



Peace and security in Europe

Report of the Enquete Commission
„Peace and security in Europe - recognizing, containing and countering threats“
by the CDU-CSU parliamentary group in the German Bundestag

January 24, 2025



**Foreword
by the Chairman of the CDU/CSU Parliamentary Group
in the German Bundestag,
Friedrich Merz MdB**

Ladies and Gentlemen,

Peace and security in Europe are under threat not only in the abstract but in concrete terms. Russia has brought back the logic of military conflict into our present time. An axis of autocracies is actively challenging our liberal democracies and thus establishing a new era of systemic competition. All of this poses major challenges for Europe and Germany in restoring peace and maintaining security.

The threats and dangers facing Europe prompted us to set up our own parliamentary group inquiry in June 2024. Renowned academics and members of the CDU/CSU parliamentary group have analyzed the situation in depth and came up with recommendations to overcome these challenges.

This report provides valuable input for our future work and positioning. I would like to thank everyone involved, especially the Chairman, Dr. Norbert Röttgen MdB, and the Deputy Chairman, Thomas Silberhorn MdB.

With best regards

Friedrich Merz
Chairman of the CDU/CSU Parliamentary Group in the German Bundestag



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Report of the Enquete Commission of the parliamentary group “Peace and Security in Europe”

The CDU/CSU Parliamentary Group Enquete Commission on Peace and Security in Europe held four meetings between July and November 2024. During this time, it analyzed the threat situation for German and European security and drew up a comprehensive report based on these meetings. In addition to the permanent members of Enquete Commission, other speakers provided input on specific topics. We would like to take this opportunity to thank them once again for their valuable contributions. The external members of the Enquete Commission speak for themselves and not for their institutions. The report was compiled by the following members:

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War in Europe: What needs to be done to make Europe safe

Europe can look back on more than three decades of peace and security after the Cold War. With the fall of the Berlin Wall in November 1989, the reunification of Germany in October 1990 and the collapse of the Soviet Union in December 1991, an all-out war involving nuclear powers seemed unthinkable.

Germany, Europe and the West as a whole focused on partnership with Russia, the successor state to the Soviet Union. There were still armed conflicts in Europe, which exposed rifts between Russia and the West in the Balkans, but these were seen as a consequence of a bygone era and were limited in time and space. The USA, Europe and Russia cooperated to end these wars in the 1990s.

Even after the terrorist attacks of September 11, 2001, Russia was among the first to offer support to the USA. The war that Moscow waged on the territory of the Russian Federation against the Chechen independence fighters was presented by Russia as a contribution to the fight against international terrorism. Germany and Europe focused on partnership with Russia and attempted to bring Russia ever closer to Europe by deepening relations on an economic and social level.

But with the attack on Georgia in August 2008 and the double attack on Ukraine in 2014, with the occupation and annexation of Crimea and the covert attack on the Donbas, Russia began to deeply shake the European peace order. Despite all the evidence, many in the West hoped that this would merely be a temporary crisis, and that Russia could and should continue to be treated as a partner. A dramatic and momentous political miscalculation.

With the re-election of Donald Trump in the USA, the security dilemma for the Europeans, who have relied on the United States as the most important European security provider since the end of the Second World War, has become much more acute. If Donald Trump stops US military aid for Ukraine, which cannot be ruled out, European security will have to be provided by us Europeans for the first time since the end of the Second World War.

The watershed moment is here – but Germany is falling short of the requirements

With the all-out attack on Ukraine on February 24, 2022, Russia has finally ended this era of rapprochement and made it clear that it wants to fundamentally revise the post-Cold War reorganization of Europe. The war is back in Europe - a brutal war of aggression and conquest against a democracy, with over a million dead and injured on both sides to date and the worst war crimes committed by Russia against the Ukrainian civilian population. The reason for Russia's war: Ukraine wants to make good on its promise of sovereignty and, as part of the West, is striving for membership in the EU and NATO. Putin wants to prevent the associated political and economic success of Ukraine by any means necessary.

The German government responded to the Russian attack by announcing a “Zeitenwende”, a turnaround, in a speech by the Federal Chancellor in the Bundestag on February 27, 2022. Scholz explained that Russia under Putin was endangering Europe's security “for the foreseeable future”. Germany is on the side of Ukraine and therefore “on the right side of history”.

The CDU/CSU parliamentary group gave the Federal Chancellor a standing ovation during his speech in the Bundestag, fully understanding that there is no more important issue for the future

of Europe than the restoration of peace and security. Party-political competition or even disputes pale into insignificance in view of the importance of this issue.

At the same time, the Chancellor emphasized that Germany must invest significantly more in NATO in the face of Russian aggression. The goal is “an efficient, highly modern, advanced Bundeswehr that reliably protects us”. This would cost “a lot of money”, which is why Germany would “from now on invest more than two percent of its gross domestic product” in defense every year.¹

It must be acknowledged that the current German government has done much to ensure that Ukraine can defend itself against the Russian attack. However, it is also clear that the promise of a turning point in German security policy has by no means been fulfilled. Measured against the task that overshadows everything else, namely the restoration of security and peace in Europe, Germany has not done enough to support Ukraine. As a result, Ukraine is in a much worse position today than it could be, and the threat of Russian imperialism, which is by no means aimed solely at Ukraine, continues. It is even increasing in intensity.

The return of Russian imperialism – a long-term threat to Europe

Russia's attack on Ukraine is not a classic conflict over a border or a piece of territory. The Russian president has repeatedly made it clear in his statements that he does not accept that Ukraine is a sovereign state. In an essay entitled “On the historical unity of Russians and Ukrainians”, which he published in July 2021, Putin declared that Russians and Ukrainians are “one people - a single whole”. The West, however, was trying to separate “the parts of a single people” and turn Ukraine against Russia.²

Putin has described the collapse of the Soviet Union as the “greatest geopolitical catastrophe of the 20th century”. He wants to turn back history and bring Ukraine, like Belarus, back under Moscow's direct control.

As Defense Minister Pistorius said in a speech in Lithuania on October 1, 2024: For Russia, “Ukraine is just the beginning”. The aim of Moscow's “imperial aspiration”, according to the defense minister, is to “restore Russian hegemony over large parts of Eastern and Central Europe”.³ Russia is seeking a hegemonic position in Europe, from which it can limit the scope of action of Western European states and ultimately subjugate Europe to its economic and political interests. Putin's role model is obviously the Soviet Union, for which he worked for 14 years, from 1975 to 1989, as a KGB officer, the last four years in the GDR, in Dresden.

Russia's attack on Ukraine is an expression of Russian imperialism, the foundations of which can be traced back to the 18th century. During this period, Russia annexed Ukrainian, Polish and

¹ Government statement by Federal Chancellor Olaf Scholz on February 27, 2022; <https://www.bundesregierung.de/breg-de/aktuelles/regierungserklaerung-von-bundeskanzler-olaf-scholz-am-27-februar-2022-2008356>.

² Vladimir Putin, On the Historical Unity of Russians and Ukrainians, July 12, 2021; <http://www.en.kremlin.ru/events/president/news/66181>.

³ Defence Minister Pistorius speaks in the Lithuanian Parliament, October 1, 2024; <https://www.bmvg.de/en/news/defence-minister-pistorius-speaks-in-the-lithuanian-parliament-5843956>.

Baltic territories and defined zones of influence on the Baltic and Black Seas. In the 19th century, imperial ideologies became effective in Russia, which formulated a fundamental East-West opposition. Today, Russian imperialism extends far beyond Ukraine. Moscow wants to re-subjugate those territories that it controlled either directly or indirectly during the Cold War. Putin is prepared to use enormous resources for these imperialist plans; he is ready to accept a large

number of soldiers being killed and injured.

Other European states with an imperial past overcame these traditions in the course of the 20th century. Countries such as Austria, the United Kingdom, France and the Netherlands have developed from imperial powers into nation states with clear borders. Germany also renounced all imperial traditions after the Second World War with its crimes against



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humanity. Russia, on the other hand, continues to strive to expand its empire in the direction of Ukraine, Moldova, Georgia, but also the Baltic countries and Poland. As many official and semi-official voices in Russia regularly express, it also has its sights set on territories that belong to the EU and NATO. This imperialist self-image, which today once again openly dominates Moscow's political course, threatens the free, peaceful and united Europe that emerged in response to the Second World War and the Cold War. As long as this imperialism lives on in Russia, there can be no peace in Europe. **Instead, a new security architecture must be created that aims to provide security from Russia.**

In the more than two decades of his rule, Putin has done everything in his power to bring Russia back into a position of strength from which it can control and dominate its European neighbors. In the case of Belarus, which has to bow to Russian pressure, it has largely succeeded in doing so. In the Republic of Moldova and Georgia, too, the internal political battle for sovereignty and territorial integrity has been raging for many years. Since the 1990s, Russia has forcibly brought parts of both countries under its rule, destabilized their political systems and thus made rapid accession to the EU or even NATO impossible. It has been less successful in Ukraine. The country has constantly resisted Putin's attempts since the early 2000s to bring the country back under Moscow's control.

Unfortunately, it is unlikely that Russian imperialism will disappear quickly. This mindset is anchored in the country's elite far beyond Putin. At the same time, the Russian state is trying to establish a new, aggressive and militant nationalism through education and propaganda. This

nationalism is closely linked to the war against Ukraine and focuses on celebrating battle and war and portraying sacrifice for the fatherland as a heroic act. It follows that even an end to Putin's rule would by no means automatically lead to a change of course in foreign policy.

From Moscow's point of view, Russian imperialism and revisionism are not only opposed by the desire for freedom of Eastern and East Central Europeans, but also by the role of the USA as the guarantor of the European security order. Ultimately, Putin is aiming to resume the battle with America for supremacy in Europe, which the Soviet Union already waged during the Cold War. This is clear from the two "draft treaties" in which he outlined his ideas of European order shortly before the major attack on Ukraine in December 2021. One letter was addressed to the US government, the other to NATO, which for Putin is nothing more than an instrument of American dominance. Putin called for the US to withdraw militarily from the NATO states that joined the alliance after the end of the Cold War.

From all this follows: **Russian imperialism represents the most important framework condition for German foreign and security policy at present and in the medium term.** It poses the greatest and most immediate threat to security and freedom in Germany and Europe. Understanding this threat and responding to it appropriately must be a clear priority for the next German government. This applies all the more in the event that Donald Trump, as re-elected US President, puts his campaign announcements into practice and does not provide any further US military aid for Ukraine. It is also possible that he will agree to a deal with Vladimir Putin at the expense of Ukraine and thus European security.

Russia has switched to a war economy – Germany lacks urgency

Russia is preparing for a long confrontation not only with Ukraine, but also with Europe as a whole, in which the Russian armed forces will play a central role. For this reason, Moscow has converted the country to a war economy. In 2024, Russia has spent six percent of its gross domestic product on armaments and defense for the first time, exceeding the social budget. A large part of the expenditure will go towards the production of new weapons and the payment of bonuses to the families of wounded and fallen soldiers. A further increase of a quarter is planned for 2025.

Although defense budgets in Europe have increased in recent years, especially since 2014, the increase is far less than that of Russia. Even though NATO is based on the principle of collective defense and therefore not every country has to purchase weapons and ammunition to the same extent as Russia, the direct comparison between Germany and Russia is alarming. In 2021, Germany had 339 main battle tanks; between February 2022 and July 2024, an average of 49 main battle tanks were reordered each year. Russia, on the other hand, only needs a few months to produce the entire stock of German main battle tanks in 2021, i.e. 339 units. Russia produced 123 tanks in the fourth quarter of 2022 and 387 in the second quarter of 2024 – an increase of 215 percent.⁴ Added to this are the weapons that Russia receives from North Korea and the Islamic Republic of Iran. So far, Russia has received 4.8 million pieces of artillery ammunition from North Korea and drones and ballistic missiles from Iran.

⁴ Data according to: Guntram B. Wolff et al., Kriegstüchtig in Jahrzehnten: Europas und Deutschlands langsame Aufrüstung gegenüber Russland, Kiel Institut für Weltwirtschaft, IFW Kiel, September 2024.

Since the beginning of the war in Ukraine, Germany has increased its defense spending and set up a special fund, but has not been able to substantially replenish its stocks of most types of weapons because hardly any more was ordered than had been promised to Ukraine.

The gap between Germany and Russia's military capabilities could widen even further in Russia's favor, according to Guntram B. Wolff and his co-authors in a September 2024 study. European and especially German decision-makers “urgently need to address their inadequate budget commitments, increase the number of units ordered to reduce unit costs, invest in military technology and innovation, and overcome an excessively local industrial policy that comes at the expense of quantity, price and effectiveness”. A long-term European and German armaments strategy is “urgently needed”.⁵

While Russia is preparing for a protracted war or possible expansion by massively expanding its arms production, to which everything else is subordinated, Europe is still poorly positioned in its own defense. This is also due to Germany, which has reached the two percent target for the first time with the inclusion of special assets, but unlike Poland, the Baltic states or the Nordic countries, still does not treat security as a priority.

In view of the Federal Minister of Defense's assessment that Russia will be in a position to attack a NATO country in five to eight years, this is irresponsible. The existing delivery times mean that orders must be placed now and production capacities expanded in order to prepare Europe for such a scenario and influence Russia's calculations.

Only if Germany and Europe develop into serious players in security policy will they be taken seriously in Moscow. Only then can we have a deterrent effect on Russia. The promise of a turnaround must be given far more substance than has been the case to date. This also and especially includes long-term investment in the German and European armed forces.

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In its Minimum Capability Requirements (MCR), NATO considers a total of 131 combat brigades to be necessary to effectively deter Russia, compared to 82 in 2021. NATO also needs far more capabilities in air defense, long-range precision weapons, ammunition, logistics and transport. Germany must provide almost ten percent of the total capabilities, which for the Bundeswehr is likely

to mean five to six additional combat brigades; the Bundeswehr currently has eight brigades. This means not only an enormous material effort, which no federal government will find easy, but also the expansion of the Bundeswehr's personnel strength to up to 270,000 men and women. Both are unavoidable in terms of our alliance capability and thus our security in Europe.⁶

⁵ Ibid.

⁶ Vgl. Nato fordert 49 weitere Kampftruppen-Brigaden, October 6, 2024, Welt; <https://www.welt.de/politik/deutschland/article253847236/Absicherung-gegen-Russland-Nato-fordert-49-weitere-Kampftruppen-Brigaden.html>.

Outcome of the war in Ukraine – three scenarios for the future of European security

Ukraine is the current battleground in the conflict between Russia and the West. Russia has attacked Ukraine, but is also targeting the West as a whole, the European peace order and the transatlantic partnership. How this war ends will have a considerable impact on the future security of Germany and Europe. If Ukraine loses, the threat will increase considerably, and it will become more likely that a triumphant Russia will also attack elsewhere because the West will be seen as weak. If Russia's attack is widely rebuffed, then Russian imperialism is significantly dampened and our deterrence against Russia is strengthened. Between these two scenarios, the most likely option at the moment is the scenario of a ceasefire in Ukraine, in which Russia retains the parts of Ukraine it has conquered. This scenario is by no means synonymous with peace and is accompanied by very far-reaching demands for action from the Europeans.

