into military space capabilities than the rest of the world combined,⁶ relies on its extensive array of satellites for its ability to project force. And strategic warning satellites are vital for nuclear deterrence and stability – not only for the United States. However, all of these systems are vulnerable: China, Russia, and most recently India have successfully tested anti-satellite (ASAT) missiles – but ASAT weapons can also take the shape of lasers, electronic jammers, or cyber tools.⁷ For their part, NATO declared space an “operational domain,”⁸ and the United States and France unveiled plans for dedicated “space forces.”⁹ But demonstratively gearing up for a “shooting war” in space may invite calamity rather than deter it: in 2007, one Chinese ASAT test alone spiked the amount of major debris in orbit by nearly 25 percent.¹⁰ While space agencies track over 20,000 pieces of debris, they estimate there are around 900,000 objects that could cause fatal collisions with satellites.¹¹ Even a brief ASAT skirmish could therefore cause disastrous fallout for the entire orbital landscape.

Effective arms control and a space “code of conduct” could head off some of these risks, but new international treaties have long been a nonstarter. The United States, Russia, and China have been at odds over the basics of space arms control for years.¹² More limited measures – for instance, banning destructive ASAT tests or a consensus against attacking strategic warning systems – could be a starting point. With an ever more crowded orbit and the threat of a spiraling contest for primacy, the patchwork of institutions and initiatives intended to facilitate the use of space is “hurtling towards obsolescence.”¹³ A return to cooperation is urgently needed to maintain space, in the spirit of the 1967 Outer Space Treaty, as the “province of all mankind.”¹⁴



HIGH EXPECTATIONS FOR FUTURE NUMBER OF SATELLITE LAUNCHES

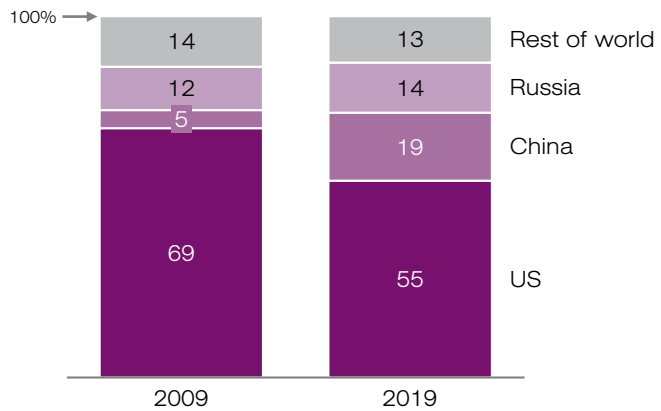
Number of (projected) satellite launches per year, 1957-2030



Source: German Aerospace Center (DLR), based on space.skyrocket.de¹⁷

DEVELOPMENT OF MILITARY ASSETS IN SPACE

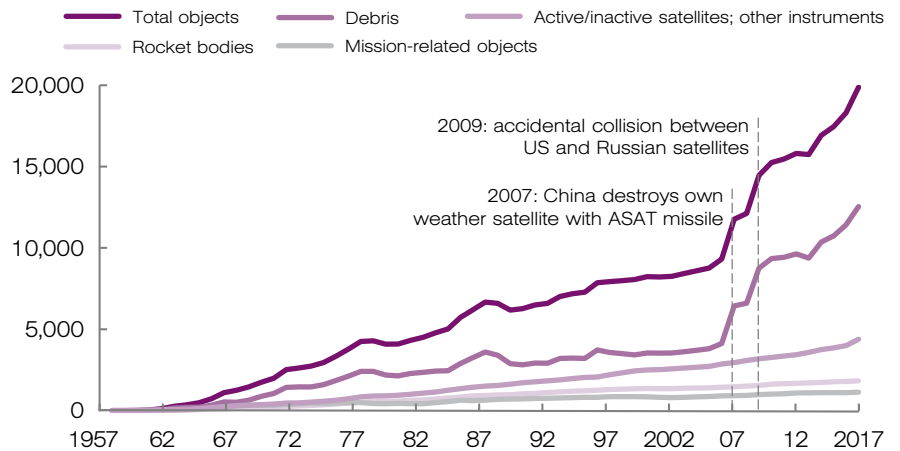
Share of total mass of military satellites in Earth orbit, 2009 and 2019, percent



Source: Munich Security Conference, based on Union of Concerned Scientists¹⁸

DANGERS OF ORBITAL CONGESTION AND SPACE DEBRIS

Tracked objects in Earth orbit, 1957-2017



Source: Munich Security Conference, based on European Space Agency¹⁹



Climate Security: To an Uncertain Degree

“We need quick wins, or the 1.5°C goal of the Paris Agreement will slip out of reach.”²²

INGER ANDERSEN,
26 NOVEMBER 2019

2019 was the year of climate advocacy, with millions of students across the world participating in the “Fridays for Future” protests calling for decisive action on climate change.¹ The unprecedented scale of Australian wildfires underlined the sense of urgency characterizing public debate.² So far, efforts to curb global warming have clearly fallen short: according to the United Nations, rather than limit global warming to 1.5°C, as governments agreed in the landmark 2015 Paris Agreement, the world is currently on the path to 3.2°C warming by 2100.³ Greenhouse gas emissions are still rising as the G20 – the world’s twenty largest economies accounting for 78 percent of global greenhouse gas emissions – have so far largely failed to make the necessary transformative changes.⁴

“I want you to act [...]. I want you to act as if the house was on fire, because it is.”²³

GRETA THUNBERG,
25 JANUARY 2019

These are no abstract debates about numbers: for many people, the changing climate is already a security threat. Between 2008 and 2018, 87 percent of internal displacements worldwide were caused by weather-related disasters rather than conflicts.⁵ Going beyond 1.5°C warming will increase both “intensity and frequency” of such events.⁶ More than 140 million people could become internally displaced by 2050 due to climate change in Sub-Saharan Africa, South Asia, and Latin America alone.⁷ Often, those experiencing the most extreme effects of climate change are also the most vulnerable to them: two-thirds of the world’s most fragile states are highly exposed to climate change.⁸ At the same time, the Least Developed Countries receive only a fraction of global climate assistance: of USD 71.2 billion raised in 2017, less than 15 percent were allocated to them.⁹ Furthermore, where climate exposure coincides with a lack of state efficiency or legitimacy, the risk of violent internal conflict increases.¹⁰ While the effect of climate change on armed conflict within states has only been modest so far, it is expected to rise with global temperatures.¹¹ The same holds true for interstate conflict, as climate change may exacerbate resource scarcity or create new and contested abundance.¹²

