



Globale Machtverschiebungen – Ende vom Wandel durch Handel ?

Instability & Uncertainty across the globe



**Ethnic
Conflicts**



Terrorism



Cyber Attacks



**Failed
States**



**Resource
Conflicts**



Military Assets



Poverty



**Organized
Crime**



Refugees



Infant Soldiers



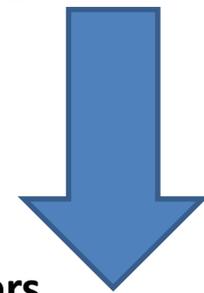
**Environmental
Threats**



Instability & Uncertainty across the globe



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**Verunsicherung =
Nation first**

Resource
Conflicts



Organized
Crime



Cyber Attacks



Ethnic
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Infant Soldiers



Military Assets



Environmental
Threats



Terrorism



Failed
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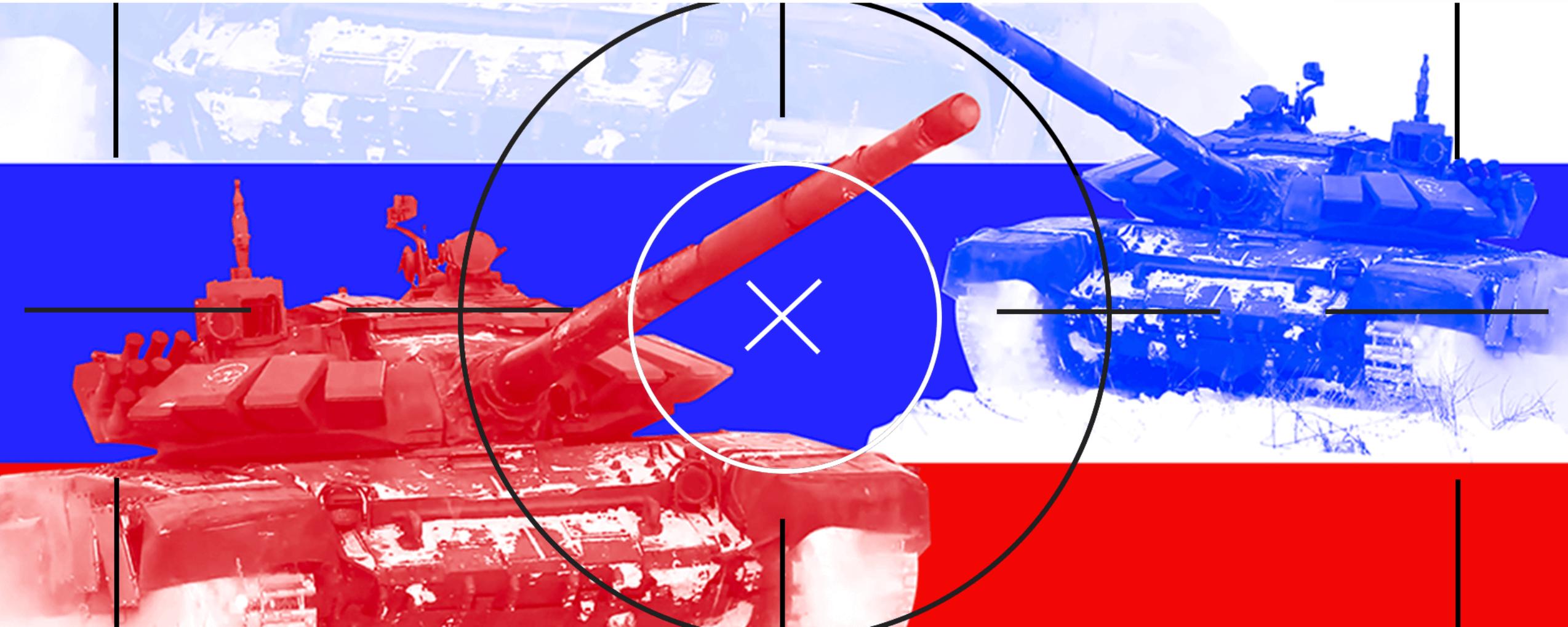


Russian Forces invade Ukraine

24th Feb 2022 = ZEITENWENDE



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Ukraine: War since 2014 / CRIMEA



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-  von der ukrainischen Regierung kontrolliertes Territorium
-  Waffenstillstandslinie
-  von Separatisten kontrolliertes Territorium

The Bigger Picture: Great Power Competition – so what?



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The Bigger Picture: Great Power Competition – so what?



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Great Power Competition:

China is the greatest state threat to economic security

Russia is the most acute threat to our security



Great Power Competition:

Democratic Values vs Authoritarian Systems

FREEDOM of CHOICE or FORCE & COERCION



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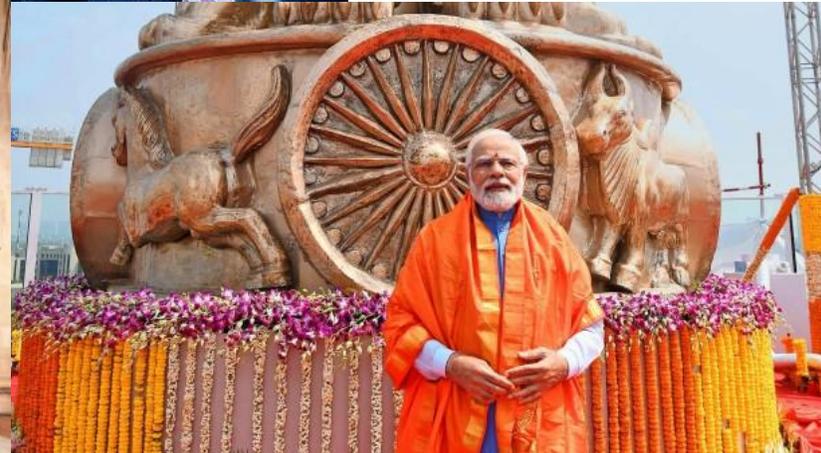
Great Power Competition:

Democratic Values vs Authoritarian Systems

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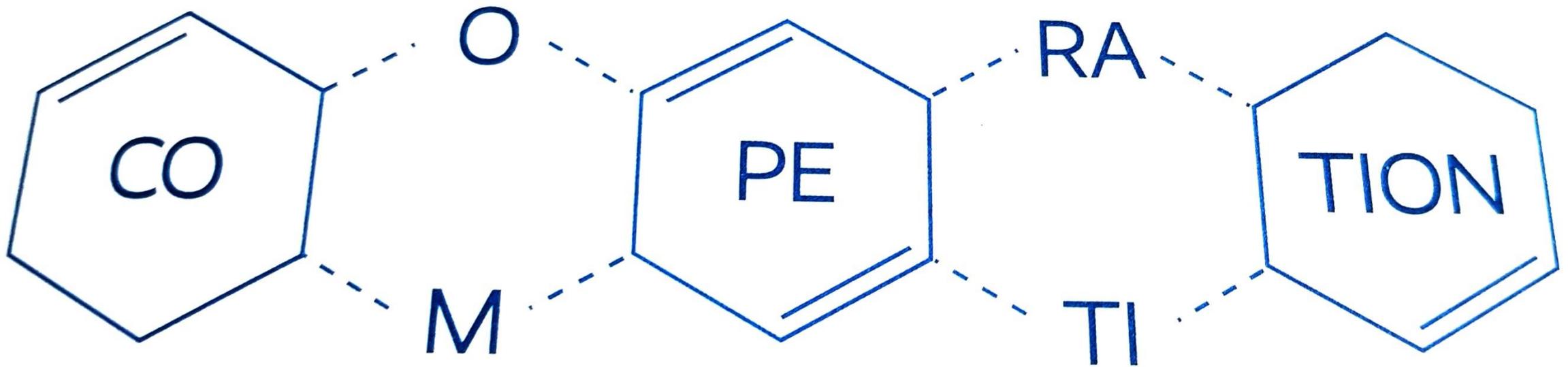


Between States of Matter: Competition and Cooperation

International rules based order



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Germany, USA, France



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Germany, USA, France



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BK Scholz zum
Arbeitsbesuch in
DC am 03. März 23

Germany, USA, France, EU & China



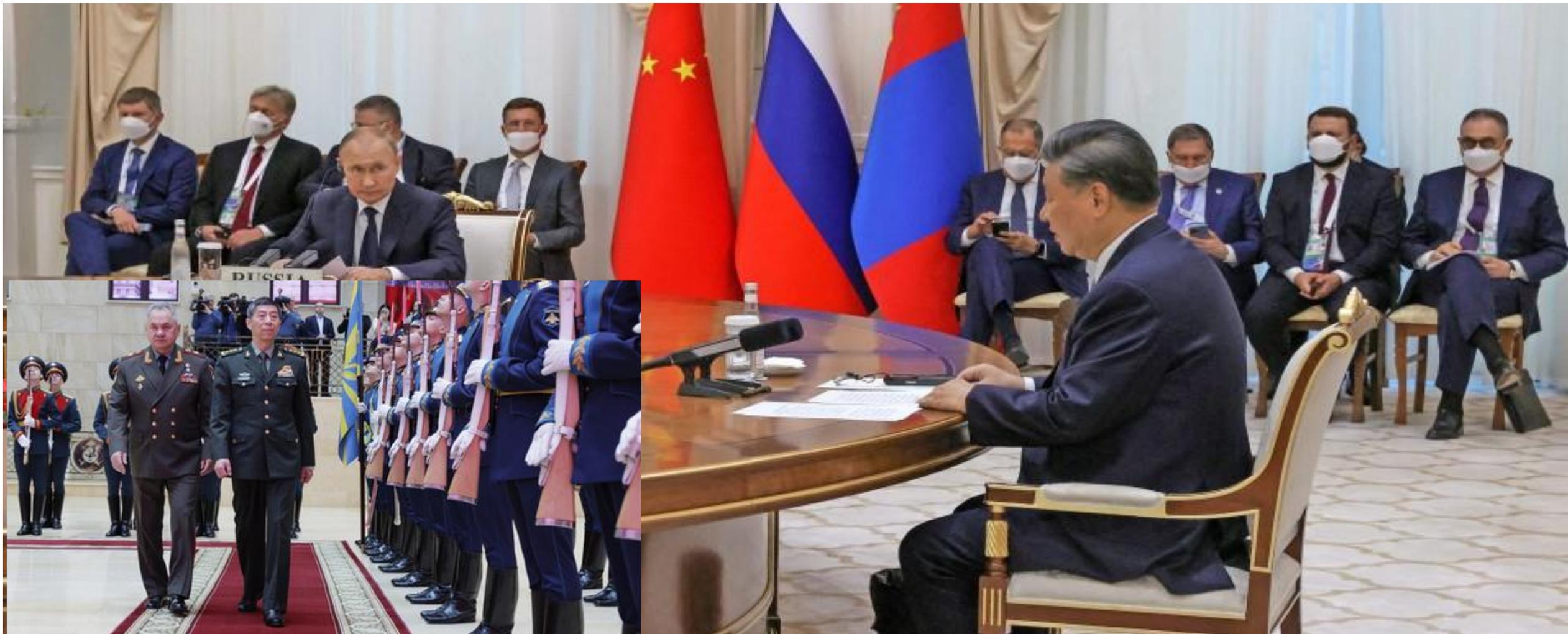
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Russian & Chinese Partnership



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Hongkong / Taiwan (Taiwan-Relation-Act mit USA)

Wandel durch Handel !!