Russia's success in Ukraine. A success or even partial success of Russia in Ukraine would be a humanitarian catastrophe for the people of Ukraine. But such a scenario would also have massive economic and social consequences for Germany and Europe. Millions more refugees would stream into the EU from Ukraine, driven by fear of oppression, as is known from the Russian-occupied territories, and massacres such as those already committed by Russia in Ukraine – for example in Butcha and Irpin. Such a mass influx would clearly overburden all affected European states and societies, and at the same time it would be morally imperative not to abandon these people.

In addition, Russian imperialism, for which the war in Ukraine is a test case, would be considerably strengthened. The Russian leadership would come to the conclusion that it had done everything right and would in all likelihood continue on the path of Russia's imperialist renewal, with even greater intensity. This means deepening the break with the West and continuing to build an alternative network of autocratic states in Eurasia, especially with China, North Korea and the Islamic Republic of Iran.

Russia's willingness to take risks would also increase significantly. The attack on Ukraine in February 2022, despite many warnings from Washington, Paris and Berlin, was a high risk. If Russia were to triumph in Ukraine, this risk would be rewarded. Moscow would draw the conclusion that confrontation with the West is worthwhile.

And last but not least, China would learn its lessons from the Russian experience: that frontal attacks in the neighborhood pay off because the West is too weak and disunited to defend the existing order. The likelihood of China taking even tougher action against the Philippines in the South China Sea and against Japan in the East China Sea would increase considerably. At the same time, Beijing's calculations with regard to Taiwan would change. The military conquest of Taiwan would become increasingly likely. One would assume that America would be unwilling to use its power to preserve the international order at the decisive moments.

Ukraine prevails against Russia. A success for Ukraine, on the other hand, i.e. a scenario in which Ukraine essentially asserts itself against Russia, would lead to a weakening of Russia and its imperialist ambitions as well as a strengthening of the international order.

If Ukraine were safe again, most of the refugees could return and the depopulation of the country that has taken place in recent years would be reversed. With Western help, Ukraine could get back on its feet economically and become a prosperous country in the medium and long term,

similar to Poland. The patriotism in Ukraine, strengthened by the Russian attack, would be further strengthened by the successful defense of the country and could drive the reform process, both economically and politically. The path to the EU and NATO would irrevocably make Ukraine an integral part of the West. At the same time, Russian imperialism would be considerably weakened. The imperial narrative of Russia as a returning great power that puts a declining, decadent West in its place and extends its dominance to Eastern and East-Central Europe would no longer be tenable. The opportunity for liberal forces to put Russia on a different path would gain new momentum.

If Ukraine were to successfully assert itself against Russia, this would encourage the entire region to also oppose the renewed Russian imperialism. The region, from Eastern Europe to the South Caucasus and Central Asia, where Kazakhstan in particular fears for its independence, is watching this struggle with great interest. Many fear Russia's imperial ambitions and its continuing ability to exert military and economic pressure.

A victory for Ukraine would strengthen those forces in Russia's neighboring countries that insist on greater independence and the political implementation of the promise of legal sovereignty made in 1991. Russia's ability to influence and destabilize countries such as Georgia and Moldova would be reduced. And the prospects for Belarus could also brighten, with considerably better opportunities for the liberal and democratic opposition in the medium and long term.

However, in view of the current developments on the front, which are characterized by a slow but steady advance of Russian troops, this scenario must be classified as unlikely at present.

Ceasefire. As a consequence of an ongoing war or a deal between Donald Trump and Putin, there could be a ceasefire in Ukraine in which Russia retains the conquered parts of Ukraine. This would be a partial victory for Putin, which would be accompanied by some of the negative consequences of Putin's success in Ukraine described above. In view of the Russian atrocities in the occupied territories, people would flee, and Russian imperialism would be strengthened for the time being.

The unoccupied remainder of Ukraine would have to be kept alive by Germany and Europe with the help of enormous transfer payments, because such an area could not survive economically on its own. The fear of renewed Russian aggression would make private-sector investment considerably more difficult.

In order to prevent a renewed attack by Russia, a ceasefire would have to be combined with credible security guarantees for Ukraine that act as a deterrent to Russia, which would have to be clearly formulated, implemented on the ground and monitored. The costs for Europe and NATO would far exceed the costs of the current support for Ukraine.

Where Russia could still attack – beyond Ukraine

As the Russian leadership has repeatedly made clear, it is not just about conquering, subjugating and integrating Ukraine. Russia's ambition is to bring large parts of Eastern and East-Central Europe back under Moscow's control. At the same time, Russia wants to become the leading power in Europe, which presupposes that the USA largely withdraws from Europe and that the Europeans are or remain weak.

As Russia gains the upper hand in Ukraine, it will presumably turn its attention to other countries and regions. Moscow's assumption that the West is weak and incapable of any real resistance would be confirmed. This would also apply to the assumption that the rules-based order, based on the UN Charter, has lost its validity, as has the European peace order, which dates back to the CSCE Final Act of 1975 and was agreed with the Soviet Union. Essentially, this stipulated that all actions against the territorial integrity or political independence of a state must be refrained from.

Not only Moldova, but also Georgia and the entire Caucasus would be highly alarmed by a Russian triumph. The countries between NATO and Russia would be directly threatened. It can be assumed that Russia would test the West's willingness and readiness to protect these countries from attacks in its usual manner and in a variety of ways. But the probability of a direct attack on NATO would also increase.

The scenario of an incident on the border between Russia and the Baltic states, Poland or even Romania, which Russia would use to intervene on NATO territory directly or under the cover of aid for "separatists" or ethnic Russians, would become much more likely. In the area of NATO territories, an attack on one of the three Baltic countries is currently seen as the most plausible scenario, partly because their territories are considered particularly difficult to defend. In order to maintain a credible deterrent, NATO would have to invest massively in the defense of its eastern flank following Putin's success in Ukraine. Here too, the financial resources required would far exceed the expenditure to support Ukraine.

An attack on NATO would be risky from Russia's point of view, but would also bring enormous opportunities. If Russia were to cross the border of a NATO country without massive resistance, this would mean the end of NATO as a community of solidarity and defense, which is essentially based on trust. The credibility of NATO's promise of protection would be severely undermined. This would remove a decisive obstacle to Russian territorial expansion.

A new security order for Europe – protection against Russian aggression

With its annexation of Crimea, Russia had already called into question the European peace order that was established after the Cold War. With the Russian large-scale attack on Ukraine in February 2022, it has now broken it. As long as Russia remains revisionist, relies on imperialism and supremacy and does not rule out war as a means, Europe must build a security order that protects and secures Europe against Russia's imperialism. This order must be based on deterrence and defense and, in particular, ensure the long-term security of Ukraine.

Long-term security for Ukraine – what needs to be done

The outcome of the war in Ukraine will have a decisive influence on Russia's future development and will shape the future European security order. Germany and Europe must therefore do everything in their power to put Ukraine in as advantageous a position as possible. In the short term, this means supporting Ukraine in such a way that it manages to halt the Russian advance and turn the momentum again.

If there are negotiations about a ceasefire, Ukraine must be in a position of strength. At present, there is every indication that Russia will only want to negotiate if it sees that it can no longer win

anything militarily in this conflict. Anyone who wants ceasefire negotiations must therefore not let up in their military and economic support for Ukraine.

However, Ukraine's military self-assertion is only the first step. It is crucial to ensure that Russia will not attack Ukraine again. Ukraine can only be economically, socially and politically successful if it is safe from Russia. A ceasefire must therefore be supported by robust security guarantees for Ukraine, because Moscow's imperial impulse will not simply disappear. What's more, Putin has lost all confidence that he will stick to his contractual obligations.

Joining NATO. In a post-war scenario, the most effective and also most cost-effective way to ensure Ukraine's lasting security is NATO membership, which would have the greatest deterrent effect against Russia. One of the central security policy tasks of the next German government must therefore be to take the political lead on this issue in order to pave the way for Ukraine to join NATO after the war. Once Ukraine is a member, this will also contribute significantly to calming the situation in Central and Eastern Europe. Once Russia has understood that the reorganization of the region after the collapse of the Soviet Union is permanent, backed by a firm Western consensus and underpinned by military capabilities, this will considerably dampen Moscow's revisionist zeal. The clear prospect of NATO membership would also bind Ukraine firmly to its European neighbors and facilitate the considerably more costly accession process to the EU through the military assurance of democracy and a market economy.

The greatest risk in this scenario would be a possible decision by U.S. President Donald Trump to lead the USA out of NATO or to deliberately raise doubts about the guarantee of support. The best strategy to minimize this risk and keep the US in NATO is for Europe to make a much greater contribution to transatlantic burden-sharing. If necessary, we must be in a position to compensate for American arms aid to Ukraine. This will not happen overnight and would, at least initially, require us to buy weapons for Ukraine on the international market. Even if the USA were to stop supplying Ukraine itself, it can be assumed that Trump would sell the Europeans weapons to remain in Ukraine. In order to avoid having to rely on this in the medium term, production capacities in Europe must be ramped up and expanded accordingly. There is no more time to lose here.

Mutual assistance treaties. The alternative to joining NATO is the much more difficult and, due to the lower deterrent effect, more costly path of continued military support via bilateral or multilateral assistance treaties. For these to be credible and to monitor a ceasefire, the parties to the treaty would have to station troops in Ukraine and enforce a no-fly zone over the non-occupied areas of Ukraine. In any case, Ukraine would need concrete support from Europe in the further development of its armed forces. This is especially true for the period after a possible ceasefire, when the security situation in Ukraine needs to be stabilized in the long term. Even a ceasefire therefore implies not less, but just as strong, if not stronger, military and economic support for Ukraine from the West. Europe would have to play the main role here.

Better positioning of the Bundeswehr and European defense – investing in deterrence

The epochal disruption signaled by Russia's full-scale attack on Ukraine in February 2022 makes it necessary for Germany and Europe to establish a credible military position in a completely different way than before. To deter Russia and thus prevent further wars, a considerable

investment in the common European defense capability and the Bundeswehr is necessary to enable us to meet the new challenges. Germany must move much more strongly than before from being a recipient of security to a provider of security and thus be a role model in Europe. One example of this development is the stationing of a German brigade in Lithuania.

The reorganization of the Bundeswehr is currently progressing far too slowly. At the current pace, it would take decades before Germany is able to fulfill its task of restoring alliance and national defense. If the Defense Minister's statement that Russia will be in a position to attack NATO in five to eight years is correct, then that is the timeframe Germany and Europe have left to build a credible deterrent capability.

Europe has the financial and industrial capabilities to provide a credible deterrent to Russian armament efforts. However, it is not currently making full use of these possibilities.

Even though the European arms industry has already expanded production, it has far greater potential that is currently not being exploited. So far, companies have mainly built up capacities at their own risk, as the example of Rheinmetall shows, which has increased its artillery ammunition capacities from 70,000 (2021) to one million rounds (2025).

Defense industry capacities could be increased rapidly if companies were given long-term financial predictability by political leaders. As it is foreseeable that Russia will continue to pose a threat to Europe in the coming years, and as investments must be made in the development of the Ukrainian armed forces in any case, it is imperative that politicians create planning security through purchase guarantees.

At the same time, further obstacles must be removed to enable the necessary military capacities to be produced as quickly as possible. Arms companies should therefore urgently be allowed to produce weapons in stock, which is currently not possible. In supply chains, dependencies on China in particular must be reduced and reporting obligations for companies must be designed in such a way that they do not allow the identification of weak points in the supply chain. Approval procedures for the construction of new facilities and the recruitment of personnel can and must be accelerated.

The development of a broad-based European defense industry relates to innovation, which could also stimulate growth in the German economy. There is great potential, particularly in the field of drones and artificial intelligence, which has not yet been fully exploited.

In addition, European armaments cooperation must be driven forward in order to achieve a joint European and Western deterrent capability against Russia as efficiently and quickly as possible. This requires more joint European procurement and greater concertation in research and development at European level. On the German side, this requires a relaxation of the extremely strict German export restrictions. European armaments cooperation is attractive for companies if they also take the lead in cooperation projects in areas in which they are leaders, such as Germany in submarines. At the same time, this prevents competition for export markets within Europe.

Germany must assume a leadership role – in the interest of Europe

Germany is already playing a central role in providing financial and military support to Ukraine. In future, it must also take on a political leadership role and help to make Europe safe again. It is

in Germany's fundamental security interests to prevent Russia from shifting borders as it sees fit and attacking peaceful neighbors in order to appropriate their territory, as was common practice in earlier eras. We cannot allow the east of the continent to be imperially divided up and reorganized according to Moscow's will, and for the might of the strongest to once again become the prevailing norm in Europe.

Due to its economic strength, its central geographical location and its reputation as a reliable partner, which has been built up over decades but has lost some of its prestige among Central and Eastern European countries in recent years, Germany has the potential to take on a leadership role like no other European country. This also gives rise to an obligation of responsibility: our eastern and northern neighbors in particular expect Germany to assume a leadership role that is coordinated with them. For many years, Washington has also expected Germany to play a major role in shaping the transatlantic relationship as a "partner in leadership". In their common interest, Germany and Europe must do everything in their power to ensure that the new US administration of Donald Trump brings transatlantic relations to life. More than ever, this will require us Europeans to make our contribution – and rightly so! This means nothing less than that European security must be provided by Europe.

Germany's political leadership role is indispensable for Europe and the cohesion of the West. Germany has the task of countering Russian aggression with a new awareness of the freedom and cohesion of the European community of states and of creating Europe as a security policy actor.

Leadership with partners. Of course, it is not a question of imposing something on others. A German leadership role with a democratic character can only consist of developing a political will together with partners in Europe and taking a leading role in its implementation. France and Poland, in particular, but also the Baltic and Scandinavian neighbors, would be ideal candidates for this. The now deeply fractured Franco-German relationship stands in the way of this. German-Polish relations are also strained. Reviving these relations will be an important task for the next German government. The "Weimar Triangle" offers the opportunity to form a vanguard (always open to all) in order to jointly and strategically build security for Europe in an era in which Russia is threatening European security. The United Kingdom should also be closely involved in this process, for example in the form of a contact group that works on proposals for the future order of Europe after the war in Ukraine.

Bringing East and West together. Germany has a key role to play in Europe: it must offer its eastern and northern partners support and reassurance as a reliable partner that understands their threat perception and their security interests. At the same time, it must promote such a policy among its Western partners, some of whose security perceptions are different, in order to create as much European coherence as possible. A central task here is close coordination with the EU institutions in Brussels. And the involvement of the United Kingdom, which plays an important role in the defense of northern and north-eastern Europe in particular and remains a global power, as a nuclear power with a seat on the UN Security Council, is of great importance.