“Climate change threatens the future of human rights and risks undoing the last fifty years of progress in development, global health, and poverty reduction.”²⁴

UN HUMAN RIGHTS COUNCIL,
25 JUNE 2019

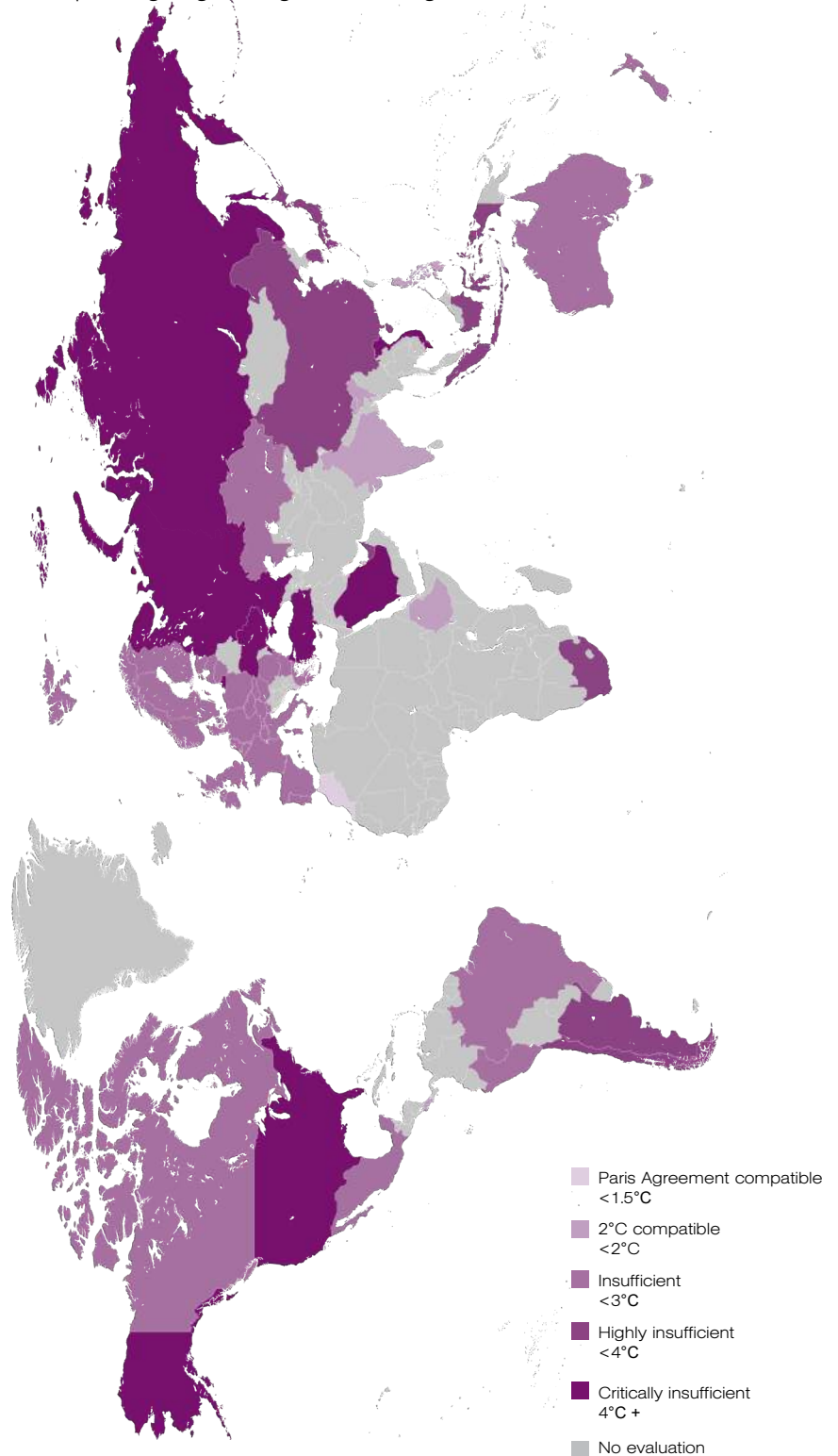
Meanwhile, in parts of the world, warming already exceeds 1.5°C compared to pre-industrial times. For example, in many areas of the Arctic, average temperatures have risen by more than 3°C.¹³ This raises the risk of triggering so-called climate tipping points. Once these points are reached, the damage caused to the environment is irreversible and, in some cases, may further accelerate climate change.¹⁴ For instance, the Arctic permafrost region is thought to hold ten times as much carbon as the Amazon.¹⁵ With global warming, the frozen soil thaws and carbon dioxide is released into the atmosphere, further adding to the greenhouse effect.¹⁶ In addition, there is increasing evidence that some of these tipping points may interact with and amplify each other.¹⁷

Upholding the 1.5°C goal is still feasible: it would require global emissions to drop by 7.6 percent each year from now through 2030.¹⁸ Every delay increases the cuts required in the future.¹⁹ However, despite overwhelming scientific evidence, some political leaders continue to question the threat of climate change and the necessity of global action.²⁰ The disappointing results of the Madrid climate summit in December hence raise doubts whether 2020 will see advocacy turn into action.²¹



**TRACK RECORD OF
SELECTED COUNTRIES
REGARDING THEIR
EFFORTS TO LIMIT
CLIMATE CHANGE**

Evaluation of national climate change mitigation commitments and corresponding degree of global warming, 2019