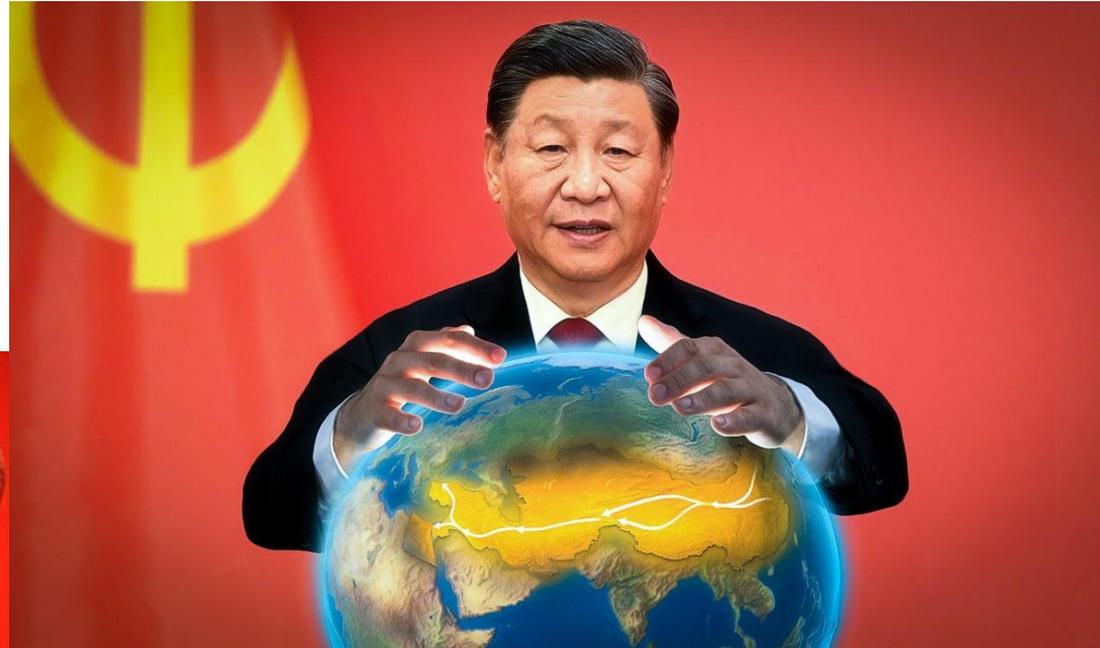
Südchinesisches Meer

Xi's Objectives: World's leading Power



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„You can't fight gravity“



Putin's Objectives: Destabilize Europe



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My Assessment before the war: UKRAINE: Creeping division ?!

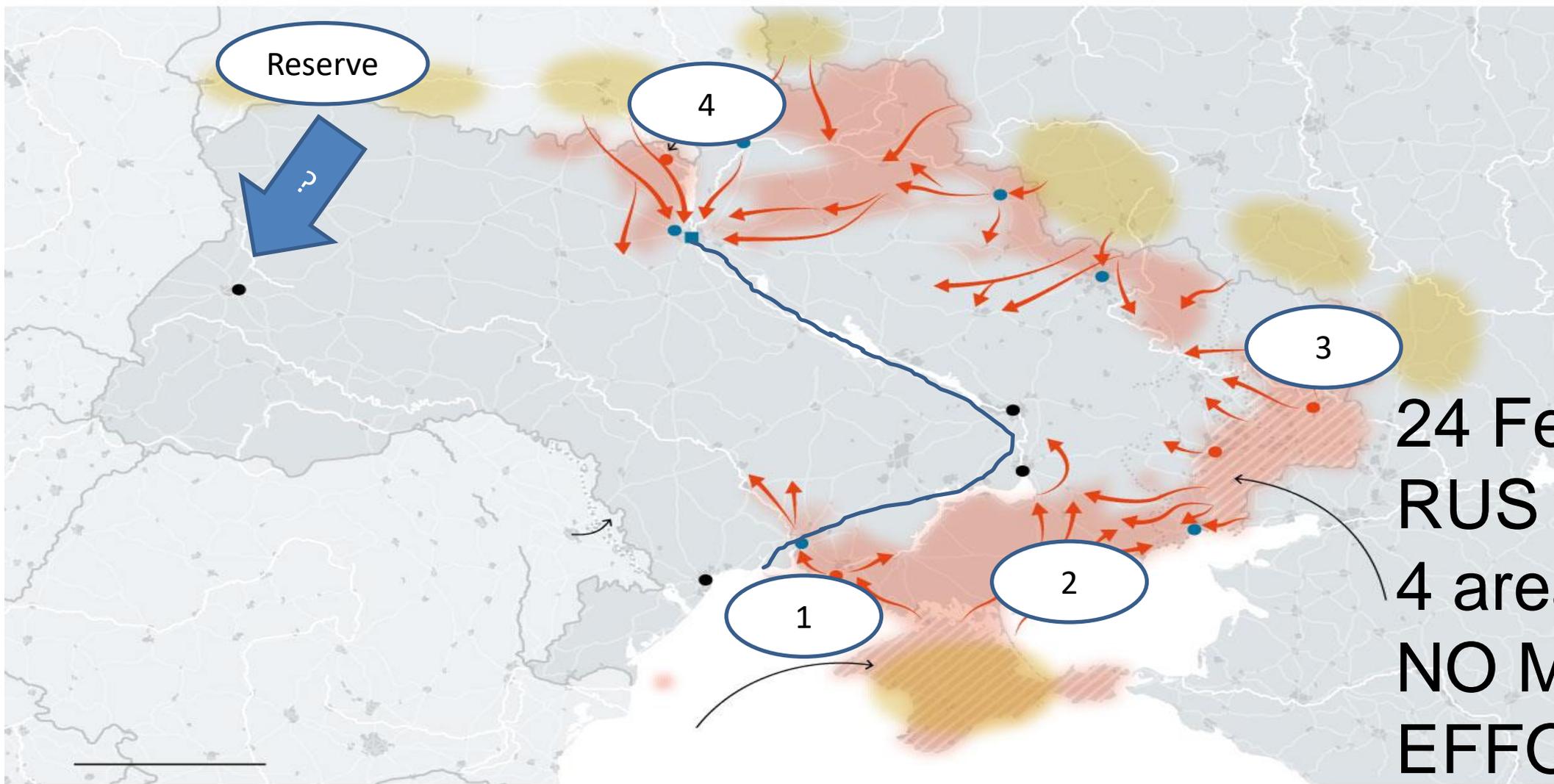


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24 Feb 22
RUS attacks in
4 areas
NO MAIN
EFFORT



