Munich Security Conference
Münchner Sicherheitskonferenz

Munich Security Report 2017

Post-Truth, Post-West, Post-Order?

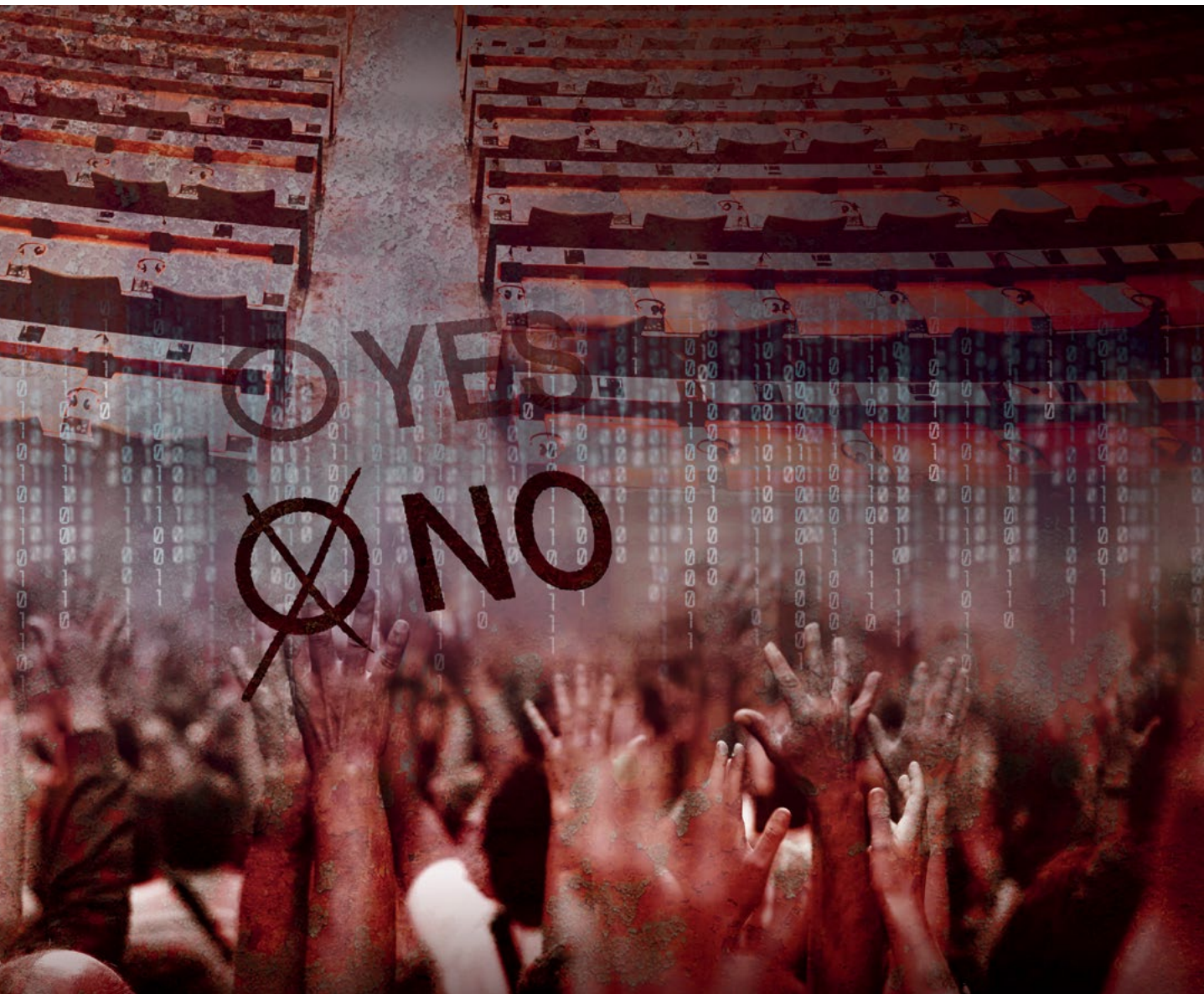


Table of Contents

Foreword

Dear Reader,

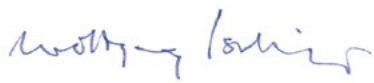
The annual Munich Security Report, first published in 2015, is our conversation starter for the Munich Security Conference and aims to serve as a useful compilation for decision-makers, security professionals, and the interested public. Ahead of the Munich Security Conference 2017, we are pleased to present the report's third edition.

The international security environment is arguably more volatile today than at any point since World War II. Some of the most fundamental pillars of the West and of the liberal international order are weakening. Adversaries of open societies are on the offensive. Liberal democracies have proven to be vulnerable to disinformation campaigns in *post-truth* international politics. Citizens of democracies believe less and less that their systems are able to deliver positive outcomes for them and increasingly favor national solutions and closed borders over globalism and openness. Illiberal regimes, on the other hand, seem to be on solid footing and act with assertiveness, while the willingness and ability of Western democracies to shape international affairs and to defend the rules-based liberal order are declining. The United States might move from being a provider of public goods and international security to pursuing a more unilateralist, maybe even nationalistic foreign policy. We may, then, be on the brink of a *post-Western* age, one in which non-Western actors are shaping international affairs, often in parallel or even to the detriment of precisely those multilateral frameworks that have formed the bedrock of the liberal international order since 1945. Are we entering a *post-order* world? How this question will be answered in the years to come will depend on all of us.

With this report, we try to make sense of today's security environment by presenting information on important current trends, actors, places, and issues. As in previous editions, the list of topics is neither comprehensive nor exhaustive.

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

Sincerely yours,



Ambassador Wolfgang Ischinger
Chairman of the Munich Security Conference

Post-Truth, Post-West, Post-Order?

The world is facing an illiberal moment. Across the West and beyond, illiberal forces are gaining ground. From within, Western societies are troubled by the emergence of populist movements that oppose critical elements of the liberal-democratic status quo. From outside, Western societies are challenged by illiberal regimes trying to cast doubt on liberal democracy and weaken the international order. And Western states themselves seem both unwilling and unable to effectively tackle the biggest security crises – with Syria as the prime example.

The Populist and Anti-Globalist Challenge in the West: The Politics of Fear in a Post-Truth World

"We are living in the days where what we call liberal non-democracy, in which we lived for the past 20 years, ends, and we can return to real democracy."[10]
VIKTOR ORBÁN, 10 NOVEMBER 2016

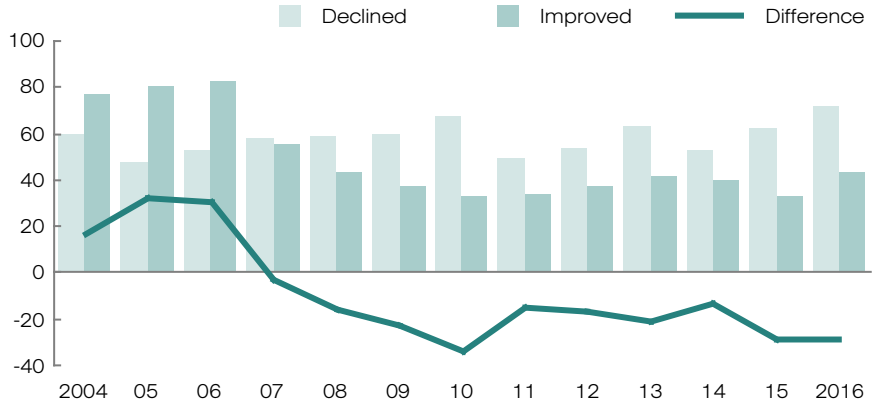
The past twelve months have been a resounding rejection of the status quo. In several elections and referenda, political outsiders succeeded, while the establishment was dealt major blows. Populist parties are now part of the government in about a dozen Western democracies. And even in countries where populists only received a small share of the vote, they often exert a defining influence by shifting the debate or pressuring mainstream parties to adopt different policy agendas.[1] Economic factors may explain part of the populist rise: incomes for a majority of citizens in industrialized economies have stagnated or fallen between 2007 and 2014.[2] However, in the US, for instance, analyses show that it was "not economic hardship but anxiety about the future that predicted whether people voted for Trump."[3] There is also a cultural backlash against so-called "globalism" from which the populist surge draws. The main dividing line in politics runs less and less between left and right but between a liberal cosmopolitan pole and a populist (or even xenophobic authoritarian) one.[4] Populist parties reject the cultural modernization in Western societies and revolt against what they perceive as threats to the nation, ranging from immigration and cosmopolitan elites to international institutions. They dismiss pluralism and liberalism, essential elements of liberal democracies.[5]

"The whole of the West is turning its back on a failed system of politics."[11]
NIGEL FARAGE, 9 NOVEMBER 2016

Populists are experts in the politics of agitation, forming an "axis of fear" across the West that exploits insecurities and grievances of the electorate, often by twisting the facts or even by spreading outright lies that speak to the preconceptions of their supporters. And they may not even be punished by voters for not offering solutions.[6] In his farewell speech, German President Joachim Gauck warned of the dangers for Western democracies: "We should remember that if we only accept as fact what we already believe anyway and if half-truths, interpretations, conspiracy theories and rumors count every bit as much as the truth, then the path is clear for demagogues and autocrats."[7] With good reason, the editors of the Oxford Dictionaries proclaimed "post truth" the word of the year 2016.[8] Beyond all the dangers for democracy, this also has a very clear security dimension: If politicians, for instance, lie about crowd sizes, say demonstrably wrong things about previously held positions and suggest that falsehoods are merely "alternative facts," can citizens and allies trust them on national security issues?[9] Likewise,

THE DECLINE OF FREEDOM AROUND THE WORLD

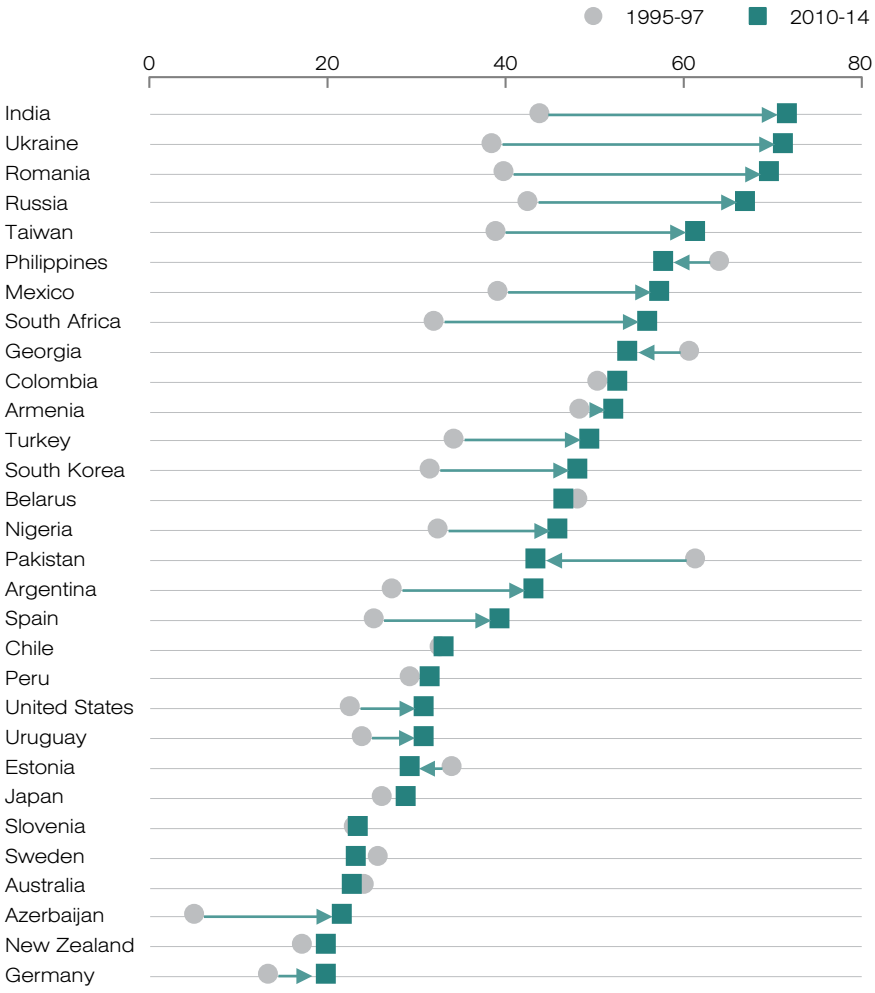
Number of countries with declining/increasing aggregate scores (combined Freedom House scores for political rights and civil liberties), 2004-16



Source: Freedom House[12]

WHAT CITIZENS THINK: WOULD HAVING A STRONG LEADER WHO DOES NOT HAVE TO BOTHER WITH PARLIAMENT AND ELECTIONS BE A GOOD WAY TO "RUN THIS COUNTRY?"

Share of citizens answering "very good" or "fairly good", percent



Source: World Values Survey; Foa and Mounk[13]

a "post-truth" culture makes foreign disinformation campaigns more likely and erodes the very foundation of enlightened debate on which liberal democracies depend.

The Illiberal International and Cracks in the Liberal International Order

"We cannot avoid facing up to this challenge. The fact is that liberal democracy and the political and normative project of the West are under fire."[21]
JOACHIM GAUCK, 18 JANUARY 2017

The rise of the populists has rapidly become a systemic challenge that threatens to undermine the liberal international order the world's liberal democracies have built and upheld since the end of World War II. The populists watch and learn from each other and increasingly cooperate across borders. Some analysts have already referred to the "Illiberal International," the "Populist International," or the "International of nationalists."[14] Together, the populists at home and the illiberal regimes abroad form a formidable challenge to the main elements of the liberal international order: the spread of liberal democracy, economic interdependence based on free trade, and a strong web of international institutions – which researchers see as major factors contributing to a peaceful international order.[15]

"For many decades, we've enriched foreign industry at the expense of American industry; subsidized the armies of other countries while allowing for the very sad depletion of our military; we've defended other nation's borders while refusing to defend our own; and spent trillions of dollars overseas while America's infrastructure has fallen into disrepair and decay.
We've made other countries rich while the wealth, strength, and confidence of our country has disappeared over the horizon. [...]
But that is the past. And now we are looking only to the future. [...] From this moment on, it's going to be America First."[22]
DONALD J. TRUMP, 20 JANUARY 2017

First, liberal democracy has become increasingly contested. According to Freedom House, 2015 was "the 10th consecutive year of decline in global freedom," i.e., for a decade, there were more countries with net declines than those with net gains each year.[16] Maybe unsurprisingly, in stark contrast to his predecessors, President Donald Trump's inaugural address did not mention words such as democracy, liberty, or human rights. This does not bode well for liberal values around the world. "The global rise of populists poses a dangerous threat to human rights," Kenneth Roth of Human Rights Watch warns. "Too many Western political leaders seem to have lost confidence in human rights values, offering only tepid support."[17]

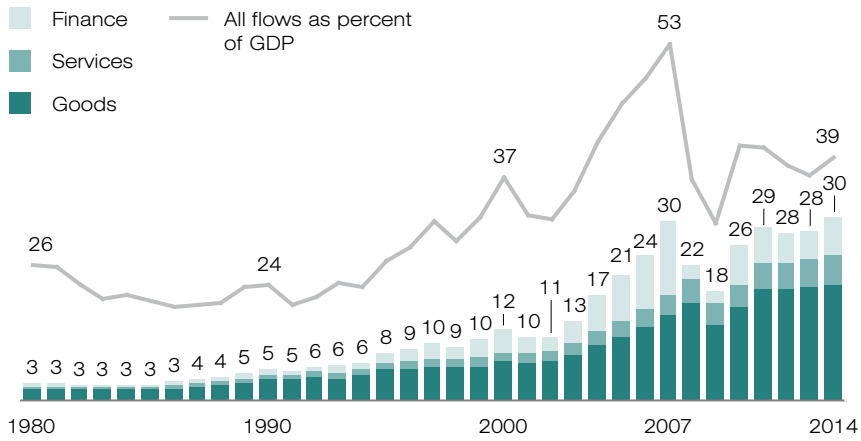
Second, the open international economic order may be unraveling. WTO negotiations have stalled for years, and it seems protectionism may return. Last year, the CETA negotiations between Canada and the European Union came close to failing, and TTIP has almost become a political anathema. Long a champion of free trade, the United States is now on a more protectionist path. In his inaugural address, Trump made a clear case for "America first" after claiming that previous US policy had "enriched foreign industry at the expense of American industry" and "the wealth of our middle class has been ripped from their homes and then redistributed across the entire world." As Trump promised: "Protection will lead to great prosperity and strength."[18] Yet, most economists warn of a new mercantilism that would affect precisely those US workers Trump claims to support.[19]

Finally, the multilateral institutions at the heart of the international order are at risk as well. To some degree, the weakness of key institutions is the result of the increasing influence of non-democratic great powers that have generally benefitted from the liberal international order but do not embrace all its elements. Partly, however, Western countries themselves are to blame for the crisis of this order. They may have pushed too hard to implement some of the normative changes, provoking a backlash against some of the most progressive developments such as the responsibility to protect (R2P) or not making room enough for emerging powers within that order. Today, major innovations of the liberal international order such as the International Criminal Court are losing support.[20]

Perhaps most importantly, some of its core institutions are increasingly questioned within the Western countries itself. Since its creation, NATO has been a central pillar of the Western-led order – and the crucial security link connecting the US,

DEVELOPMENT OF GLOBAL TRADE VOLUME SINCE 1980

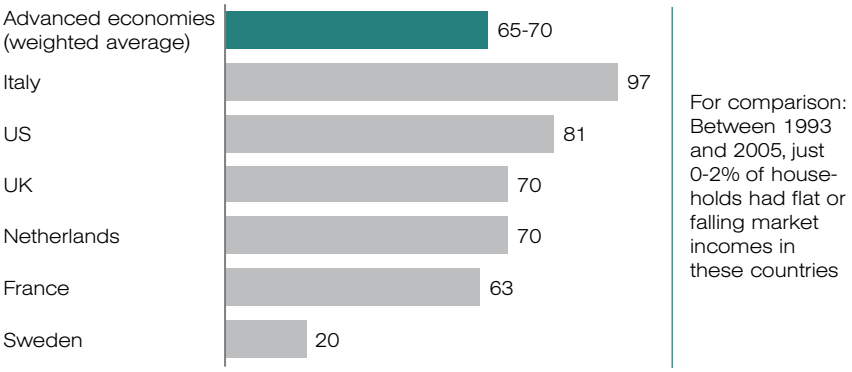
Flows of goods, services, and finance, 1980-2014, USD trillions, nominal



Source: McKinsey Global Institute, based on UNCTAD; IMF; World Bank[23]

STAGNATING AND DECLINING INCOMES IN SELECT ADVANCED ECONOMIES

Share of households with flat or falling market income, 2005-14, percent



Source: McKinsey Global Institute, based on INSEE; Bank of Italy; CBS; Statistics Sweden; ONS; CBO[24]

WHAT DO EUROPEANS WHO FEAR/ENDORSE GLOBALIZATION THINK ...

Opinion poll, all 28 EU member states, August 2016

		Respondents who think globalization is ...	
		... a threat	... an opportunity
About the EU	Vote for EU exit	47% (Leave)	83% (Remain)
	Want more integration	40%	60%
About their country	Trust politicians	9%	20%
	Are satisfied with democracy	38%	53%
About policy issues	Think country has too many foreigners	57%	40%
	Oppose gay marriage	29%	19%
	Think climate change is a hoax	34%	28%

Source: Bertelsmann Stiftung[25]

Canada, and their European allies. Yet, Donald Trump's comments about NATO being "obsolete" have caused great uncertainty among America's allies, especially in Central and Eastern Europe. The European Union is under pressure, too, as it has to deal with Brexit, a populist surge, the refugee crisis, a potential return of the euro crisis, jihadist attacks, and a revisionist Russia. And while the Obama administration referred to Europe as "the cornerstone of our engagement with the rest of the world" and "a catalyst for our global cooperation,"[26] Donald Trump, a few days before his inauguration, described the EU as a project intended to counter US influence and suggested he did not really care about its future.[27]

"The world order that we built, our dearest inheritance, which we tended to and shored up every year here at Munich, is coming apart. It is not inevitable that this happen. It is not occurring because we lack power, or influence, or options to employ. No, this comes down, ultimately, to our judgment and our resolve."[31]
JOHN MCCAIN, 14 FEBRUARY 2016

Post-West or Even Post-Order?

What does this – especially a much more unilateralist, nationalist US foreign policy – mean for the future international order? Will it slowly become a more fragmented order in which regional hegemons define the rules of the game in their spheres? Or will the Western democracies be able to preserve the core norms and institutions of the liberal international order? Do they even want to? Who is going to provide common public goods that benefit their own country, but also others? The development of some of today's crucial geopolitical hotspots may give us a preview of the emerging disorder and disengagement.

In Syria, more than 400,000 people died, and millions had to flee their homes. While the Europeans stood by and the United States was reluctant to fully engage, others filled the vacuum. Most decisively, the Russian government took an active role in the conflict when the Syrian regime appeared to be losing. It claimed that it was fighting against the Islamic State, but primarily waged war on the opposition. According to the human rights groups, hospitals were regularly and deliberately targeted.[28] While Western officials have repeatedly argued that "there is no military solution" to the war in Syria, Russia and its allies pursued one – and seem to be successful. Is this the brave new post-Western world? The events in Aleppo also may foreshadow the significance of international law and human rights (or lack thereof) in the future. Should a genocide be perpetrated somewhere in the world in the coming months, would anybody step in?

"If the scope of freedom and respect for the rule of law shrinks around the world, the likelihood of war within and between nations increases, and our own freedoms will eventually be threatened."[32]
BARACK OBAMA, 10 JANUARY 2017

In Ukraine, Russia has violated several key principles governing European security. Even so, sanctions might be reduced without any progress on implementing the Minsk Agreements. Should the Trump administration strike a meaningful deal with Moscow, this could signal a new era of great powers determining the fate of smaller ones. As several European leaders warned Trump before his inauguration: "The rules-based international order on which Western security has depended for decades would be weakened. […] A deal with Putin will not bring peace. On the contrary, it makes war more likely."[29]

Despite its various flaws, the liberal international order has, in the bigger scheme of things, allowed for a remarkable era of peace and economic development. It is, in principle, open to accommodate rising powers and can be adapted to changing circumstances.[30] But a fundamental question has emerged: has the post-Cold-War period been merely a liberal interregnum that is giving way to a more illiberal era? Will this new era again be marked by greater tensions and, possibly, even outright conflict between the world's major powers, not least between China and the US? Is this a post-order world in which the elements of the liberal international order are fading away because no one is there to protect them? The world is about to find out.