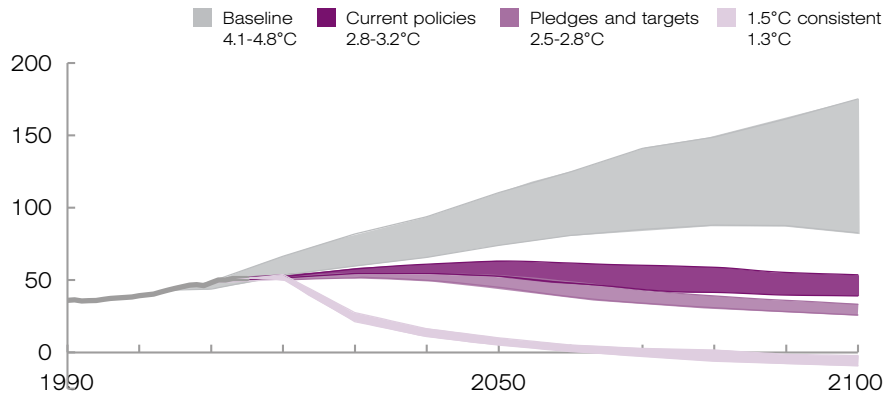


Source: Climate Action Tracker²⁵



GLOBAL EMISSIONS AND WARMING PROJECTIONS

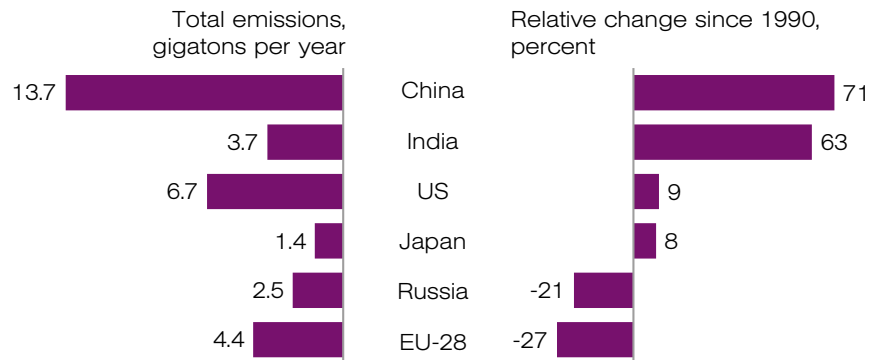
Greenhouse gas emissions per year, 1990-2100, gigatons and respective global warming by 2100 compared to pre-industrial levels



Source: Climate Action Tracker²⁶

SELECTED COUNTRIES' CHANGES IN EMISSIONS

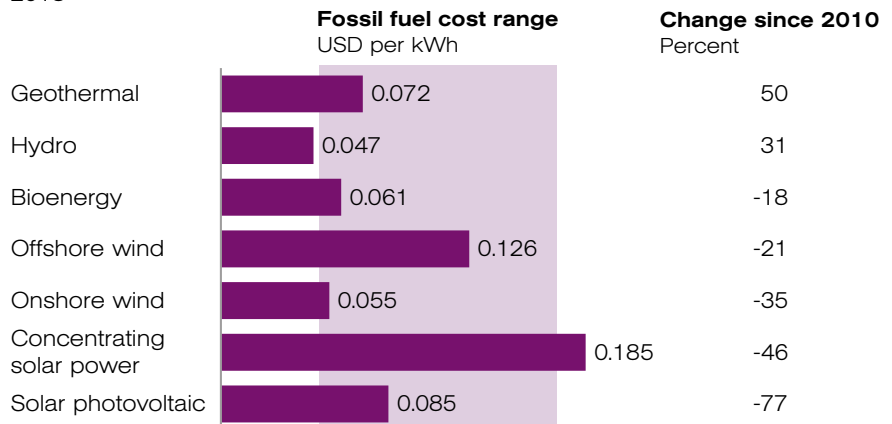
Greenhouse gas emissions, 2018, by country



Source: United Nations Environment Programme (UNEP)²⁷

RENEWABLE ENERGY COSTS

Global levelized cost of energy for key renewable energy technologies, 2018

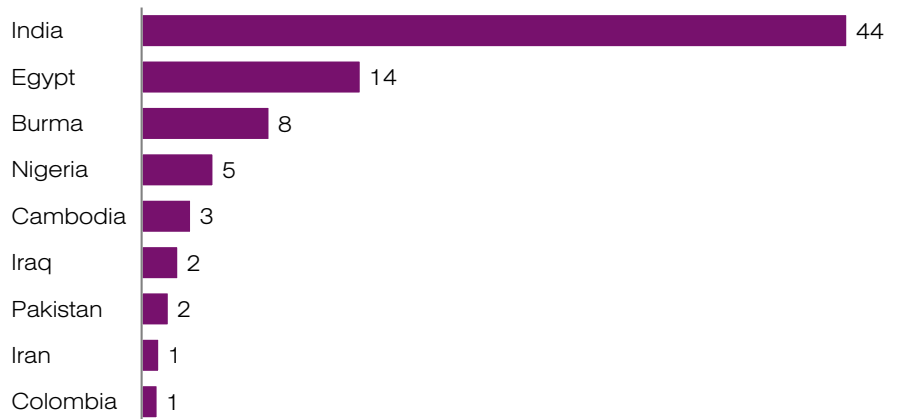


Source: United Nations Environment Programme (UNEP)²⁸



VULNERABILITY TO CLIMATE CHANGE IN SELECTED HIGHLY FRAGILE COUNTRIES

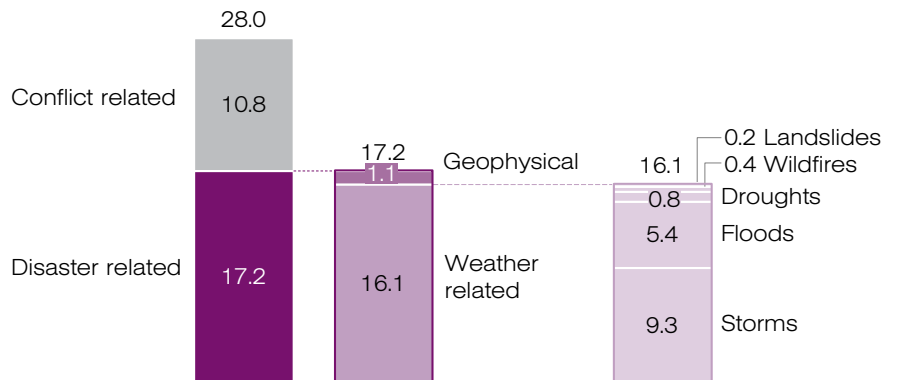
People in very high climate exposure areas by country, 2018, millions