100 days of fighting



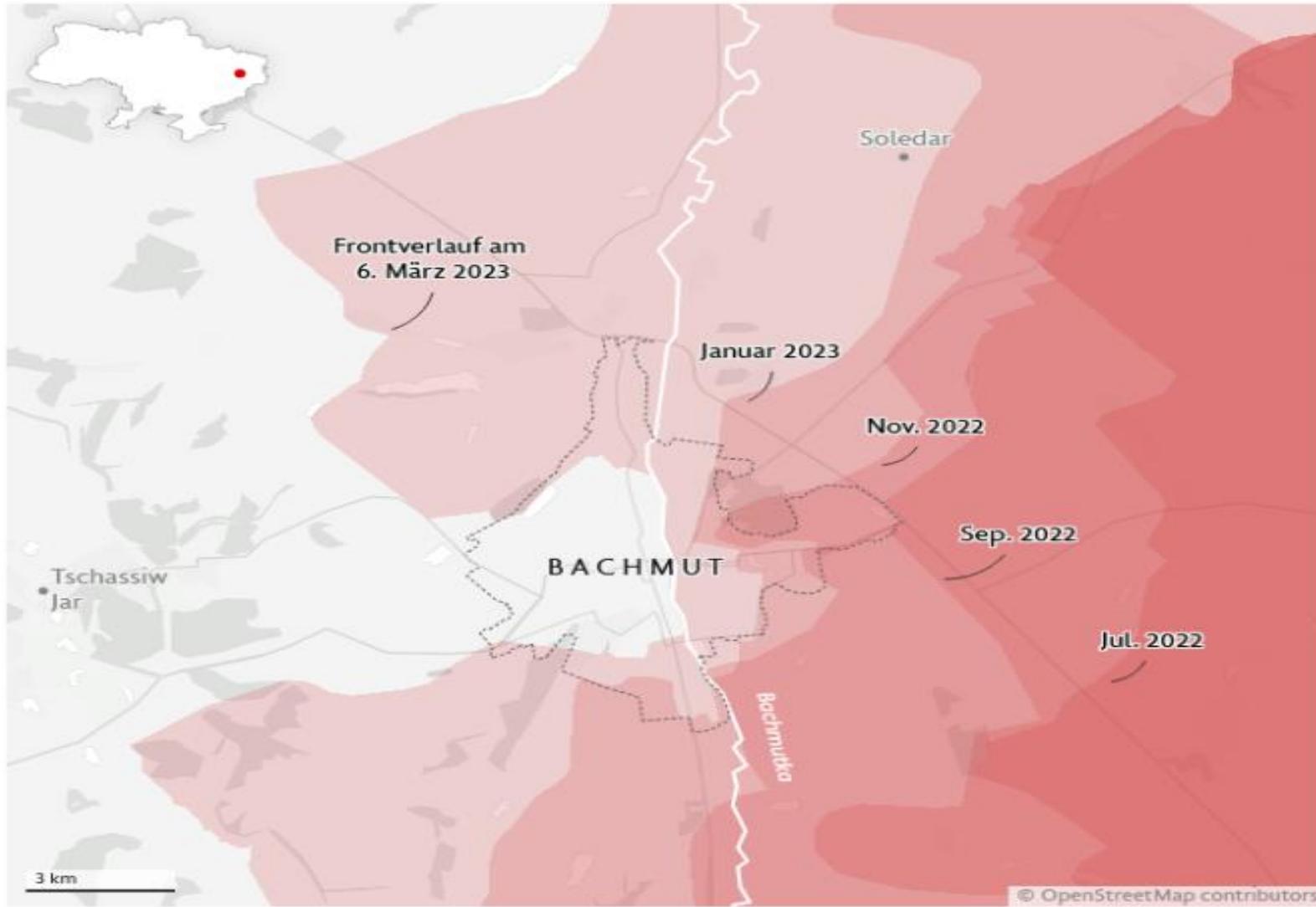
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Russia's Diminishing Goals for Encircling Southeast Ukraine



Der Kampf um Bachmut

Vormarsch der russischen Truppen von Juli 2022 bis März 2023



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Grafik: jpg., omer. / Quelle: Institute for the Study of War (ISW)



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RUSSIA's
Escalation
Dominance

RUSSIA IN STRATEGIC
DEFENCE



UKRAINE's Frühjahrsoffensive



RUSSIA IN STRAT DEFENCE



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Compromise?: Withdrawl of Russian Forces in UKR UN General Assembly after 1 year of Russian Invasion

193 = 141 + 45 + 7 (Russia, N-Korea, Nicaragua, Eritrea, Belarus, Mali, Syria)