THE EURASIA GROUP'S TOP 10 RISKS FOR 2017

Each year, Eurasia Group publishes a list of the top 10 political risk stories for the year ahead. In 2017, as they put it, "we enter a period of geopolitical recession, the most volatile political risk environment in the postwar period." These are the trends Eurasia Group believes will define it.

1	**Independent America:** Donald Trump will use US power overwhelmingly to advance US interests, with little concern for the broader impact. Trump is no isolationist. He's a unilateralist. Expect a more hawkish – and a much less predictable – US foreign policy. Allies, especially in Europe and Asia, will hedge. Rivals like Russia and China will test. US-led institutions will lose more of their international clout.
2	**China overreacts:** The need to maintain control of the transition ahead of next fall's party congress will increase the risk of economic policy mistakes that rattle foreign investors and international markets. President Xi Jinping knows this is a dangerous time to look weak and irresolute. US-Chinese tensions might play out to make 2017 a dangerous year.
3	**A weaker Merkel:** Strong leadership from Angela Merkel has proven indispensable for Europe, which will face more challenges in 2017 – from France's elections, Greece's finances, Brexit negotiations to relations with Russia and Turkey. Though Merkel is likely to win reelection, she'll emerge as a weakened figure.
4	**No reform:** Some leaders, like India's Modi, have accomplished as much as they can for now. In Russia, France, and Germany, reform will wait until after coming elections, and China faces an all-consuming leadership transition next fall. Turkey's Erdogan and Britain's May are fully occupied with domestic challenges. In Brazil, Nigeria, and Saudi Arabia, ambitious plans will advance but fall short.
5	**Technology and the Middle East:** The revolution in energy production undermines the stability of states still dependent on oil and gas exports. New communications technologies enhance the ability of angry citizens to commiserate and organize. Cyber conflict is shifting the region's precarious balance of power. Finally, "forced transparency" (think Wikileaks) is dangerous for brittle authoritarian regimes.
6	**Central banks get political:** Western central banks are increasingly vulnerable to the same sort of crude political pressures that distort economies in developing countries. In 2017, there's a risk that Trump will use the Fed as a scapegoat, putting new pressure on future Fed decisions.
7	**The White House vs. Silicon Valley:** Trump wants security and control. The tech firms want freedom and privacy for their customers. Trump wants jobs. The tech firms want to push automation into overdrive. The two sides also differ substantially on investment in science.
8	**Turkey:** President Erdogan continues to use an ongoing state of emergency to tighten his control of day-to-day affairs. In 2017, he'll use a referendum to formalize his powers, and his strengthening grip will exacerbate the country's economic problems and its tense relations with neighbors and with Europe.
9	**North Korea:** It's hard to know exactly when North Korea will have a missile capability that poses a clear and immediate danger to the US, but the DPRK appears to be approaching the finish line at a time of deteriorating relations between China and the US. A tough Trump policy could roil geopolitics throughout the region.
10	**South Africa:** Unpopular President Zuma is afraid to pass on power to someone he doesn't trust. Infighting over succession poses an obstacle to any effort on needed reforms and limits South Africa's ability to help stabilize conflicts in its neighborhood.

Source: Eurasia Group[33]

Actors

United States: Trump's Cards

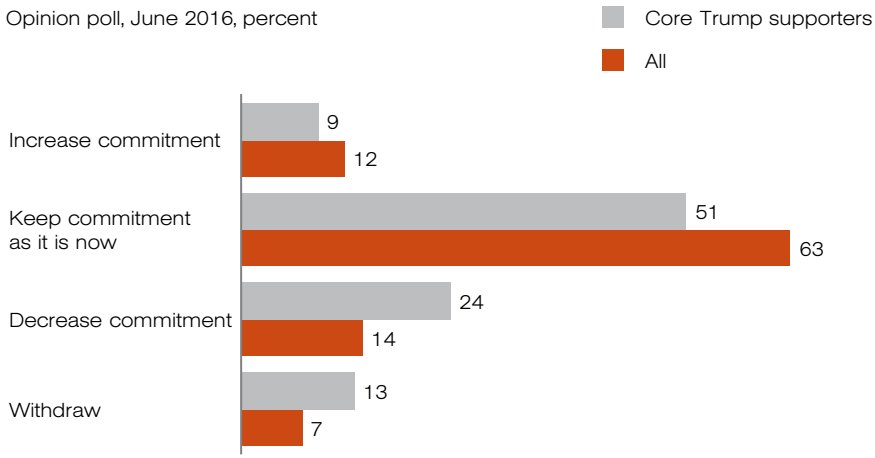
"Who plays cards where you show everybody the hand before you play it?," Donald Trump said in January 2017 as he explained why he would not yet discuss specific foreign policy plans.[1] For US allies, statements such as this can lead to both hope and worry. The hope is that Trump is trying to keep as many options and bargaining chips as possible, but that the cards he chooses to play may not be as disruptive or confrontational as feared. The worries are that Trump will embark on a foreign policy based on superficial quick wins, zero-sum games, and mostly bilateral transactions – and that he may ignore the value of international order building, steady alliances, and strategic thinking. Or, maybe worse, that he sees foreign and security policy as a game to be used whenever he needs distractions for domestic political purposes.

"On the biggest question of all, from which everything else flows, the question of US responsibility for global order, [Trump] clearly has little interest in continuing to shoulder that burden. […] The US is, for now, out of the world order business."[5]
ROBERT KAGAN, 19 NOVEMBER 2016

In terms of his priorities, Trump has stressed repeatedly that fighting jihadist groups, especially Daesh, is his security policy priority. But little else is clear. "Mr. Trump's unpredictability is perhaps his most predictable characteristic," Steven Erlanger writes. "No one knows where exactly he is headed – except that the one country he is not criticizing is Russia […]. For now."[2] However, that does not mean Trump lacks core beliefs. In fact, he has consistently held key convictions about America's role in the world since the 1980s: he has long been a critic of America's security alliances, saying the US pays a lot for them without getting nearly enough in return. He has frequently opposed US trade deals and argued in favor of tariffs. He has often spoken favorably of authoritarian leaders in other countries.[3] Thus, "America First" will likely mean a resolutely unilateralist foreign policy – and a foreign policy in which values do not matter much.

What is uncertain is how Trump's core beliefs will translate into policy (and whether policies will be coherent). Is NATO "obsolete" or "very important" (Trump has said both)? Does the US no longer care whether the European Union provides stability throughout the continent – or will the US even actively undermine the EU? How close will the Trump administration's relationship with Russia actually be, considering widely differing positions held by key advisors? Will Trump risk a trade war with China or even a military confrontation in the Pacific? How much deviation from fundamental conservative foreign policy principles will Congressional Republican leaders accept? The consequences for the international order could be tremendous: if the US does retreat, vacuums will be filled by other actors. Key institutions will be weakened, spoilers will be emboldened. And some US allies may see no alternative than to start hedging by seeking out new partners. Others will try to convince the new administration that the US-led alliances continue to be a good deal for Washington – and that there is inherent value in long-term commitments.[4] After all, successful deals are based on trust, which requires some predictability and is often strongest between countries sharing common values – not between opportunistic leaders. A unilateralist Trump administration may find that it has a different hand than it currently thinks. And once cards are on the table, you cannot pretend you never played them.

WHAT AMERICAN CITIZENS THINK ABOUT THE US COMMITMENT TO NATO: SHOULD THE US …?



Source: Chicago Council on Global Affairs[6]

MIXED MESSAGES: TRUMP AND HIS NATIONAL SECURITY TEAM

Trump (and National Security Advisor Michael Flynn)

"The countries we are defending must pay for the cost of this defense – and, if not, the US must be prepared to let these countries defend themselves." – ***Donald J. Trump***

"I believe an easing of tensions and improved relations with Russia – from a position of strength – is possible. Common sense says this cycle of hostility must end. Some say the Russians won't be reasonable. I intend to find out." – ***Donald J. Trump***

"If you get along and if Russia is really helping us, why would anybody have sanctions if somebody's doing some really great things?" – ***Donald J. Trump***

"We have a problem with radical Islamism and I actually think that we could work together with [Russia] against this enemy. They have a worse problem than we do." – ***Michael Flynn***

"I think we ought to get on with our lives." – ***Donald J. Trump*** (asked about the consequences of Russia's election interference)

"All of my Cabinet nominee [sic!] are looking good and doing a great job. I want them to be themselves and express their own thoughts, not mine!" – ***Donald J. Trump***

Trump's nominees in their confirmation hearings

"History is clear: nations with strong allies thrive and those without them wither. Strengthening our alliances requires […] living up to our treaty obligations. When America gives its word, it must mean what it says." – ***James Mattis*** (Defense Dept.)

"There are a decreasing number of areas where we can cooperate, and an increasing number of areas in which we will have to confront Russia. […] the most important thing is that we recognize the reality of what we deal with, with Mr. Putin, and we recognize that he is trying to break the North Atlantic alliance." – ***James Mattis***

"Russia today poses a danger […]. It has invaded Ukraine […] and supported Syrian forces that brutally violate the laws of war. Our NATO allies are right to be alarmed at a resurgent Russia." – ***Rex Tillerson*** (State Department)

"[Russia] reasserted itself aggressively, invading and occupying Ukraine, threatening Europe, and doing nothing to aid in the destruction and defeat of ISIS." – ***Mike Pompeo*** (CIA)

"I'm hopeful we can get [Trump] to see it the way we see it." – ***Nikki Haley*** (UN Ambassador)

"The commander in chief makes the call." – ***Mike Pence***

Source: Various news media; US Senate transcripts; Twitter[7]

EU: Brussels' Clout

Up to 30%
of annual European defense investment could potentially be saved through pooling of procurement.[9]
MCKINSEY ANALYSIS, DECEMBER 2016

"The purpose, even existence, of our Union is being questioned" at a time when "our citizens and the world need a strong European Union like never before,"[1] EU High Representative Federica Mogherini said in June, summarizing the core of the EU's tragic dilemma. The past year has seen the rise of populist, anti-EU forces across the Union, culminating with the Brexit vote in June. The UK's decision reversed the development toward an "ever closer union" and created a precedent other countries could follow. At the same time, Europe is faced with a wide array of threats, which most experts say can best be tackled through joint European responses. Challenges not only include the ongoing crisis with Russia in the East, protracted wars to the South, or Islamist terrorist attacks in the heart of European cities, but also the uncertainty about the transatlantic security partnership and about the United States' commitment to European security.

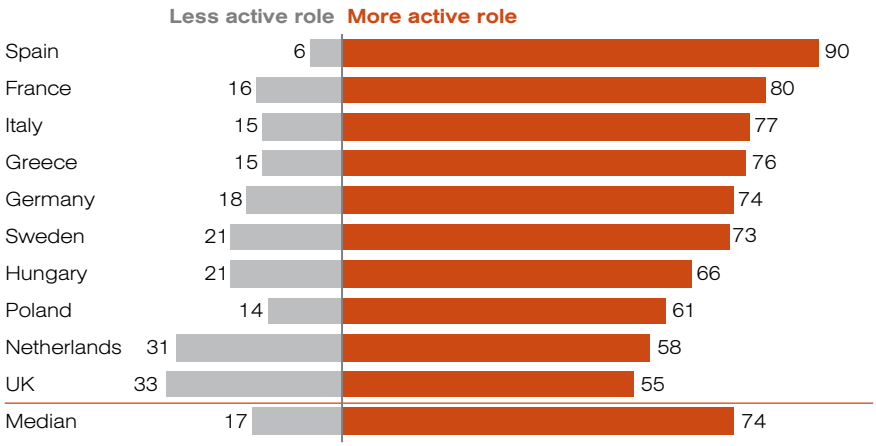
Over the past months, this has brought more and more Europeans to recognize the need for a strong European Union. Since the British referendum, a mood of "Regrexit" is starting to spread. Across Europe, EU approval ratings have risen to over 60%.[2] Particularly when it comes to the EU's role in the world, a clear majority of EU citizens is now calling for greater engagement.[3] If the EU wants to prove to itself and to its skeptics in and outside Europe that it is capable of being a "super-power that believes in multilateralism and in cooperation,"[4] as Federica Mogherini recently put it, a common foreign policy strategy backed with sufficient military power is widely seen as a strategic necessity. In many European capitals, this has already triggered a trend reversal in defense expenditures. According to NATO Secretary General Jens Stoltenberg, 2017 will be "the third consecutive year of increased defense spending in Europe."[5] Although an average of 1.46 percent of GDP spent on defense in European NATO member states[6] is still far from the Alliance's 2-percent goal, a new consensus is emerging: "Europe can no longer afford to piggyback on the military might of others,"[7] Commission President Jean-Claude Juncker acknowledged in September.

In order to improve joint foreign and security policy making, the EU not only presented a new Global Strategy but has also taken a bundle of concrete measures to boost European cooperation in security and defense as part of the EU Security and Defense Package.[8] Other ideas include a European semester on defense, a "Schengen of Defense," as well as the highly controversial notion of a "European Army."

Whether the new momentum will translate into a truly new level of EU cooperation will primarily depend on the member states themselves. Besides having to fill the new framework with policies and instruments, EU countries will have to set aside their differences, including concerns that the new plans will divert resources away from NATO. But when, if not now, should Brussels' clout in the world ever be on top of the menu?

WHAT CITIZENS OF SELECT EU COUNTRIES THINK: SHOULD THE EU PLAY A MORE/LESS ACTIVE ROLE IN WORLD AFFAIRS?

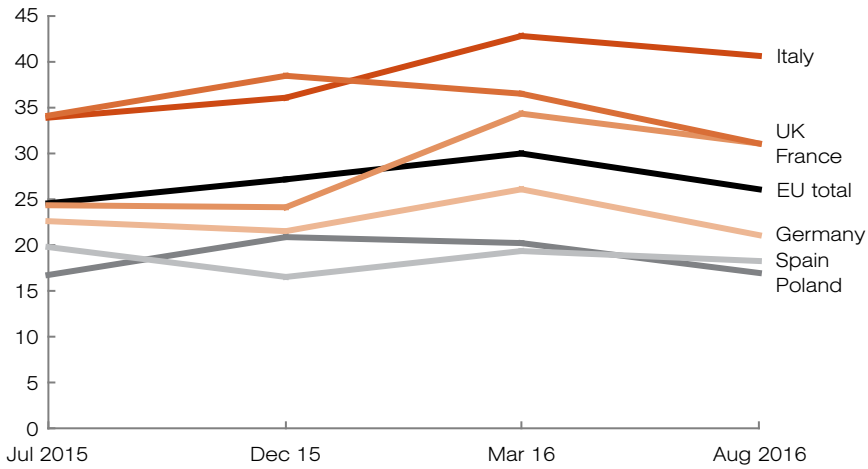
Opinion poll, spring 2016, percent



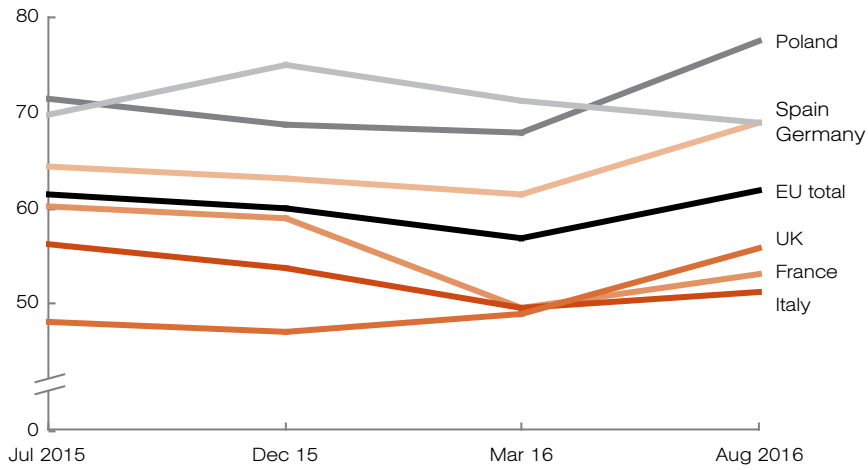
Source: Pew Research Center[10]

HOW CITIZENS OF SELECT EU COUNTRIES WOULD VOTE IN A REFERENDUM ON EU MEMBERSHIP OF THEIR COUNTRY

Opinion poll, share of citizens who would vote to leave, percent

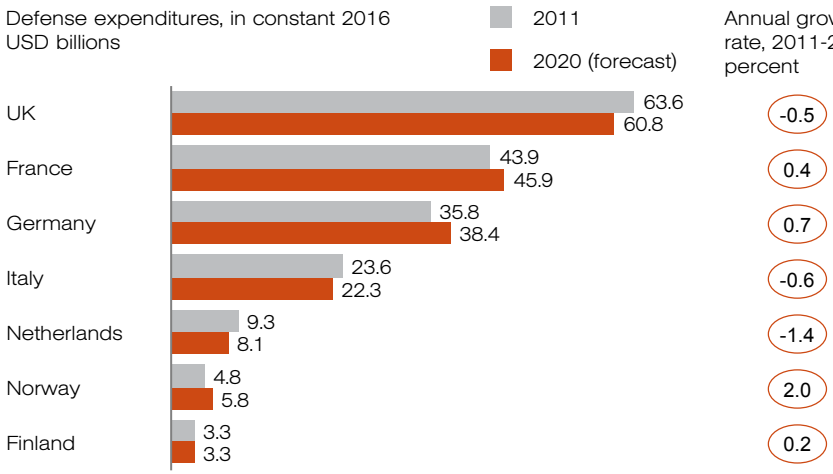


Opinion poll, share of citizens who would vote to stay, percent



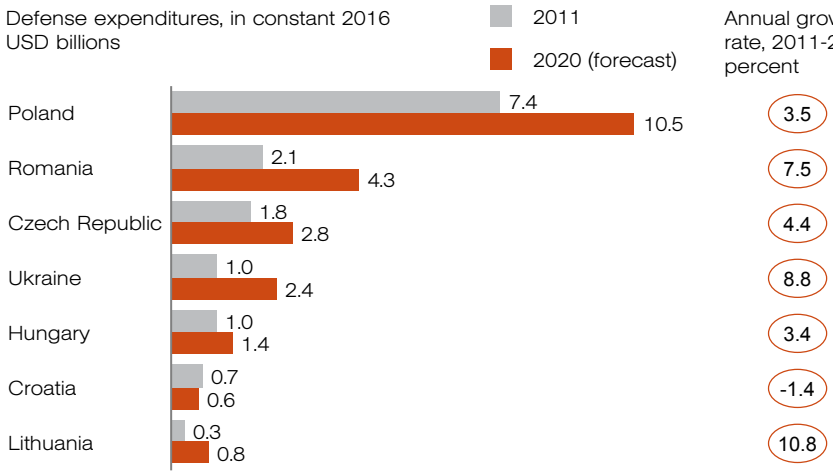
Source: Bertelsmann Stiftung[11]

DEFENSE EXPENDITURE EVOLUTION IN WESTERN EUROPE – SELECT COUNTRIES



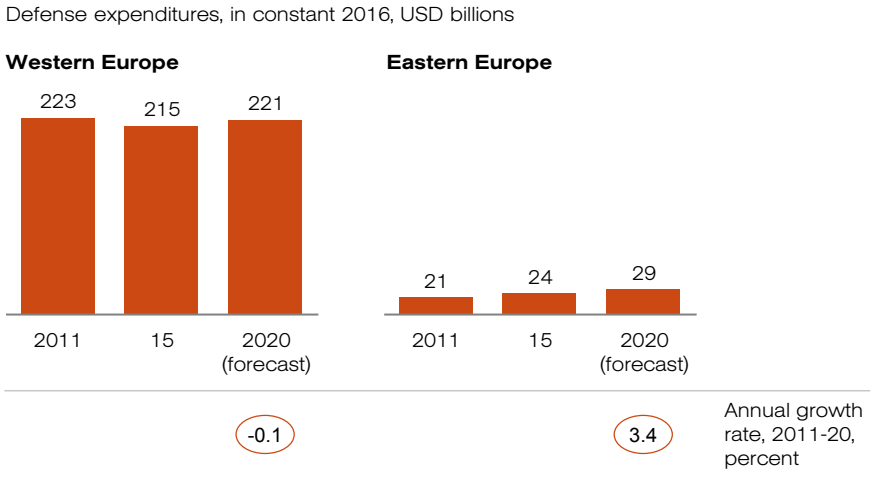
Source: IHS Jane's Defence Budgets[12]

DEFENSE EXPENDITURE EVOLUTION IN EASTERN EUROPE – SELECT COUNTRIES



Source: IHS Jane's Defence Budgets[12]

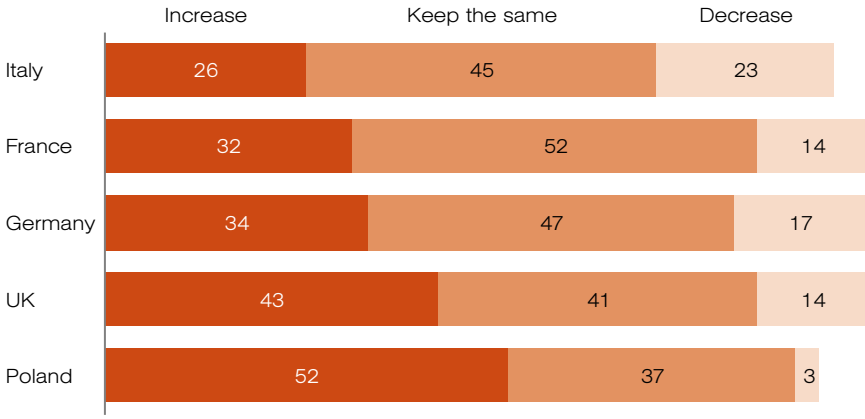
DEFENSE EXPENDITURE EVOLUTION: WESTERN AND EASTERN EUROPE COMPARED



Source: IHS Jane's Defence Budgets[12]

WHAT CITIZENS OF SELECT EU COUNTRIES THINK: SHOULD SPENDING ON NATIONAL DEFENSE BE INCREASED, KEPT ABOUT THE SAME, OR BE DECREASED?