Organizing European support for Ukraine. It is not a question of Germany organizing support for Ukraine on its own. Rather, our task is to launch initiatives and improve cooperation within the EU. Without such leadership, Europe is at risk of remaining stuck in paralysis. Germany is all the more convincing in its role as initiator the more it is prepared to share the costs associated with such initiatives and strategies, to lead the way itself and to become fully involved. At the moment, it is primarily the large EU member states that are not doing enough for Ukraine. The Nordic countries (Denmark 1.721%, Finland 0.793%, Sweden 0.663%), the Baltic states (Estonia

1.482%, Lithuania 1.198%, Latvia 1.187%) and Poland (0.475%) are the frontrunners, measured against their economic power. In contrast, the large EU member states are lagging behind: Germany (0.259%), France (0.110%), Spain (0.041%) and Italy (0.068%).⁷ This gap must be reduced. Germany should lead the way by providing more support itself and at the same time increasing the pressure on the other large member states.

We need new leadership constellations in Europe to bring together states that are ready and willing to work together to solve concrete problems, as has been done, for example, within the framework of the F-16 coalition and the Czech munitions initiative. Such initiatives should of course always be open to all.

Deterrence against Russia. Russia's imperialist aggression is not only aimed at Ukraine, but also at the European security order. Putin's ultimate aim is to drive the USA out of Europe and to continue to expand the space that Russia controls. To counteract this, Europe must organize the credible deterrence of Russia in Europe. This is the only way to prevent another war in Europe. In concrete terms, this means significantly strengthening our conventional military capabilities. Europe will remain dependent on the USA for nuclear deterrence for a long time to come. As Europeans, we must therefore do nothing on our own initiative to call into question the American nuclear umbrella for Europe and nuclear sharing. Building up Europe's own nuclear capacity would take decades, would involve enormous financial investment that would be lacking elsewhere for conventional deterrence, and would require complicated legal and political coordination.

Keeping the West together. A united West is capable of repelling Russian imperialism and restoring security in Europe. Taken together, the West is far superior to Russia financially and militarily. Russia's aim is therefore to weaken the cohesion of the West, to divide and conquer. Contrary to Russian expectations, this has not yet succeeded. On the opposite: the cohesion and decisive action of the West have proven to be our greatest strength and have created the conditions for Ukraine to resist Russian aggression to this day. However, the cohesion of the West is at risk and by no means secure. With Donald Trump, a U.S. president has been elected who does not regard Europe's security as an original interest of the USA, but rather as a matter for Europeans. But even if the outcome of the election had been different, the USA would have increasingly turned its attention to China as the USA's geopolitical adversary. The Europeans' contribution must therefore increase in any case. There is also considerable potential for turbulence in Europe itself. If Eurosceptic forces come to power in France, joint work on strengthening European defense will also be at risk. **The cohesion of the West is of fundamental importance for European security and must therefore be a central goal of German and European foreign policy.** Germany must play a decisive role in organizing this cohesion, in Europe and vis-à-vis its transatlantic partners and other like-minded partners.

⁷ Data based on the Ukraine Support Tracker, IfW Kiel; <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>.

China's quest for dominance: How Germany can maintain its freedom to act

After Russia's major attack on Ukraine in February 2022, it became very clear that we are in a new era in which economic interdependence is increasingly being used as a weapon. Not only Russia, but also the major Asian autocracy, China, is separating the spheres of business and politics less and less and is systematically expanding and exploiting economic dependencies in order to achieve power-political goals – namely to assert its claims to hegemony in Asia and global domination. Germany must therefore not only review its economic dependencies on China, but also reduce them in the event of vulnerabilities to remain capable of acting freely in the political and military sphere, especially in the event of future crises and conflicts.

Dependence on China is problematic in several respects. Firstly, because the scenario of a hard decoupling has moved into the realm of possibility. This could be the case if China were to initiate a military conflict in the Indo-Pacific. In this case, it is likely that economic exchange with China would be abruptly and significantly impaired. In this scenario, there would also be trade barriers with the attacked Taiwan and other partners in Asia. However, such a scenario would also be costly for China.

Secondly, dependencies on China are problematic because the Chinese regime is increasingly able and willing to use them to exert pressure in order to achieve economic and political goals. This threatens Germany's and Europe's ability to act. The considerable importance of China for some German companies and critical dependencies in individual economic and technological areas make us vulnerable to blackmail. There is a risk of contagion for the entire German economy.

The more the rivalry between the USA and China intensifies, the more Europe, and Germany in particular, runs the risk of being caught between the two fronts. Our economic interests are not always congruent with those of the USA. In order to avoid becoming a pawn in this conflict, it is necessary to reduce dependencies independently according to our own ideas and not only in response to American pressure.

It is in our security and economic interests to reduce Germany's dependence on China and to shape the economic relationship in such a way that there is no potential for blackmail on the Chinese side.

China wants a world order according to its interests

China has changed its strategy in recent years. It is no longer about modernization, about “reform and opening up”, as the motto was for several decades, but about becoming the world's leading superpower. The President of the EU Commission put it aptly in her much-noticed China speech at the Mercator Institute for China Studies (MERICS): China is to become the most powerful country in the world according to the will of its President Xi Jinping. At the same time, China is striving for a “systemic change in the world order with China at its center”.⁸ The target date for

⁸ Speech by President von der Leyen on EU-China relations to the Mercator Institute for China Studies and the European Policy Centre, March 30, 2023; https://ec.europa.eu/commission/presscorner/detail/%E2%80%8C/speech_23_2063.

this is 2049, the hundredth anniversary of the “People's Republic of China”, which describes itself as communist.⁹

After decades of integration into the international order, Beijing is now turning ever more aggressively against this order. As the CDU/CSU parliamentary group's position paper from April 2023 states, China wants to “create a world order that is more Sinocentric and hierarchical and that is intended to give greater international recognition to authoritarian principles and values”.¹⁰ This does not mean that China rejects all elements of the existing system – in some areas, Beijing believes it can at least partially achieve its goals within the framework of existing institutions. However, China's assurances that it supports the rules-based international order are contradicted by its behavior in three areas in particular:

Support for Russia's war of aggression against Ukraine. Instead of distancing itself from Russia or exerting pressure to respect the territorial integrity and sovereignty of Ukraine, China has clearly sided with Moscow. Shortly before the Russian attack, China and Russia issued a joint statement criticizing NATO and pledging “mutual support for their core interests”. In April 2024, US Secretary of State Antony Blinken stated that Russia “would struggle” to continue the war against Ukraine without China's support; it keeps Russia's war going by supplying dual-use goods that are vital to the Russian defense industry.¹¹ In July, NATO described China as a “decisive enabler” of the Russian war of aggression and called on the People's Republic to “end its material and political support for Russia's war effort”, to which the Chinese side did not respond.¹² The USA is explicitly accusing China of developing and producing drones for Russia's war in Ukraine. To this end, they are working together with Russian arms companies. As a result, Chinese companies have been sanctioned by the USA.

Growing aggression towards Taiwan, the Philippines and Japan. For decades, China has accepted the territorial status quo in relation to Taiwan in the South China Sea and East China Sea while formally maintaining the one-China policy. It did not try to enforce its territorial claims in the South China Sea and East China Sea by applying pressure. This was also due to the status of the USA as the protector and guarantor of this status quo. That has changed. Xi Jinping has repeatedly made it clear that the integration of Taiwan, by force if necessary, is a central part of his agenda. This claim is being reinforced by increasingly aggressive military maneuvers. The aim is to intimidate Taiwan and its allies as much as possible in order to prevent them from coming to Taiwan's aid in the event of a conflict. At the same time, Beijing is taking an increasingly tough stance towards Japan in territorial disputes in the East China Sea. For years, China has been pursuing a strategy of creeping annexation in the South China Sea, where the claims and rights of the Philippines in particular, an ally of the USA, are being ignored, even though the arbitration tribunal in The Hague ruled in 2016 that China's claims are not legitimate.

⁹ Ibid.

¹⁰ Souveränität aus eigener Stärke – Eckpfeiler einer neuen China-Politik. Position paper of the CDU/CSU parliamentary group in the German Bundestag, resolution of April 18, 2023; <https://www.cducusu.de/sites/default/files/2023-04/PP%20Eckpfeiler%20China-Politik%20neu.pdf>.

¹¹ Secretary Antony J. Blinken at a Press Availability, 26.4.2024; <https://china.usembassy-china.org.cn/secretary-antony-j-blinken-at-a-press-availability-12/>.

¹² Washington Summit Declaration issued by the NATO Heads of State and Government participating in the meeting of the North Atlantic Council in Washington, D.C. July 10, 2024; https://www.nato.int/cps/en/natohq/official_texts_227678.htm.

Massive armament and preparations for war. In July 2021, Xi Jinping declared in a speech to mark the centenary of the Communist Party that whoever wanted to “bully, oppress or subjugate” China would find themselves on a collision course with “a great wall of steel”.¹³ According to some American calculations, China has already overtaken the USA in terms of military capacity in the western Pacific. The balance of power could shift even further towards China in the coming years. Beijing invests over 700 billion US dollars a year in building up its armed forces, and this figure is set to rise.¹⁴ As a result, China has also become an almost equal competitor to America in military terms. At the same time, China is investing massively in its nuclear capabilities. China currently has over 500 operational nuclear warheads, a number that is expected to double by 2030 and triple by 2035; with 1,500 warheads, China would then be on a par with the USA. China has just successfully tested an intercontinental ballistic missile over the Pacific. The last time such a test took place was in 1980. China has an increasing global presence with port visits by its fleet and military maneuvers. Among other things, it holds military exercises with Russia and Belarus. Overall, China is arming itself at a volume and speed that puts it in a position to wage a major war.

Hard decoupling – the risk of geopolitical escalation

China's increasingly aggressive, revisionist course under Xi Jinping increases the risk of a clash. Almost daily, there are aggressive acts by Chinese ships against the Philippines' attempts to secure their territorial claims against advancing Chinese superiority. China's neighbors feel increasingly threatened and see Russia's attack on Ukraine as a blueprint for East Asia – especially with regard to Taiwan. This is where the risk of escalation to the point of open warfare is highest.

For the USA and neighboring states in the region, especially Japan, however, an annexation of Taiwan would be unacceptable. Just as Russia is already trying to do in Europe, China would thus establish war of aggression and conquest as a method of achieving its political goals in the Indo-Pacific as well.

The scenario of a war over Taiwan has been in the public debate for some years now. There are various possible scenarios, ranging from a blockade to a rapid, fact-creating military invasion. Whatever a concrete scenario would look like, an abrupt break in economic relations between the EU and China as a result of Western sanctions and Chinese counter-sanctions would be highly likely. Both sides would lose considerably in such a scenario.

German industry would be severely affected by a hard decoupling. The Bundesbank estimates that the overall economic losses would be significantly higher than the costs of a far-reaching decoupling from Russia¹⁵:

¹³ Speech by Xi Jinping at a ceremony marking the centenary of the CPC, Xinhua, July 1, 2021; http://www.xinhuanet.com/english/special/2021-07/01/c_1310038244.htm.

¹⁴ Robertson, Peter and Wilson Beaver: China's Defense Budget Is Much Bigger Than It Looks, Foreign Policy, September 19, 2023, <https://foreignpolicy.com/2023/09/19/china-defense-budget-military-weapons-purchasing-power/>.

¹⁵ Wirtschaftliche Risiken für Deutschland aus der Verflechtung mit China; January 24, 2024. <https://www.bundesbank.de/de/aufgaben/themen/wirtschaftliche-risiken-fuer-deutschland-aus-der-verflechtung-mit-china-922432>.

- Companies active in China could lose a substantial part of their sales and profit base. Only seven percent of total German goods exports went to China in 2022. However, some sectors that are strategically important for the German economy, such as the automotive sector, mechanical engineering, chemicals, electronics and electrical engineering, are much more dependent on Chinese demand.
- The number of companies that depend directly or indirectly on critical intermediate goods such as rechargeable batteries and batteries, as well as some raw materials such as rare earths from China, is far greater. Missing deliveries could lead to considerable production losses in Germany. According to a representative survey by the Bundesbank, almost one in two companies in the manufacturing sector directly or indirectly purchased critical intermediate goods from China.
- In addition, there would be spillover effects that could trigger similar problems in the economies of other countries. This, in turn, could have a negative impact on other economic sectors in Germany due to the associated increased macroeconomic uncertainty.
- The close ties between Germany and China in the real economy also pose considerable risks for the German financial system. German banks have high exposures to domestic companies and sectors that are heavily dependent on China. A far-reaching disruption to German-Chinese economic relations would have a significant impact on these and increase the probability of loan defaults. In addition, the German financial system would probably be further impacted by a general loss of confidence on the global financial markets, among other things.

In the event of a massive blockade or invasion of Taiwan by China, the absence of chips from Taiwan would also be a consequence. During the coronavirus pandemic, when supply difficulties arose, it became clear how dependent Germany is on chips from Taiwan, especially in the automotive industry. Taiwan dominates the global market, especially for high-end chips.

Another study concludes that a complete breakdown in trade relations with China would have serious, but not catastrophic, effects on the German economy. The welfare loss for Germany would amount to around five percent of gross national income in the first few months and fall to around four percent over the course of the first year, in addition to further short-term costs due to economic amplification effects. In the medium to long term, the costs would fall to a permanent loss of prosperity of one to two percent.¹⁶ However, even the associated loss of prosperity would be difficult to cope with politically.

The consequential costs of such a hard decoupling would hit German industry very unequally. Large car manufacturers, which are already weakened by growing Chinese competition in the field of electromobility, could be hit so hard that they would have to fight for their survival. This in turn would result in massive political costs that are difficult to quantify.

Germany therefore has a double interest in ensuring that there is no military conflict over Taiwan. On the one hand, it is about preventing war as such. On the other hand, to avoid a hard decoupling from China. Deterrence is essential to prevent China from achieving its goal of annexing Taiwan. In military terms, Europe hardly plays a role in the region. Europe's contribution

¹⁶ Was wäre wenn? Die Auswirkungen einer harten Abkopplung von China auf die deutsche Wirtschaft, Kiel Policy Brief, Januar 2024; <https://www.ifw-kiel.de/de/publikationen/was-waere-wenn-die-auswirkungen-einer-harten-abkopplung-von-china-auf-die-deutsche-wirtschaft-32325/>.

to deterrence therefore consists, firstly, in demonstrating to China that it does not recognize its privileged, unilaterally proclaimed claims to supremacy in the region and, accordingly, repeatedly claims rights of passage for naval vessels. Secondly, we Europeans must make it clear to the Chinese leadership through all diplomatic channels that it would be economically catastrophic for China itself if an attack on Taiwan were to lead to a severe disengagement. China's international economic ties are too strong for that. For these diplomatic efforts to be successful, Germany and Europe must credibly demonstrate to China that we would be prepared to implement sanctions against China in an emergency. For Germany, this means above all that we have to put ourselves in a position in which we are able to cope with the expected Chinese counter-sanctions. This is currently not the case for parts of the German economy, which reduces our contribution to deterring China.