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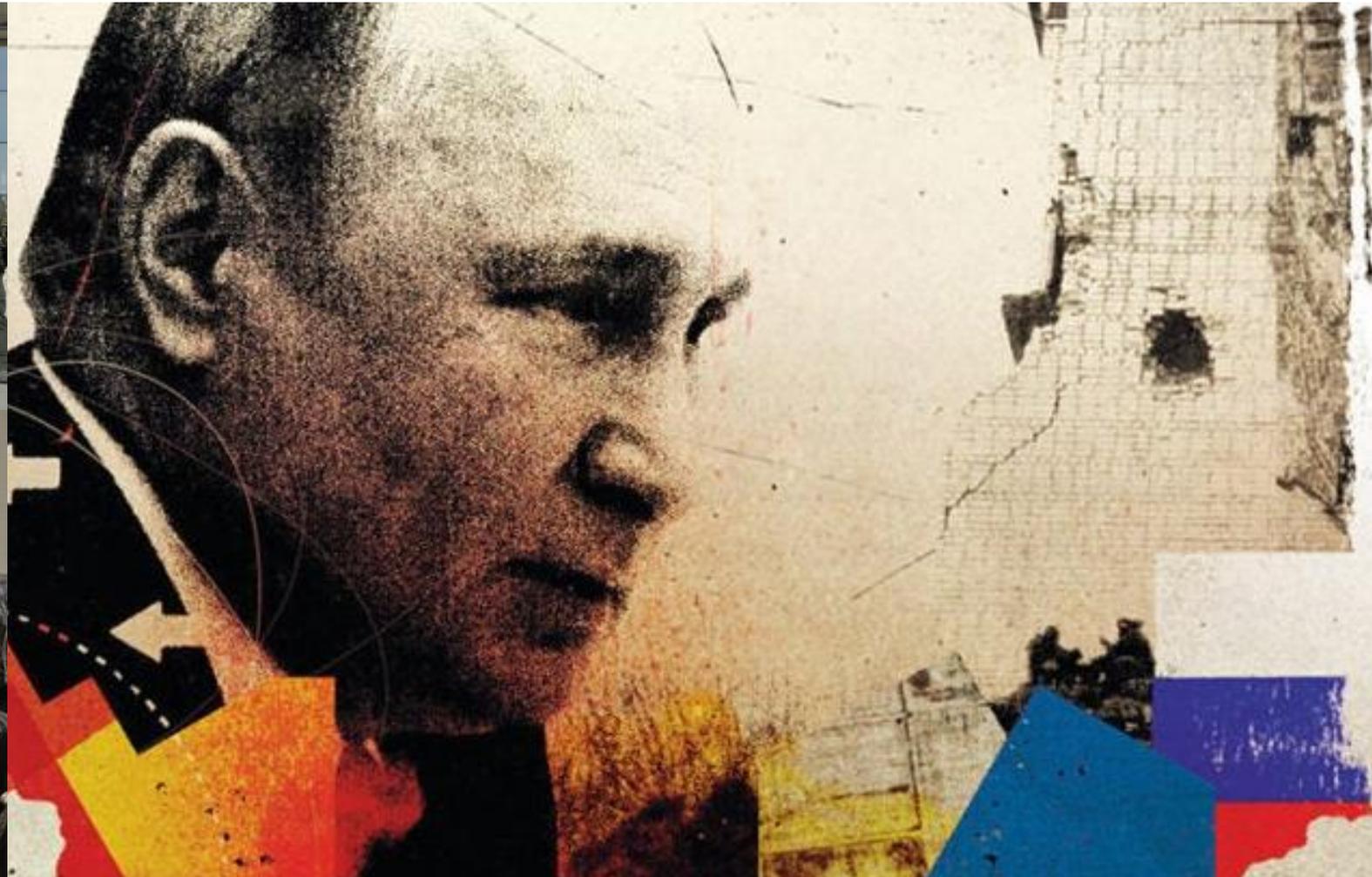
Russian-Ukraine-War: R2P !!!



Putin's Objectives: Denazify & Disarm Ukraine as a whole



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Neue Zahlen zu den Verlusten Russlands im Ukraine-Krieg (25.03.2023)

Soldaten: 168.150 (+660)

Flugzeuge: 305

Hubschrauber: 290

Panzer: 3.570 (+13)

Gepanzerte Kampffahrzeuge: 6.898 (+11)

Artilleriesysteme: 2.608 (+19)

Flugabwehrsysteme: 273 (+1)

Mehrfachraketenwerfer: 511 (+2)

Fahrzeuge und Treibstofftanks: 5.452 (+18)

Schiffe:

Drohnen: 2.203 (+18)



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Quelle: UKR/Die Angaben lassen sich nicht unabhängig prüfen.