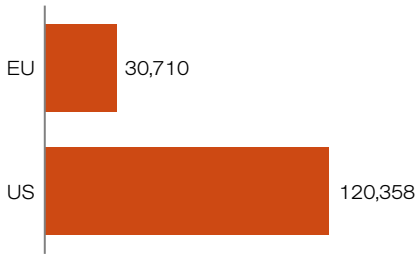
Opinion poll, spring 2016, percent



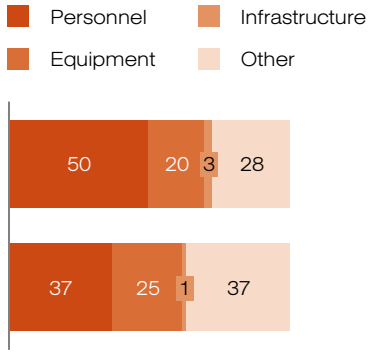
Source: Pew Research Center[13]

DEFENSE EXPENDITURE: US AND EU COMPARED

Investment in defense equipment per soldier, 2016, USD



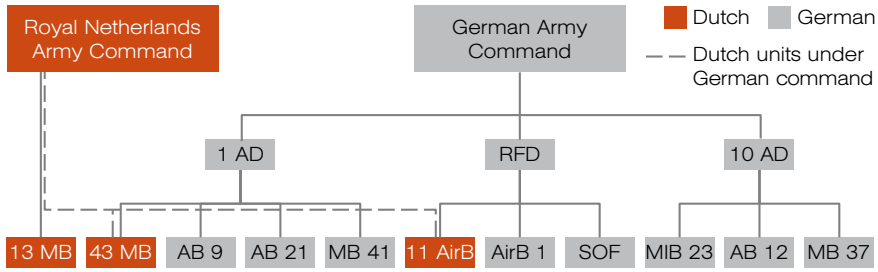
Defense expenditure breakdown by category, 2016, percent



Source: European Political Strategy Centre[14]

European Political Strategy Centre

AN EXAMPLE OF EUROPEAN MILITARY INTEGRATION: THE DUTCH AND GERMAN LAND FORCES



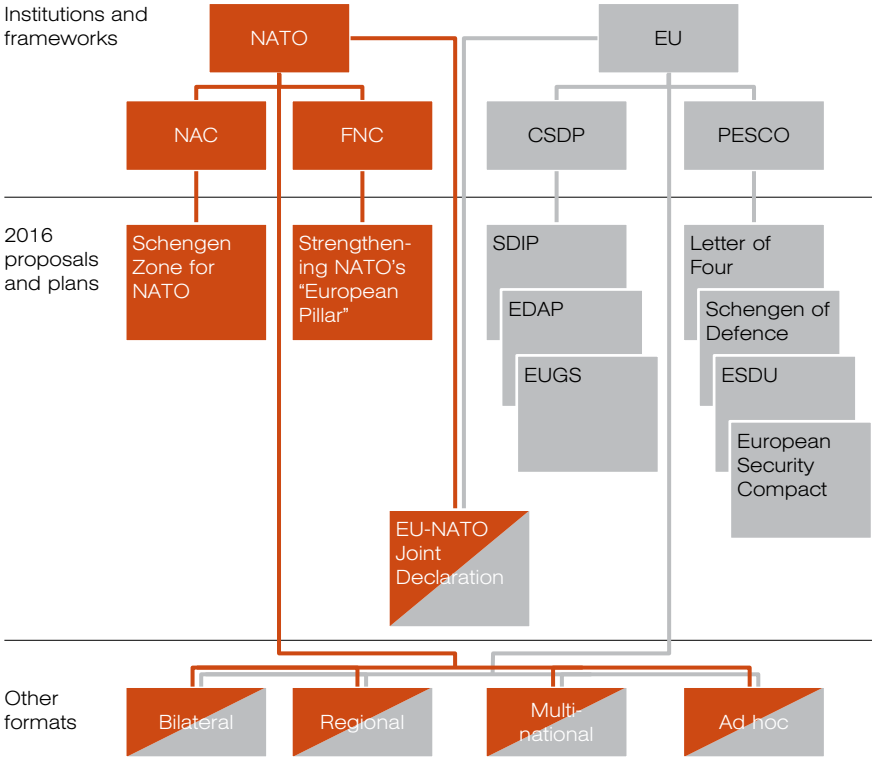
Simplified with focus on ground combat brigades and harmonized designations

AD – armored division
RFD – rapid forces division
SOF – special operations forces
AirB – airmobile/airborne brigade
AB – armored brigade
MIB – mountain infantry brigade
MB – mechanized brigade/mechanized infantry brigade

Source: Center for Security Studies (ETH Zurich)[15]

CSS ETH Zurich

EUROPEAN DEFENSE: INSTITUTIONS, PROPOSALS, AND PLANS



Institutions and frameworks

NAC North Atlantic Council: Consensus-based decision-making body for all 28 NATO members

FNC Framework Nations Concept: Initiative that forms part of broader idea to strengthen the "European Pillar" of NATO

CSDP Common Security and Defense Policy: Inter-governmental framework for military cooperation housed within EU foreign policy structures

PESCO Permanent Structured Cooperation: Legal mechanism to allow a smaller group of EU countries cooperate more closely together on military matters

2016 proposals and plans

Schengen Zone for NATO: Proposal for freedom of movement for soldiers and military equipment across NATO-internal borders

Strengthening NATO's "European Pillar": Proposal to increase Europe's military burden within NATO, such as meeting NATO's 2% goal

EU-NATO Joint Declaration: Cooperation program agreed at the July NATO Warsaw summit, 40+ proposals in 7 areas such as migration, cyber, hybrid threats, exercises

EUGS EU Global Strategy: Document outlining the objectives of EU foreign and security policies

EDAP European Defense Action Plan: Proposals to augment financing of military research and joint equipment programs, and opening up national defense markets

SDIP Security and Defense Implementation Plan: Follow-on document to EUGS focusing on security and defense aspects

European Security Compact: A June Franco-German call to increase the EU's contribution to international security and improve EU's ability to tackle internal security threats

ESDU European Security and Defense Union: Long-term idea to create a common defense for the EU

Schengen of Defense: An August Italian proposal for a permanent multinational European force outside institutional structures but available to EU/NATO/UN

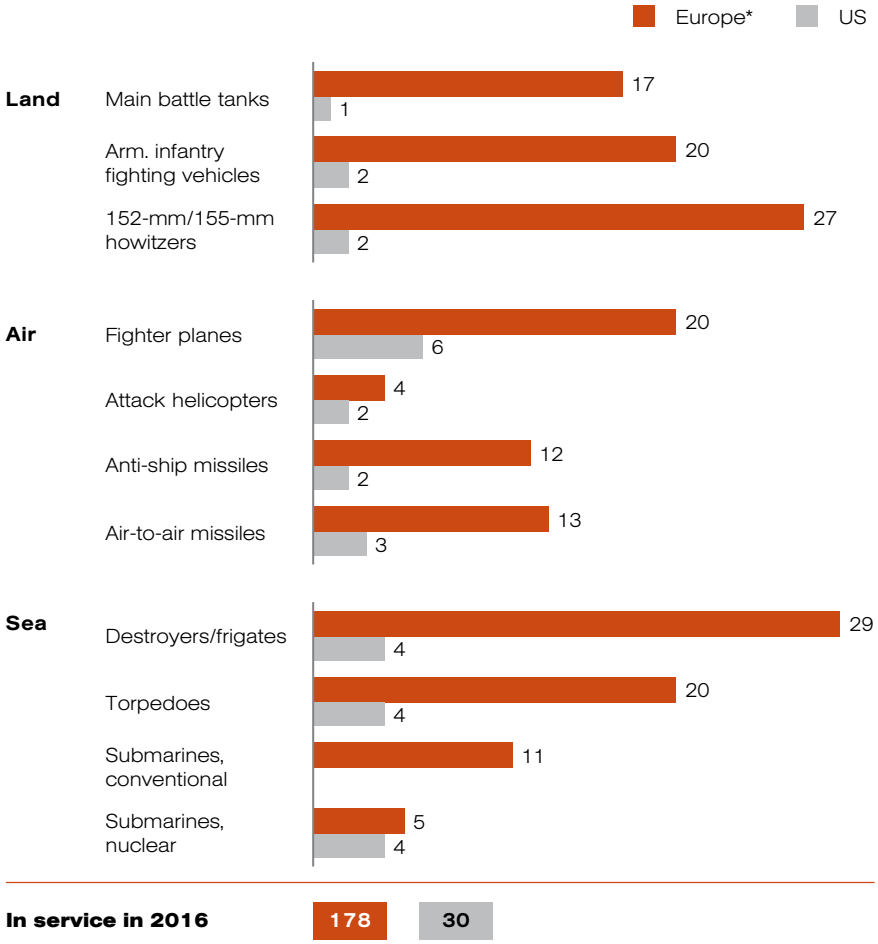
Letter of Four: An October Franco-German-Italian-Spanish call for exploring the use of the PESCO mechanism in the EU treaties

Source: Center for Security Studies (ETH Zurich)[16]

CSS ETH Zurich

NUMBER OF WEAPON SYSTEMS: US AND EUROPE COMPARED

Number of systems from selected weapon system categories in service, 2016

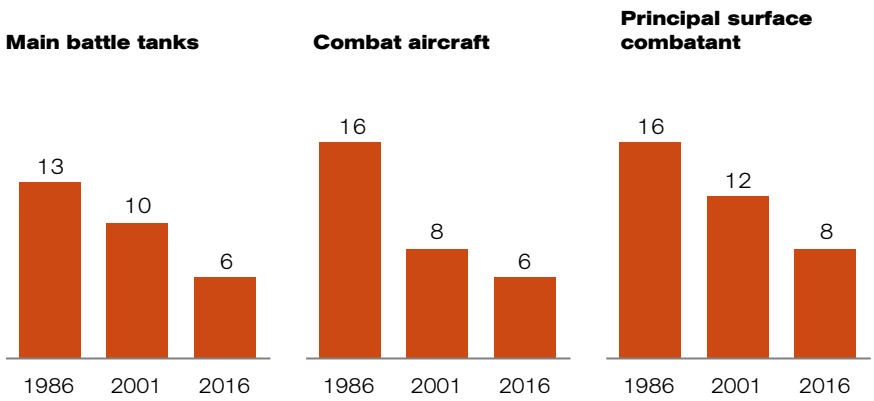


* EDA members, countries with EDA Administrative Arrangements as well as Denmark

Source: McKinsey, based on International Institute for Strategic Studies[17]

HOW HAS THE NUMBER OF MAJOR WEAPON SYSTEM MANUFACTURERS IN EUROPE CHANGED OVER TIME?

Number of manufacturers in select weapon system categories in Europe



Source: McKinsey[18]

McKinsey&Company

Turkey: Scoring a Coup

As the centenary of the Turkish Republic approaches in 2023, Turkey is shaken by developments that are changing the face of the country significantly: a failed coup and an ensuing crackdown, a resurging domestic conflict, and a war at its borders. This all comes at a time when Turkey's relations with the West are more strained than they have been in many years.

The July 15 coup attempt, during which 265 people were killed,[1] demonstrated the vulnerability of Turkey and its institutions. The legitimate desire to punish those involved in the coup – supported by almost the entire opposition – has turned into a broad crackdown against those opposing the Justice and Development Party's (AKP) vision for Turkey.[2] Over 100,000 people in the police, the judiciary, the military, the education system and others were investigated.[3] More than 30,000 were arrested.[4] All university deans were asked to resign.[5] The crackdown also led to the arrest of at least 81 journalists who are currently jailed – the highest number in any country around the globe.[6]

"Unfortunately the EU is making some serious mistakes. They have failed the test following the coup attempt […]. Their issue is anti-Turkey and anti-Erdogan sentiment."[9]
MEVLUT CAVUSOGLU, AUGUST 2016

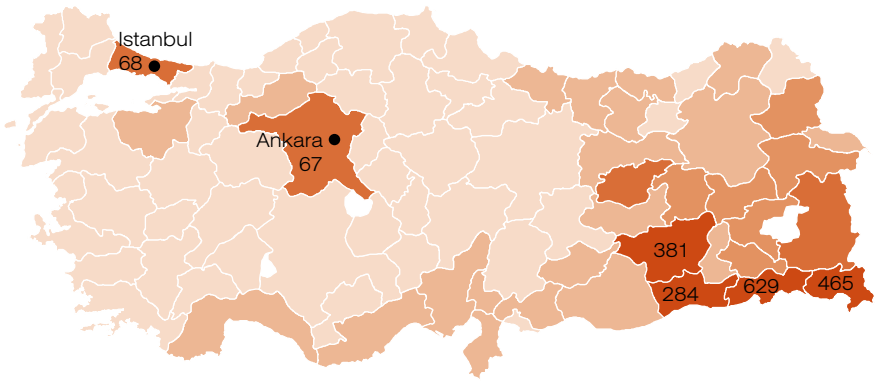
President Erdogan's government is also fighting another battle: against various Kurdish groups, most notably the Kurdistan Workers' Party (PKK). Following unrest at the Turkish-Syrian border in the summer of 2015, the conflict escalated and ended a relatively stable peace process, leaving more than 2,400 dead until now.[7] This domestic struggle also shapes Turkey's Syria policy, especially its military intervention, which began in August 2016. "Operation Euphrates Shield" has aimed at preventing a strong Kurdish presence at Turkey's southern borders. Relations with Russia have also played a major part in defining the government's Syria policy. At the beginning of the year, Turkish-Russian relations were at a low after the Turkish military had shot down a Russian fighter jet and Moscow had introduced sanctions against Turkey. The two countries' Syria policies were greatly at odds – particularly on the question whether the Assad regime should have a future. But, recently, relations have improved and areas of cooperation have been found, e.g., on negotiating a ceasefire at the end of 2016 and conducting joint airstrikes.

At the same time, Turkey's traditional links with the West have suffered: "I don't care if they call me a dictator or whatever else. It goes in one ear, out the other," President Erdogan stressed in November 2016.[8] Disappointment over a paralyzed EU accession process, lacking Western sympathy after the coup, and the Turkish government's moves to give more powers to the president and to curtail press freedom are some reasons for the deteriorating relationship. However, both Turkey and the West still very much depend on each other. Significant trade volumes, the NATO partnership as well as the 2016 EU-Turkey deal on refugees are just some major examples for this significant interdependence.

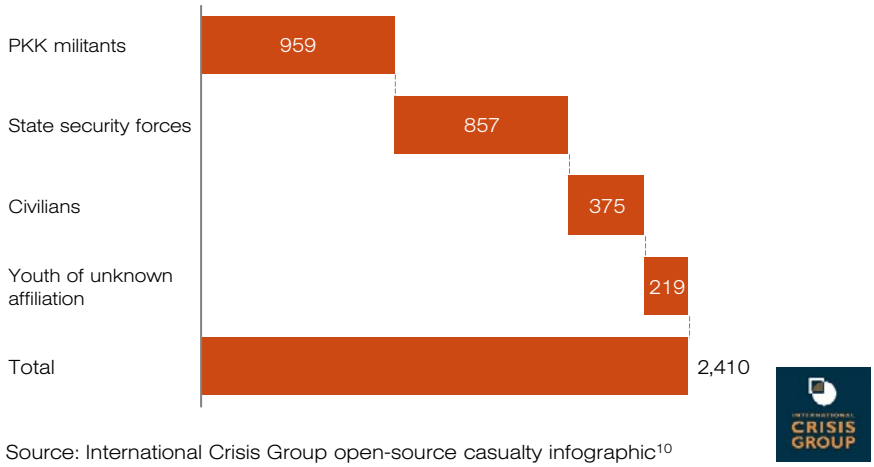
THE DEATH TOLL OF THE PKK CONFLICT

Number of deaths, July 2015 - mid-December 2016

By province



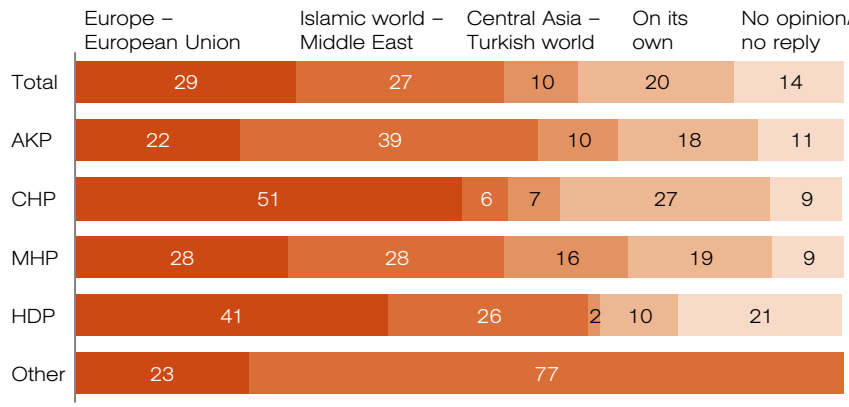
By casualty type



Source: International Crisis Group open-source casualty infographic[10]

WHAT TURKISH CITIZENS THINK: WHAT COUNTRY GROUP SHOULD TURKEY BELONG TO?

Opinion poll, August 2016, by party affiliation, percent



Source: Metropoll[11]

Places

Central and Eastern Europe: Fears of Influence

"The countries we are defending must pay for the cost of this defense – and, if not, the US must be prepared to let these countries defend themselves."[9]
DONALD J. TRUMP, 27 APRIL 2016

"We are united in our efforts to increase our defense and deterrence, but we are also united in our efforts to strengthen the dialogue with Russia," NATO Secretary General Stoltenberg said in July 2016 at the Alliance's Warsaw Summit.[1] In the Polish capital, NATO members agreed on "the biggest reinforcement of our collective defense since the end of the Cold War," as Stoltenberg put it.[2] The most visible part of the new posture are the multinational battalions in Estonia, Latvia, Lithuania, and Poland, led by the framework nations UK, Canada, Germany, and the US, respectively. Russia's violations of the NATO-Russia Founding Act notwithstanding, the Allies agreed to remain well below the threshold of "substantial combat forces," usually understood as troop levels exceeding one brigade per host country.[3] At the same time, the Alliance also agreed to reengage with Russia within the framework of the NATO-Russia Council.

Reinvigorating the dialogue on military incidents, transparency, and arms control has proved difficult, however. Efforts to heighten the transparency of exercises or to update and specify rules to avoid military incidents have yet to produce results. Some already fear an erosion of the remaining arms control agreements and the advent of an escalating arms race in Europe.[4] While the Russian government continues to oppose NATO's Ballistic Missile Defense system, some Western diplomats accuse Russia of violating the Intermediate-Range Nuclear Forces Treaty, which had ended the missile crisis in the 1980s.[5] At last year's Munich Security Conference, Russian Prime Minister Dmitri Medvedev already warned that "we are rapidly rolling into a period of a new cold war."[6]

"The Alliance does not seek confrontation and poses no threat to Russia. But we cannot and will not compromise on the principles on which our Alliance and security in Europe and North America rest."[10]
NATO WARSAW SUMMIT COMMUNIQUÉ, 9 JULY 2016

Against this background, some Europeans are hopeful that the Trump administration may forge a new détente with Moscow. Yet, many fear that this would come at their expense. A group of leaders from Central and Eastern Europe publicly warned then-President-elect Donald Trump of striking a new grand bargain with Moscow: "Vladimir Putin is not America's ally. Neither is he a trustworthy international partner. […] A deal with Putin will not bring peace. On the contrary, it makes war more likely."[7]

While some US allies are deeply worried about their security, the situation for those outside NATO is even worse. Despite decreasing international attention, the armed conflict in Eastern Ukraine is "far from frozen," as Alexander Hug, the Deputy Chief of the OSCE's Special Monitoring Mission, put it.[8] And although the full implementation of the Minsk agreements seems far away, an increasing number of politicians have speculated about an overhaul of the EU sanctions, which are explicitly linked to those very agreements. As the signatories of the open letter put it: "It would be a grave mistake to end the current sanctions on Russia or accept the division and subjugation of Ukraine." For Ukrainians and the rest of Europe, 2017 – with upcoming elections in major European countries and a new US administration – will be a critical year.

RUSSIA'S (POTENTIAL) MISSILE CAPABILITY IN KALININGRAD

Several surface-to-air missile types presently covering ranges of at least up to 200 km are currently deployed in Kaliningrad. Several additional defensive and offensive missile systems could be deployed (see map). Russia has on some occasions, as part of exercises, deployed Iskander missiles to Kaliningrad in the past. Russia has also allegedly tested a yet-to-be-fielded ground-launched cruise missile which Washington maintains is above the lower threshold of the Intermediate-range Nuclear Forces Treaty and thus in breach of the treaty. The cruise missile is believed to have a potential range in excess of 1,500 km.