Dependence on China – why our ability to act is under threat

The costs of a hard decoupling are difficult to calculate precisely as a war between the U.S. and China over Taiwan would have massive impact on the global economy, which is intertwined in many ways. In any case, these costs would be considerable, especially for a number of companies that are heavily involved in China through exports to and production in China. Added to this would be the disruptive impact on the supply chains of German and European companies.

But even if it does not come to a catastrophic scenario of a military conflict, economic dependence on China harbors many problems and risks.

The close economic ties were forged on the premise of virtually unrestricted globalization, in which states would become ever more closely linked economically, socially and politically, which would banish war and conflict forever, at least between large states. The expectation was that China would gradually liberalize and orient itself more and more towards cooperation.

This premise has proven to be wrong. In the last decade, China has developed very clearly in the direction of a hard, even partially totalitarian autocracy. Society and the economy are being controlled and managed more and more comprehensively. At the same time, mistrust of democracy and the West has increased considerably. In the eyes of the rulers in Beijing, the West is an opponent that needs to be weakened and infiltrated because it stands in the way of their own power.

Under Xi, the power apparatus in China has been re-ideologized, considerably streamlined and completely oriented towards the top. At the same time, areas of the economy that have been liberalized since the 1970s and increasingly in the 1990s are once again increasingly subject to state control, with a central role for public enterprises.

Economic policy is less and less geared towards maximizing profits but is subordinated to political goals that are defined by Xi in terms of power politics. The aim is to achieve a high degree of self-sufficiency, for China to become independent of foreign countries, and at the same time to become an industrial leader in future technologies, which will enable Xi to create new dependencies on China. The policy of "dual circulation" is based on the assumption that there should be two economic cycles: firstly, a self-sufficient sector within China itself, largely independent of foreign countries, and secondly, an external cycle that enables China to benefit from the global economy and exert global influence. It is unclear whether and when China will

be able to fully implement this strategy. However, it is clear that the ambition exists, and that Beijing has been investing heavily for years to make it a reality.

China is working strategically and with a long-term perspective. The aim is to be the world's leading political, economic and technological power by the centenary of the Communist Party's assumption of power in 2049. The party leadership is not only focusing on expanding its own research but is also working on acquiring know-how and technology from other countries: by taking over companies abroad, by establishing companies in China that have to share knowledge and technology with Chinese partners, and through espionage. In the “Made in China 2025” industrial strategy, Beijing has identified ten strategically relevant technology areas in which it wants to lead globally, including green transformation, mobility, industrial production and telecommunications.

Parts of the German economy have been heavily involved in China in recent decades. As a result, Germany as a whole has become dependent on China, which could become a problem not only in the event of an abrupt, severe decoupling. Even under normal circumstances of power-political competition, China could use these dependencies to try to force Germany to behave according to its will, both economically and geopolitically. The more dependent Germany is, the greater China's scope for exerting political influence. This applies firstly to China as a sales market and production location for German companies, secondly to China's role as a supplier of important raw materials, and thirdly to China's access to critical infrastructure in Germany in particular through the production of components (e.g. 5G).

Massively invested – China as a sales market and production location

In recent decades, numerous German companies have focused on China as a sales market and increasingly also as a production location. With government support, companies in the automotive, mechanical engineering and chemical industries in particular have tapped into the Chinese market. Some have focused their growth strategy entirely on China. Volkswagen, for example, has generated 40 percent or more of its corporate profits in China over the years. However, unlike with its combustion models, the company is having major problems competing in the Chinese market for electric cars, which are increasingly replacing the combustion engine there.

China is gaining in importance as a production location, but also as a location for research and development. This creates an additional path dependency that makes it difficult for companies looking for top personnel, for example in the engineering sector, to leave the location. The presence in China enables German companies to participate in the innovation process in the country and to be close to consumers in China. However, this is also associated with considerable constraints. China obliges companies to localize production and share their know-how and technology with Chinese partner companies.

The massive involvement of large German companies in China makes them vulnerable to political pressure. In addition to giving away knowledge and technology, the Chinese side may also try to influence German China policy via these companies in order to prevent a robust German and European China policy from being established.

Growing dependence – China as a supplier and producer

The hard decoupling from Russian energy has demonstrated the geopolitical risks that close ties with the economies of large, aggressive autocracies can lead to. In the case of dependence on China, the consequences would be many times more serious. The German government's China strategy of July 2023 therefore already stated that it was a priority for Germany "to reduce such risks quickly and at a cost that is justifiable for the German economy, especially if they relate to products that are essential for health, the energy transition or technological innovation".¹⁷ With regard to China, there are "dependencies in numerous areas", such as metals and rare earths, lithium batteries and photovoltaics, as well as active pharmaceutical ingredients.

China plays an important role in the supply chains of the energy and transportation transition and is striving to become the market leader in green technology: China produces 70 percent of the world's solar panels and half of its wind turbines and electric cars; it is also the world's largest producer of batteries and hydrogen from fossil sources. To put itself in a dominant position, the Chinese regime uses unfair methods such as massive subsidies and unwanted technology transfers. This increases dependencies and forces suppliers in the EU out of the market.

Dependence on China is particularly problematic in the raw materials sector. China uses raw materials geostrategically: it is tapping into global deposits of raw materials and intensifying processing and refining at home. In recent years and decades, it has thus become the dominant player in many commodity markets. The EU has become dependent on Chinese raw materials in many cases, which is also due to its own sluggishness in the development and mining of raw materials in the EU: for example, the dependency is 97% for magnesium, 88% for germanium, 85% for gallium, 79% for synthetic graphite and 76% for rare earths and metals.

However, Germany is dependent on a secure supply of raw materials for its industrial production. Raw materials imported from China are particularly important for electric motors, wind turbines, photovoltaic technologies, robotics, digital technologies, drones, 3D printing, lithium-ion batteries, fuel cells and hydrogen technologies. According to a study by the Kiel Institute for the World Economy, China dominates individual raw materials and products, particularly in the electronics sector, and could not be replaced as a supplier in the short term.¹⁸

In recent years, Germany's dependence on many raw materials has even increased, as the BDI found in a study.¹⁹ Chinese exports of rare earths accounted for 32% of German imports in 2014, rising to 69% in 2023. The share of Chinese germanium imports rose from 23% in 2014 to 40% in 2023. If, for example, lithium from China were to fail to materialize, the damage to the economy as a whole would amount to no less than 115 billion euros according to the BDI's calculations (direct, indirect and induced effects).

¹⁷ China-Strategie der Bundesregierung, 13.7.2023; <https://www.auswaertiges-amt.de/resource/blob/2608578/810fdade376b1467f20bdb697b2acd58/china-strategie-data.pdf>.

¹⁸ Abhängigkeit der deutschen Wirtschaft von China: Bei einzelnen Produkten kritisch, IfW Kiel; <https://www.ifw-kiel.de/de/publikationen/aktuelles/abhaengigkeit-der-deutschen-wirtschaft-von-china-bei-einzelnen-produkten-kritisch/>.

¹⁹ Wege aus der Abhängigkeit: Wie Deutschland die Rohstoffe für eine zukunftsfähige Wirtschaft sichert, BDI, 11.11.2024; <https://bdi.eu/publikation/news/wege-aus-der-abhaengigkeit-wie-deutschland-die-rohstoffe-fuer-eine-zukunftsaehige-wirtschaft-sichert>.

As a political threat, Beijing imposed export restrictions on access to gallium and germanium back in July 2023. Both materials are important for the semiconductor industry, especially for the production of semiconductors. China produces 95% of the world's gallium and 67% of its germanium. Export controls on the semi-metal antimony have also been in place in China since September 15, 2024. This is used in the manufacture of green technologies such as car batteries and solar panels, but also in the construction of nuclear weapons and military equipment such as night-vision goggles. The US has already included antimony on a list of minerals that are important for economic and national security. In the midst of the European Union's dispute with China over countervailing duties on Chinese electric cars, China also imposed stricter controls on the mining, processing and trade of the rare earths praseodymium, neodymium, terbium and dysprosium, which are used in the production of electric car batteries and wind turbines and are considered difficult to replace, on October 1, 2024. China accounts for more than 60 percent of global mining of these metals.

Hungry for power – China as a strategic investor in Germany

Chinese investments in Germany are problematic from a security policy perspective in three areas:

Firstly, where technological leadership is at stake which should not be ceded to China. This applies in particular to complex fields of application in which European companies are still competitive and a potential dependency on China would be detrimental.

Secondly, it is about technologies that could give China a military advantage. With this in mind, in September 2023, the German government prohibited the complete takeover of the German satellite company Connect by its Chinese majority shareholder Shanghai Spacecom Satellite Technology, under the leadership of the Federal Ministry of Economics following an investment review. The company plans to offer global civilian satellite communication services, which could also be used for military purposes, as demonstrated by the use of the Space X network in the war in Ukraine.

Thirdly, Chinese investments in the area of critical infrastructure are problematic. This is because the increasing technologization and digitalization of many areas of life also increases the possibility of espionage and sabotage by hostile powers. The area that can be defined as critical infrastructure is growing. If, for example, a state-controlled Chinese company has access to the electronics in electric cars, this opens new opportunities for the Chinese regime to gather information, but also for violent disruption. Such opportunities do not even have to be used to be problematic: it may be enough for both sides to be aware of them to motivate a change in behavior. The possibility of sabotage alone could lead to a government allowing itself to be influenced in its decisions, especially in the event of heightened political tensions.

Critical infrastructure that can be attacked with the help of technology includes, among others: Rail transport, cars, drones, wind turbines, digital infrastructure, social media and mobile telecommunications. A detailed definition of what constitutes critical infrastructure that requires special protection against espionage and sabotage does not yet exist in Germany. The German government's China strategy mentions telecommunications, data, energy and transport infrastructure. The KRITIS umbrella law, which is currently at the draft stage, lists the following sectors: Energy, water, food, transportation and traffic, information technology and telecommunications, finance and insurance, waste disposal, media and culture, government and administration.²⁰



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By trying to gain influence on international standardization, China wants to position itself advantageously in the technology competition. There are indications that the Chinese state is specifically identifying weaknesses in foreign companies operating in China in order to exploit them for its own purposes and goals. A 2021 law also stipulates that companies are obliged to report weaknesses to the state. It is also suspected that China is deliberately building backdoors into products that can be used for espionage and sabotage. With China's growing share in the development of open source software, this risk is increasing. In addition, access through the "front door" is officially permitted for many technical devices originating from China: for management, updates, licenses and the like. The manufacturer's access is intended and necessary here. That is why there can be no 100 percent security against manipulation. Trust in the manufacturer is crucial here. The best example of this is the dispute over the involvement of Huawei and ZTE in the German 5G network.

At the heart of the dispute, which has been ongoing since 2019, is the question of whether all manufacturers of 5G components should be allowed to participate equally in the expansion. It is important to understand that the 5G network functions like a digital nervous system of our state,

²⁰ Kritis-Dachgesetz: Kritische Sektoren; <https://www.openkritis.de/it-sicherheitsgesetz/kritis-sektoren.html>.

economy and society. Security against manipulation is therefore crucial. Concerned about growing Chinese influence, the EU Commission has formulated strict requirements with the 5G Security Toolbox and called on the member states to implement them. While the proportion of Chinese 5G components across the EU is now only 25 percent, it is still 60 percent in Germany. Germany is therefore considered a security risk, particularly by the USA and NATO partners.

In the last legislative period, the German Bundestag agreed on a law that allows the German government to exclude providers that are not trustworthy in terms of national security, defined as those that are subject to the influence of foreign governments. This criterion applies to Huawei and ZTE. Even though they are not Chinese state-owned companies, they are still required by law to cooperate with the Chinese security services. Instead of implementing the will of the legislator, the current government has reached a compromise with the telecommunications companies. This compromise is inadequate because it comes at the expense of national security. With regard to the access network, the agreement only covers the management system, which may no longer be used by Huawei from 2029. Huawei software may still be installed in the antennas after 2029. This leaves Germany vulnerable in the event of a geopolitical conflict.

The example of 5G also highlights the weakness of European competition law in the face of players who deliberately do not play by the rules and exploit them to their own advantage. China subsidizes its companies in a way that European competitors are prohibited from doing, so that they can always offer lower prices. A competition law that is based exclusively on the lowest price and does not factor in safety is out of place in today's geopolitical environment.

The partial sale of a terminal in the port of Hamburg to the Chinese state-owned company COSCO is another prominent example of how Germany has created an opportunity for China to exert influence without need and contrary to the applicable legal situation. The decisive factor here was the approval of the Federal Chancellor, against the negative vote of all six ministers.

Threatening gestures – how China uses economic leverage

China increasingly has not only the will but also the means to use its economic power to get others to bow to its demands. Pressure is often exerted subtly, for example through warnings from diplomatic staff. For years, the regime in Beijing applied so-called “wolf warrior” diplomacy, in which the interests of the Chinese state and the Chinese economy were presented in an increasingly aggressive and often public manner. Beijing has since reversed this style, at least in part, after it led to considerable resistance in the countries concerned.

Yet Time and again, China openly uses economic pressure to achieve its political and economic policy goals. Some examples:

Australia. In April 2020, the Australian Foreign Minister called for an international investigation into the coronavirus outbreak. In response, China imposed massive punitive tariffs on Australian wines and barley. Coal imports were also blocked, and trade barriers were introduced for cotton, beef and lobster.

Germany. In the fall of 2022, China threatened to no longer process its trade transactions via Hamburg in future, but via Antwerp and Rotterdam instead, if the German government did not allow the Chinese state-owned company COSCO to buy into a terminal at the Port of Hamburg.

France. In October 2024, China imposed a de facto tariff on European brandy, apparently as punishment for the EU states agreeing to countervailing duties on electric cars from China. Paris in particular had lobbied hard for this decision; the Chinese punitive measure almost exclusively affects French brandy (Cognac).

Huawei. In the dispute over the German 5G expansion, China threatened **Germany** with consequences if it were to exclude Chinese equipment suppliers (Huawei and ZTE) from the expansion of the network. The German automotive industry was repeatedly brought into play in China and it was insinuated that excluding Huawei from the German 5G expansion could be rewarded with sanctions against the German automotive industry. Denmark and Portugal also came under massive pressure from China in the course of 5G regulation. China threatened **Portugal** with interventions in Portuguese companies in which China has a stake. **Denmark** was also put under pressure. In 2019, the Chinese ambassador threatened the Faroe Islands, which belong to the Danish crown, that China would not enter into a trade agreement with the Faroe Islands if Huawei was not allowed to participate in the 5G expansion there.