Selenskyj's Objectives: Maintain whole Ukraine incl. DONBASS & CRIMEA



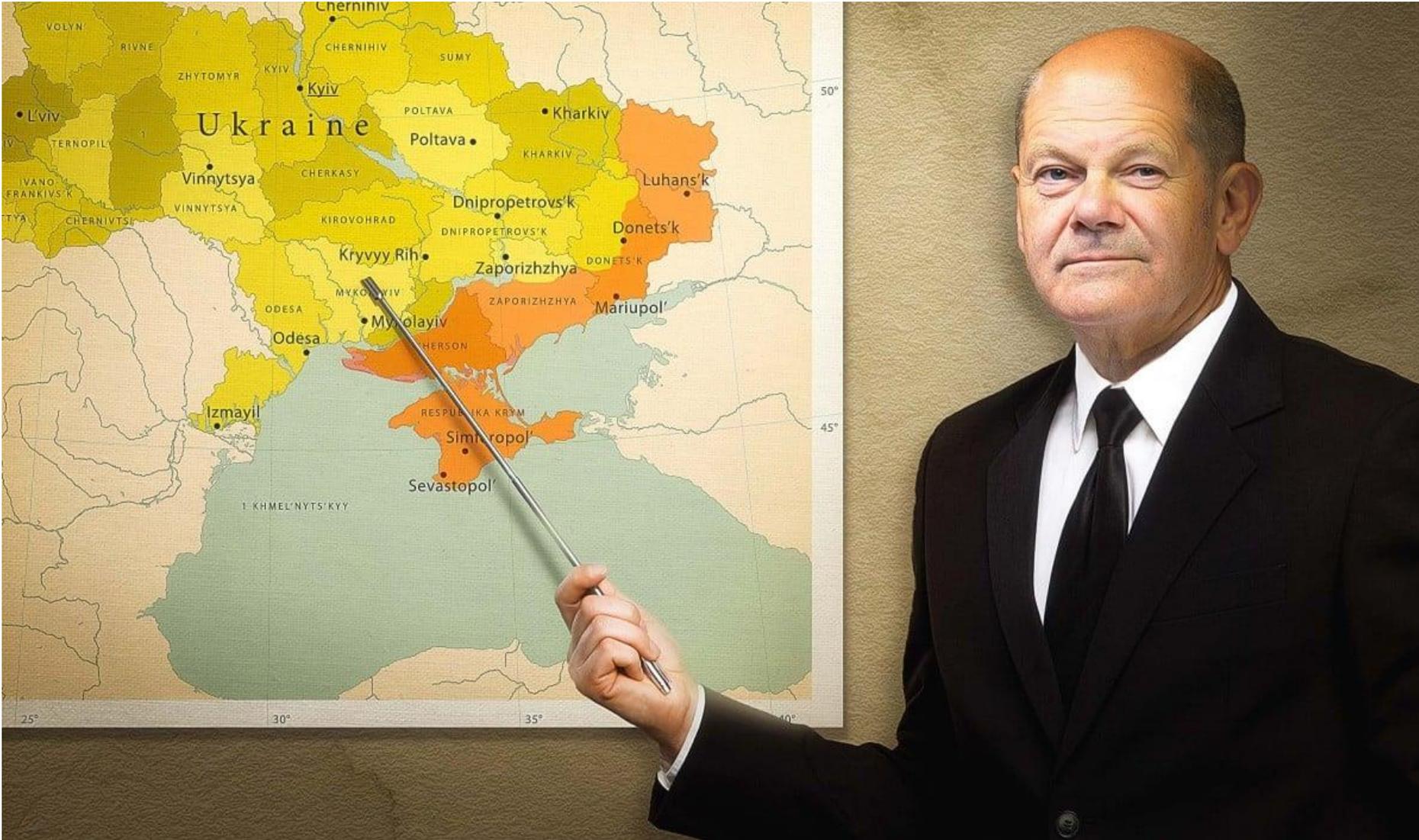
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Scholz's Objectives: Stabilize Europe & Arm Ukraine as a future member of EU & NATO



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Ramstein- Conference, 20.01.2023



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Compromise?: “Neutral” UKR without CRIMEA & DONBASS, however, with EU/NATO-Perspective...

Assurance: “Model Israel”



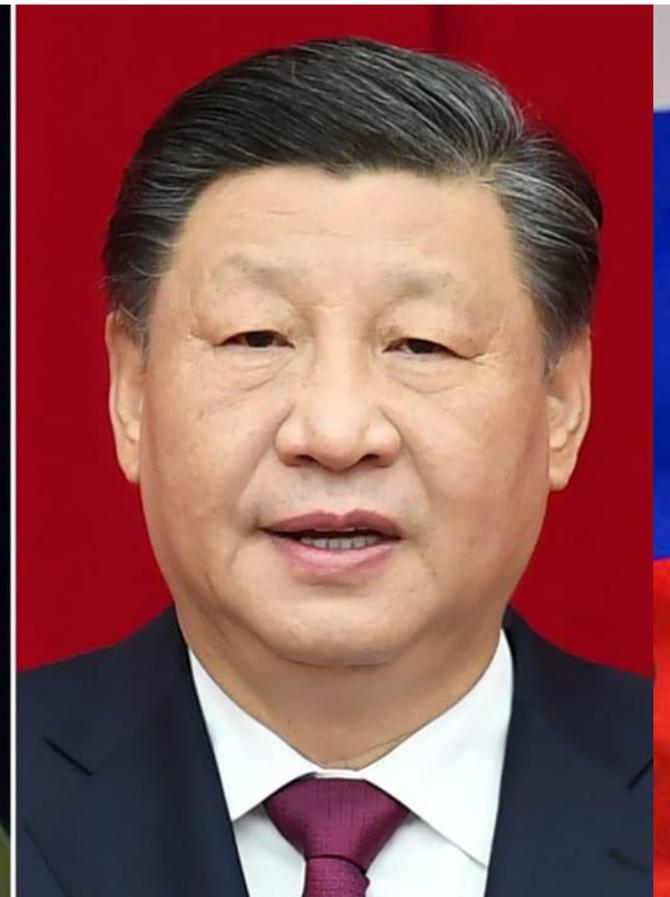
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...Berlin und Washington loben Xis Telefonat mit Selenskyj... (april, 27,2023)



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„The purpose is to keep the Russians out,
the Americans in and the Germans down...”



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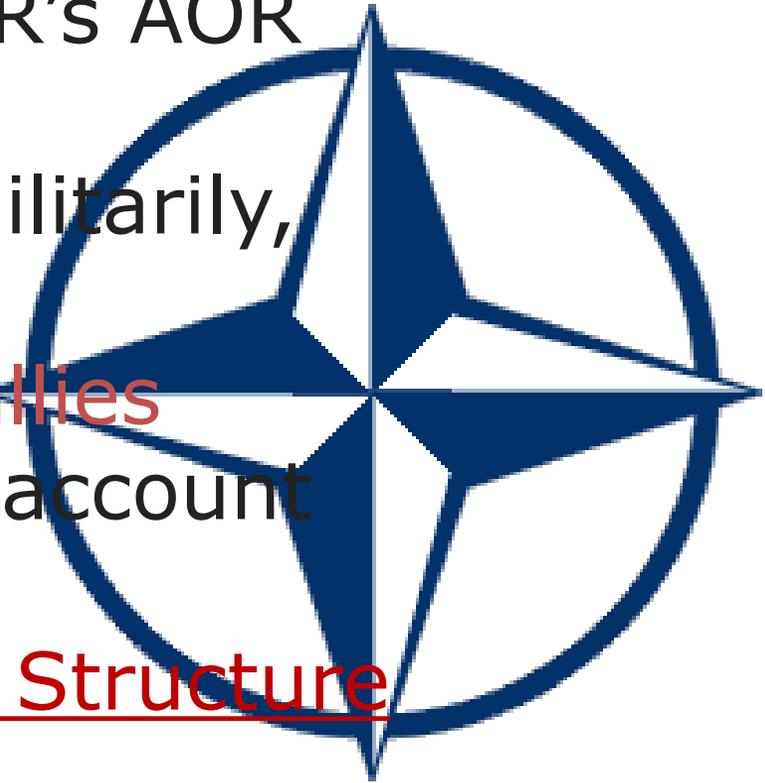