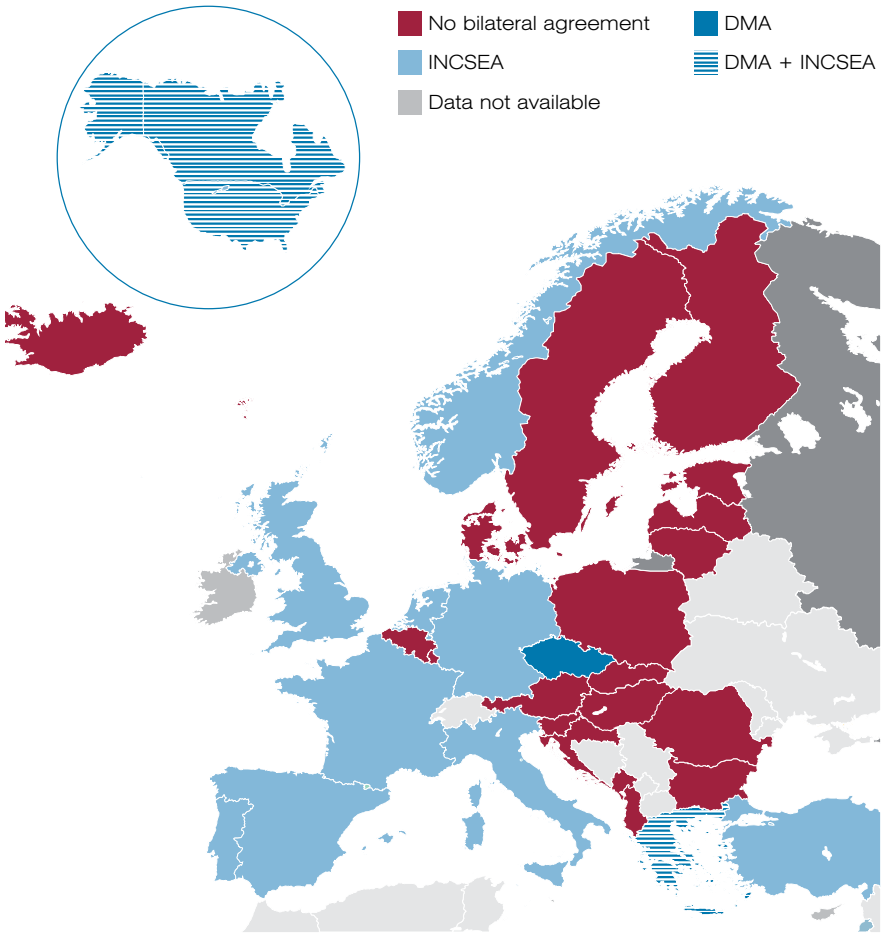
Source: The International Institute for Strategic Studies[11]

MULTINATIONAL NATO BATTALIONS IN THE BALTIC STATES AND POLAND

Source: The International Institute for Strategic Studies[12]

MANAGING MILITARY INCIDENTS IN THE EURO-ATLANTIC AREA

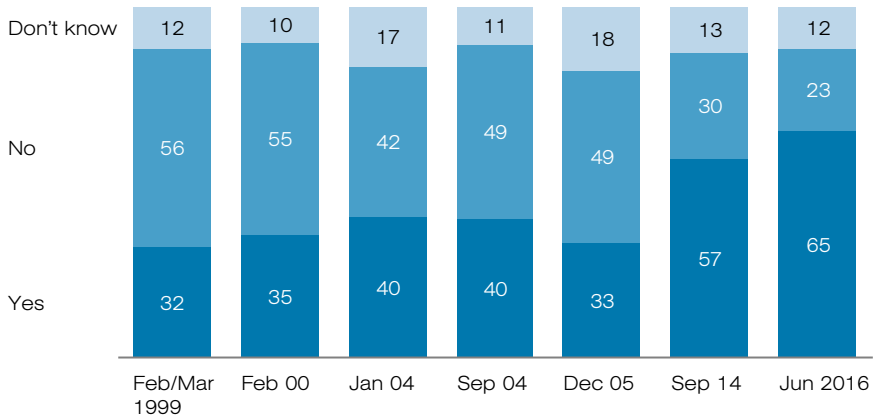
Bilateral agreements between Russia and EU/NATO member states: Agreements on Preventing Dangerous Military Activities (DMAs) and Incidents at Sea Agreements (INCSEAs)



Source: Munich Security Conference, based on European Leadership Network[13]

WHAT POLISH CITIZENS THINK: SHOULD ARMED FORCES OF OTHER NATO MEMBERS BE STATIONED IN POLAND?

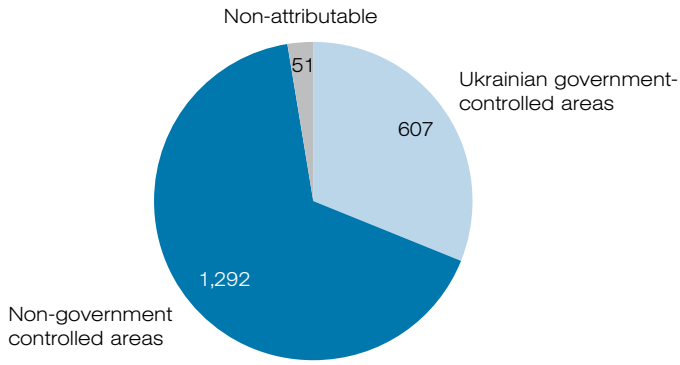
Opinion poll, percent



Source: CBOS Public Opinion Research Center[14]

WHERE IN EASTERN UKRAINE DID THE OSCE FACE FREEDOM OF MOVEMENT RESTRICTIONS?

Restrictions faced by the OSCE's Special Monitoring Mission to Ukraine (SMM) by area, number of occasions, 2016

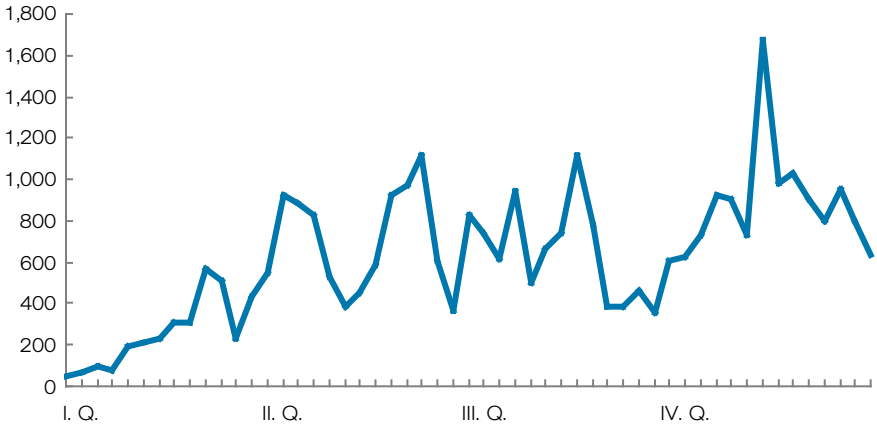


Source: OSCE[15]

OSCE Organization for Security and Co-operation in Europe

CEASEFIRE VIOLATIONS IN EASTERN UKRAINE

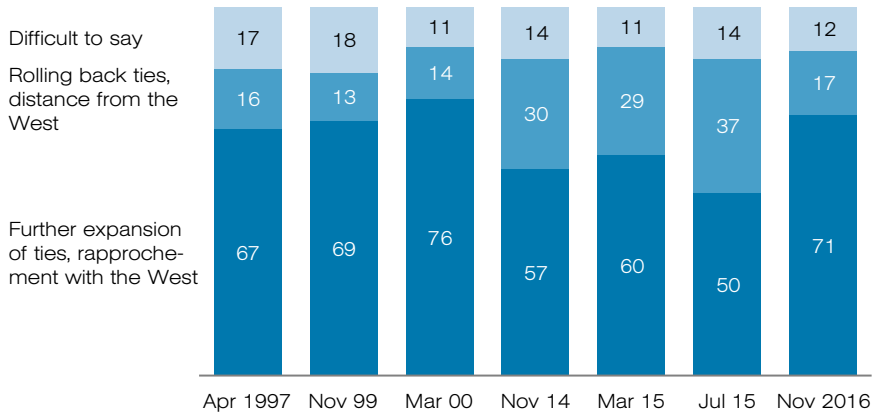
Number of weekly ceasefire violations, 2016



Source: Ukraine-Analysen, based on OSCE[16]

WHAT RUSSIANS THINK: WHICH RUSSIAN POLICY TOWARDS THE WEST WOULD YOU MOST LIKELY SUPPORT?

Opinion poll, percent



Source: Levada Center[17]

Middle East: Meddling Through

"The name Aleppo will echo through history, like Srebrenica and Rwanda, as a testament to our moral failure and everlasting shame."[8]
JOHN MCCAIN, LINDSEY GRAHAM, 13 DECEMBER 2016

Is a post-Western Middle East emerging? As sectarian conflict, civil war, and state failure continue to shape key countries in the region, the US and the EU are struggling to redefine their roles. Meanwhile, other countries are taking the initiative. Turkey has now intervened in Syria and is seeking closer cooperation with Russia. Iran and Saudi-Arabia are engaged in multiple conflicts as part of their competition for regional power and influence. Russia continues to be heavily involved in the war in Syria, attempting to reassert its role on the world stage and to break what Russia's Defense Minister Shoigu recently called "the chain of 'color revolutions' spreading across the Middle East and Africa."[1]

Nowhere have the new realities become more apparent than in Syria. Backed by Iran and Russia, President Assad recently achieved his most significant victory: with the fall of Aleppo, the regime is now back in control of the country's four major cities. Moderate opposition forces have been considerably weakened after Turkey ceased its direct military assistance for Aleppo's rebel groups in its rapprochement with the Kremlin. At the same time, Western countries continued to resist opposition calls for greater military support, while Saudi-Arabia and the UAE have shifted their focus and resources away from Syria's rebel groups and further towards Yemen, where another protracted and deadly civil war is raging.[2]

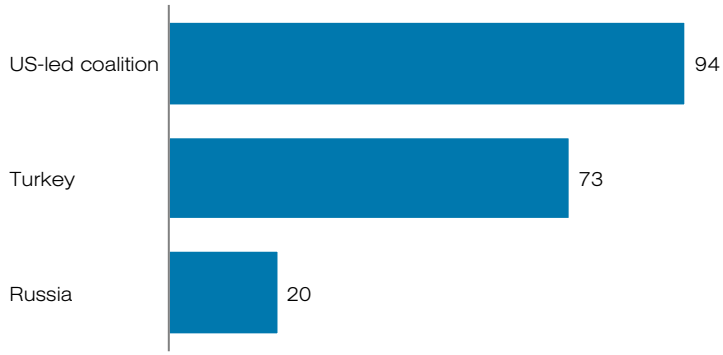
"[Aleppo] is the biggest – and I want to emphasize this for all to hear – the biggest international humanitarian action in the modern world."[9]
VLADIMIR PUTIN, 23 DECEMBER 2016

While the past months have seen clear outcomes on the battlefield, a diplomatic solution remains out of sight. None of the three ceasefire agreements lasted long enough to pave the way for meaningful peace talks. Since September alone, three UN Security Council resolutions failed to pass due to Russian and Chinese vetoes. After six years of empty calls for Assad to step down, red lines drawn and transgressed with no consequences, and fruitless UN Security Council meetings, the international community is no step closer to a political settlement which all conflict parties can agree to. "We will liberate every inch of Syria," Assad stated in June 2016, emphasizing his unwillingness to negotiate and his determination to fight this war at all costs.[3]

Particularly for Syria's civil population, this has come at a devastating price. More than half of the population was forced to flee their homes.[4] Under Assad's "starve or surrender" strategy, the death toll has risen to more than 400,000, according to various estimates.[5] "If you don't take action, there will be no Syrian peoples or Syria to save," UN Humanitarian Coordinator Stephen O'Brien warned the UN Security Council in late October 2016.[6] But key Western actors stood by as Aleppo fell, watching what a UN spokesperson described as "a complete meltdown of humanity."[7] As numerous actors are meddling in the crises in Syria and the region, while the West attempts to somehow muddle through, the Middle East's post-Western age might have already begun.

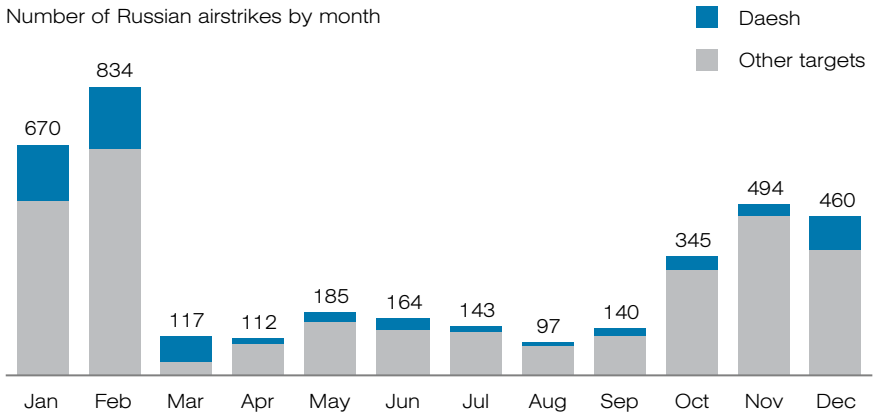
AIRSTRIKES BY RUSSIA AND OTHER EXTERNAL ACTORS IN SYRIA IN 2016

Share of airstrikes targeting Daesh, 2016, percent



Note: For airstrikes conducted by the Syrian government in its own country, there is no sufficiently reliable data available, which is why those were not included

Number of Russian airstrikes by month



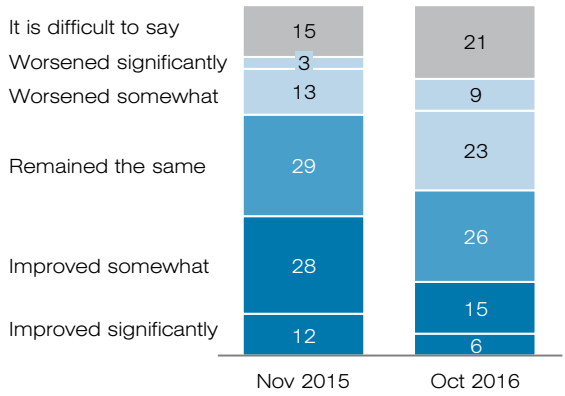
Share of airstrikes targeting Daesh, percent

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
24	21	64	16	17	21	13	13	19	12	7	22

Source: IHS Conflict Monitor[10]

WHAT RUSSIANS THINK: HOW DOES THE RUSSIAN BOMBING OF SYRIA INFLUENCE INTERNATIONAL ATTITUDES TOWARDS RUSSIA?

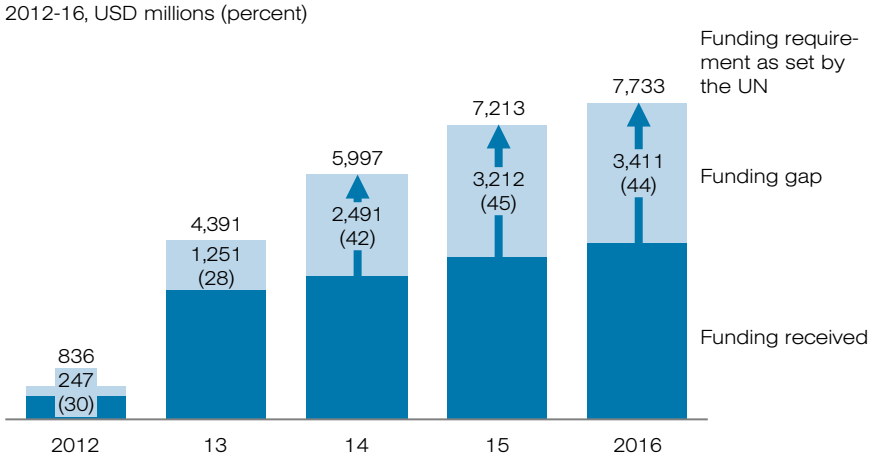
Opinion poll, percent



Source: Levada Center[11]

THE HUMANITARIAN CRISIS IN SYRIA: FUNDING REQUIREMENTS AND GAPS

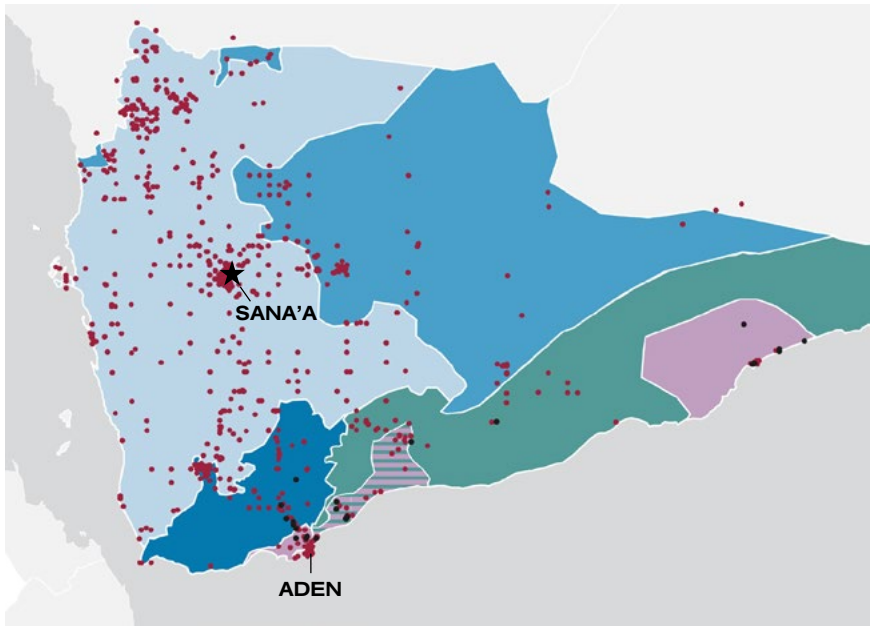
2012-16, USD millions (percent)



Source: UN OCHA[12]

MAPPING YEMEN'S FRONTLINES

Areas of control, location, and targets of coalition airstrikes, as of December 2016



Location and targets of airstrikes by Saudi-led coalition

- Targeting Al Houthi-Saleh
- Targeting Al Qaeda in the Arabian Peninsula (AQAP)

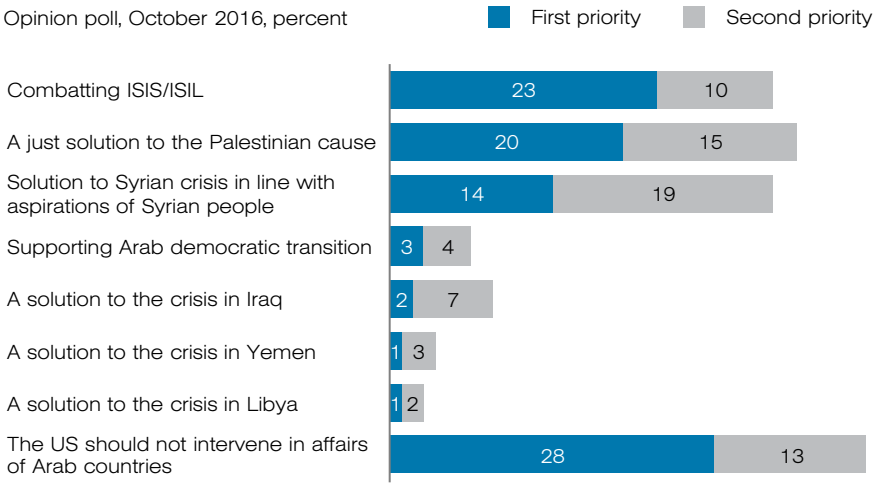
Areas of control

- Al Houthi-Saleh forces
- Hadi coalition: Saudi-influenced 1st armored division, tribal militias
- Hadi coalition: UAE-influenced Southern Movement, Salafi, and tribal militias
- Hadi coalition: UAE-trained military and security units
- Hadi coalition: tribal militias opposing AQAP

Source: AEI Critical Threats Project[13]

WHAT ARAB CITIZENS THINK: WHAT ISSUES SHOULD THE NEXT US PRESIDENT FOCUS ON?

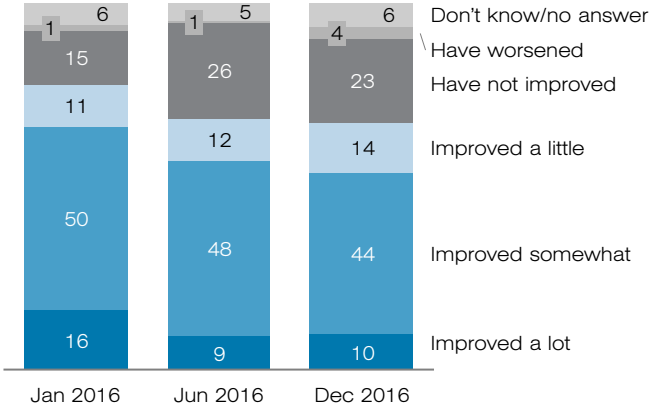
Opinion poll, October 2016, percent



Source: Arab Center Washington DC[14]

WHAT IRANIANS THINK: AS A RESULT OF THE NUCLEAR AGREEMENT, HAVE IRAN'S RELATIONS WITH EUROPEAN COUNTRIES IMPROVED?

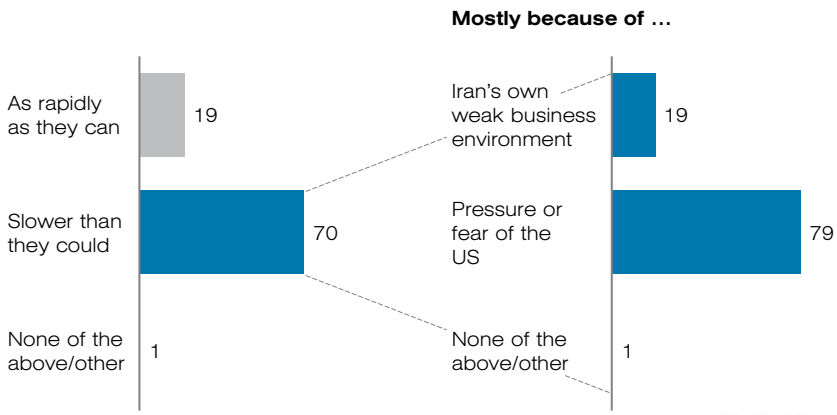
Opinion polls, percent



Source: CISSM at the School of Public Policy, University of Maryland[15]

WHAT IRANIANS THINK: ARE EUROPEAN COUNTRIES MOVING AS RAPIDLY AS THEY CAN TO TRADE AND INVEST WITH IRAN?

Opinion poll, December 2016, percent



Source: CISSM at the School of Public Policy, University of Maryland[16]

East Asia: Pacific No More?