Lithuania. In December 2021, China imposed a de facto import ban on beef, dairy products and beer because the country had deepened relations with Taiwan.

Sweden. Since 2020, China has blocked the export of graphite to Sweden, a key component for batteries for electric cars, without justification. Relations between the two countries have been considered tense for years due to human rights issues.

Czech Republic. When Czech Parliament President Jaroslav Kubera wanted to travel to Taiwan in 2020, the Chinese embassy in Prague threatened that Czech companies operating in China, such as Skoda Auto, Home Credit Group and Klaviry Petrof, would suffer the consequences for doing so.

Maintaining the ability to act – what is at stake

In recent years, China has risen to become a leading economic and political power. However, it is less and less following the path of partnership and strengthening the international system. Instead, China is selectively using the system to its own advantage. China openly rejects human rights and their protection (especially political rights and freedoms). With its ambition to restructure the international order in a Sinocentric manner and to its own advantage, China is increasingly on a collision course with America and the liberal democracies allied with the USA. China is showing an increasing will to confrontation and has in many cases left behind the willingness to find win-win solutions and compromises that characterized the decades of “opening and reform”.

Claims to dominance, starting in the Indo-Pacific, and the willingness to use military and economic means of coercion to achieve this are becoming increasingly clear. In combination with China's support for the Russian war of aggression against Ukraine, this results in an increasingly acute threat to prosperity, freedom and security in Europe too.

Our economic ties with China must therefore be put to the test. For decades, the economic interests of German companies have dominated the development of an intensive bilateral relationship. In view of the considerable changes in China, the security dimension must now play a far greater role. Germany must be in a position to confront China resolutely where it is

geopolitically and geo-economically necessary, without shying away from safeguarding its security policy interests out of concern for economic losses. In any case, Germany must maintain its ability to act politically, within the European and transatlantic alliance and in coordination with its value partners in the Indo-Pacific.

What is to be done? De-risking as a strategy – but no decoupling

To achieve these goals, it is neither necessary nor advisable for us to completely decouple ourselves economically from China. Instead, we must work towards targeted risk reduction (de-risking) in critical areas that are essential for the functioning of the state and the economy.

The majority of economic exchange with China is unproblematic, despite all the geopolitical tensions. We want to continue to trade with China, invest in China and facilitate Chinese investment in Germany. This will enable German companies to maintain their global competitiveness and secure jobs and value creation in Germany. The close ties between the two countries through trade also make it at least more difficult for the Chinese leadership to act in a way that would lead to a hard decoupling. The loss of prosperity from a war against Taiwan is higher for China if the Chinese economy on the one hand and the German and European economies on the other are economically intertwined. This also creates potential for the German and European side to issue clear warnings and also act geo-economically.

The clearer the framework conditions and rules are, the better this exchange works. China quite naturally claims to balance its security interests with economic interests. For their part, the German and European sides must also adapt their stance to the changed geopolitical and geo-economic situation – a process that has begun but is still in its infancy in many areas.

It is important to act in coordination with the EU, the U.S. and partners in Asia. The larger the circle of like-minded countries that act in concert, the greater the chance of influencing China's behavior and countering its claim to geo-economic and geopolitical dominance.

The US is about to deploy the entire toolbox: Export restrictions to prevent China from gaining access to the most advanced semiconductors to improve its technological and military capabilities; screening of American investments in China; tariffs; and industrial policies to ensure, among other things, that the US is not overly dependent on China for critical goods and remains a technological leader.

The resolute line taken by the USA often puts Germany and Europe under pressure to act. For example, the USA is planning to ban Chinese hardware and software components in electric cars. This in turn is forcing European companies to make corresponding adjustments. However, instead of just reacting, Germany and the EU should work to be involved in American planning processes at a much earlier stage so that, in the best-case scenario, they can play an active role in shaping them. After all, the interests of the EU and the US are not always identical when dealing with China. Accordingly, the Europeans should clearly communicate to the US that an either/or decision, i.e. a decision in favor of either the US or China, is not in our interest – also in order to keep the costs for China high in the event of a conflict and thus reduce the likelihood of such a conflict.

The European Commission under Ursula von der Leyen has placed de-risking and economic security high on its agenda. The aim is to reduce critical dependencies and cluster risks in the

supply chains and to ensure that no know-how or advanced technology flows into the Chinese arms industry.

Security screening tools – protecting critical infrastructure and preventing China's military superiority

In recent years, China has shown increased interest in German companies in the areas of critical infrastructure and technologies. It is important that the existing national and European instruments for security screening are comprehensively applied and further developed, in particular to achieve the objective of protecting critical infrastructure and preventing the transfer of militarily relevant technology.

The German government uses the instrument of **investment screening** to monitor such acquisitions. In some cases, the Federal Government has prohibited the acquisition. Investment reviews are intended to protect independence in areas that are critical to security and relevant to the supply of the population, the defense capability of Germany and its allies and to strengthen the technological sovereignty of Germany and the EU. Chinese direct investments pose a particular challenge because, in the case of China, civilian corporate interests and the military interests of the state cannot be precisely separated.

Since the **EU Screening Regulation** 2020 came into force, there has also been an EU-wide cooperation mechanism for screening foreign direct investments. This regulation lists infrastructure, as well as critical technologies such as semiconductors, artificial intelligence, robotics, security of supply and access to and control of sensitive information. Currently, 24 EU member states have a screening mechanism in place and three more (Croatia, Cyprus and Greece) are working on it. In a legislative proposal to the Council and Parliament in January 2024, the EU Commission suggested improvements to coordination.

In addition, an instrument against economic coercion (**Anti-Coercion Instrument**) was introduced in December 2023, which helps the Commission to initiate countermeasures if a member state comes under pressure. Companies that find themselves subject to coercive economic measures by third countries can report this to the European Commission, which then examines the activation of the instrument together with the EU member states. However, the European Commission can also investigate on its own initiative. As a countermeasure, the Council can then decide on the recommendation of the European Commission to impose tariffs, import and export restrictions or restrictions on direct investments, among other things.

Outbound investment screening to check outgoing direct investments in non-EU countries, as will come into force in the USA on January 2, 2025, for example, does not yet exist in the EU. Commission President Ursula von der Leyen declared in March 2023 that the EU must ensure that the capital, expertise and knowledge of our companies "are not used to enhance the military and intelligence capabilities of those who are also systemic rivals".²¹ The Commission set up an expert group on outbound investment screening with Member States in July 2023; however, concrete results are not expected until fall 2025 at the earliest.

²¹ Speech by President von der Leyen on EU-China relations at the Mercator Institute for China Studies and the European Policy Centre, March 30, 2023; https://ec.europa.eu/commission/presscorner/detail/de/speech_23_2063.

The ‘**KRITIS umbrella law**’ is intended to define the sectors, companies and facilities in Germany that belong to critical infrastructures and make them more resilient with the help of minimum requirements. Such a law is long overdue in Germany, for example to regulate the many private 5G campus networks of companies and institutions that are still allowed to install Chinese components.

Resilience and risk minimization – reducing dependencies in trade and supply chains

In order to assess the extent of Germany's dependence on China more accurately than is currently known, regular stress tests should be carried out, at the level of companies, sectors and the economy as a whole. The specific dependencies and vulnerabilities in the area of trade and supply relationships should be examined: Firstly, the degree of critical import dependency on a particular product; secondly, the existence of production in the EU and long-term comparative advantages; thirdly, the possibility of “friendshoring” to secure the supply of this product. By “friends” we mean countries that would continue to supply us even in the event of an escalating geopolitical conflict. **In addition, an internal government task force should be set up to identify critical dependencies.** With the available foreign trade data, it is not yet possible to determine how significant the current dependencies are in detail.

On this basis, criteria for economic policy measures to reduce critical import dependencies can then be identified and such measures can be comprehensively initiated.

The German economy's dependence on China for raw materials is particularly problematic. In some areas, this is well over 90 percent. Dependencies are critical when they are essential for the functioning of the state and the economy and when supplies cannot be substituted. In order to reduce these dependencies, Germany and the EU must build up or expand their own extraction, processing and refining capacities in strategically important areas.

With the European Critical Raw Materials Act, the EU is already making efforts to strengthen the extraction and recycling of critical raw materials in the EU. These efforts must be intensified at all levels and initiated as quickly as possible, as time is a critical factor. Even in the best-case scenario, exploration cycles often span many years. In addition to the extraction of raw materials in the EU, which is currently failing mainly due to political disputes and convenience, alternative sources of supply for raw materials and critical primary products must be developed in competition with China on the global market. It is advisable to intensify efforts for **bilateral raw material cooperation**. At the same time, the possibility of strategic stockpiling of particularly critical raw materials should be examined to be more resilient in the event of a crisis. Research and development into the substitution and improved recycling of raw materials also offers further potential. The German government has taken a first step in the right direction with the one-billion-euro raw materials fund launched in September 2024 and managed by KfW.

Diversification – relativizing and reducing China's dominance

The most important strategy for avoiding one-sided dependencies is to diversify trade and supply relationships in order to create more security in our economic relationships, value chains and raw material imports. However, this diversification has hardly taken place so far. Between 2021 and

2023, German companies invested as much in China as in the six years from 2015 to 2020. China's share (including Hong Kong) of all foreign direct investment by the German economy is even increasing.²²

In order to actually promote diversification, there are three possible approaches:

Trade offensive: Germany and Europe need a trade offensive. Existing trade partnerships must be deepened, and new agreements must finally be concluded or ratified, including the EU-Mercosur Agreement, which has already been negotiated and will create the world's largest free trade area; the modernized EU-Chile Association Agreement; new agreements with Mexico, India, ASEAN and, in the future, the African Free Trade Area.

Focus on the Indo-Pacific: Partner countries such as Australia and Japan have a head start in terms of experience in striking the difficult balance with China between openness in trade and safeguarding their own security interests. Germany can learn and benefit from this experience.

Common EU strategy towards China: Germany must do much more to develop a common EU strategy towards China. Beijing is pursuing a strategy of “divide and rule” by rewarding or punishing individual member states. In doing so, China is deliberately undermining efforts, particularly by the European Commission and with strong support in the European Parliament, to turn the EU into a serious geopolitical and geo-economic player. The goals of maintaining Europe's ability to act and sovereignty and not contributing to further empowering China's growing armed forces through the transfer of know-how and technology cannot be pursued at national level alone. This requires close cooperation within the EU, not least because the national economic areas are closely linked and interlinked through the EU internal market. In terms of industrial policy, Europe must focus on those sectors in which there are still clear competitive advantages and where the potential for innovation is high. In these areas, countervailing duties are also necessary in extreme cases to eliminate the competitive advantage resulting from unfair Chinese subsidies.

Build strength – invest in your own abilities

China is acting strategically. The Chinese economy has increasingly become an instrument of this strategy. The regime is doing everything it can to dominate the technologies of the future, including electromobility, climate technology, military technology, space technology and computer technology. It is also prepared to use all available instruments to gain a strategic advantage over Germany and Europe.

In contrast, Germany has long relied on the primacy of the economy – on the fact that trade with China could be maintained largely unchanged even under changed geopolitical conditions. However, in recent years it has become increasingly clear that Germany must also readjust its relationship with China. We need to balance our economic interests and concerns with our security policy concerns and geopolitical interests.

²² Jürgen Matthes, Deutsche Direktinvestitionen nach China und Hongkong auf neuem Höchststand – von Diversifizierung kaum eine Spur, IW-Kurzbericht Nr. 7,16.2.2024; <https://www.iwkoeln.de/studien/juergen-matthes-deutsche-direktinvestitionen-nach-china-und-hongkong-auf-neuem-hoehchststand-von-diversifizierung-kaum-eine-spur.html>.

For its part, Germany must position itself strategically vis-à-vis China. It must develop creative power by reducing dependencies, developing resilience and maintaining the ability to act, and by acting together with allies and friends. However, building a position of external strength also requires Germany to rebuild its internal strengths and invest in them in a targeted manner, with its own strategic agenda that encompasses geopolitical and geo-economic dimensions.

As a basis for this, it must strengthen its own competitiveness and innovative power. This begins with investment in education, as companies will only remain in Germany if they continue to find highly trained engineers and IT specialists here. We must expand the area of future technologies and create the framework conditions to ensure that Germany not only researches and invents, especially in the digital sector, but also has more companies that turn this into marketable products. The focus of European industrial policy and regulation must therefore be on promoting competition and innovation.

Subversion of the democratic order: how we must protect ourselves

In the new era of systemic and power-political competition, social, economic, political, military and technological vulnerabilities are being exploited to create insecurity or instability among opponents. The autocratic challengers to the West and the liberal democracy are exploiting the openness and plurality of our political system and the information space in the West to gain an advantage and to influence political decisions. Using various hybrid instruments, they aim to spread their narratives, attack the unity of liberal societies and weaken their will to assert themselves and their way of life and to counter the autocrats' increase in power.

This poses a real dilemma for liberal societies. On the one hand, they must protect themselves against subversion and, on the other, they must not fall into the attackers' trap and abandon their fundamental liberal principles. Otherwise, they would become accomplices to their own downfall. Russia and China in particular, but also the Islamic Republic of Iran, make use of the full toolbox of hybrid influence operations: for years, these have included extensive state-led operations in cyber and information space, in which they primarily use the open and freely accessible internet as a central platform for their campaigns. They find a grateful sounding board in right-wing and left-wing populist movements, represented institutionally in Germany by parties such as the AfD and the BSW. But cyber-attacks – whether for information gathering, espionage, sabotage or economic pressure – are also becoming increasingly common. The boundaries of legitimate promotion of one's own positions and generally practiced intelligence service activities have been crossed to the point of strategic subversive exertion of influence as part of hybrid warfare.

State actors often also make use of non-state structures of organized crime or private groups. A characteristic feature of these hostile actors is that they operate in secret, feign false facts and false identities or instrumentalize local actors for reasons of authenticity and endeavor to conceal their origins as much as possible. This is intended to make it difficult or impossible to attribute their actions to the state's clients.

Germany must do far more to maintain its domestic and foreign policy capacity to act and to protect the liberal order that gives Western societies their identity. We must minimize vulnerabilities, defend ourselves better against attacks and strengthen social resilience to hybrid warfare.

Exploiting vulnerabilities and undermining trust in democracy – what external attackers are aiming for

The overarching goal of the actors pursuing hybrid iattacks can be summarized as “weakening” Germany and liberal democracies. The sovereign decision-making process in Germany and the state's ability to act are to be impaired. The aim is therefore to change the balance of power in favor of the attackers. What is remarkable here is the partial alignment of Russian and Chinese narratives, which are directed against US hegemony, support for Ukraine, sanctions and Western, liberal democracy in general. The type of hybrid influence is very changeable and depends on the respective “weak points” of the victim. Recognizing one's own weak points and reducing vulnerabilities is therefore crucial in order to protect our open society from such attacks.