NATO 2030 – New Force Model



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- New Strategic Concept with global responsibility ?
- **Deterrence** & Defence & Dialogue (**NT**)
- **NRF up to 300.000** soldiers in SACEUR's AOR
- **Russia** (NRC) remains main effort
- China as competitor (economically, militarily, techno)
- **Fair Burden sharing between US/EU allies**
- New technologies (AI) are taken into account
- Counter **Terrorism**
- Nato Command Structure/Nato Force Structure
- NATO - EU / Cyber / Resilience
- Framework South / Hub



Germany's Dependencies



Security: USA



Energy (Oil / Gas): Russia



Economy: China



Germany's Dependencies



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Sondervermögen Bundeswehr plus 2% BIP



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**MEHR GELD
FÜR DIE
BUNDESWEHR**

100 Milliarden Euro

Der Bundeshaushalt 2022 wird für notwendige Investitionen und Rüstungsvorhaben mit einem Sondervermögen ausgestattet

mehr als 2 Prozent

unserer Wirtschaftsleistung soll für Verteidigung eingesetzt werden

"European Sky Shield Initiative" (ohne FRA!)



Israels Raketenabwehr

Zum Schutz gegen Kurzstreckenraketen hat Israel das System „Iron Dome“ (Eisenkuppel) aufgebaut

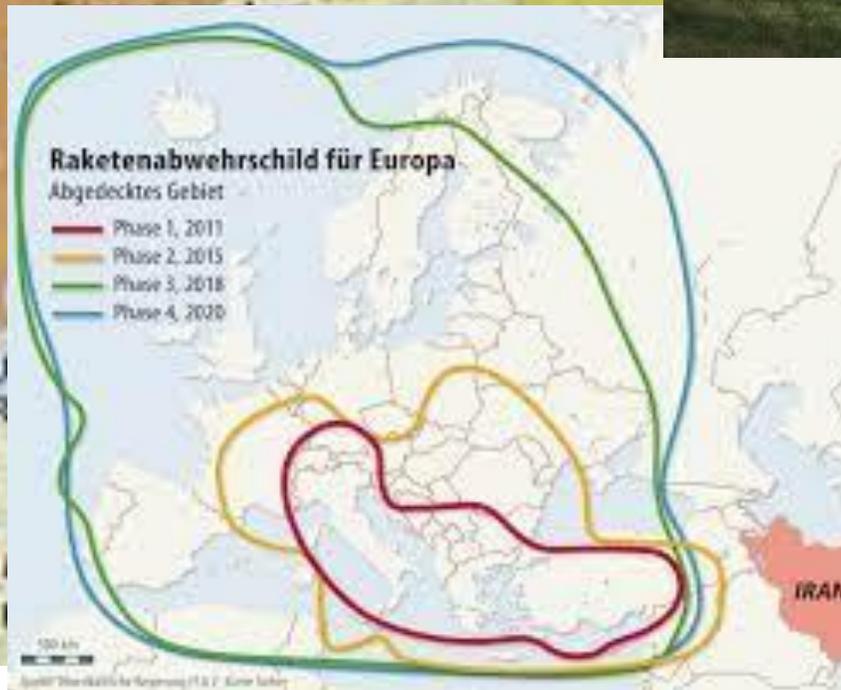


dpa-102441

schematische Darstellung

Quelle: Hersteller

NATO-Raketenschirm in Europa



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MEHR GELD FÜR DIE BUNDESWEHR

100 Milliarden Euro

Der Bundeshaushalt 2022 wird für notwendige Investitionen und Rüstungsvorhaben mit einem Sondervermögen ausgestattet

mehr als 2 Prozent

unserer Wirtschaftsleistung soll für Verteidigung eingesetzt werden

The Tragedy: Syria is bleeding since 2011 Yemen since 2014 // new Biden initiative !



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The Tragedy: Syria is bleeding since 2011 Yemen since 2014 // new initiative ??



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Iran Nuclear Deal // US & EU & RUS



TING
ications

Iran Demonstrations since sept 16, 2022 after death of 21 year old Mahsa Amini



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"Ukraine, Taiwan and Iran form currently the most dangerous triangle of geo-politics", Joschka Fischer, ex Sec Foreign Affairs, Germany



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"Ukraine, Taiwan and Iran form currently the most dangerous triangle of geo-politics", Joschka Fischer, ex Sec Foreign Affairs, Germany



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36% LIVE ON LESS THAN ONE DOLLAR PER DAY

HEIGHT OF KILIMANJARO 19,340 FEET 

 14% WORLD POPULATION : **53 COUNTRIES**

12 MILLION  : **31%** SECONDARY SCHOOL ENROLLMENT

6 AVERAGE CHILDREN EACH WOMAN BEARS : **44%** POPULATION IS UNDER FIFTEEN : **ONE THOUSAND+** LANGUAGES

80% OF THE WORLD'S CHILDREN LIVE IN AFRICA

81148 BARRELS IN 2ND MOST POPULOUS CONTINENT : **6%** OF WORLD'S SURFACE AREA : **900** PEOPLE PER SQ. MILE

26,828 SQUARE MILES IN LAKE VICTORIA

SUCCESSFUL MILITARY COUPS : AVERAGE GDP \$671 PER CAPITA

80  : **53** M CELL PHONE USERS

\$10 BILLION  ANNUALLY IN CONFLICT DIAMONDS DURING 1990s

44.3 MILLION  INTERNET USERS

27 YEARS NELSON MANDELA WAS IMPRISONED

16,100 MILES OF CONSTRUCTION

36% LIVE ON LESS THAN ONE DOLLAR PER DAY

HEIGHT OF KILIMANJARO 19,340 FEET

14% WORLD POPULATION 53 COUNTRIES

12 MILLION 31% SECONDARY SCHOOL ENROLLMENT

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NUMBER ONE POLYGLOT CONTINENT 26,828 SQUARE MILES IN LAKE VICTORIA

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The Other Issues... Munich Security Index 2021/ 2022