"[TPP] was all about the United States showing leadership in the Asia region. […] But in the end, if the US is not there, that void has to be filled. And it will be filled by China."[9]
JOHN KEY, THEN-PRIME MINISTER OF NEW ZEALAND, NOVEMBER 2016

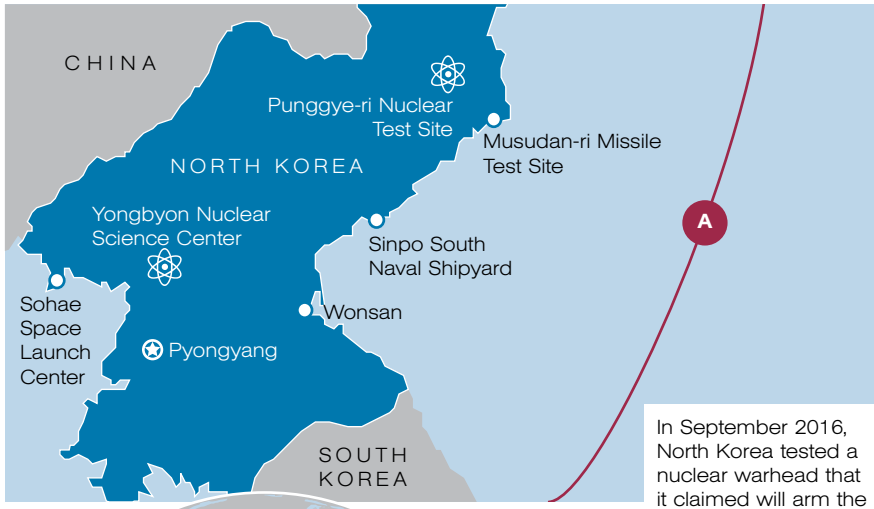
In East Asia, the risk of a major security crisis is higher than it has been in many years. With the five-yearly Central Committee Congress of the Chinese Communist Party scheduled for this fall, "[President] Xi will be extremely sensitive to external challenges to his country's interests," the Eurasia Group, a risk consultancy, writes. "He will be more likely than ever to respond forcefully to foreign policy challenges."[1] In the coming months, such challenges could emanate from numerous hot spots ranging from the South China Sea and Taiwan to North Korea – or from the new US administration. During his confirmation hearings in January 2017, the designated US Secretary of State Rex Tillerson possibly set the stage for a major clash: "We're going to have to send China a clear signal that, first, the island-building stops and, second, your access to those islands also is not going to be allowed," he said, referring to China's construction of artificial islands in the South China Sea.[2] China has long considered large parts of the South China Sea its own sovereign territory and continues to do so in spite of the recent Permanent Court of Arbitration ruling, which sided with the Philippines (and with the position of most of the international community).[3]

"China has been taking out massive amounts of money and wealth from the US in totally one-sided trade, but won't help with North Korea. Nice!"[10]
DONALD J. TRUMP, 3 JANUARY 2017

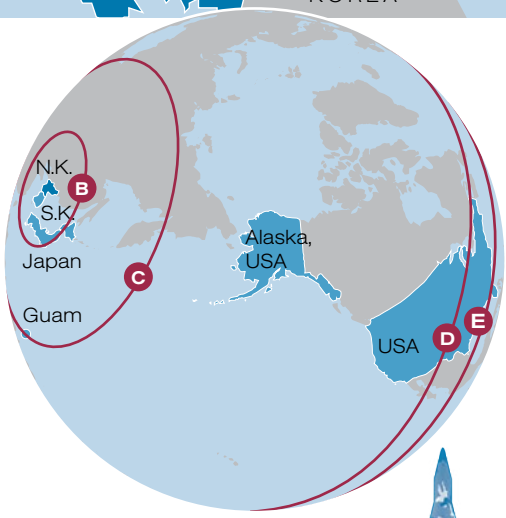
However, China seems confident of its growing power and of limited opposition across the region. Some countries are already seeking closer ties with Beijing, perhaps wondering about the durability of the US strategic "rebalancing" to the Asia-Pacific. In November 2016, Australia announced that it would now support China-led regional trade deals as plans for the US-led Trans-Pacific Partnership (TPP) were unravelling.[4] During an October 2016 visit to Beijing, Philippine President Duterte questioned his country's military agreement with the United States: "I announce my separation from the United States. […] America has lost. […] I've realigned myself in your [China's] ideological flow."[5] Finally, US allies South Korea and Japan are left wondering what the mixed messages coming from the US mean. During the campaign, Donald Trump had suggested that it might "not be a bad thing" if both countries developed nuclear weapons in order to be able to defend themselves against North Korea.[6]

The most dangerous regional crisis is likely to emerge over Pyongyang's nuclear weapons program. In defiance of international law, the country has made significant progress in 2016 as its program shifted from "developing a nuclear capability in the abstract to deploying a nuclear-armed force of ballistic missiles," as Jeffrey Lewis puts it."[7] It is getting closer to an intercontinental ballistic missile capability that would enable it to hit the US West Coast with a nuclear weapon. "It won't happen." Trump tweeted in January 2017.[8] But it is unclear how he intends to prevent this North Korean capability. If the US adds sanctions (including ones that hit Chinese banks), presses China to increase its coercive measures against North Korea, or even opts for military steps, a major US-China crisis could be right around the corner. And, at any point, Pyongyang could plunge Northeast Asia into chaos.

NORTH KOREA'S STRATEGIC THREAT



In September 2016, North Korea tested a nuclear warhead that it claimed will arm the country's strategic ballistic missiles. The claim is unverified, but some experts find it credible based on North Korea's five nuclear tests.



KN-02	Scud B/C/ER	KN-11	Nodong	Musudan	KN-14	KN-08
120 km	300-1,000 km	1,000 km	1,300 km	3,500 km	10,000 km	11,500 km
Fewer than 100 launchers		At least 1, submarine-launched	Fewer than 50 launchers	Fewer than 50 launchers	At least 6 launchers, not yet tested	

Note: North Korea may have additional missiles

Source: James Martin Center for Nonproliferation Studies; Nuclear Threat Initiative[11]

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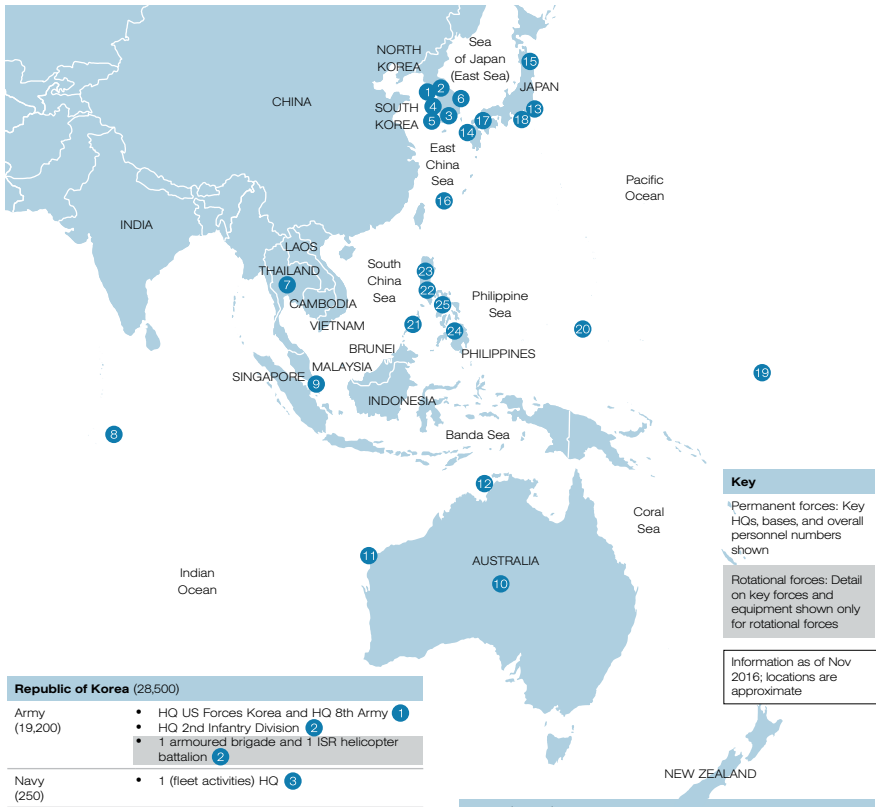
US DISPOSITIONS IN THE WESTERN PACIFIC



Republic of Korea (28,500)

Army (19,200)	• HQ US Forces Korea and HQ 8th Army 1 • HQ 2nd Infantry Division 2 • 1 armoured brigade and 1 ISR helicopter battalion 2
Navy (250)	• 1 (fleet activities) HQ 3
Air Force (8,800)	• HQ 7th Air Force 4 • Kunsan Air Base 5
US Marine Corps (250)	• Marine Force Korea 6

Thailand (300)

Joint	• Bangkok: Joint Military Advisory Group 7

British Indian Ocean Territory (300) 8

Strategic Forces/Navy	• 1 Spacetrack Optical Tracker • 1 deep-space surveillance • 1 Maritime Prepositioning Ship squadron
Air Force	• 3 B-2 bombers (Mar 2016)

Singapore (180) 9

Navy (180)	• HQ Commander Logistics Group, Western Pacific and Combined Joint Task Force 73
Navy	• 2 Littoral Combat Ship • P-8A Poseidon
Air Force	• 1 training squadron and 1 air mobility squadron • Rotations 4 per year of 6 F-15, F-16 or Navy/USMC F/A-18

Australia (1,250 including rotational forces)

Strategic Forces (180)	• 1 satellite and early-warning system, communications and 1 signals-intelligence station 10 • 1 radar 11
US Marine Corps (1,250)	• 1 marine battalion 12

Hawaii (40,034) (not shown on map)

Army (17,584)	• HQ 25th Infantry Division • Various combat support and combat service support commands
Navy (8,138) Air Force (4,990)	• HQ Pacific Fleet
US Marine Corps (1,267)	• HQ Pacific Command • MCB Hawaii

Japan (47,050)

Army (2,900)	• HQ I Corps (Forward) 13
Navy (12,000)	• HQ 7th Fleet 13 • Sasebo Naval Base 14
Air Force (11,450)	• HQ US Forces Japan and HQ 5th Air Force 13 • Misawa Air Base 15 • Kadena Air Base 16
US Marine Corps (20,700)	• HQ III Marine Div 16 • Marine Corps Air Stations Futenma 16 and Iwakuni 17 • Combined Arms Training Center 18 • 2 ftr sqn with F/A-18D Hornet; 1 avn tpt sqn; 1 avn atk sqn

Marshall Islands 19

Strategic Forces	• Detection and tracking radar at Kwajalein Atoll

Guam (5,150 permanent, 500 rotational) 20

Navy	• 1 Maritime Prepositioning Ship squadron
Air Force	• Andersen Air Base
Air Force (500)	• Andersen Air Base • 1 bbr sqn with B-1B (Mar 2016) • 1 Theater Security Package fighter squadron with 12 F-16 (from Jan 2016)

Philippines

Enhanced Defence Cooperation Agreement allowing permanent facilities (to support rotational deployments) at:

- Antonio Bautista Air Base 21
- Basa Air Base 22
- Fort Magsaysay 23
- Lumbia Air Base 24
- Mactan-Benito Ebuen Air Base 25

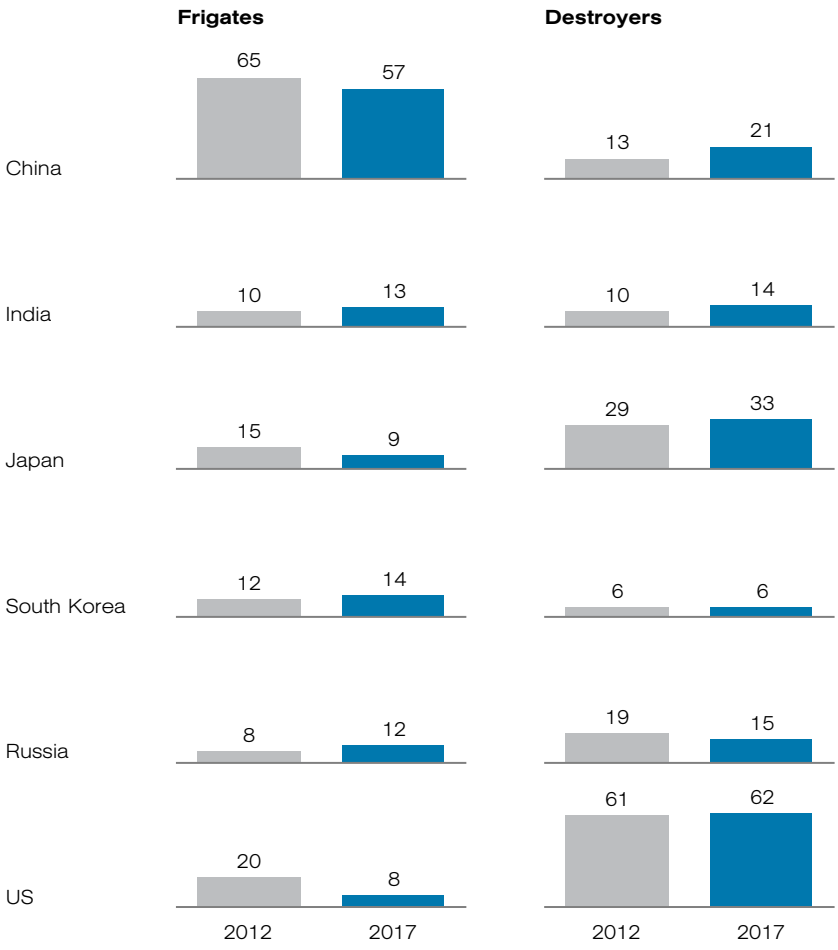
Air Force (200)	• Air contingent at Clark Air Base 22 • 5 A-A-10C Thunderbolt II, 3 HH-60G Pave Hawk, 1 MC-13-H Combat Talon II (Apr 2016) • EA-18G Growler (Jun-Jul 2016)
US Marine Corps (about 75)	• Camp Aguinaldo

Source: The International Institute for Strategic Studies[12]

IISS The Military Balance

NAVAL CAPABILITIES OF SELECT COUNTRIES FIVE YEARS AGO AND TODAY

Number of frigates and destroyers



Source: The International Institute for Strategic Studies[13]

NAVAL ASSETS COMMISSIONED SINCE 2001: CHINA AND THE US COMPARED

Number of vessels commissioned

Source: The International Institute for Strategic Studies[14]

IISS The Military Balance

The Arctic: Tempers Rising?

Warming at a pace of at least twice the global average,[1] the Arctic is undergoing a dramatic transformation that may also entail far-reaching geopolitical and security implications. In late 2016, the average extent of Arctic sea ice was a staggering 8 percent less than a decade earlier, setting the lowest record since the beginning of satellite observation.[2] The melting of these vast natural reflectors, which prevent the Arctic Ocean from heating up, thus endangers one of the planet's most vital systems to moderate global climate.

"The Arctic is key strategic terrain. Russia is taking aggressive steps to increase its presence there. I will prioritize the development of an integrated strategy for the Arctic."[13]
JAMES MATTIS, JANUARY 2017

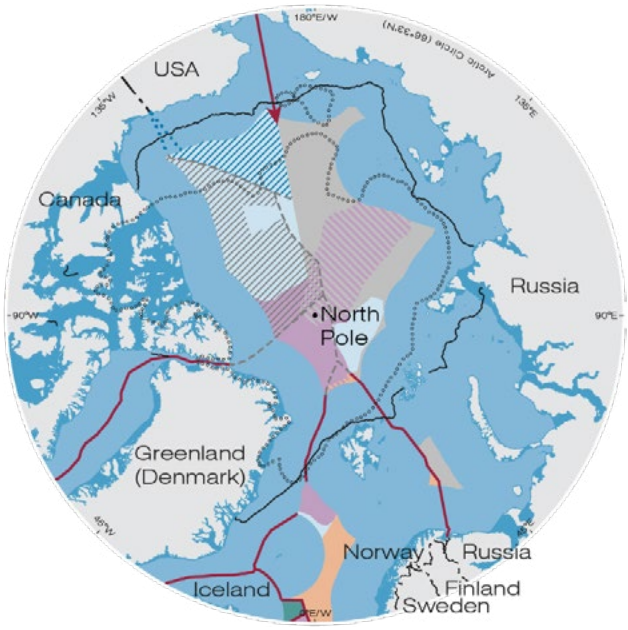
While climate change in the Arctic exacerbates challenges to climate security worldwide,[3] the Arctic's increasing accessibility is also of economic significance: as melting sea ice reveals vast amounts of potentially exploitable hydrocarbon resources, some observers fear new conflicts over existing territorial disputes. Others regard the Arctic region as a positive example of cooperation among states that often are at loggerheads elsewhere but do cooperate quite well within the current governance framework, including the Arctic Council.[4] Indeed, at least on Arctic matters, states have a history of adhering to international rules, with Russia's submission to the UN Commission on the Limits of the Continental Shelf in 2016 serving as a recent example. Moreover, up to 95 percent of the region's estimated resources are located in areas of undisputed jurisdiction.[5] Thus, predictions of a hostile race for oil and gas in the High North seem unwarranted.

Potential for conflict does exist, however. As the region becomes more navigable, Russian observers worry that "the ice melt will do to the Arctic what the fall of communism did in Eastern Europe," i.e., diminish Moscow's regional influence.[6] Russian military engagement in the Arctic has increased remarkably in recent years. Moscow argues its activities are moderate and defensive in nature, but suspicion in the West is growing.[7] Shipping rights and the power that comes with them mark an issue fraught with particular tension: in 2011, then-Prime Minister Putin said he expected the so-called Northern Sea Route to attain the economic significance of the Suez Canal.[8] Moscow is trying to assert legal authority over that route, which most other nations, including the United States, regard as international waters. Running roughly along Russia's coastline, the route could become a major shipping passage, cutting transit time between Europe and Asia by up to 15 days compared to current routes and potentially allowing Russia to profit from tariffs of up to USD 500,000 per tour.[9]

Consequently, Arctic affairs have become a matter of global attention.[10] Speaking to the Arctic Circle Assembly in late 2015, China's Vice Foreign Minister Ming declared his country "a major stakeholder in the Arctic."[11] In 2016, the European Union, too, underlined that it has a "strategic interest in playing a key role" in Arctic affairs, and that it is now "more important than ever to ensure that the Arctic remains a zone of peace, prosperity, and constructive international cooperation."[12]

CONTESTED MARITIME JURISDICTION IN THE ARCTIC

Status of Arctic waters beyond 200 nautical miles from shore

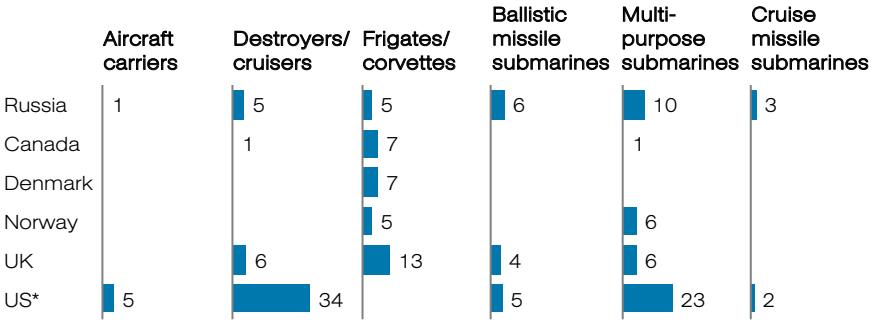


* Approved by Commission on the Limits of the Continental Shelf (CLCS)
** Under review by CLCS

Source: IBRU – Center for Borders Research, Durham University[14]

NAVAL CAPABILITIES IN OR NEAR THE ARCTIC

Major submarine and surface vessels (excluding auxiliary submarines and ships) likely to operate in or close to the Arctic, operational vessels only, 2016, estimate



* Entire US fleet stationed in Groton, Connecticut, and in Norfolk, Virginia. Historical trends during the Cold War show that this part of the US Navy would most likely be used in the Arctic

Source: Center for Strategic and International Studies; CNA[15]

Issues

(Dis)Information: Fake It, Leak It, Spread It

"If the most powerful and richest democracy in the world can have its electoral process derailed through mass disinformation, electronic break-ins and doxing, then what awaits the elections next year in Germany, France and the Netherlands, where genuine extremist parties are rapidly gaining popularity?"[11]
TOOMAS HENDRIK ILVES, 19 DECEMBER 2016

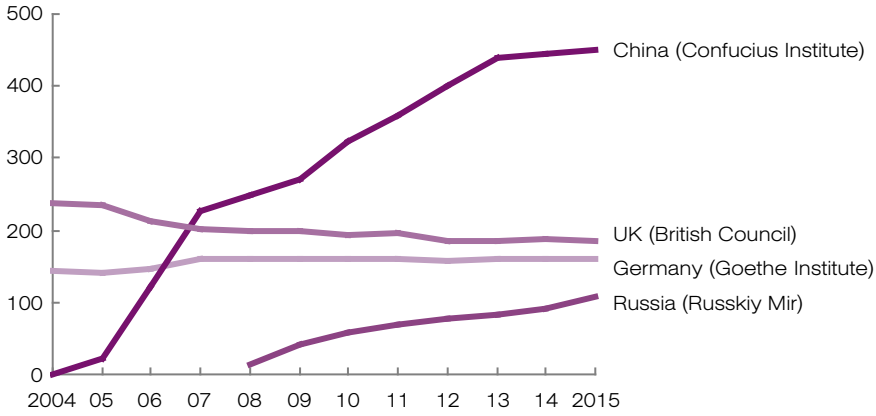
If the referendum debates in the UK or the US election campaign are any indicator, facts matter less and less.[1] Whether it is the spread of fake news, politically motivated leaks of hacked information, the use of trolls, or automated social media bots: these instruments present a grave challenge to informed public debate. Several factors enhance their impact: today's media landscape holds many challenges for quality journalism and is, in many countries, increasingly fragmented, polarized, and politicized. Technological changes, most importantly the rise of social media as a major source of information, create filter bubbles and echo chambers in which only partial sets of information are shared and amplified. In the US, for instance, only 14 percent of Republicans "have trust in the mass media."[2] All this creates a structure waiting to be exploited – both by populists within our societies and by interested outside actors.

In the recent past, Russia has demonstrated a particular ability to use these weaknesses of open societies to further its objectives and cast doubt on democratic institutions. In early January 2017, the US intelligence community released a report in which they assessed with "high confidence" that "Russian President Vladimir Putin ordered an influence campaign in 2016 aimed at the US presidential election. Russia's goals were to undermine public faith in the US democratic process, denigrate Secretary Clinton, and harm her electability and potential presidency."[3] This campaign included the hacking of the servers of the Democratic Party, the leaking of emails by party and campaign officials to WikiLeaks and other outlets, as well as the support of fake news outlets and social bots amplifying the message.[4] This has increased worries in other Western democracies, especially in those where elections are scheduled for 2017. Authorities in France and Germany, whose parliament's network was hacked by the same group that broke into the Democratic Party's servers, have already warned of Russian attempts to influence the upcoming elections.[5] Across Europe, the members of a new "Populist International" rely on so-called alternative media that regularly spread Kremlin-friendly messages or fake news.[6] It seems to pay off: in Germany, a poll in August 2016 showed that 30 percent of supporters of the populist Alternative for Germany and 31 percent of left-wing voters trust Vladimir Putin more than Angela Merkel.[7] Interestingly, many of the accounts that spread pro-Trump information during the US election campaign have now turned to criticizing Angela Merkel and her refugee policy.[8]

The main threat is that citizens' trust in media and politicians might further erode, creating a vicious cycle that threatens liberal democracy. States must better protect their hardware; but cyber defense will not be enough. Democratic institutions can also support media literacy, strengthen their communication efforts, and educate their citizens. Yet, they cannot forbid "fake news" or introduce "truth agencies" lest they turn illiberal themselves. Preventing a "post-truth" world, in which "nothing is true and everything is possible,"[9] is a task for society as a whole.[10]

WHO IS OPENING CULTURAL INSTITUTES AROUND THE WORLD?