Unlike authoritarian states, open, pluralistic societies offer numerous starting points for exerting influence due to freedom of opinion and largely uncensored social media platforms. Due to the increasing polarization in recent years, German society has also become more vulnerable to

hybrid influence and disinformation. Positions skeptical of democracy are in particular finding resonance on the growing fringes. In recent years, a dangerous sounding board for disinformation campaigns controlled from abroad has emerged in Germany and similarly in other European societies. Political actors such as the AfD and the BSW work relatively openly with actors close to the Kremlin and use their narratives for their political work. As a result, such issues are increasingly dominating political discourse, particularly in those parts of Germany where these parties together have a near political majority. Political disinformation is not recognized as such but is passed on as fact and supposed truth – in line with the attackers who use the AfD and BSW to achieve their goals in Germany.

On the internet, supporters of such parties and affiliated groups can further radicalize and organize themselves in filter bubbles and echo chambers and disconnect themselves from the broader social discourse. Trust in democratic institutions is systematically discredited in the

process. All of this creates additional points of attack and resonance spaces for disinformation from hostile actors. Social scientists diagnose the existence of three groups in these milieus: the internal challengers, who protest within the system and make use of their leeway; the external challengers, who reject the system; and a broad group that is primarily driven by fear and concern and that can be won back to the system in principle –



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provided that politicians turn their attention to them, close existing gaps in representation and manage to restore trust.²³ At the same time, existing fears are easy points of attack that hostile actors can latch onto in order to reinforce them and pursue their own goals. The following section examines what these objectives are in detail, particularly with regard to Russia and China as the most important state actors of hybrid influence.

Propagating one's own position. In recent years, the information spaces in Russia and China have been subjected to much greater state control. For years, there was a certain amount of leeway for the press in Russia to deviate from the official line. The Internet remained a playground for activists critical of the regime, while the regime concentrated heavily on television. That has changed. In Russia, this leeway has shrunk considerably since the full-scale war of aggression against Ukraine in February 2022 at the latest. In China, the spaces for dissidence and criticism, which had already been smaller by comparison for a long time, have been reduced even further under Xi Jinping.

²³ see Tanja Börzel, Johannes Gerschewski, Michael Zürn (Hrsg.), *The Liberal Script at the Beginning of the 21st Century: Conceptions, Components, and Tensions* (Oxford: Oxford University Press 2024), open access at: <https://academic.oup.com/book/58951>.

In both countries, state bodies and the media work together to build narratives that completely dominate the discourse in the country. The aim of these narratives is to strengthen the regimes and mobilize support for their actions. They often construct an “alternative” reality based on the statements of the leadership; for example, the war in Ukraine was not called a war in Russia, but a “special military operation”. The West is portrayed as decadent and, paradoxically, as a threat to Russia against which it must defend itself.

The narratives that are spread in Russia itself are also deliberately taken abroad - both by official propagandists of the regime and so-called “troll factories” that flood social media with bots. The aim is to win over undecided supporters and close the ranks of existing supporters. At the same time, the aim is to turn opponents against each other and thus increase polarization.

On the one hand, the aim is to present Russia's and China's actions as reasonable and guided by global values. On the other hand, it is increasingly about justifying aggressive behavior. For Russia, the focus is on Ukraine, for China on Taiwan.

Weakening Western support for Ukraine. As early as 2014/15, when Russia annexed Crimea and covertly attacked eastern Ukraine, it relied heavily on information warfare to minimize Western support for Ukraine. Attempts were made to convey the Russian narrative to the Western public in many ways: in particular via reports from state-owned news agencies and via “trolls” who flooded the internet and social media in particular with comments and postings.

The large-scale attack on Ukraine in February 2022 increased the intensity of these activities. The 2023 report of the domestic intelligence service²⁴ writes: “The already highly frequent and comprehensive dissemination of state propaganda and disinformation has become even more intense since the start of the Russian war of aggression. Distribution channels in the area of social media in particular are increasingly being used by state or state-affiliated actors to disseminate their content and narratives to the largest possible group of people.”

The European Commission has summarized thirteen “meta-narratives of Russian disinformation” and divided them into three groups: the first describes Ukraine and being Ukrainian as evil and anti-Russian, the second describes the West as Russia's irreconcilable and incompetent enemy, the third describes Russia as superior to the West and Ukraine: stronger, more legitimate and better armed, and morally in the right.²⁵

Weakening of partnerships and alliances. Another key objective of hostile actors is to weaken Germany's alliances and partnerships. The less Germany acts in harmony with others, so the calculation goes, the easier it will be for Russia or China to influence Germany's behavior. For both Russia and China, the main aim is to separate Europe from the USA. For this reason, legitimate criticism of America as well as ideological anti-Americanism is reinforced and deepened in social networks. In relation to the war in Ukraine the West is repeatedly blamed. According to this narrative, America and NATO have put pressure on Russia and put it on the

²⁴ Verfassungsschutzbericht 2023, June 2024;
<https://www.verfassungsschutz.de/SharedDocs/publikationen/DE/verfassungsschutzberichte/2024-06-18-verfassungsschutzbericht-2023.html>.

²⁵ 13 Mythen über den Krieg Russlands in der Ukraine – und die Wahrheit. Europäische Kommission;
https://germany.representation.ec.europa.eu/13-mythen-uber-den-krieg-russlands-der-ukraine-und-die-wahrheit_de.

defensive, trying to turn Ukraine into a base for American offensive military capabilities. Russia, on the other hand, is only defending itself.

Undermining trust in democratic institutions and actors. Analyses of Russian and Chinese activities indicate that the aim is to undermine citizens' trust in the state and society. At the same time, populist and anti-democratic actors in the system, such as the AfD and BSW parties, are to be strengthened. In this way, Germany is to be destabilized and weakened in its international activities. The ability to oppose the interests of China and Russia is to be reduced in this way. The power-political direction of such efforts is reinforced by the systemic competition: the autocracies Russia and China try to weaken and delegitimize liberal democracy as an attractive and successful order.

One method used by Russia in particular is to undermine the idea of truth and objectivity. Once the reference of the political discourse to verifiable facts has been removed and all political statements appear to be nothing more than subjective opinions, then state-controlled disinformation is on a par with the fact-based debates in democracies.

In connection with this, attempts are being made to undermine the public's trust in the established media by actively inventing false facts and introducing them into the discourse. What the free press reports is denounced as government propaganda or a "lying press" and, in the spirit of conspiracy theory thinking, presented as an attempt by a ruling class to subjugate the population through manipulation. These external activities are reinforced by internal forces, in particular the AfD. Here too, the sounding board in Western democracies is worrying. Political and social networks have been established across almost all Western countries that consciously use Russian and Chinese narratives for their own purposes, thereby reinforcing them and playing into the hands of the creators.

Furthermore, state-controlled disinformation, such as that spread by hostile actors primarily in the social media, aims to weaken social and political cohesion and strengthen polarization within society. Groups competing in the field of democratic debate are to be turned into enemies and their willingness to compromise is to be weakened. Such campaigns are aimed in at groups whose trust in the democratic state is already low. They characteristically tap into existing fears, discourses and socio-economic lines of conflict and attempt to reinforce these even further.

Instruments and main actors of influence

Disinformation. The fact that hostile actors are seeking influence in the information space is nothing new in itself. But the problem has a completely different dimension today than it did a few years ago. Firstly, because we find ourselves in geopolitical competition with powerful autocracies that are increasingly calling our way of life and our democratic order into question. Secondly, because the fragmentation of the public information space due to digitalization and technological progress now offers hostile actors new opportunities to introduce disinformation into the discourses of democracies.

Platforms such as X (formerly Twitter), Facebook, Instagram, YouTube, TikTok and Telegram are now central to the formation of the political will, especially among younger generations. What these platforms have in common is that they are either insufficiently moderated or not moderated at all by the operators. The general accessibility of these platforms means that anyone can act not only as a consumer but also as a producer of information, which makes a central overview and

control of content considerably more difficult. For example, the Russian state broadcaster for foreign propaganda “Russia Today” could still be banned in Germany at the beginning of February 2022 because it was a traditional media organization. What is beyond control, however, is the variety of often anonymous actors who operate on YouTube or TikTok and to whom the content previously disseminated via Russia Today is now being shifted. There are also new opportunities for fakes. So-called deepfakes are appearing more and more frequently. These are audiovisual fakes – faces, voices – as well as fake texts that either discredit well-known people or use their identities to link disinformation with the authority of this personality. Methods from the field of artificial intelligence make such forgeries much easier.

In January 2024, experts from the Federal Foreign Office uncovered a Russian disinformation campaign on the online platform X. Special software was used to uncover an extensive network of fake user accounts as part of the so-called “doppelganger campaign”, a total of 50,000 accounts that published over a million posts in the space of a month, which led to fake pages of established news media. Here too, the central focus was on weakening German support for Ukraine.

Cyberattacks. While for many years it was mainly criminal groups that used cyberspace for their purposes, cyberattacks have long since become an essential part of the toolbox of hostile state actors. However, here too, they sometimes rely on non-state actors to disguise the origin and make it more difficult to attribute attacks. The attackers benefit from the increasing digitalization and the fact that the security level of IT systems is not keeping pace. Cyberattacks are used for digital espionage to obtain information that they hope will bring them advantages. In addition to certain economic sectors, political parties and the pre-political sphere in particular are increasingly coming into the focus. Due to the increasingly restricted diplomatic spaces and access of China, Russia and Iran, there is an increased interest in gaining more far-reaching information. Cyber-attacks are not only cheaper than “human” espionage, but also provide better protection for their own agents.

The same applies to acts of sabotage using digital means (cyber sabotage). These are also relatively inexpensive. The focus is primarily on state institutions and critical infrastructure companies. Their (long-term) failure can have a considerable effect on the population and cause uncertainty. China in particular is preparing to exploit vulnerabilities in critical infrastructure. Pre-positioning involves exploiting vulnerabilities in the IT systems of critical infrastructures. The actors gain access to an operator's IT systems in peacetime, install malicious code, for example, and then remain inconspicuous in the system. If an interstate conflict arises, the malicious code can be used to disrupt the critical infrastructure and thus cause further unrest among the opponent. The aim is to create doubts within society about the state's ability to act and defend itself. In China in particular, these strategic and tactical considerations have been proven by US intelligence services in the context of the actions of the state-affiliated cyber group Volt Typhoon.

A similar effect can also be achieved through the placement of critical components, as has been repeatedly discussed in the context of the use of Chinese elements in 5G networks, for example. There are fears that the elements and control software could either be used for espionage or have a disruptive effect through a state-ordered emergency shutdown (kill switch). The manufacturer's access to the components is officially intended and necessary for their maintenance, management purposes and updates. As a result, the risk of espionage cannot be avoided. Even more problematic, however, is the fact that the permitted access can lead to a high level of vulnerability in the event of a conflict if critical components are compromised or switched off completely. In these constellations, it is difficult to distinguish between espionage and sabotage.

The boundaries between information gathering through espionage and preparatory acts of sabotage are blurred.

Another trend is the increasing combination of cyberattacks and information operations (hack-and-leak or hack-and-publish). These operations involve obtaining data and information about cyberattacks, which is then published to influence public opinion or reinforce narratives. In particular, social media and email accounts, often of politicians and journalists, are hacked and the information obtained is then used to spread disinformation. The accounts of the SPD party headquarters were hacked at the beginning of 2023, followed by those of the CDU a year later. The attackers also secured data that has not yet been used for disinformation campaigns. However, such an operation could take place at any time.

Physical sabotage and espionage. Foreign intelligence services or extremist groups can carry out combined and coordinated physical acts of sabotage and are increasingly using these capabilities.

The prevented explosions of DHL parcels in Germany were worrying evidence of the greatly increased and concrete threat to which we are exposed. Such cases are part of a larger pattern: numerous cases of attempted and actual arson and vandalism by Russian low-level agents have been recorded in other European countries in recent months. These are predominantly young, Russian-speaking and trained individuals who want to earn money quickly by carrying out simple tasks. Many are recruited via social media. Extremist forces from the far-left and far-right spectrum also pose a threat. They primarily target critical infrastructure companies, as the attack on the power lines near Grünheide illustrates.

We are also seeing an increasing number of acts of sabotage in ammunition depots and factories. Recently, European submarine cables have also repeatedly been the focus of attention. These can be used for energy supply or the functioning of the internet and have been compromised by external sabotage. With low repair capabilities, acts of sabotage are particularly effective here. These acts of sabotage cannot yet be clearly attributed.

Authoritarian states are also strategically expanding their espionage capacities in Europe. This applies above all to China, Russia, Iran and North Korea. China focuses primarily on science and research, with its main focus on high technologies. Beijing specifically promotes research collaborations, talent programs, visiting scientists and working students in other countries and at the same time relies on non-professionals, as



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they receive extensive access without arousing suspicion. Recently, the interest in information has shifted to dual-use technology and proliferation-relevant knowledge. This is because Beijing's plans to become the largest military power rely on the close links between business, academic institutions and the military.

While Russia primarily focuses on the political sphere and Bundeswehr facilities as well as the arms industry in Germany, military technologies and know-how are crucial for North Korea. For some time now, Pyongyang has been trying to place IT specialists in particular with fake identities in companies in order to obtain information.

Russia as the most important player. It has been known for years that Russia uses disinformation, cyber-attacks, espionage and sabotage in a targeted manner to assert its own interests abroad. These operations are centrally controlled by the Kremlin, are highly professionally organized and have billions at their disposal.

One of the leading figures in the organization of disinformation is Sergei Kiriyenko, a former Russian prime minister and close confidant of President Putin. At a meeting of regime propagandists in August 2022, Kiriyenko declared, according to a report in the Wall Street Journal,²⁶ , that “the essential war that is going on now is the war on people's minds” and that everyone in the room was a “special force” in this war. To this end, Russia is trying to specifically promote extremist forces in Germany and Europe – this has been clearly demonstrated in cases such as the AfD and the Rassemblement National – and at the same time undermine trust in the established parties and democratic institutions.