Source: United States Agency for International Development (USAID)²⁹

DRIVERS OF INTERNAL DISPLACEMENT: DISASTERS VS. CONFLICTS

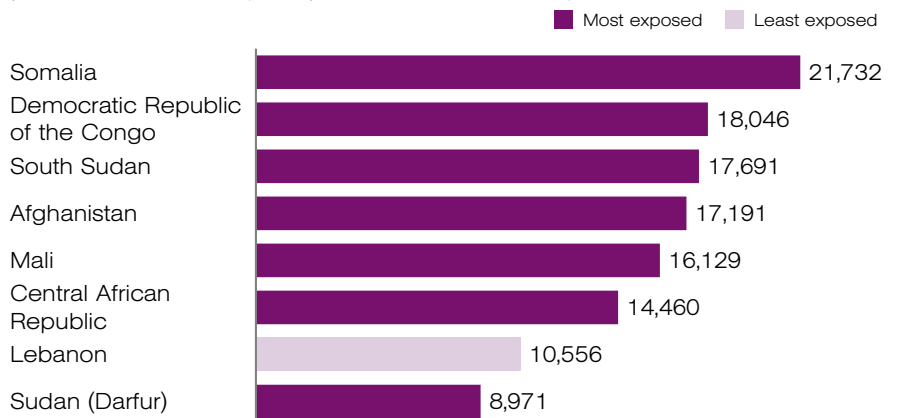
Number of newly displaced people by cause, 2018, millions



Source: Internal Displacement Monitoring Centre³⁰

CLIMATE CHANGE AND PEACE OPERATIONS

Countries hosting largest multilateral peace operations, 2018, total international personnel and country's exposure to climate change



Source: Stockholm International Peace Research Institute (SIPRI)³¹



Right-wing Extremism: White and Wrong

“Around the world, we see a groundswell of xenophobia, racism and intolerance, violent misogyny, anti-Semitism, and anti-Muslim hatred.”¹⁹

ANTONIO GUTERRES,
18 JUNE 2019

While vast resources have been spent on the “war on terror” fighting jihadist extremism since 9/11, another type of extremism has not received the same attention: right-wing extremism. Its death toll again produced dire headlines in 2019. While its adherents are highly heterogeneous,¹ right-wing extremism commonly refers to the act of supporting or committing violence based on the belief in one’s racial, ethnic, or cultural supremacy, fierce nationalism, and/or opposition to government authority.² Less prominent on the public and political agenda,³ it has killed more people in the United States since 9/11 than the jihadist variant.⁴ The fact that until recently, right-wing extremist attacks have been more frequent, yet less deadly on average than those committed by jihadists, has contributed to a misperception of the size of the threat.⁵ A series of highly lethal extreme-right attacks committed in 2018 and 2019, among them the killing of 11 people at the Tree of Life synagogue in Pittsburgh in October 2018, of 51 people in the March 2019 mosque attacks in Christchurch, and of 22 people in El Paso in August 2019 might have begun to change this perception.

Although most right-wing extremists conduct their attacks alone, they are increasingly embedded in transnational networks. These networks rely on a strong sense of common identity, based on the belief in white supremacy and the perceived need to protect it.⁶ This global “intellectual cohesion of ideas”⁷ was evident in the manifestos and social media posts released for example by the perpetrators of Christchurch, Pittsburgh, El Paso, and Halle.⁸ Explicitly referring to each other and seeking to inspire others, these attacks do not describe “one-off events, but a loosely coordinated chain of far-right attacks across the world.”⁹

“There is no question that ideas and language of division and hate have existed for decades, but their form of distribution, the tools of organization – they are new.”²⁰

JACINDA ARDERN,
19 MARCH 2019

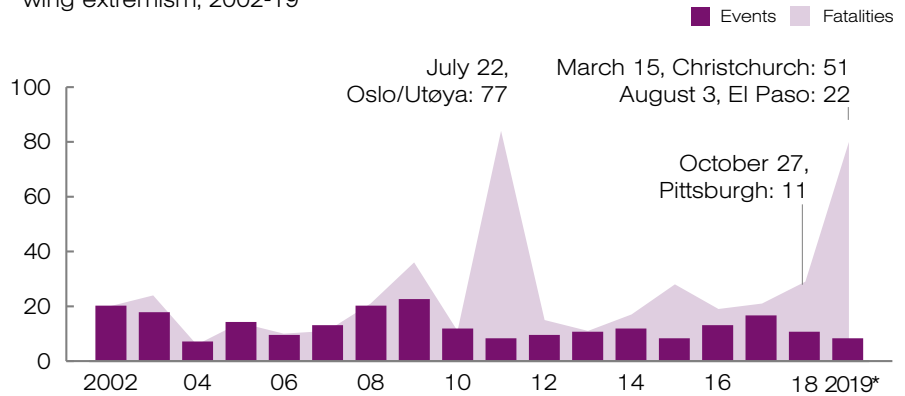
While right-wing extremists also connect offline,¹⁰ the internet plays a central role in breeding and amplifying extremist thought. Frequently outpacing jihadist extremists in the use and reach of social media posts,¹¹ right-wing extremists strongly rely on internet platforms to communicate and disseminate their ideas. With the increased takedowns of extremist content by platforms like Twitter, Facebook, and YouTube, right-wing extremists have shifted more and more to encrypted apps like Telegram and Discord as well as unregulated platforms such as 8chan or Gab.¹² These “far corners of the internet”¹³ also decisively contribute to self-radicalization processes.¹⁴

Beyond the opportunities provided by social media and the internet, the extreme right capitalizes on fears of demographic and socioeconomic change,¹⁵ as illustrated by upticks in violence following the election of the first African American president in the United States¹⁶ or the refugee crisis in Europe.¹⁷ The fears extremists exploit have been nurtured by far-right, nationalist parties. As such, right-wing extremism is part of a much broader problem: the rise of actors who are mainstreaming radical views and are thereby eroding the fabric of Western liberal democracies from within.¹⁸