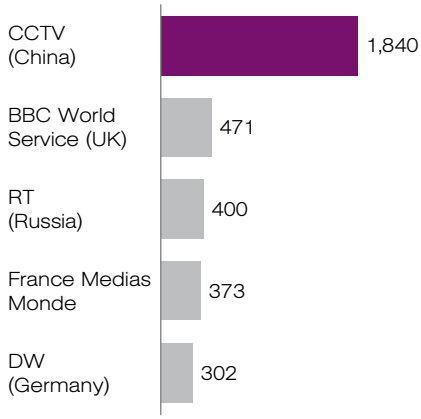
Number of cultural institutes, 2004-15



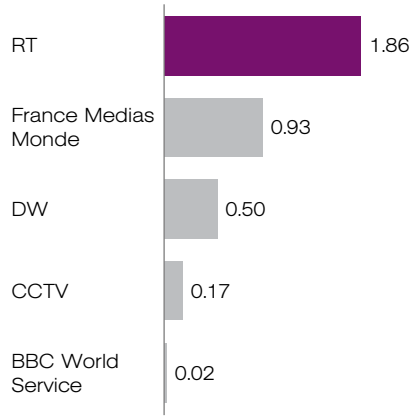
Source: Hertie School of Governance[12]

BUDGET AND SOCIAL MEDIA PERFORMANCE OF PUBLIC INTERNATIONAL BROADCASTERS

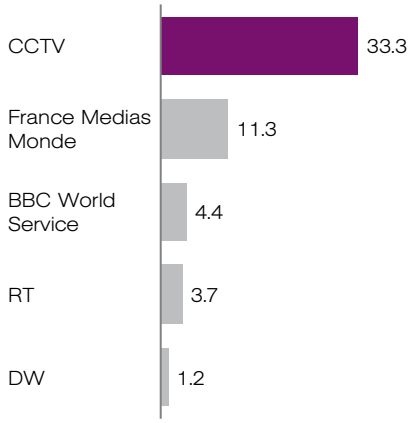
Budget, 2016, EUR millions



YouTube subscriptions, as of September 2016, millions



Facebook likes, as of September 2016, millions

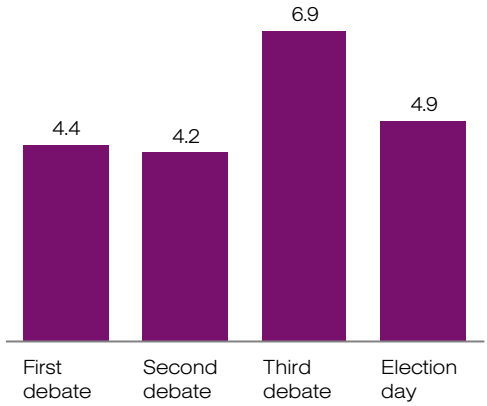


Source: Hertie School of Governance[13]

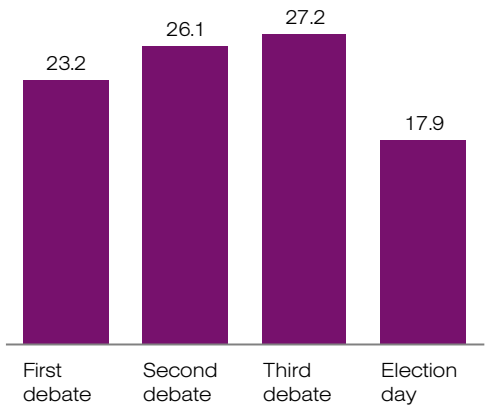
Hertie School of Governance

USE OF SOCIAL BOTS DURING KEY MOMENTS OF THE US PRESIDENTIAL CAMPAIGN

Number of automated pro-Trump tweets for every automated pro-Clinton tweet around select key periods of the US presidential election campaign, 2016



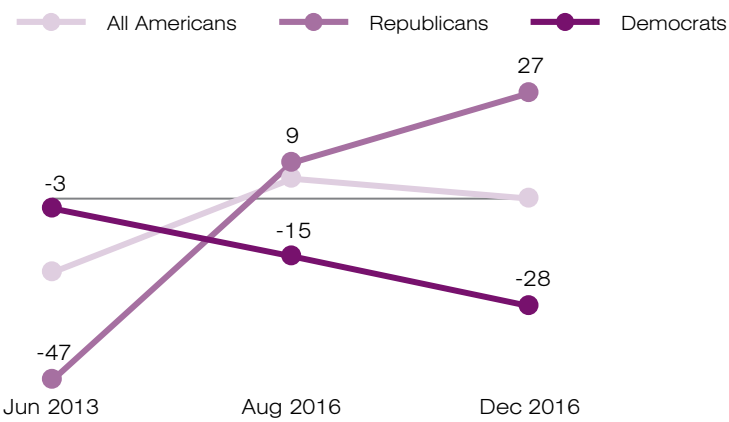
Share of tweets generated by highly automated accounts around select key periods of the US presidential election campaign, percent



Source: Oxford Internet Institute, Oxford University[14]

HOW DEMOCRATS AND REPUBLICANS VIEW WIKILEAKS

Net favorability by party affiliation (difference between favorable and unfavorable), percentage points

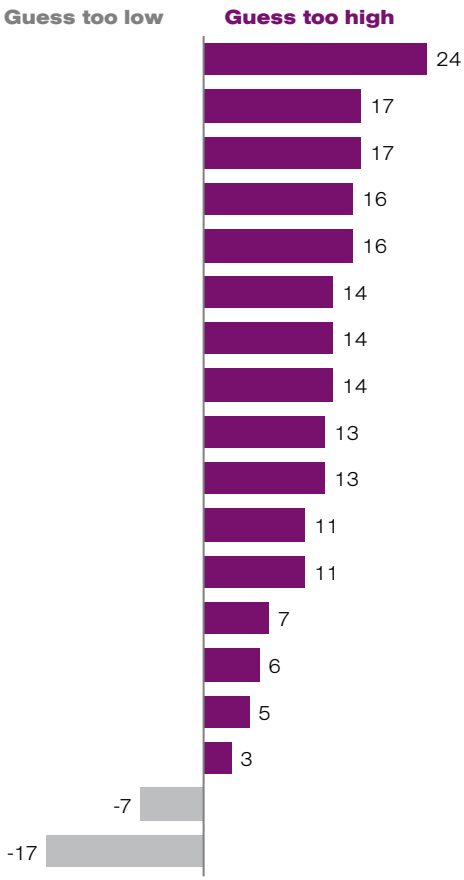


Source: YouGov[15]

WHAT CITIZENS IN SELECT COUNTRIES THINK: OUT OF EVERY 100 PEOPLE IN YOUR COUNTRY, ABOUT HOW MANY ARE MUSLIM?

Opinion poll, fall 2016

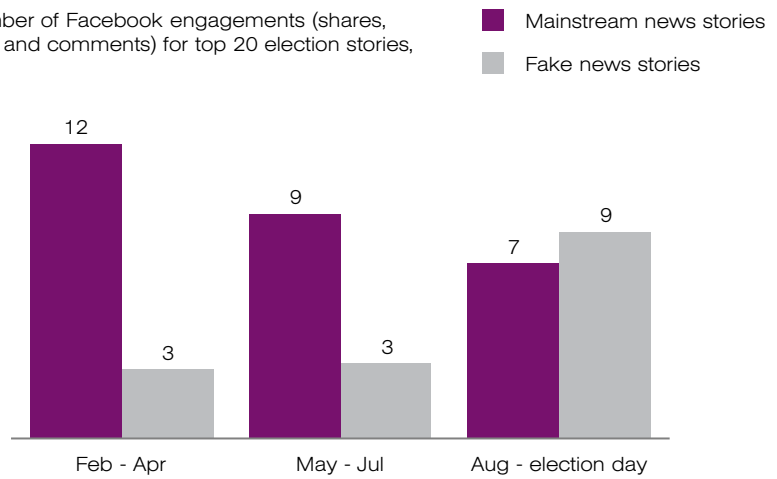
	Average guess Percent	**Actual** Percent
France	31	7.5
Philippines	23	5.5
Italy	20	3.7
Germany	21	5.0
US	17	1.0
Russia	24	10.0
Canada	17	3.2
India	28	14.2
Sweden	17	4.6
Netherlands	19	6.0
UK	15	4.8
Denmark	15	4.1
Poland	7	<0.1
Hungary	6	<0.1
Israel	23	18.6
Czech Republic	3	<0.1
Indonesia	80	87.2
Turkey	81	98.0



Source: Ipsos MORI[16]

MAINSTREAM VS. FAKE NEWS ATTENTION ON FACEBOOK IN THE RUN-UP TO THE US ELECTION

Total number of Facebook engagements (shares, reactions, and comments) for top 20 election stories, millions



Source: BuzzFeed News[17]

(Forced) Migration: Here to Stay

"We are facing a crisis of epic proportions. More than 65 million people have been driven from their homes."[7]
BARACK OBAMA, 20 SEPTEMBER 2016

The global population of forced migrants – including refugees, asylum seekers, and internally displaced persons – continues to grow dramatically. In 1996, it stood at 37 million people, 20 years later at 65 million.[1] A significant increase was observed after state structures in North Africa were considerably weakened in the aftermath of the Arab Spring and after the outbreak of the civil war in Syria. Forced migration also took a larger death toll in 2016 than in previous years: an estimated 7,495 migrants worldwide died during their voyage, most of them drowned.[2]

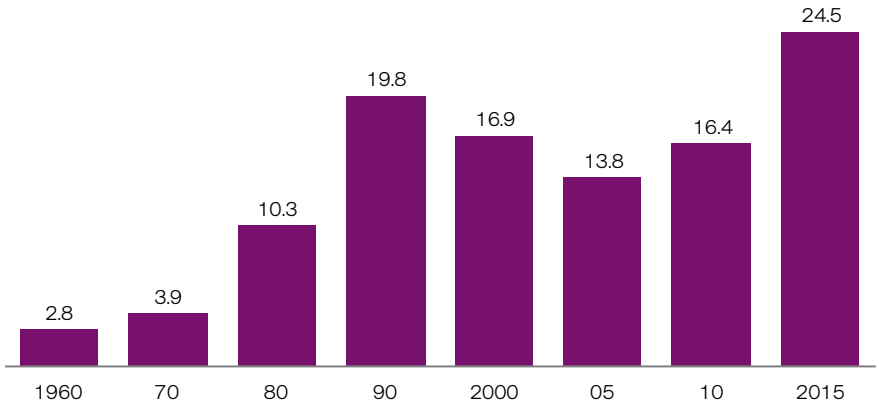
Last year, developing countries again hosted the lion's share of forcibly displaced persons – while arrivals in Europe have fallen significantly. In 2015, almost 1.8 million asylum seekers were counted in Europe, while in the first two quarters of 2016, only 540,000 people arrived.[3] A major reason for this is the Turkey-EU deal, which came into effect in March 2016 and led to a steep decrease in arrivals in Greece – from 853,000 in 2015 to 174,000 in 2016. Tragically, 2016 saw an increase in total deaths of migrants at European borders – the International Organization for Migration recorded almost 5,079 dead migrants in the Mediterranean, up from 3,777 in 2015. Thus, the Mediterranean was the world's deadliest migration route in 2016 – accounting for almost 70% of recorded migrant deaths worldwide.[4]

Key dynamics that make this an age of forced migration are likely to get even more pronounced in the future. Those include environmental stress, Africa's demographic surplus as well as low fertility rates and skill gaps in developed countries, failing states, and conflict. The war in Syria, in particular, was the single most important event to lead to forced migration in the past years. 4.9 million Syrians have fled their country since 2011, according to UNHCR – more than a quarter of the entire Syrian population.[5]

Management and coordination of large migration flows are key issues to be addressed in the short term. Due to lower influx numbers, inner-EU disagreements on refugees and asylum seekers have for now been mitigated. However, the underlying mechanisms aimed at distributing asylum seekers across the European Union have not been fixed. Progress on improving institutional arrangements remains weak, on a European as well as a global level. In September 2016, the host countries of the Leaders' Summit on Refugees – including the US and Germany – recognized "that no routine mechanism exists yet to facilitate the kind of voluntary responsibility-sharing for refugees that was demonstrated today or to more comprehensively address other challenges arising from large-scale refugee crises."[6] Thus, unsatisfactory unilateral and ad-hoc actions will likely remain the norm – at the expense of some of the most vulnerable populations in the world.

HOW HAS THE GLOBAL REFUGEE POPULATION DEVELOPED OVER THE LAST 50 YEARS?

Global total of refugees and asylum seekers, not including internally displaced persons, millions



Source: McKinsey Global Institute, based on UNHCR[8]

WHAT WILL DRIVE MIGRATION IN THE YEARS AND DECADES AHEAD?

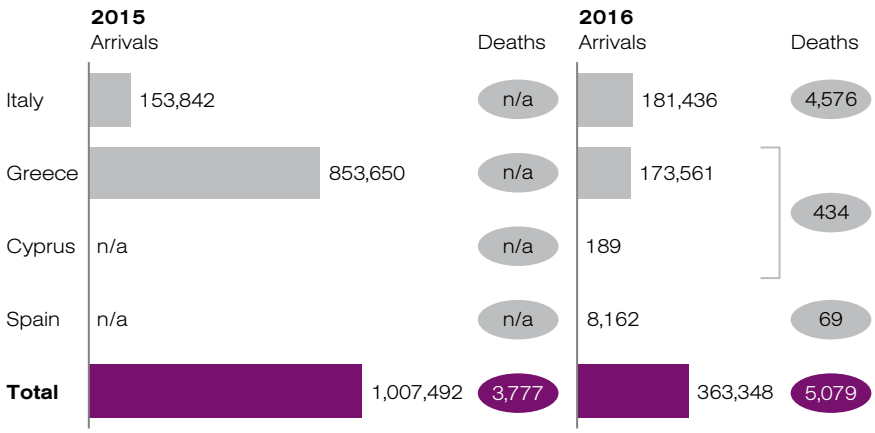
- ⬆ Likely to rise in future, leading to increased migration
- ⬇ Likely to decline in future, leading to decreased migration
- ? Uncertain or unpredictable

Forces positively linked to migration	Forces at play: In origin country	Between origin and destination country	In destination country
Motivating factors	⬇ Poverty ? War and civil strife ⬆ Environmental stress	⬇ Income inequality between countries	
Labor demand and supply drivers	⬆ Demographic bulge in developing countries ⬆ Skill surpluses in key occupations ⬆ Education levels		⬆ Low fertility rates in developed countries ⬆ Skill gaps in key occupations
Mobility enablers	⬆ Urbanization ⬆ Economic growth in the poorest countries	⬆ Information flows ⬆ Transport networks ? Trade links	? Open immigration policies ? Effective integration policies

Source: McKinsey Global Institute, based on Goldin/Cameron/Balarajan, Exceptional People and OECD, The Future of International Migration to OECD countries[9]

THE ROUTE TO EUROPE: MIGRANT ARRIVALS AND DEATHS

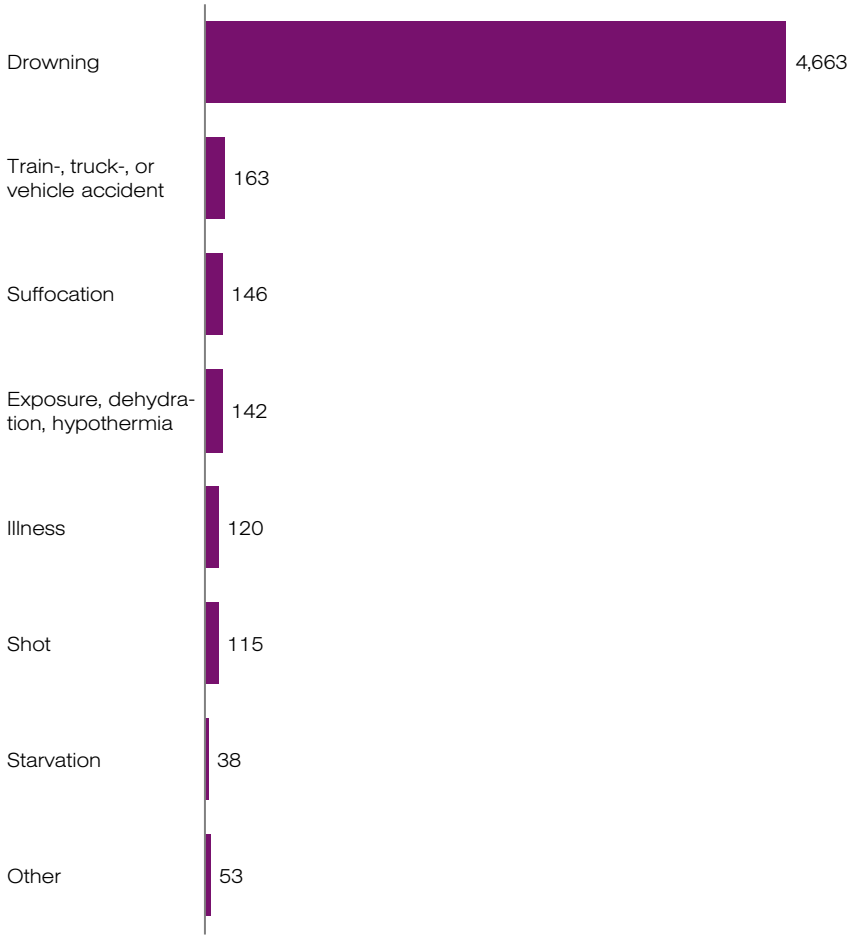
Total sea arrivals and deaths in the Mediterranean by country, 2015 and 2016



Source: International Organization for Migration[10]

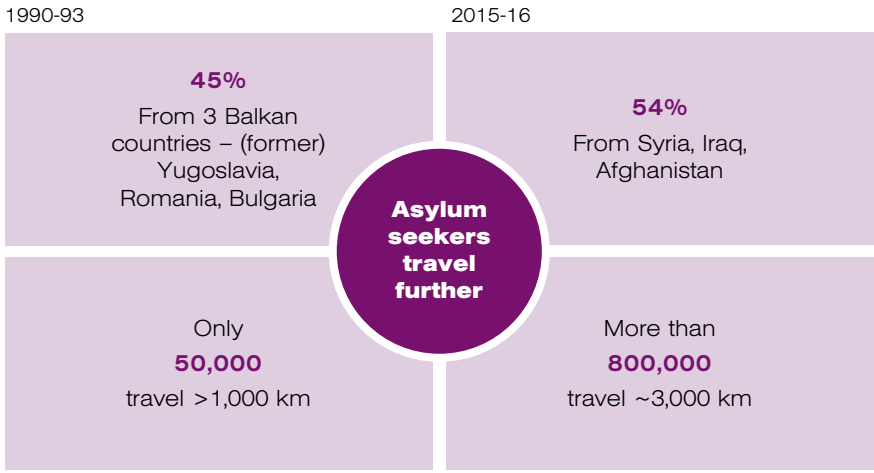
CAUSES OF DEATH OF MIGRANTS EN ROUTE TO DESTINATION COUNTRIES

Confirmed causes of death, globally, January to end-November 2016



Source: International Organization for Migration[11]

THE ROAD TO EUROPE FOR ASYLUM SEEKERS IN THE 1990S AND TODAY



Source: McKinsey Global Institute, based on Eurostat[12]

ASYLUM SEEKERS IN EUROPE: DISTRIBUTION ACROSS COUNTRIES

Asylum seekers in Europe (EU-28 plus Norway and Switzerland), January 2015 - August 2016

	Asylum seekers, thousands	Share of total arrivals, percent	Asylum seekers per 1,000 inhabitants
Germany	1,099	48	14
Hungary	199	9	20
Sweden	172	8	18
Italy	155	7	3
France	119	5	2
Austria	116	5	14
UK	66	3	1
Switzerland	57	2	7
Netherlands	55	2	3
Belgium	49	2	4
Greece	37	2	3
Finland	36	1	7
Norway	33	1	6
Bulgaria	32	1	4
Denmark	26	1	5
Spain	24	1	1
Poland	18	1	<1
Other	24	1	<1

Source: McKinsey Global Institute, based on Eurostat[13]

Jihadism: Cornered Rads

"The number of battle-ready fighters inside Iraq and Syria is now at [the] lowest point that it's ever been."[5]
BRETT MCGURK, 13 DECEMBER 2016

"Our objective is clear: We will degrade, and ultimately destroy, ISIL through a comprehensive and sustained counterterrorism strategy," then-US President Barack Obama said in September 2014.[1] In Iraq and in Syria, the campaign against the group – "Daesh" in a loose Arabic acronym for "Islamic State in Iraq and the Levant" – is under way and largely successful. A US-led coalition of more than 50 countries has stripped Daesh of large swaths of its territory. According to the US, more than 50,000 Daesh fighters in Iraq and Syria, about 75%, have been killed as a result of the coalition war.[2]

"The smallest action you do in their heartland is better and more enduring to us than what you would do if you were with us [in Syria/Iraq]."[6]
ABU MUHAMMAD AL-ADNANI (DAESH SPOKESPERSON), MAY 2016

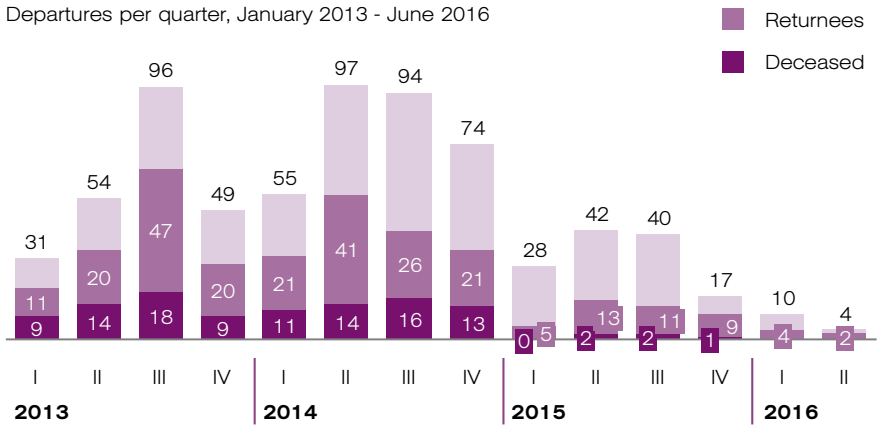
But as the jihadist "caliphate" in the Middle East physically diminishes, the immediate dangers of terrorist strikes in the West have increased significantly, as attacks from Nice to Berlin have shown. Actual and prospective militants are no longer asked to join the fight defending dwindling Daesh territory in the Middle East. Instead, they are to focus on attacks in their countries of origin. "Revolt everywhere!," a spokesperson of Daesh requested of its followers last year. Looking at Germany alone, for example, the number of jihadists joining the fight in Syria and Iraq has dropped precipitously: in 2014, hundreds of fighters emigrated to the "caliphate" (and some to join Jabhat al-Nusra). Today, that flow has all but stopped, and some have even returned from the Middle East. Thus, more potential attackers are in Germany. In addition to those terrorists directed by Daesh, those inspired by the group but without direct links have also become a growing challenge (in Orlando and in Nice, for example). For security services, these are even more difficult to detect.