Germany is a particular focus because it is considered to be open to pro-Russian positions and carries particular weight in Europe. The former deputy head of the BND, Arndt Freytag von Loringhoven, explains: “Germany is perceived by the Kremlin as a key decision-maker in the EU and NATO, even when it comes to arms aid or sanctions. And at the same time as easy prey, as a soft spot in the EU. This combination of strong influence and simultaneous weakness makes us the ideal target.”²⁷

China is catching up. Compared to Russia, China is pursuing a different strategic approach in the area of hybrid influence. It plans more long-term than Russia and relies less on aggressive means and more on a combination of instruments. This includes exerting influence in politics, society and the economy to create a favorable environment. In some cases, this is done through traditional lobbying, which is not illegitimate per se. In other places, however, China deliberately builds up pressure on critics, e.g. through the Confucius Institutes, parts of the Chinese diaspora and Chinese students loyal to the regime. In 2022, it became known that China maintains illegal police stations in several European countries to intimidate critics. In addition, according to a report of the German domestic intelligence service (Bundesamt für Verfassungsschutz), Chinese state actors are attempting to “instrumentalize leading figures from the German economy by exploiting existing dependencies of individual German companies on the Chinese market to enforce the interests of the CCP” and, in the event of undesirable behavior by foreign companies and governments, “rely on high-profile sanctions and state-controlled boycotts in China for the

²⁶ Putin's Propaganda Chief Urges 'War Over People's Minds', The Wall Street Journal, December 10, 2022

²⁷ Russlands hybride Kriegsführung: „Der Kreml stuft Deutschland als leichte Beute ein“, Spiegel, September 19, 2024; <https://www.spiegel.de/netzwelt/netzpolitik/russlands-hybride-kriegsfuehrung-der-kreml-stuft-deutschland-als-leichte-beute-ein-a-6bd9e17b-239d-4873-b469-0abbf6823d6b>.

purpose of deterrence”.²⁸ Overall, the main aim is to enforce positive narratives about China and spread the official Chinese view of current events and developments. According to the 2023 constitutional protection report, Chinese agencies spread disinformation in order to “cast China's policies in a positive light and emphasize the supposed superiority of the Chinese model of order”.²⁹ There is a strong focus on Taiwan, Hong Kong, Xinjiang and Tibet. However, China has also supported and spread pro-Kremlin narratives about the war in Ukraine. Since 2019/2020, it has become increasingly apparent that China is adapting Russian methods in Europe, for example by undermining trust in the fact-based reporting of German media. Beijing is experimenting with new formats that are disseminated via channels that cannot be directly linked to official Chinese bodies. China is now also working with “troll factories” but has not yet exhausted the enormous potential here. The adaptation of Russian methods suggests that there is now an exchange between Russia and China in the area of disinformation and hybrid warfare. However, it is unclear how extensive this is. There are opportunities here, particularly with regard to Germany: While China has sufficient financial resources but has a much poorer understanding of the political mechanisms in Germany, Russia lacks money but has an excellent understanding of German society and the political system.

Most of these measures used by China in this context are not illegal. So, they cannot be banned. Nevertheless, they do harm us, which is why it is necessary for us to counter them, for example by providing our own information.

The situation is different in the area of cyber attacks and espionage. US security authorities in particular are now increasingly warning of the danger of Chinese pre-positioning in Western networks, i.e. Chinese intrusion into our telecommunications infrastructure in preparation for later attacks. The central role of Chinese companies in the field of telecommunications infrastructure helps them enormously in this regard.

Strengthening defenses without giving up openness – what needs to be done

In recent years, the activities of hostile actors in the field of disinformation and propaganda have increased significantly. In order to shift the asymmetric battle, we are engaged in in our favor and make our Western democracies more resilient to hybrid external influence, there are a number of measures we can and should urgently take.

Adaptation of the constitutional order. Our constitutional order does not recognize the state of hybrid aggression. It only distinguishes between war and peace. Hybrid attacks are often below the threshold of acts of war, but nevertheless have a massive destabilizing effect on society and the state. There is therefore a need for constitutional recognition of the “hybrid state” with clear and capability-specific responsibilities.

Clarification of administrative responsibilities. In the event of an attack, it is often not immediately clear to German security authorities whether it is a military or intelligence operation by a state or the activities of private or criminal groups. The latter are increasingly being used by

²⁸ Verfassungsschutzbericht 2023, June 2024;
<https://www.verfassungsschutz.de/SharedDocs/publikationen/DE/verfassungsschutzberichte/2024-06-18-verfassungsschutzbericht-2023.html>.

²⁹ Ibid.

state attackers to disguise the origin of the attack. The official responsibilities for responding to such attacks are often unclear on our part. This makes it impossible to react quickly. Clearer rules on responsibility are urgently needed here.

Strengthening the state's defensive measures. Government agencies have now recognized, for example, that disinformation and the fight against it are not purely civil society tasks. However, the roles and responsibilities have not yet been adequately distributed. Within the Federal Government, the Federal Ministry of the Interior and Homeland (BMI) coordinates the handling of hybrid threats in the Hybrid Threats Working Group. This working group also includes the “Taskforce against Disinformation” for the exchange of information between ministries and authorities. Since June 2024, the “Central Office for the Detection of Foreign Information Manipulation” (ZEAM) has also been established in the BMI. The Federal Ministry of Justice (BMJ), the Federal Chancellery (BKAm) and the Federal Foreign Office (AA) are part of the ZEAM.

There is no comprehensive nationwide picture of the situation, and some authorities do not have the necessary powers and resources to react quickly and flexibly. In order to get a clearer picture of who is conducting disinformation, cyber-attacks, espionage and sabotage, in what way and with what effect, cooperation between the various agencies must be further improved. Duplicate structures between state, civil society and private sector initiatives must also be dismantled. The scope of the security authorities should be increased where necessary to take effective action against these activities. To this end, we need an honest debate that deals with the powers of the security services, particularly abroad, in the context of the new threat situation and the geopolitical framework conditions.

In concrete terms, a defense center against hybrid threats is needed, in which a situation and analysis center converge. All relevant security authorities are docked to the defense center. In the situation center, significant incidents are displayed in a dynamic real-time situation picture dashboard. In future, attackers will carry out cyberattacks, sabotage, espionage and information operations in an even more targeted and coordinated manner. The dashboard should therefore cover cyberattacks, disinformation campaigns, narratives and essential basic services in Germany (such as energy, water, healthcare, food supplies and the internet). The incidents and supply situation are evaluated in the analysis center and the intensity of the incident is determined. Depending on the intensity of the incident, different crisis response mechanisms are available to the responsible authorities. The analysis center creates profiles of the attackers. It also continuously analyzes its own systemic vulnerabilities.

Further development of operational capabilities. The targeted further development of our own operational capabilities in cyber and information space can form the basis for deterrence and defense in this domain. Close partners such as the USA and the UK have been investing heavily in offensive cyber capabilities for years and are in a position to counter attackers such as China and Russia on an equal footing. Germany is in a position of great dependency here. For our national security, it is urgently needed to develop a strategic doctrine for active cyber defense and – building on this – to further develop operational capabilities. Establishing a legal foundation for the development and deployment of such capabilities must be a priority. The current framework conditions are too restrictive. New competencies must be created at federal level for implementation, e.g. at the Federal Office for Information Security (BSI), the Federal Intelligence Service (BND) or the Bundeswehr. Similar considerations should be made for the information space. In this context, an approach for proactively responding to adversarial information operations should be developed.

There is also a need for internationally coordinated attribution and response to attacks, also in order to raise the inhibition threshold for future attacks. These could take place within the framework of NATO or within the EU.

Increase pressure on platform operators. The EU's Digital Services Act provides a legislative framework that allows illegal content to be removed from platforms more quickly. Special due diligence requirements apply to large online platforms and search engines. The EU Commission has already opened a formal investigation into Meta (Facebook, Instagram) on suspicion that they are doing too little to combat influence operations by hostile actors.

Germany must resolutely support such efforts. The countries united in the “Weimar Triangle” – France, Germany and Poland – have adopted an “alert and response mechanism” and appealed to the European Commission to make full use of its powers under the Digital Services Act and ensure the implementation of the guidelines prescribed for providers.

Strengthen resilience. Hybrid threats are largely unknown to the general public. Preparations for infrastructure failures are virtually non-existent. The population must be made more aware of hybrid threats, the actors behind them, their objectives and links to populist and extremist groups such as the AfD and BSW and prepare for outages.

The same applies to disinformation and propaganda. Our state options for countering the activities of hostile actors in this area are limited. For one thing, the measures used by Russia or China are often not explicitly prohibited. On the other hand, complete control is not only not possible, but also even explicitly undesirable in terms of our liberal order. The boundary to censorship of the content of legitimate expressions of opinion must not be crossed.

The core of the actual defense must therefore be provided by the citizens. The resilience of our society in the face of disinformation and propaganda depends on the population's ability to distinguish disinformation from serious news and not to be confused by the communication strategies of hostile actors and their supporters at home.

The EU's East Stratcom Task Force has listed behaviors that help immunize against disinformation and propaganda: Stay vigilant, learn to decode, verify the source, fact check, compare information with others, think before you share, examine images or videos, educate yourself, encourage critical thinking and report suspicious content.

In future, far more should be invested in young people's ability to use social media competently. On platforms such as YouTube or TikTok, children and young people are repeatedly confronted with disinformation and propaganda via algorithms without being able to recognize it as such and deal with it responsibly. An “anti-disinformation driving license” should be compulsory in schools in the 6th/7th grade, and the topic should play an ongoing role in lessons.

It is also important that the state practices transparency and publicizes existing knowledge about troll factories and the actions of hostile actors so that there is a broad understanding of this dimension of the “hybrid war” against Germany. This is especially true around elections, when democracies are particularly vulnerable to disinformation and propaganda.

How the axis of autocrats is challenging us and how the liberal order can assert itself

Just a few years ago, it was possible to view challenges to the international order in the Eurasian region separately: Russia's aggression against neighbors such as Georgia and Ukraine; China's quest for dominance in the South and East China Seas and its growing pressure on Taiwan; Iran's nuclear program and the establishment of proxy militias in the Middle East; North Korea's aggressive posturing accompanied by nuclear armament.

In the meantime, these regional challenges have become interwoven into an overarching threat to the free international order. Russia is supported by the Islamic Republic of Iran in its brutal war of aggression against Ukraine. China, in turn, has become the main buyer of Iranian oil and is relying on Russia as a strategic partner to fundamentally restructure the international order. North Korea is completely dependent on China economically and is supplying Russia with considerable quantities of ammunition and now also soldiers for its war of aggression against Ukraine.

Even though they have not concluded a formal alliance treaty, and their geopolitical interests are not always congruent, these four countries are exploiting synergies, supporting each other and challenging Europe, the US and the Indo-Pacific democracies. The main players in this axis of autocrats are Russia and China: two of the five permanent members of the UN Security Council, autocratically governed and revisionist-minded. These two countries are the source of a systemic rivalry that goes hand in hand with efforts to sort the world into new blocs, namely "the West" versus the rest. We must clearly oppose this attempt and seek partners in Latin America, Africa and Asia on an equal footing.

What does the Axis of autocrats want?

After the end of the Cold War, the West sought to integrate Russia and China into the Western order. It was hoped that Moscow and Beijing, driven by their interest in economic globalization, would become supporters of this new order. Instead, they have increasingly become critics of this system and opposing poles to the West. This has gone so far that both are closely coordinating their efforts to push back the West and break its intellectual, economic and geopolitical leadership. In doing so, they hope to benefit from the growing number of anti-liberal and autocratic states that reject the political and social freedoms enshrined in the UN Charter or at least do not wish to be restricted in their actions by them. China and Russia are both consciously trying to support this process by helping rulers in developing and emerging countries to develop consolidated autocratic structures, e.g. by building up cadres, and by providing financial resources for investment. In doing so, they are acting politically and militarily. Russia wants to regain the supremacy that the Soviet Union once enjoyed. At the same time, it is also harking back to the imperialism of the Tsarist era. China wants to gain supremacy, first in Asia and then globally. Both countries have invested massively in their armed forces and are exerting more and more pressure on weaker countries in their neighborhood. In Russia's case, this extends to the open war that the country is waging against Ukraine.

The order that Russia and China are striving for is based on the law of the jungle. For China, the target date is 2049, when it wants to be the most powerful country in the world on the centenary of the communist "People's Republic of China". To achieve this, it must oust America from its leading international role. It helps that the USA is deeply divided and polarized in terms of

domestic and increasingly also foreign policy. With Donald Trump's re-election, an "America First" policy with isolationist tendencies is returning, calling America's leadership role into question from within. Russia is also determined to become a leading power in a new world order; it wants to dominate at least Eastern and East-Central Europe and establish a stable zone of influence far into the rest of Europe, the Middle East and Africa.

The ruling elites of these states are convinced that America's days are numbered and that their time has come to assert regional and global dominance. Their strategy is aimed at reinforcing the supposed decline of the West and building a new order in which they themselves are at the center.

In addition to the power-political goals, there are also ideological goals in the context of system rivalry. In both countries, the ruling elites are autocratically organized. They only hold on to power through massive repression and see the spread of democratic values as a threat. For them, the West is the enemy not only for reasons of power politics, but also because it represents democracy, which threatens their own power base at home. It is not NATO as a purely defensive alliance that poses a threat to Russia, but the will of the Ukrainians to become a democratic, constitutional and successful market economy as a Western-organized state – just as Poland has already done. At some point, the Russian people might ask themselves why all the countries around them are economically successful and increasing the prosperity of their populations, but not them.

The world order that Russia and China are striving for is no longer to be characterized by democratic values and ideas, but by principles of autocracy, the so-called "power vertical", as it is called in Russia: an order controlled from above, in which the weaker countries have to submit to the powerful.

What instruments does the Axis of autocrats use?

China and Russia, in cooperation with the Islamic Republic of Iran and North Korea, are not yet strong enough to dominate the democratic West. But they can already achieve their goals, at least in part, by playing across borders and using a variety of instruments simultaneously. What are these in detail?

New alliances. China and Russia are working together, particularly in the BRICS format, to build close partnerships within a multilateral framework and steadily increase the number of members. While they are succeeding in the latter, the coordination of the BRICS states remains limited, as the interests of the members sometimes diverge greatly. There is a fundamental disagreement between the members about the purpose of the "club". While China, Russia and Iran want to use the BRICS to push back Western influence, countries such as Brazil and South Africa are more concerned with diversifying their partnerships, economic cooperation and development cooperation. They do not see themselves as opponents of the West, but rather as its partners where there are common interests, and they are treated as equals. India has a special role to play within the BRICS, as the country increasingly views China as a geopolitical rival.

At the same time, the Islamic Republic of Iran is pursuing a different kind of network formation. Tehran supports groups such as Hamas, Hezbollah and the Houthis in order to expand its political influence and pursue geopolitical goals in the region. This network of proxies, all of which are to a large extent directed from Tehran and dependent on it financially and for the supply of arms

and technology, is destabilizing the entire region. The Islamic Republic of Iran thus creates new room for maneuver, especially for Russia, which can subsequently benefit geopolitically.

Political pressure. Russia and China are particularly courting the numerous states that are not closely tied to the USA and are primarily pursuing their own interests. On the one hand, they want to weaken the West by withdrawing support – for example in UN votes. On the other hand, they want to get into a position of strength themselves, economically, militarily and politically. China is trying to use economic means to bind other countries to itself and make them dependent. As part of the Belt and Road Initiative, it grants loans and investments, which it has repeatedly used in the past to exert political pressure and extort benevolent behavior towards China. However, following a series of negative examples as a result of Chinese investments, most notably the port of Hambantota in Sri Lanka, which China annexed for 99 years after loans could not be serviced, there is now also considerable resistance in many countries to China's attempts to make them dependent. Russia offers autocratic regimes arms supplies and help in securing power, often in return for access to natural resources.