RIGHT-WING FATAL EVENTS AND FATALITIES IN WESTERN COUNTRIES

Number of fatal events and fatalities in Western countries attributed to right-wing extremism, 2002-19

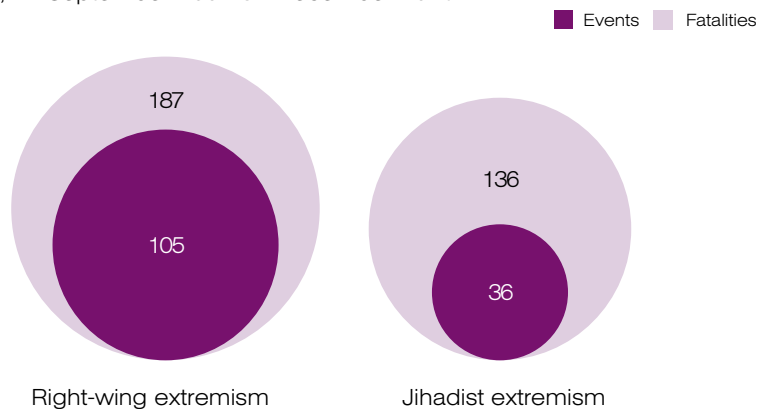


* Figures for 2019 are preliminary as cases are still being vetted

Source: The United States Extremist Crime Database (ECDB); Jacob Aasland Ravndal; Center for Research on Extremism (C-REX) at the University of Oslo²¹

FATAL EVENTS AND FATALITIES BY IDEOLOGY IN THE US SINCE 9/11

Number of fatal events and fatalities attributed to right-wing and jihadist extremism, 12 September 2001-31 December 2018



Source: The United States Extremist Crime Database (ECDB)²²

THE EXTREME RIGHT FORGES TRANSNATIONAL LINKS BY...

... connecting online on mainstream platforms such as Facebook, YouTube, and Twitter, fringe platforms such as Gab, Reddit, and Voat, encrypted apps such as Telegram and Discord, and image boards like 4chan and 8chan.

... building organizational ties such as between the US-based "Atomwaffen Division" and its European counterparts.

... conducting joint combat trainings for the alleged defense of the white race, as in the paramilitary corps "Asov Battalion" in Ukraine.

... convening at conferences across Europe and the US, **at marches** such as "Unite the Right" in Charlottesville in August 2017 or the annual "Independence March" in Poland, and **at concerts** such as "Fortress Europe" in Kyiv in June 2019.

Source: Munich Security Conference, based on Anti-Defamation League (ADL); The Soufan Center²³



Technology and Innovation: It's All About Politechs

The discussion around technology has rarely – if ever – been so closely linked to the discussion on sovereignty of nation states. President Macron made it clear last year that technology is no longer seen as politically neutral:¹ “The battle we’re fighting is one of sovereignty [...]. If we don’t build our own champions in all areas – digital, artificial intelligence – our choices will be dictated by others.”²

It is against this backdrop that Europe, with its historically strong industrial base, sees its economic position increasingly challenged by other global powers.³ The US holds the leading position in many tech areas and China is stepping up. This is evident in the rise of Chinese tech giants such as Huawei, Alibaba, Baidu, Tencent, and Xiaomi.⁴ China’s powerful catch-up is also borne out by the numbers: the country almost tripled its share of R&D spending in technology and hardware equipment between 2012 and 2019.⁵ The main challenge for Europe lies in its structural disadvantages vis-à-vis China and the US.⁶ Its fragmented markets, including capital markets, and governance – for example, with regard to taxation – stand in the way of rapid scale-up and make it difficult for “superstars” to emerge.⁷

To be sure, Europe still has technology leadership in industries such as automotive, where it provides more than half of global R&D investment.⁸ However, Europe is losing ground as a home of leading companies in the world. A 2018 analysis of the top 100 global companies by market capitalization found that 18 of those companies from China and 13 from the United States were founded in the past 30 years;⁹ by contrast, the share of “superstars” in Europe has dropped by 50 percent over the past two decades and no new company made it to the list.¹⁰

Europe needs its own approach for innovating at scale that both builds on its unique strengths and overcomes its unique challenges.¹¹ “Mission-led” innovation, whereby Europe’s diverse stakeholders rally around a joint, concrete, and ambitious goal to collaborate at scale, could be a potential solution.¹² Such large, ambitious missions can then galvanize public-private collaborations to stimulate innovation.¹³

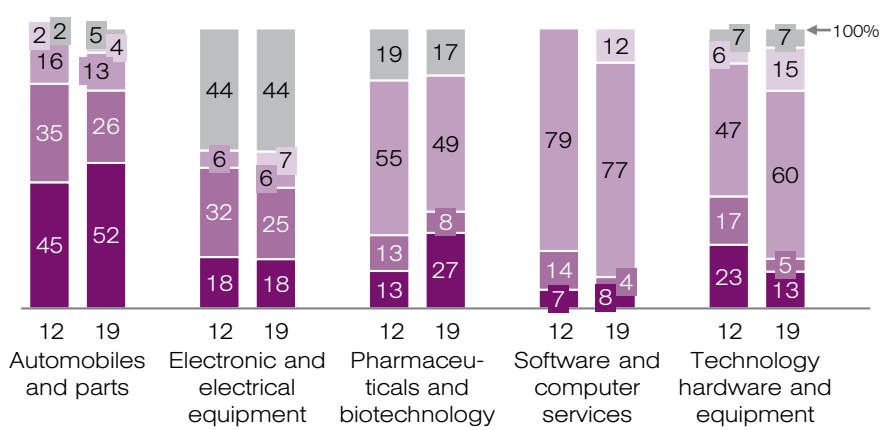
The security, defense, and space sector in Europe offers real and concrete opportunities to create such missions today. As an example, building a “digital Galileo” – Galileo is the EU’s global navigation satellite system – to ensure European digital end-to-end sovereignty and independence, could potentially unleash a similarly unifying force.¹⁴ If Europe were to take this chance, it would also demonstrate that European cooperation can produce tangible wins in a landscape of rapid technological change.