Only by further stepping up EU anti-terror cooperation and capabilities will European states be able to rise to what will likely be a long-term jihadist challenge. Main reasons for this include the growing potential recruitment pool in Europe; more jihadist entrepreneurs and local network builders, including an increasingly strong crime-terror nexus; the ongoing conflicts in the Muslim world which can be used for recruitment and propaganda; and the clandestine communication opportunities the Internet provides.[3]

But not just in Europe, much work on the way to crippling Daesh (and jihadism, in general) remains to be done. Recently, Daesh's leader Abu Bakr al-Baghdadi reminded his followers that there was a "wide path" available for them to act – beyond the West, Iraq, and Syria – in other proclaimed Daesh provinces, e.g., in Nigeria, Libya, or Afghanistan.[4] So while the loss of its main sanctuary in Syria and Iraq would mean a major setback for Daesh, its militants will not just disappear. Moreover, without enhanced efforts toward stabilization, reconstruction, and political progress, the military advances in Iraq and Syria will be insufficient. And, finally, with Daesh under pressure, other jihadist groups, not least Al Qaeda, are geared for a resurgence. Even without a caliphate and a state, jihadist groups will continue to inspire youths to join their cause.

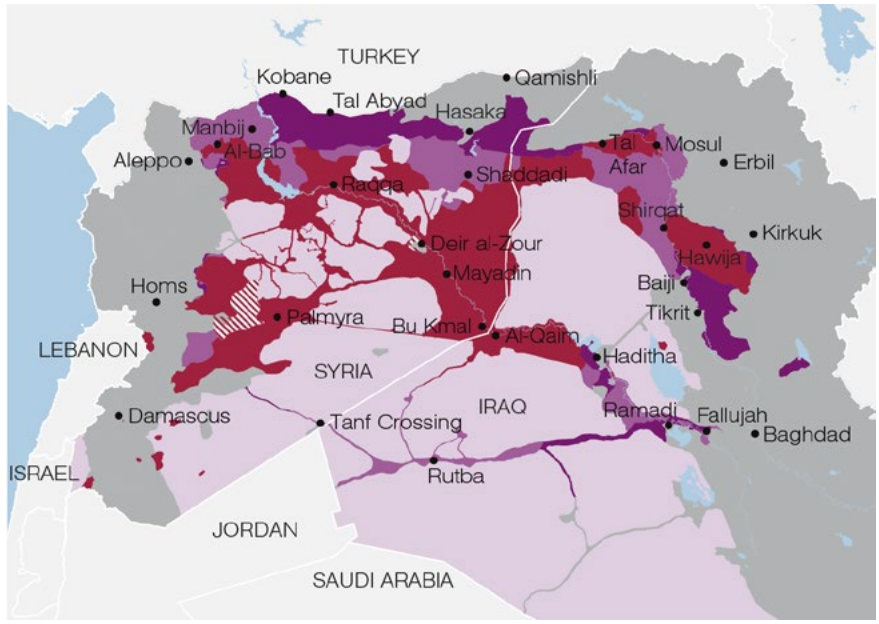
HOW MANY PEOPLE HAVE LEFT GERMANY TO JOIN JIHADIST GROUPS IN IRAQ AND SYRIA?

Departures per quarter, January 2013 - June 2016



Source: German Federal Criminal Police Office (BKA); German Federal Office for the Protection of the Prosecution (BfV); Hessian Information and Competence Centre Against Extremism (HKE)[7]

HOW MUCH TERRITORY HAS DAESH LOST IN SYRIA AND IRAQ (BETWEEN JANUARY 2015 AND DECEMBER 2016)?



- Islamic-State-controlled areas (no change in 2016)
- Islamic State territorial gains in 2016
- Islamic State territorial losses in 2016
- Islamic State territorial losses in 2015
- Key towns/cities
- Territory controlled by other actors
- Unpopulated desert areas

Source: IHS Conflict Monitor[8]

A LOOK AT RECENT DAESH PROPAGANDA: SHIFTING STRATEGIES AND TACTICS

"A wide path" beyond Syria/Iraq

"[We] remind all our Muslim brothers that if the paths have become restricted and the routes of migration to Iraq and Syria cut off, then Allah has made a wide path for them to migrate to those blessed provinces [Afghanistan and Pakistan, Bangladesh, Indonesia, the Caucasus, the Philippines, Yemen, the (Arabian) Peninsula, the Sinai, Egypt, Algeria, Tunisia, Libya, Somalia, West Africa] to establish there a fortress of Islam."

Abu Bakr Al-Baghdadi (November 2016)

"Revolt everywhere!"

"Know that blood has no value in the countries of the crusaders and that there are no innocents there. Know that your targeting civilian people known as 'the civilized' is more pleasant and impressive to us. [...] Revolt everywhere!"

Abu Muhammad al-Adnani al-Shami (August 2016)

Vehicle-ramming attack "one of the safest and easiest weapons"

"The method of such an attack is that a vehicle is plunged at a high speed into a large congregation of kuffar [disbelievers], smashing their bodies with the vehicle's strong outer frame, while advancing forward – crushing their heads, torsos, and limbs under the vehicle's wheels and chassis – and leaving behind a trail of carnage. [...] It is one of the safest and easiest weapons one could employ against the kuffar, while being from amongst the most lethal methods of attack and the most successful in harvesting large numbers of the kuffar.

It has been shown that smaller vehicles are incapable of granting the level of carnage that is sought. Rather, the type of vehicle most appropriate for such an operation is a large load-bearing truck. [...] All so-called 'civilian' (and low-security) parades and gatherings are fair game and more devastating to Crusader nations."

Daesh magazine "Rumiyah" (November 2016)

"Applicable Targets for Vehicles"

- "Large outdoor conventions and celebrations
- Pedestrian-congested streets (high/main streets)
- Outdoor markets
- Festivals
- Parades
- Political rallies

In general, one should consider any outdoor attraction that draws large crowds."

"Rumiyah" (November 2016)

"Knives are widely available"

"One need not […] even own a gun or rifle in order to carry out a massacre or to kill and injure several disbelievers and terrorize an entire nation. Knives […] are widely available in every land. […] The target could be […] someone by himself in an alley close to a night club or another place of debauchery, or even someone out for a walk in a quiet neighborhood. One should consider canals, riversides, and beaches."

"Rumiyah" (October 2016)

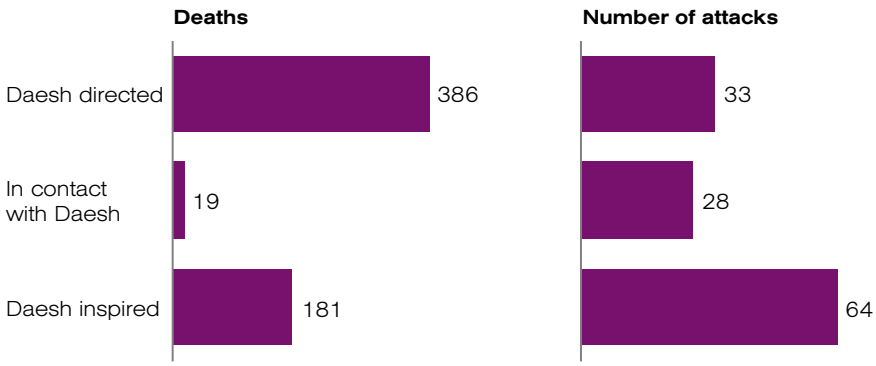
NOTE:

While we considered not printing Daesh propaganda in order not to spread it, we believe it is important to learn as much as possible about the group. That is why we decided to publish excerpts from Daesh publications and messages.

Source: Middle East Media Research Institute; Clarion Project; Rumiyah[9]

HOW MANY ATTACKS DID DAESH DIRECT OR INSPIRE?

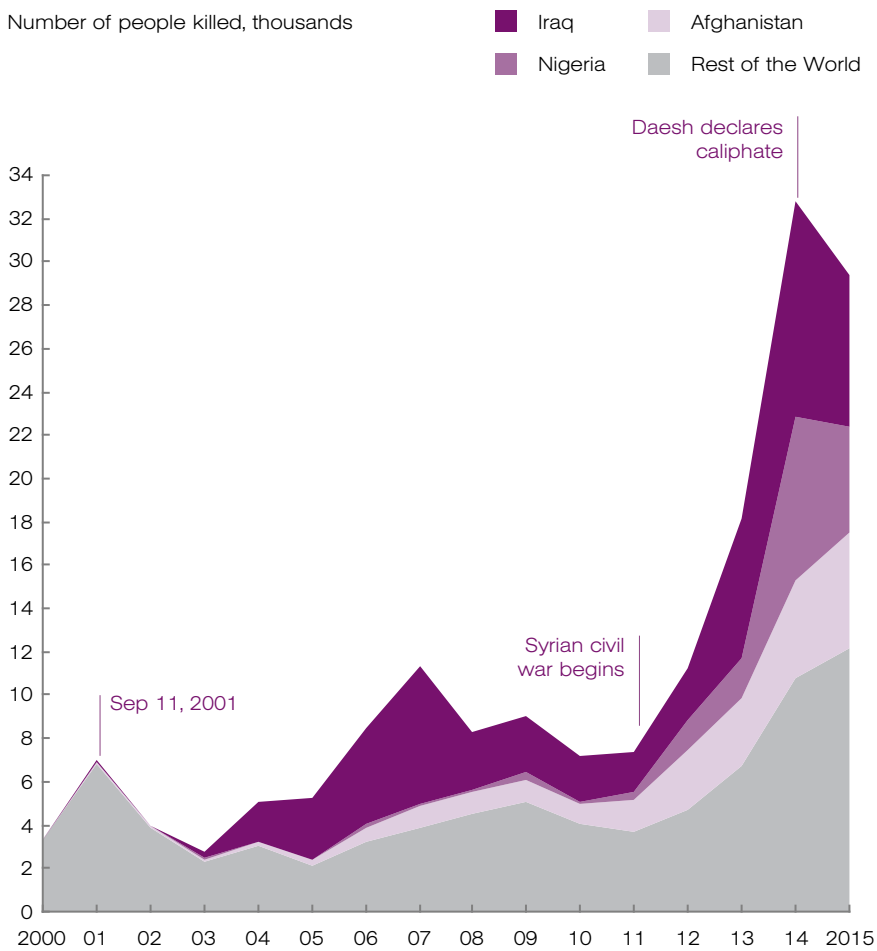
Daesh attacks in OECD countries by involvement type, 2014 to mid-2016



Source: Institute for Economics and Peace[10]

DEATHS FROM TERRORISM BETWEEN 2000 AND 2015

Number of people killed, thousands



Source: START Global Terrorism Database, calculations by Institute for Economics and Peace[11]

Health Security: Small Bugs, Big Bombs

"Deliberate attacks on hospitals are war crimes. Denying people access to essential health care violates international humanitarian law."[4]
BAN KI-MOON, 28 SEPTEMBER 2016

Threats to global health security continued to arise in 2016: The world addressed the global impact of the mosquito-borne Zika virus, which causes birth defects, while major deliberate attacks on healthcare infrastructures, not least in Syria, were a particularly disgraceful feature of armed conflicts. Concurrently, lessons learned from the Ebola outbreak started to be drawn, notably by the UN High-Level Panel on the Global Response to Health Crises and by the World Health Organization (WHO), which reported that only 65 of the 193 states had necessary frameworks in place to detect and respond to infectious diseases.[1]

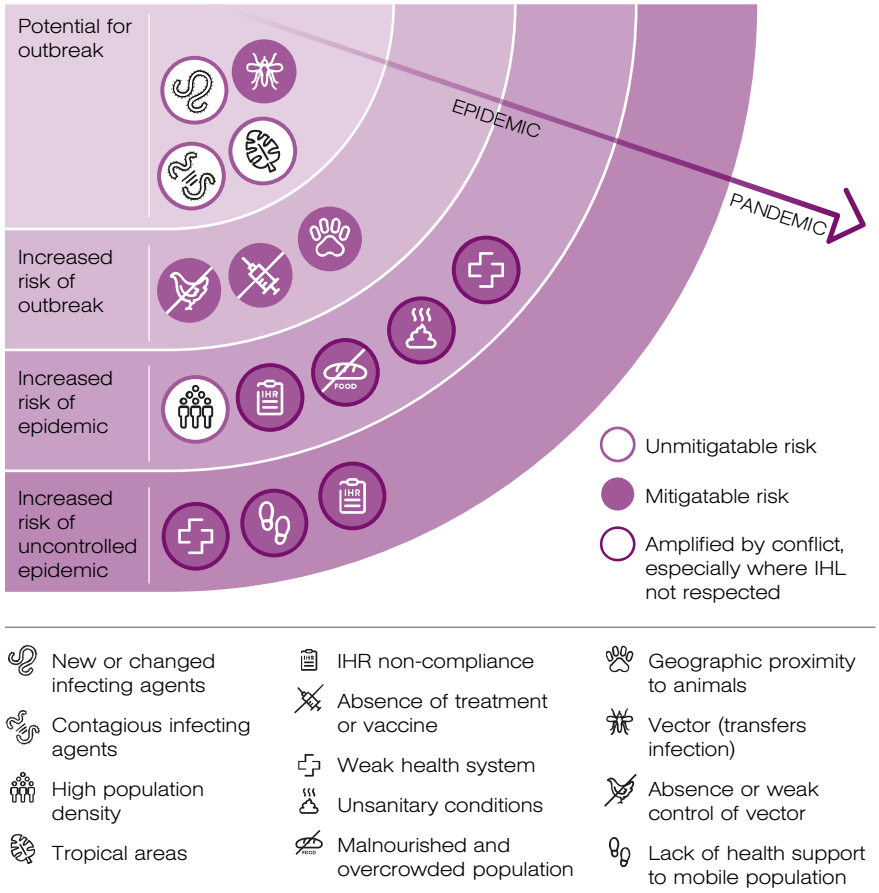
In February 2016, just before the emergency status of the Ebola outbreak was terminated, the spread of the Zika virus led the WHO to formally declare it a global public health emergency. As with Ebola, the military played a significant role in the response to the outbreak: More than 200,000 soldiers participated in Brazil's efforts to reduce mosquito populations, inspecting buildings for stagnant water and treating potential breeding grounds with insecticides.[2]

Globally, since 2014, the WHO has recorded 707 attacks on healthcare resources, 444 of which targeted healthcare facilities.[3] 58 percent of these attacks were considered deliberate. In 2016, attacks on health facilities brought further opprobrium on the Syrian regime and condemnation of the Russian involvement in Aleppo: for the third quarter of 2016, the WHO recorded 70 such attacks in Syria alone, most of them by bombing. They deprive a population already struck by war of access to essential basic medical care. Such attacks can also undermine the ability to identify and respond to infectious disease outbreaks, potentially enabling epidemics. And they undermine the ability of populations to provide for themselves and their families, contributing to the global refugee crisis.

But there was good news, too. In response to the Ebola outbreak, there has been important progress on strengthening the impact of the International Health Regulations (IHR), the international legal instrument aiming to help prevent and respond to acute public health risks that have the potential to cross borders. The World Health Assembly accepted external independent evaluation of country capacities. But the process continues to be voluntary. There are no sanctions for refusing to accept such an assessment, and no clear financial incentives for low-income countries to become IHR compliant. An even bigger challenge will be to make progress on International Humanitarian Law (IHL), which governs issues such as attacks on healthcare. The resolution of the conflict in Syria could provide the required impetus to strengthen the IHL regime. In any case, the dangerous relationship between conflict and health will continue to be a major issue on the international agenda.

WHAT FACTORS CONTRIBUTE TO THE SPREAD OF AN EPIDEMIC?

Risks for initiation, development, and spread of an epidemic

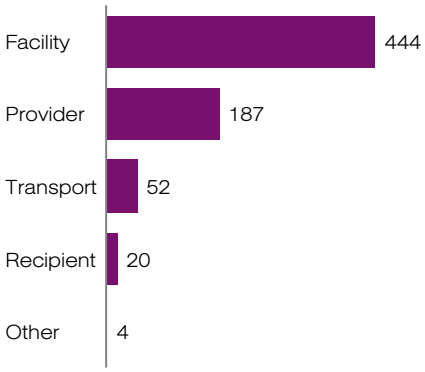


Source: Chatham House[5]

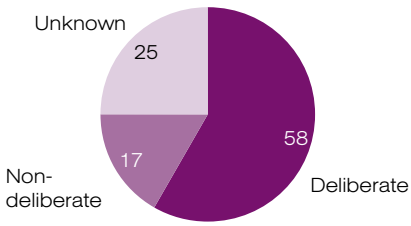
ATTACKS ON HEALTH INFRASTRUCTURE AROUND THE GLOBE

January 2014 - June 2016

Number of attacks by type of health-care target, primary object



Intentionality of attack
Percent



Source: Chatham House, based on WHO[6]

Defense Innovation: Changing Gear

"Achieving sustainable growth [in industry] is not just about chasing government contracts, it's about investing in innovation."[5]

ADM MARK FERGUSON, USN (RET.), 2017

Defense has traditionally been one of the hardest industries to disrupt due to high entry barriers, low risk tolerance, and the high level of specialized technical knowledge required. However, the digital revolution sweeping through other industries is now increasingly disrupting defense as well.

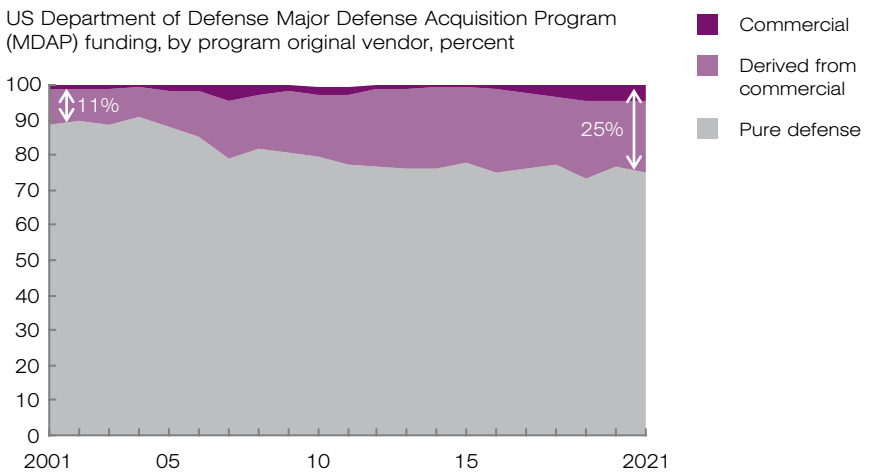
Digitization is changing both where and how defense companies compete. First, the "where to compete" is shifting from "traditional" defense to IT-based products. New battlefields like cybersecurity and big-data analytics have allowed pure IT players to gain a foothold in the security and defense business, and budgets for these areas are on track to grow faster than those for "traditional" defense. The share of the US Department of Defense budget allocated to the areas of C3, intelligence, and space has doubled since 1976.[1] The four digital giants Google, Amazon, Microsoft, and Intel alone spend more than USD 50 billion a year on digital innovation, with dual use[2] offering militaries an opportunity to innovate within constrained defense budgets.[3] Second, digitization is changing the factors that differentiate defense solutions, meaning the "how to compete" is changing too. The increasing digitization of weapon systems ("Defense 4.0") impacts and even disrupts the very core of defense. This development is best evidenced by shifts in technology investment. While military platforms have long been pieces of "embedded software," the ratio of "software" to "hardware" has changed more rapidly and significantly in recent years. As the absolute value of electronics in a platform has almost tripled from one generation to the next,[4] advancement in this area has become the driver of innovation. The extent to which the door is open for disruption by new civilian players can best be seen in the "New Space" industry.

Ministries of defense, established defense companies as well as their suppliers (especially tier 1 and tier 2) all face the need to adapt their ways of doing business. Externally, they must demonstrate the ability and willingness to engage with non-traditional companies in non-traditional processes. One approach involves using "innovation units" and "hubs" to move closer to civilian innovation. Internally, procurement processes could focus on overcoming the disconnect between lengthy procurement cycles and shorter innovation cycles. Experiments with non-traditional methods such as competitions and direct awards for prototype technologies have proven successful. A ministry of defense strategy for sustained technology development should allow for an outside-in innovation process, a streamlined approach to defining requirements, and simplified procurement of digital technologies. New forms of partnering with emerging tech companies will also be needed. Traditional defense contractors will face the challenge of introducing digital innovation cells within their companies and identifying candidates for mergers or acquisitions, along with competitive pressure to digitize their industrial processes. New strategies will therefore be essential for "traditional defense" to sustain growth in the Defense 4.0 era, while maintaining a technological edge is mission-critical for militaries as well.

This page was prepared by MSC's knowledge partner McKinsey & Company.