The biggest risks are rising across the world



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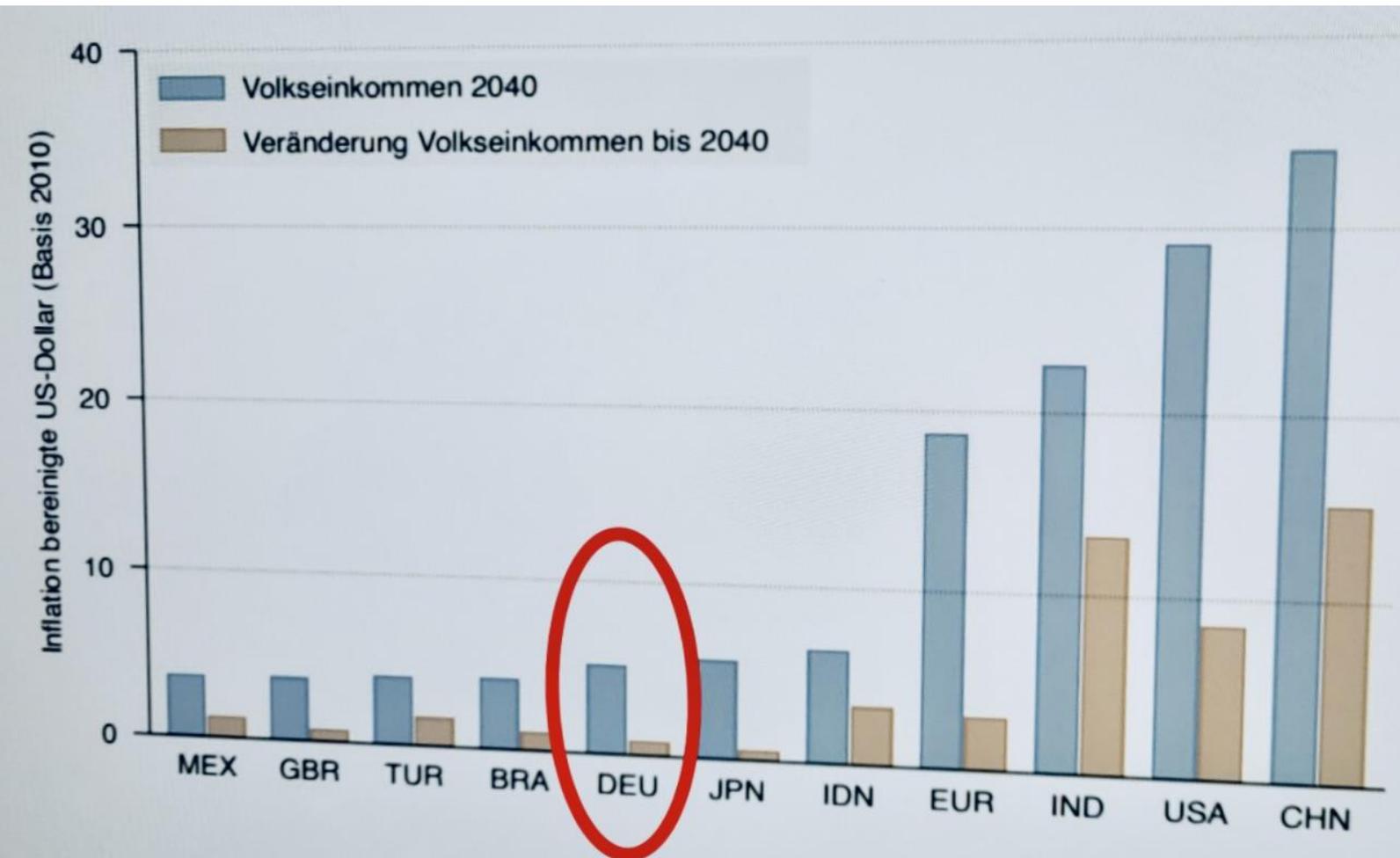
- **Climate change**
- Mass migration
- Food Security / Shortage
- **A prevailing mood of helplessness amongst Western Nations**
- Concern about China / lack of consensus on how to approach CHN
- Russia is judged as risk, but still low on the list (No 24 out of 31)
- **Concern about the state of democracy / civil war**
- Radical Islamic terror (top threat in France)
- **Cyber attacks**
- Nuclear attack (top risk in India)



Langfristiges Wachstum: Prognose 2022



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Reales
Volkseinkommen in
US-Dollar
und Differenz
Volkseinkommen
(2040 minus 2020)

Langfristiges Wachstum: alle 110 Jahre ein Wechsel



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Wechsel der Welthandelswährungen

China
数字元 / digitaler Yuan

ab 2030?



Vereinigte Staaten
US-Dollar

1925-2030? (~105 Jahre)



Vereinigtes Königreich
Pfund Sterling

1815-1925 (110 Jahre)



Niederlande
Gulden

1640-1720 (80 Jahre)



Spanien
Real / Escudo

1530-1640 (110 Jahre)



Portugal
Dukaten / Cruzado

1450-1530 (80 Jahre)



Ära des Überflusses hin zu einer Ära des Mangels



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Without security, there is no freedom!



Thank you very much

Die Wirkung von Sanktionen am Beispiel von Iran



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