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



RESEARCH AND DEVELOPMENT SPENDING (R&D) BY TOP GLOBAL 250 COMPANIES IN COMPARISON

Share of aggregated private sector R&D spending by country/region, 2012 and 2019, percent



Source: McKinsey, based on European Commission¹⁵

CONDITIONS FOR INNOVATION IN SELECTED COUNTRIES

Country scores on indicators for (digital) innovation potential, 2018, quartiles



Source: McKinsey Global Institute¹⁶

This page was prepared by the MSC's knowledge partner:





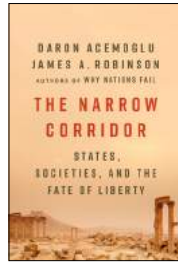


Food for Thought





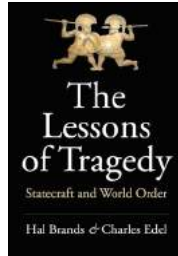
Books



DARON ACEMOGLU, JAMES A. ROBINSON: **The Narrow Corridor**

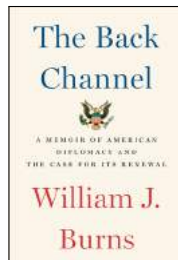
States, Societies, and the Fate of Liberty

Drawing on cases across geographies and time periods, the authors show that political liberty is never static, but “originates from a delicate balance of power between state and society.” To uphold political freedom, and protect prosperity and safety, they argue for a mobilized society and a responsive state.¹



HAL BRANDS, CHARLES EDEL: **The Lessons of Tragedy**

Building on an ancient Greek approach to history, modernist thinkers, and contemporary observations, the authors assess past attempts to create a stable world order. Concluding that a peaceful international order was the exception, not the rule, they argue that US leadership was key for 75 years of great-power peace and warn against a US retreat.²



WILLIAM J. BURNS: **The Back Channel**

A Memoir of American Diplomacy and the Case for Its Renewal

Having served as American diplomat for more than three decades, Burns provides a rare insight into US diplomatic history. By illustrating what has characterized and facilitated effective US leadership in the past, the author makes the case for diplomacy's enduring value amidst international turmoil.³



KIMBERLY CLAUSING: **Open**

The Progressive Case for Free Trade, Immigration, and Global Capital

As nationalism and protectionism increasingly guide policy making around the world, Clausing argues that a more globally connected economy can help especially the weakest. Outlining a progressive agenda, she advocates for better management of, rather than retreat from, globalization.⁴



JOANA COOK: **A Woman's Place**

US Counterterrorism Since 9/11

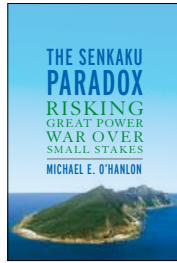
Drawing on extensive interviews, official documents, and existing scholarship on women in international security, Cook analyzes how women have become a key part of US counterterrorism efforts since 9/11. In describing their multifaceted role as agents, partners, and targets, Cook argues for an inclusive engagement of women in all aspects of security.⁵



JESSICA TRISKO DARDEN: **Aiding and Abetting**

U.S. Foreign Assistance and State Violence

Building on statistical analyses and case studies, Darden examines how US economic and military assistance has affected the human rights situation in recipient countries. Showing that aid given to nondemocratic regimes repeatedly led to more violence and repression, the author argues for only providing aid to countries unlikely to use such resources coercively.⁶



MICHAEL E. O'HANLON: **The Senkaku Paradox**

Risking Great Power War Over Small Stakes

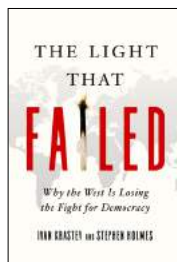
Introducing the idea of “integrated deterrence,” O'Hanlon argues that the United States should draw on a mix of economic and military tools to effectively deter and respond to competitors. The need for this strategy results both from the impact of technological progress and the risks of a potential escalation of local crises to major great-power conflict.⁷



ALICE C. HILL, LEONARDO MARTINEZ-DIAZ: **Building a Resilient Tomorrow**

How to Prepare for the Coming Climate Disruption

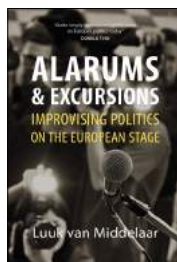
Highlighting the economic, social, and geopolitical impact of climate change, the authors stress the need to foster resilience. Citing cases from across the globe and drawing on their personal experience as senior Obama administration officials, the authors offer several pragmatic policy recommendations.⁸



IVAN KRASTEVA, STEPHEN HOLMES: **The Light That Failed**

Why the West Is Losing the Fight for Democracy

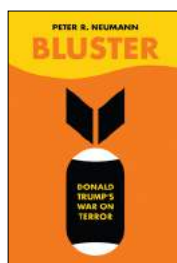
Krastev and Holmes explain why post-Cold War hopes for an eastward spread of liberal democracy were dashed. Making sense of liberalism's present crisis, they show how the “politics of imitation” sparked resentment and fueled anti-liberal populism in the post-Soviet space and beyond.⁹



LUUK VAN MIDDELAAR: **Alarums & Excursions**

Improvising Politics on the European Stage

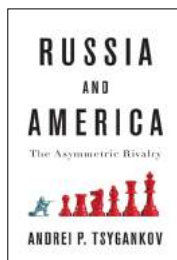
Blending political theory with his profound governance experience, van Middelaar traces the transformation of EU policy-making in response to recent major crises. Pointing to increased public scrutiny and the need for swift action, the author shows how the Union's traditional technocratic approach has shifted to more pragmatic, event-based policies.¹⁰



PETER R. NEUMANN: **Bluster**

Donald Trump's War on Terror

Comparing the Trumpian rhetoric with the administration's actual policies, Neumann offers an in-depth analysis of the past two years of US counterterrorism strategy. He argues that President Trump, despite continuing many of his predecessors' policies, has had a tangible impact by transforming fundamental values that have so far guided US policy.¹¹



ANDREI P. TSYGANKOV: **Russia and America**

The Asymmetric Rivalry

Providing one of the first analyses of the Trump-Putin relationship, Tsygankov offers a nuanced assessment of US-Russian relations across a range of policy issues. While stressing that both sides have “no choice but to look for opportunities to cooperate,” the author highlights prospects for continued conflict given mutual distrust and deep political divisions.¹²