THE INCREASED ROLE OF COMMERCIAL DISRUPTORS

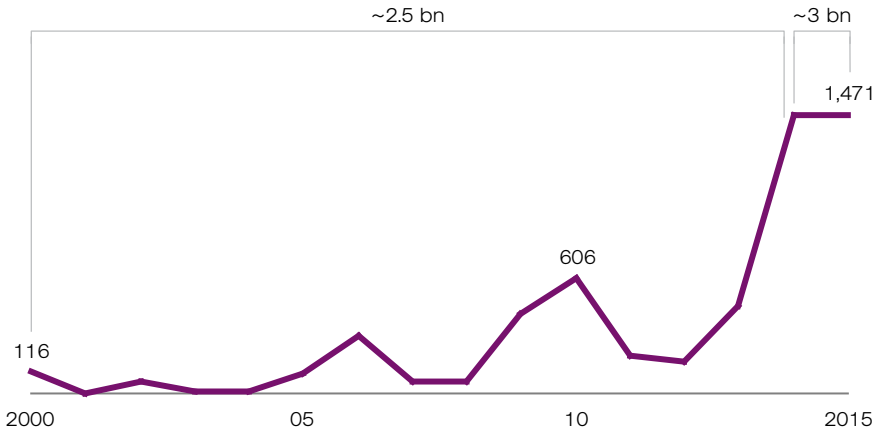
US Department of Defense Major Defense Acquisition Program (MDAP) funding, by program original vendor, percent



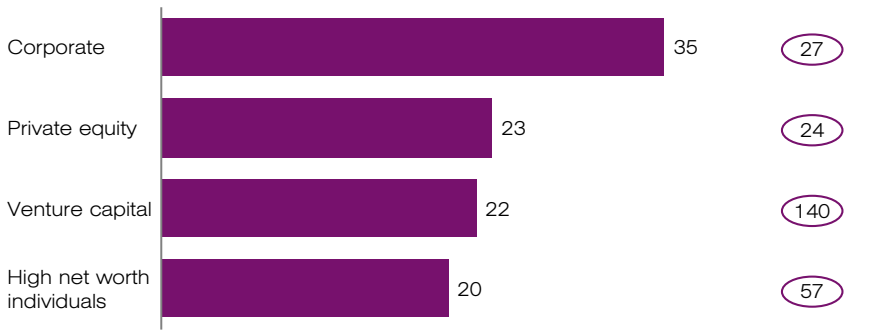
Source: McKinsey VisualDoD, based on US DoD selected acquisition reports[6]

"NEW SPACE" SHOWCASES INCREASED INVESTMENT IN INNOVATION

Global investment into New Space*, 2000-15, USD millions



Global investment into New Space*, 2000-15, by investor group (known investors only, based on volume), percent



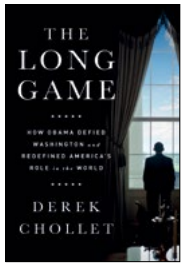
* "New Space" is defined as new players in aerospace (est. later than 1995) with disruptive and significantly lower cost operating model vs. traditional defense primes

Source: McKinsey SILA; S&P Capital IQ; PitchBook Data, Inc; CB Insights[7]

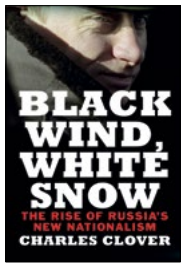
McKinsey&Company

Food for Thought

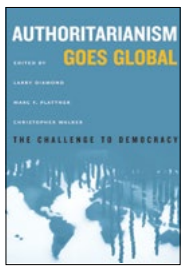
Books



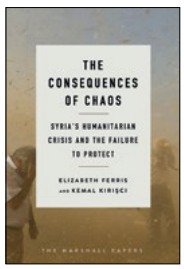
DEREK CHOLLET: **The Long Game**
How Obama Defied Washington and Redefined America's Role in the World
Chollet, a former senior Obama official, maintains the President's grand strategy was defined by playing the "long game," carefully projecting "global leadership in an era of seemingly infinite demands and finite resources." As he argues, this has benefited the US's ability to lead in the future.[1]



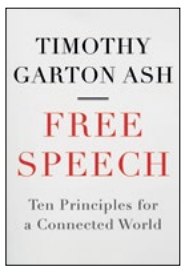
CHARLES CLOVER: **Black Wind, White Snow**
The Rise of Russia's New Nationalism
The former head of the Moscow bureau of the Financial Times Charles Clover discusses the concept of "Eurasianism," a distinct theory that bases Russian national identity on ethnicity and geography and that, as the author shows, has vastly influenced the geopolitical reasoning of Moscow's present political elites.[2]



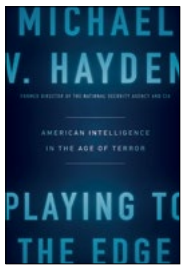
LARRY DIAMOND, MARC F. PLATTNER, CHRISTOPHER WALKER (EDS.): **Authoritarianism Goes Global**
The Challenge to Democracy
How can advanced democracies better respond to today's authoritarian threats? In this collection of compelling essays, experts investigate how authoritarian regimes across the globe repress democratic development and share ideas on how the liberal international order can be protected.[3]



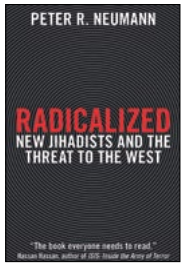
ELIZABETH FERRIS, KEMAL KIRISCI: **The Consequences of Chaos**
Syria's Humanitarian Crisis and the Failure to Protect
What long-term ramifications will the Syrian crisis have for neighboring regions, countries that host refugees, and for the international community? This book looks beyond crisis management and addresses humanitarian challenges that will keep policy makers busy in the future.[4]



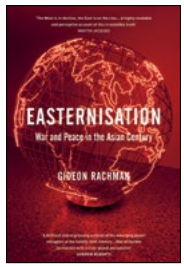
TIMOTHY GARTON ASH: **Free Speech**
Ten Principles for a Connected World
Citing from this timely book by Garton Ash in his farewell speech in early 2017, outgoing German Federal President Joachim Gauck supported the author's central call for a "robust civility" in our digital age, meaning that we need to "argue intensely yet respectfully as well as with a thick skin."[5]



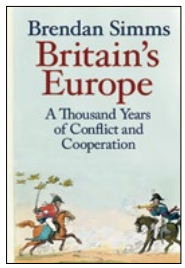
MICHAEL V. HAYDEN: **Playing to the Edge**
American Intelligence in the Age of Terror
Few intelligence services have sparked such intense debate as the NSA. As former director of NSA and CIA, the author led US intelligence through trying moments of American history. In this book, he gives an insider's account of the United States' response to terrorism – ranging from phone surveillance to targeted killing.[6]



PETER R. NEUMANN: **Radicalized**
New Jihadists and the Threat to the West
Predicting "a new wave of terrorism that will occupy us for a generation," Peter R. Neumann provides a thorough analysis of Daesh as well as jihadist terrorism in general, and puts forth suggestions on how to counter this phenomenon both abroad and at home.[7]



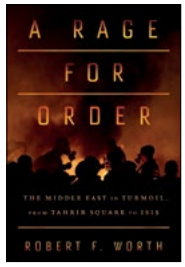
GIDEON RACHMANN: **Easternisation**
War and Peace in the Asian Century
Journalist Gideon Rachman argues that we are standing at a historic turning point, with the rise of Asian nations and the decline of Western influence marking the beginning of a new era of global instability. Rachman offers an insightful analysis of a momentous shift of the established global order.[8]



BRENDAN SIMMS: **Britain's Europe**
A Thousand Years of Conflict and Cooperation
Britain and the European mainland share a turbulent history. Historian Brandon Simms offers insights into past encounters and thoughtfully links these to present-day challenges that trouble the Euro-British relationship, including Britain's referendum on EU membership.[9]

DMITRI TRENIN: **Should We Fear Russia?**
In this concise analysis of the current state of Russian-Western relations, Dmitri Trenin cautions against drawing hasty Cold War analogies, which he views as easily misleading. Discussing crucial differences between the Cold War and today's tensions, this book helps to better understand the true intricacies of dealing with Russia.[10]

GRAEME WOOD: **The Way of the Strangers**
Encounters with the Islamic State
Described as an "intimate journey into the minds of the Islamic State's true believers," Yale University scholar Graeme Wood's gripping book illustrates what motivates individuals across the globe to give up their lives and join Daesh.[11]



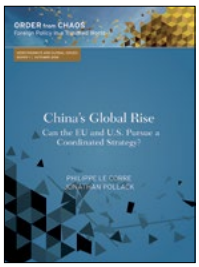
ROBERT F. WORTH: **A Rage for Order**
The Middle East in Turmoil, from Tahrir Square to ISIS
What has remained of the optimism and opportunities that marked the Arab Spring? Not much, argues New York Times correspondent Robert F. Worth. By sharing intriguing stories of personal encounters, the author offers a powerful yet dark portrayal of today's Arab world.[12]

Reports

ATLANTIC COUNCIL: **Global Risks 2035**

The Search for a New Normal

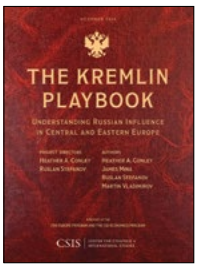
Determining a breakdown of the post-Cold War security order, Matthew J. Burrows's insightful report discusses what the international order might look like roughly 20 years from now; thought-provoking if dire scenarios range from a "fragmented world" to a new Cold War.[1]



THE BROOKINGS INSTITUTION: **China's Global Rise**

Can the EU and U.S. Pursue a Coordinated Strategy?

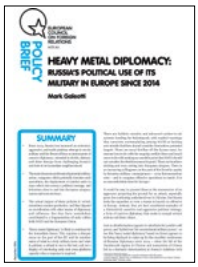
China's current economic transition poses a significant challenge for policy-makers in the US and the EU. The authors argue that a coordinated approach by the US and the EU is necessary in order to ensure China's compliance with the rules of global economic governance.[2]



CENTER FOR STRATEGIC AND INTERNATIONAL STUDIES: **The Kremlin Playbook**

Understanding Russian Influence in Central and Eastern Europe

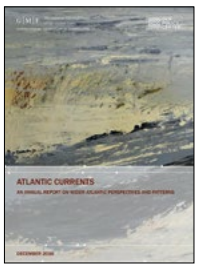
Calling on the international community to "collectively recognize that Russian influence is not just a domestic governance challenge but a national security threat," CSIS analysts take a close look at Russia's manifold external networks and activities in its neighborhood.[3]



EUROPEAN COUNCIL ON FOREIGN RELATIONS: **Heavy Metal Diplomacy**

Russia's Political Use of Its Military in Europe Since 2014

The use of military power for coercive diplomacy has characterized Russia's recent foreign policy toward the West, Mark Galeotti argues in this report. In doing so, "Four Ds" have been at the center of Russian strategy: Divide, Distract, Dismay, and Dominate.[4]



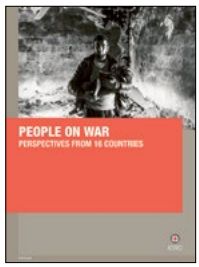
THE GERMAN MARSHALL FUND OF THE UNITED STATES/OCP POLICY CENTER: **Atlantic Currents 2016**

An Annual Report on Wider Atlantic Perspectives and Patterns

Analyzing issues ranging from climate-resilient development, the EU Global Strategy's potential impact on Africa to cooperation against transnational crime, GMF and OCP provide a multifaceted collection of impulses for Atlantic dialogue.[5]

GLOBAL COMMISSION ON INTERNET GOVERNANCE: **Final Report**

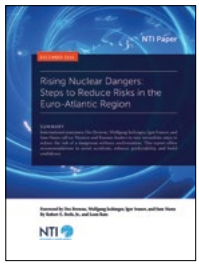
A two-year initiative led by the Centre for International Governance Innovation and Chatham House, the Global Commission on Internet Governance consists of 29 commissioners and 39 research advisors who in this report address key issues in Internet governance, ranging from cybersecurity to digital privacy, surveillance, and the protection of human rights online.[6]



INTERNATIONAL COMMITTEE OF THE RED CROSS: **People on War**
Perspectives from 16 Countries
2016 saw a dismaying number of violations of the laws of war, including, but not limited to, targeted attacks on civilians, humanitarian personnel, and medical facilities. In this report, the ICRC combines striking findings from a large-scale survey with calls for action.[7]

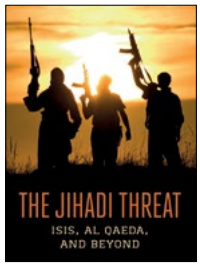
INTERNATIONAL CRISIS GROUP: **Seizing the Moment**
From Early Warning to Early Action
Recent crises, rivalries, and conflicts have shown the shortcomings of preventative diplomacy. Yet, diplomacy can be revived – the authors propose a strategic framework addressing both internal and external dimensions of recent conflicts, based on a thorough analysis of conflict drivers.[8]

MCKINSEY GLOBAL INSTITUTE: **People on the Move**
Global Migration's Impact and Opportunity
Across societies, heated debate around migration shaped the political discourse over the past year. Yet a central fact is largely ignored: as this McKinsey report shows, migration generates significant economic benefits, which can be further increased through better integration of immigrants.[9]



NUCLEAR THREAT INITIATIVE: **Rising Nuclear Dangers**
Steps to Reduce Risks in the Euro-Atlantic Region
Based on a survey of leading security experts, this report proposes several measures to avoid miscalculation and escalation. The authors call on Western and Russian leaders to initiate a dialogue on strategic stability and nuclear risk reduction.[10]

STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE: **Climate-Related Security Risks**
Towards an Integrated Approach
This comprehensive report lays out the far-reaching security implications of climate change. It analyzes both risks in six thematic areas as well as current responses by different policy communities – foreign affairs, defense, environmental, and development.[11]



UNITED STATES INSTITUTE OF PEACE/WILSON CENTER: **The Jihadi Threat**
ISIS, Al-Qaeda, and Beyond
What are the key drivers of jihadism? How will terrorist groups change in the near future? In this volume, 20 leading scholars on the Middle East, Islamic extremism, and jihadism share their assessments of one of the most pressing and complex security challenges of our time.[12]

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Endnotes

Endnotes

Please note that all links were last checked on 24 January 2017. All quotes in British English have been changed to American English.

Post-Truth, Post-West, Post-Order?

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to major equipment; infrastructure expenditures = NATO common infrastructure and national military construction: other expenditures = operations and maintenance expenditures, other R&D expenditures and expenditures not allocated among before-mentioned; investment per soldier = defense equipment expenditures per soldier.

15. Graphic provided to MSC by Center for Security Studies (ETH Zurich). Based on data from German Army and Royal Netherlands Army.
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18. Data provided to MSC by McKinsey. Europe = EDA members, countries with EDA Administrative Arrangements and Denmark. Players in scope = at the given point in time with manufacturing capacity and actively marketing the respective product. License production is included. Joint ventures are not to avoid double counting as in the product categories of the analysis, JV partners maintain own final assembly or product offering. Products in scope = main battle tanks, jet-powered combat aircraft incl. light attack aircraft and bombers, principal surface combatant, i.e., frigates or similarly complex vessels like destroyers.

Turkey: Scoring a Coup

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Issues

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Food for Thought

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Acknowledgments

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Events

Calendar of Events 2017

JANUARY

16	**EU Foreign Affairs Council** – Brussels, Belgium
17-20	**World Economic Forum Annual Meeting** – Davos, Switzerland
20	**MSC Global Security Dinner at the World Economic Forum** – Davos, Switzerland
20	**Inauguration of the 45th US President** – Washington D.C., United States
22	**G20 Agriculture Ministers Meeting** – Berlin, Germany
22-31	**28th African Union Summit** – Addis Ababa, Ethiopia
24-27	**OSCE Conference on Migration Dilemma** – Dushanbe, Tajikistan
25-27	**67th Session of the UN Secretary-General's Advisory Board on Disarmament Matters** – Geneva, Switzerland
26	**G20 Annual Anti-Corruption Conference** – Berlin, Germany

FEBRUARY

3	**EU27 Summit** – Valletta, Malta
5	**Parliamentary Election** – Liechtenstein
6	**EU Foreign Affairs Council** – Brussels, Belgium
12	**Presidential Election** – Turkmenistan
12	**Presidential Election** – Germany
12-14	**World Government Forum** – Dubai, United Arab Emirates
13	**MSC Kick-off** – Berlin, Germany
15-16	**NATO Ministers of Defence Meeting** – Brussels, Belgium
16-17	**G20 Foreign Ministers Meeting** – Bonn, Germany
17-19	**Munich Security Conference 2017** – Munich, Germany
19	**General Elections** – Ecuador
27-24 March	**34th UN Human Rights Council Session** – Geneva, Switzerland

MARCH

6	**EU Foreign Affairs Council** – Brussels, Belgium
7-9	**Arctic Council, Senior Arctic Officials' Meeting** – Juneau, United States
7-10	**84th Session of the Executive Council Organisation for the Prohibition of Chemical Weapons** – The Hague, Netherlands
9-10	**European Council Meeting** – Brussels, Belgium
15	**General Elections** – Netherlands
17-18	**G20 Finance Ministers and Central Bank Governors Meeting** – Baden-Baden, Germany
25	**EU Summit, 60th Anniversary of the Treaty of Rome** – Rome, Italy
27-31	**UN Nuclear Ban Treaty Negotiations (1st Session)** – New York, United States

APRIL

2	**Parliamentary Election** – Armenia
3-21	**UN Disarmament Commission Annual Session** – New York, United States
6	**Parliamentary Election** – Gambia
6-7	**G20 Ministers in Charge of Digitalisation Meeting** – Düsseldorf, Germany
9	**Presidential Election** – Serbia
10-11	**G7 Foreign Ministers Meeting** – Lucca, Italy
22-23	**6th Tana High Level Forum on Security in Africa** – Bahir Dar, Ethiopia
23	**First round of Presidential Elections** – France
25	**MSC European Defence Roundtable** – Valletta, Malta
27	**Parliamentary Election** – Algeria
TBD	**ASEAN Summit** – Manila, Philippines

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MAY

7	**Second round of Presidential Elections** – France
8-9	**World Health Summit Regional Meeting North America** – Montreal, Canada
8-9	**Arctic Broadband Forum** – Fairbanks, United States
9-10	**MSC Core Group Meeting** – Washington D.C., United States
15	**EU Foreign Affairs Council** – Brussels, Belgium
18-19	**G20 Labour Ministers Meeting** – Bad Neuenahr, Germany
19	**Council of Europe, Session of the Committee of Ministers** – Nicosia, Cyprus
19	**Presidential Election** – Iran
19-20	**G20 Health Ministers Meeting** – Berlin, Germany
22-31	**7th World Health Assembly of the WHO** – Geneva, Switzerland
23-24 (TBC)	**OSCE Counter-Terrorism Conference** – Vienna, Austria
25	**OPEC 172nd (Ordinary) Meeting** – Vienna, Austria
26-27	**G7 Summit** – Taormina, Italy
TBD	**OSCE Asian Conference**
TBD	**Parliamentary Election** – Lebanon

JUNE

2-4	**IISS Shangri-La Dialogue Asia Security Summit** – Singapore
5-9	**UN Ocean Conference** – New York, United States
6-23	**35th UN Human Rights Council Session** – Geneva, Switzerland
7-8	**Shanghai Cooperation Organisation Summit** – Astana, Kazakhstan
11/18	**National Assembly Elections** – France
12	**G20 Africa Partnership Conference** – Berlin, Germany
15-7 July	**UN Nuclear Ban Treaty Negotiations (2nd Session)** – New York, United States
18	**Parliamentary Election** – Albania
19	**EU Foreign Affairs Council** – Brussels, Belgium
22-23	**European Council Meeting** – Brussels, Belgium
25-26	**MSC Cyber Security Summit** – Tel Aviv, Israel
28-30	**68th Session of the UN Secretary-General's Advisory Board on Disarmament Matters** – New York, United States
TBD	**UN Security Council Election of Non-Permanent Members for 2018/19** – New York, United States
TBD	**Presidential Election** – Mongolia

JULY

2	**Parliamentary Election** – Senegal
6	**MSC G20 Outreach** – Hamburg, Germany
7-8	**G20 Summit** – Hamburg, Germany
10-19	**UN High-level Political Forum on Sustainable Development** – New York, United States
11-14	**85th Session of the Executive Council Organisation for the Prohibition of Chemical Weapons** – The Hague, Netherlands
29	**Legislative Election** – Gabon
TBD	**Presidential Election** – India

AUGUST

4	**Presidential Election** – Rwanda
8	**Presidential Election** – Kenya
26 (TBC)	**Presidential Election** – Singapore
TBD	**Legislative Election** – Angola

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SEPTEMBER

4-6	7th Meeting of States Parties, The Convention on Cluster Munitions – Geneva, Switzerland
7-9	**MSC Munich Young Leaders Reunion** – Moscow, Russia
11	Parliamentary Election – Norway
12-25	72nd Session of the UN General Assembly – New York, United States
18	UN Private Sector Forum – New York, United States
18-22	61st IAEA General Conference – Vienna, Austria
24	Federal Election – Germany
TBD	BRICS Summit – Xiamen, China
TBD	OSCE Human Dimension Implementation Meetings

OCTOBER

10	General Election – Liberia
10	Presidential Election – Honduras
10-13	86th Session of the Executive Council Organisation for the Prohibition of Chemical Weapons – The Hague, Netherlands
12	**MSC Arctic Security Roundtable** – Reykjavík, Iceland
13-15	Arctic Circle Assembly – Reykjavík, Iceland
13-16	Annual Meetings of the World Bank Group and the International Monetary Fund – Washington D.C., United States
15	**MSC Health Security Roundtable** – Berlin, Germany
15-17	World Health Summit – Berlin, Germany
19-20	European Council Meeting – Brussels, Belgium
29	Legislative Election – Argentina
TBD	19th National Congress of the Communist Party of China – Beijing, China
TBD	Legislative Election – Czech Republic
TBD	Presidential Election – Kyrgyzstan

NOVEMBER

6-17	23rd Session of the Conference of the Parties (COP 23) to the UN Convention on Climate Change – Bonn, Germany
13	19th Annual Conference of the High Contracting Parties to Amended Protocol II to the Convention on Certain Conventional Weapons – Geneva, Switzerland
19	General Election – Chile
TBD	ASEAN Summit – Luzon, Philippines
TBD	East Asia Summit – Luzon, Philippines
TBD	13th ASEM Foreign Ministers' Meeting – Naypyidaw, Myanmar

DECEMBER

3-5	**MSC Munich Strategy Forum** – Elmau, Germany
4-6	3rd Session of the UN Environment Assembly – Nairobi, Kenya
7-8	OSCE Ministerial Council Meeting – Vienna, Austria
14-15	European Council Meeting – Brussels, Belgium

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