Reports



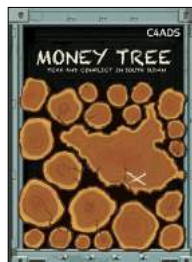
CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE: **Think Peace: Essays for an Age of Disorder**

Growing tensions and increasing great-power competition mandate a reimagined international peace project. Reviewing the last century's overarching historical narratives and examining some of today's most pressing challenges, this report maps a way toward a renewal of diplomacy.¹



CENTER FOR A NEW AMERICAN SECURITY (CNAS): **New Voices in Grand Strategy**

In recent years, US grand strategy has been controversially debated by Washington's policy establishment – whether with regard to the role of its underlying values, the country's national interests or the importance of burden sharing with partners. In this report, academics and policy planners offer thought-provoking contributions on the future of US foreign policy.²



CENTER FOR ADVANCED DEFENSE STUDIES (C4ADS): **Money Tree: Teak and Conflict in South Sudan**

This report highlights the interconnectedness of armed conflict and natural resource exploitation by illicit actors. The authors analyze how corruption in the South Sudanese teak sector, legal grey areas, and foreign companies' profit seeking exacerbate instability in the country and contribute to persisting conflict at the expense of local communities.³



CENTER FOR STRATEGIC AND INTERNATIONAL STUDIES (CSIS): **Out of the Shadows: Shining a Light on Irregular Migration**

Assessing the cases of Mexico, Eritrea, and Ghana, this report assesses the complex nature of irregular migration. The policy-oriented analysis of this global phenomenon identifies a lack of opportunities at home as the main driver for the movement of an estimated 107 million irregular migrants around the world.⁴



CENTRE FOR EUROPEAN REFORM (CER): **Can Europe Learn to Play Power Politics?**

This report analyzes why the EU, faced with a shifting global order, is “punching below its weight” on foreign policy. Arguing that the European project was built against the idea of international power politics, the author outlines how instead the EU could enhance its foreign policy clout by using its soft power instruments as a source of hard power.⁵



EUROPEAN UNION INSTITUTE FOR SECURITY STUDIES (EUISS): **What if...? Scanning the Horizon: 12 Scenarios for 2021**

From a territory swap between Kosovo and Serbia and another Arab Spring to a continental debt crisis in Sub-Saharan Africa, this collection of policy briefs explores possible future scenarios that might occur in 2021. This report provides an overview of such emerging policy challenges and invites the reader to exercise strategic foresight.⁶



THE GERMAN MARSHALL FUND OF THE UNITED STATES (GMF): **Reassessing 1989**

Events proceeded at breakneck speed in 1989, from the Tiananmen Square protests to the fall of the Berlin Wall and the breakup of Yugoslavia. This essay collection looks back at this momentous year's historical upheavals, examines lasting consequences for liberal democracy and provides a critical review of the year's global legacy until today.⁷



THE INTERNATIONAL INSTITUTE FOR STRATEGIC STUDIES (IISS): **Defending Europe: Scenario-based Capability Requirements for NATO's European Members**

Drawing on open source data, this report puts European defense capabilities to the test in fictitious scenarios set in the early 2020s following a US withdrawal from NATO. Analyzing capability and funding shortfalls, it adds important substance to the ongoing discussion on European strategic autonomy.⁸



MERCATOR INSTITUTE FOR CHINA STUDIES (MERICs): **China's Digital Rise: Challenges for Europe**

Examining how Chinese state-backed companies are co-shaping the global digital architecture and norms, this report analyzes the Chinese Communist Party's corresponding strategy. The authors find that Beijing's digital foray poses more security risks than cooperation opportunities for Europe and outline recommendations for a joint European strategy.⁹



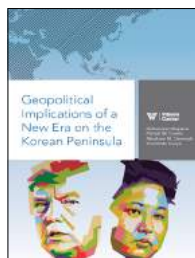
RAND CORPORATION: **A Consensus Proposal for a Revised Regional Order in Post-Soviet Europe and Eurasia**

Cooperation in the post-Soviet space faces many impediments. This proposal, drafted by experts from the Euro-Atlantic space outlines a regional order aimed at economic integration, resolution of regional conflicts, and a revised security architecture acceptable to all actors involved.¹⁰



STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE (SIPRI): **Advancing United Nations Responses to Climate-related Security Risks**

This policy brief describes the recent evolution of the climate security debate in the UN and in the UN Security Council in particular. It suggests three interrelated policy areas where the UN could enhance its role: resilience building, climate security knowledge provision, and financing climate security action.¹¹



WOODROW WILSON INTERNATIONAL CENTER FOR SCHOLARS: **Geopolitical Implications of a New Era on the Korean Peninsula**

This essay collection offers perspectives from US-American and Japanese scholars on North Korea-United States relations, their geopolitical as well as regional impact, and nuclear security in the Indo-Pacific. Examining the recent summit diplomacy on the Korean peninsula, the authors review different policies that might promote regional stability.¹²





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This report presents research and input on a variety of security policy topics prepared by staff and partners of the MSC as well as other institutions. The primary goal of the report is to present this thought-provoking material to a broad audience. We consequently do not endorse every quote or every line of analysis in this report.

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Endnotes





Endnotes

Please note that all links were last checked on 10 January 2020. All quotes and descriptions in British English have been changed to American English. Note that deviations from 100 percent in visualized data are due to rounding.

Westlessness

1. Oswald Spengler, *The Decline of the West: Outlines of a Morphology of World History*, Alfred Knopf (New York), 1927, originally published as *Der Untergang des Abendlandes: Umriss einer Morphologie der Weltgeschichte* (Vol. 1, Vienna: Braumüller, 1918, rev. edition, Munich: C. H. Beck, 1923; Vol. 2, Munich: C. H. Beck, 1924).
2. For some examples see Bill Emmott, *The Fate of the West: The Battle to Save the World's Most Successful Political Idea*, PublicAffairs (New York), 2017; Edward Luce, *The Retreat of Western Liberalism*, Atlantic Monthly Press (New York), 2017; Kishore Mahbubani, *Has the West Lost It? A Provocation*, Penguin (London), 2018; Vessela Tcherneva, "The End of the Concept of 'the West'," ECFR Commentary, 18 May 2018, https://www.ecfr.eu/article/commentary_the_end_of_the_concept_of_the_west; Carl Bildt, "It's the End of the West As We Know It," *The Washington Post*, 15 November 2016, https://www.washingtonpost.com/opinions/global-opinions/its-the-end-of-the-west-as-we-know-it/2016/11/15/9e3ce89a-ab54-11e6-977a-1030f822fc35_story.html; Joschka Fischer, "Das Ende des Westens," *Süddeutsche Zeitung*, 12 December 2018, <https://sz.de/1.3289483>; Andreas Whittam Smith, "This Is the End of the West – But the Western Establishment Only Has Itself to Blame," *The Independent*, 15 February 2017, <https://www.independent.co.uk/voices/end-of-west-western-establishment-wolfgang-ischinger-munich-security-conference-blame-a7582081.html>.
3. Roger Cohen, "Munich or a Requiem for the West," *The New York Times*, 15 February 2019, <https://nyti.ms/2EbAbbr>. In a similar vein, Jacob Heilbrunn noted that the 2019 edition "exposed the decline of the West." See Jacob Heilbrunn, "Munich Conference Exposes the Decline of the West," *The National Interest*, 18 February 2019, <https://nationalinterest.org/feature/munich-conference-exposes-decline-west-44922>.
4. Griff Witte and Michael Birnbaum, "Trump Foreign Policy Under Attack from All Sides at European Security Conference," *The Washington Post*, 16 February 2019, https://www.washingtonpost.com/world/europe/trump-foreign-policy-under-attack-from-all-sides-at-european-security-conference/2019/02/16/9b1a713a-2fac-11e9-8781-763619f12cb4_story.html.
5. See, e.g., Benjamin Herborth and Gunther Hellmann, "Introduction: Uses of the West," in Gunther Hellmann and Benjamin Herborth, (eds.), *Uses of the West: Security and the Politics of Order*, Cambridge University Press (Cambridge), 2017, pp. 1-9, p. 1: "In everyday political language 'the West' is usually understood to refer to a grouping of states and societies in Europe and North America, which share a few characteristics, are tightly connected among each other, and have amassed the overwhelming bulk of military capabilities, economic power, and cultural attraction. Defying geographical common sense, however, Australia, New Zealand, and possibly even Japan are widely considered to be 'Western' outliers in the Pacific. While the idea of 'the West' as well as the array of images, practices, and institutions associated with it did originate in Western Europe, today the imaginary dimension of 'the West' has taken on a life of its own."
6. See endnote 5.
7. Mattias Kumm, Jonathan Havercroft, Jeffrey Dunoff, Antje Wiener, "Editorial: The End of 'the West' and the Future of Global Constitutionalism," *Global Constitutionalism*, Vol. 6, No. 1, 2017, pp. 1-11, p. 2.
8. Tom McTague, "The Spiritual Disunity of the West," *The Atlantic*, 4 December 2019, <https://www.theatlantic.com/international/archive/2019/12/nato-summit-west-torn/602998/>.
9. According to many political scientists, the open-closed cleavage has replaced the traditional left-right divide, reshaping politics in the Western World. See, e.g., *The Economist*, "Drawbridges Up," 30 July 2016, <https://www.economist.com/briefing/2016/07/30/drawbridges-up>.
10. Interestingly, there is a new push for fences, as *The Economist* noted in 2016: "Since the fall of the Berlin Wall, over 40 countries around the world have built fences against more than 60 of their neighbours. The majority have cited security concerns and the prevention of illegal migration as justifications. More than 30 of those decisions were made following 9/11, 15 of them last year." See *The Economist*, "More Neighbours Make More Fences," 7 January 2016, <https://www.economist.com/graphic-detail/2016/01/07/more-neighbours-make-more-fences>.
11. Quoted by Louie Dean Valencia-García, "The Ups and Downs and Clashes of Western Civilization," *openDemocracy*, 23 July 2019, <https://www.opendemocracy.net/en/countering-radical-right/ups-and-downs-and-clashes-western-civilization/>.
12. Patrick Buchanan, *The Death of the West: How Dying Populations and Immigrant Invasions Imperil Our Country and Civilization*, "Thomas Dunne Books (New York), 2001. On the role of Buchanan for the thinking of the radical right see Edward Ashbee, "Patrick J. Buchanan and the Death of the West," in: Mark Sedgwick, *Key Thinkers of the Radical Right: Behind the New Threat to Liberal Democracy*, Oxford University Press (Oxford), 2019, pp. 121-136.



13. In his manifesto, Breivik approvingly cited Buchanan's assertion that "the rise of feminism spells the death of the nation and the end of the West." See Michelle Goldberg, "Norway Massacre: Anders Breivik's Deadly Attack Fueled by Hatred of Women," *The Daily Beast*, 13 July 2017, <https://www.thedailybeast.com/norway-massacre-anders-breiviks-deadly-attack-fueled-by-hatred-of-women?ref=scroll>.
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15. Illustration provided to the Munich Security Conference by McKinsey & Company, based on European Commission, "The EU Industrial R&D Investment Scoreboard," 2012 and 2019, <https://iri.jrc.ec.europa.eu/scoreboard>. Note that every company of the top global 250 R&D spenders in the European Commission's Industrial R&D Investment Scoreboard is mapped into one sector only although many companies are active in various sectors; geographical company mapping is based on registered headquarters although R&D activities are in most cases distributed across various countries/regions. Note that for 2012 headquarters of two companies were manually corrected by the authors from "Bermuda" to "USA."
16. Illustration provided to the Munich Security Conference by McKinsey Global Institute, building on "Notes from the AI Frontier: Modeling the Impact of AI on the World Economy" and "Notes From the AI Frontier: Tackling Europe's Gap in Digital and AI." Note that beyond enablers, the market and demand side determine actual technology leadership. China benefits from the size and attractiveness of its domestic market, while in the EU, progress on the digital single market is continuing but still incomplete. This is not incorporated in this illustration.



Food for Thought

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