International institutions. China and Russia both use their position in international institutions such as the United Nations to advance their anti-Western positions. China in particular is increasingly seeking influence in the UN in order to rewrite the understanding of democracy and human rights, block pressure on China and win strategic votes in its favor. To this end, China is occupying strategically important positions in the UN. It is organizing the necessary support for this through economic enticements and political pressure resulting from the resulting dependencies.

Technological leadership. China is convinced that the key to the systemic conflict with the USA lies in technological leadership. Whoever sets the standards and algorithms controls the future. That is why China is trying to catch up and become a leader, particularly in future technologies. China has already succeeded in quite a few areas. In addition, China is trying to become so strong economically and technologically that it is less sensitive to economic pressure from outside and can exert economic pressure on others itself.

Hybrid attacks. Russia and China both use secret services and private hacker groups to conduct espionage on a large scale. Both state institutions and private companies are affected. Cyber activities in the fields of business and research are leading to a considerable state-controlled technology transfer. Disinformation is being used to divide Europeans from each other and Europe from the USA, true to the motto “divide and conquer”. In spreading their own narratives, cooperation between states is becoming increasingly apparent. Attempts are being made to tap into existing criticism of America and anti-Americanism and to reinforce these in such a way that Europe is neutralized geopolitically or even tends towards the Russian and Chinese side. Both Russia and China see Germany as the most important European “swing state”.

State terrorism. In the recent past, Russia in particular has repeatedly resorted to state terrorism in order to assert its own interests abroad. Prominent cases include the Tiergarten murder in Berlin and the use of nerve agents against former MI6 double agent Sergei Skripal.

Rearmament. Russia and China have significantly expanded their armed forces in recent years. This makes confrontation with NATO an option for Russia. The German intelligence service believes that Russia will be in a position to attack NATO by the end of this decade at the latest. More and more red lines are already being tested. NATO is to be reduced to absurdity by undermining confidence in its mutual assistance clause, for example if help is not forthcoming or arrives late in the course of an attack on the Baltic states. The Kremlin assumes that the West

would have great difficulty in finding a joint and decisive response. In addition to conventional armaments, we are also seeing developments in the nuclear field. China is investing massively to bring its nuclear capabilities up to the level of the USA, North Korea wants to expand its limited capabilities, and the Islamic Republic of Iran could also acquire a nuclear weapon in the near future.

Growing cooperation between the Axis of autocrats

Russia and China have been working ever more closely together for years. It is important to emphasize that this is by no means a relationship of equals. Rather, Russia is massively dependent on China, which sees Russia not as an equal, but rather as a junior partner in the relationship. What unites the two countries is their rejection of the West and their desire to change the international order in favor of their own interests. Contrary to the West's hopes, China has therefore not helped to dissuade Russia from going to war against Ukraine. On the contrary, China is a key supporter of the war. Without Chinese aid, especially in the form of dual-use goods, Russia would hardly be able to wage this war. President Xi and President Putin meet regularly in their capitals and coordinate at multilateral meetings. In November 2024, former Russian Defense Minister Shoigu was in Beijing for four days for "consultations on strategic affairs" with Chinese Foreign Minister Wang Yi and other.

In their joint declaration of February 4, 2022, shortly before Russia's invasion of Ukraine, Russia and China made the thrust of their alliance of convenience clear. A "transformation of the world order" is taking place, it says. "However, some actors" - meaning the West - 'are hindering the development and progress of humanity'. China and Russia, on the other hand, as world powers, are prepared to assume joint responsibility and "build a more prosperous, stable and just world".³⁰ For both sides, the other is the most important partner in the fight against the dominance of America and the West; without such a partner playing in the upper league of power politics, Russia would be threatened with isolation and China would have to invest much more of its own resources. At the moment, in the slipstream of the Russian war of aggression in Europe and the complex conflict situation in the Middle East, it can expand its position of power in the Indo-Pacific largely undisturbed.

Tehran plays a supporting role within the axis. The Islamic Republic of Iran recently became a member of the BRICS and the Shanghai Cooperation Organization (SCO). Geopolitically, the country is oriented towards the east and sees Russia as its great ally. The Islamic Republic of Iran and Russia have already cooperated in supporting the Syrian ruler Bashar al-Assad. The regime in Tehran also supported Russia with arms supplies during the war against Ukraine. However, in the course of the Israeli attack on targets in the Islamic Republic of Iran in October 2024, its production capacities were significantly impaired, so it is unclear what deliveries are still possible. The Yemeni proxies of the Islamic Republic of Iran, the Houthis, are also integrated into this relationship. On the one hand, they supply recruits for Russia's war against Ukraine; on the other, they receive support from Moscow in the form of target data and military trainers, which they can use to expand their attacks on Western merchant and military ships in the Red Sea. At the same time, China has become the most important customer for Iranian energy, which the Islamic

³⁰ Joint Statement of the Russian Federation and the People's Republic of China on the International Relations Entering a New Era and the Global Sustainable Development, February 4, 2022; <http://www.en.kremlin.ru/supplement/5770>.

Republic provides to China at an advantageous price. Although there have been various joint military manoeuvres between the Islamic Republic of Iran and China, military cooperation has not yet been formalized. In the area of economic cooperation, a 25-year deal has been agreed, but to Tehran's great frustration this has so far produced hardly any significant Chinese investment in economically ailing Iran. An agreement with Russia is also planned but has not yet been signed. Timing and content are dictated by the Russian side. Similar to the relationship with China, there is a major power asymmetry in Russia's favor. Both countries are seen as guarantor powers by the regime, whose own internal stability is now far less secure than in the other three Axis countries. As Russia and China have moved to the side of the Islamic Republic of Iran, international isolation of the regime, which was still conceivable a few years ago, has now become impossible.

The Islamic Republic of Iran shares Russian and Chinese anti-Americanism and, like them, is pursuing a revisionist agenda in its own region. All three states are increasingly using military pressure to intimidate America, its partners and allies into backing down. And just like Russia and China, the ruling elite in Tehran is very concerned about possible democratization, which is equated with American influence.

The fourth member of this axis is North Korea. It shares an anti-American, anti-Western and anti-democratic agenda with Russia, China and the Islamic Republic of Iran. With the supply of ammunition and the provision of troops for Russia's war – there are already at least 12,000 North Korean soldiers in Russia – the connection with Russia has become even closer. North Korea is thus making an important contribution to Russia's ability to hold out. North Korea and Russia are the only two of the four countries involved to have concluded a formal defense alliance, which is also expressed in high-ranking delegation visits. It is assumed that North Korea receives access to advanced weapons technology from Russia in return. Economically, North Korea is almost entirely dependent on China, which is the most important hub for illegal imports. The procurement of machinery for weapons production runs almost entirely through China.

Cooperation between North Korea and the Islamic Republic of Iran is at its loosest. In terms of political cooperation, North Korea propagates support for the Iranian regime, which is seen as a like-minded state, but there is hardly any economic exchange. Cooperation in the military field cannot be ruled out. There is speculation that North Korea has supplied the Iranian regime with engines for the construction of medium-range missiles.

The members of the informal axis have common interests that bring them together and motivate them to work in the same direction and often coordinate their efforts. All four want to weaken the rules-based international world order and further reduce America's influence as a global shaping power, which has gradually declined since George W. Bush, partly as a result of serious foreign policy mistakes. In contrast, they do not have their own concept to shaping the world order, which would of course be legitimate, but rather ideas of imperial supremacy and the law of the jungle.

At the same time, there are also tensions and conflicts of various kinds between the four countries. There are tensions between China and Russia in Eurasia, including the competition for supremacy in Central Asia. China does not want to be too open about its coalition partners in order to keep its diplomatic leeway open in its relations with the USA, Europe and other countries. It is at least unclear whether Beijing approves of Russia's increasing support for North Korea. Moscow and Beijing are also reluctant to support the Islamic Republic of Iran, partly because they consider good relations with the Gulf monarchies, the Iranian regime's regional rivals, to be important.

However, despite these restrictions, the four countries have moved ever closer together in recent years, at least as an alliance of convenience. They support each other in the anti-American and anti-Western thrust of their foreign policy. The war in Ukraine has made this development visible and at the same time accelerated it. At decisive moments, the four countries act together and support each other in their respective core interests.



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Our vulnerabilities

The West has been surprised by the intensity with which the axis of autocrats is turning against the international order. The aggression against neighbors, as Russia has been doing since 2008 with the war against Georgia, has long been played down and not taken seriously enough. In favor of the nuclear negotiations with the Islamic Republic of Iran, eyes were closed to its export of terror to the entire region, which is destabilizing it on a massive scale. And China's increasingly aggressive behavior in the South and East China Sea, where it does not recognize and ignores the ruling of an international arbitration tribunal in favor of the Philippines' territorial claims, had no consequences either. It was assumed that the overriding interest of these countries was to have good economic relations with the West and that this interest would prevent major geopolitical confrontations.

However, Russia's large-scale war of aggression against Ukraine since February 2022 has shown that this assumption was wrong. Integration into the global economy does not prevent these countries from putting their revisionist visions into practice. For them, it is not a question of "if", but only of "how" - the right moment to intimidate, push back and, if necessary, openly attack weaker neighbors militarily.

With regard to the many states that are not clearly linked to the USA or close to the axis of autocrats, the West is not in a good position. Their priorities have little to do with the security issues that are central to us. They are often concerned with poverty reduction, regime stability or economic development. Accordingly, the vast majority of states represented in the UN General Assembly have strongly condemned the Russian war of aggression against Ukraine but are not involved in isolating Russia and enforcing sanctions. Often preoccupied with their own conflicts in the region, which in turn receive little attention in Europe, the majority of them see the war in Ukraine as a European problem. This view was summed up by the Indian Foreign Minister when he said that Europe must grow out of the mindset that Europe's problems are the world's problems. If the West and Europe in particular do not succeed in correcting course here, it will be difficult to win the favor of the many undecided states vis-à-vis China and gain their support for the protection of the rules-based international order.

The West is finding it difficult to accept the change in relations with the countries in the coalition of autocrats and to draw the consequences. All too often, countries in the West are still relying on arguments and friendly invitations to persuade the autocrats to abandon their course of

aggression and expansion – for example, when the pro-Putin parties AfD and BSW, as well as the democratic spectrum in Germany, say across the board that we should negotiate with Putin instead of investing in Ukraine's defense capabilities and thus putting it in a position of strength.

The West still has some steps to take to actually achieve an attitude of resilience and proper defense capabilities. Initial initiatives have already been launched. NATO has been revived and has once again made its original task in Europe – alliance defense – a priority. Ukraine is being supported, albeit not yet to the extent that would be necessary for it to defend itself effectively against Russia. The West has also become more skeptical of China's influence. A rethink has begun here, but this must now be reflected in action. Europe is also investing more in its defense again – even if the Western European countries in particular are still at the beginning here. Deterrence and defense can only be ensured from a position of strength. This, in turn, is essential to prevent the axis of autocrats from opening further areas of conflict and instead provide options for political solutions.

Strategy: What needs to be done

Germany, Europe and its partners in North America, Asia and elsewhere have all the prerequisites to succeed in the confrontation with the autocrats. So far, however, they have been reluctant to recognize and accept the new challenge. Russia, China and the Islamic Republic of Iran have momentum and have achieved at least partial success in weakening liberal democracies and the rules-based international order.

The liberal democracies must mobilize and concentrate their forces in order to prevent the coalition of autocrats from growing stronger, becoming more closely united and unhinging the international order.

To this end, they should address the following points:

Recognize the changed strategic situation. Germany and Europe must realize that this is not a temporary crisis in relations with Russia and China, but a new, long-term confrontation that will shape our foreign and security policy. A systemic conflict is emanating from China and Russia, in which these states are attempting to change the international order in their favor and divide the world into “the West” and “the rest”. Our goal must therefore be to prevent this division.

Developing new global partnerships. The challenge posed by the axis of autocrats also affects many countries in Asia, the coming epicenter of global politics. Japan, South Korea, India and others are keen to forge closer ties with Germany and Europe. Such a connection not only strengthens their position vis-à-vis a China pushing for expansion and regional supremacy. It also reduces their one-sided dependence on the USA. Conversely, this also applies to Germany and Europe. With strategic partners in Asia who themselves feel threatened by Russia and China, European security interests can be better asserted against both countries. At the same time, however, partnerships with other countries in Latin America, Africa, the Middle East and Asia, with which there is less agreement in terms of values, must be entered into and deepened. In order to win these countries over to our side and to the protection of the rules-based international order, we must make up ground diplomatically, culturally and economically. The number of countries accusing the West of arrogance and reacting with increasing indignation to the finger pointing has grown, not shrunk, in recent years. At the same time, the “soft power” of liberal values remains high all over the world. It is not for nothing that people generally flee to the liberal

West and not to Russia or China. Europe and Germany must make much greater use of this soft power, especially to bind and stabilize the many “hybrid” states that are neither completely democratic nor autocratic. Only by remaining globally engaged and offering alternatives can we prevent the emergence of vacuums that Russia and China know how to exploit for themselves. In some regions, particularly in Europe's southern neighborhood, this means that we must also cooperate with autocracies in order to achieve foreign and security policy goals. The decisive criterion for us when dealing with autocracies should be not to become dependent. Through reliable trade relations on an equal footing, regular consultations, support against destabilization efforts and the effects of climate change, but also through cooperation in the military sphere, Europe and the West must try to detach countries from Russia's and China's sphere of influence. However, this requires a clear strategy that goes beyond short-term economic interests, as well as close coordination between European states and institutions.

Renewal of Europe. A Europe that invests in its economic, technological and military strength will also be perceived very differently globally. This also includes a new ability to act. The times when Europe was led exclusively by Paris and Berlin are over. At the same time, it is illusory to assume that all 27 EU member states can quickly agree on decisive strategic action. This is why Europe needs new formats of cooperation to be able to play a part in a changed global world: coalitions that can lead the way and take others with them. In the area of security and foreign policy, for example, a flexible “E4-Plus 2” format would be conceivable, consisting of Germany, France, the United Kingdom and Poland (E4), as well as the EU Commission and NATO (Plus 2), which could be expanded to include other member states depending on the issues at hand.

Rebuilding the transatlantic partnership at eye level. The most important prerequisite in the confrontation with the coalition of autocrats is the unity of the West. Europeans among themselves and Europe and the USA must not allow themselves to be divided. A stronger Europe that takes care of itself and assumes responsibility for European security would also be a far better partner for the USA – and would be taken seriously by Washington. In future, America will focus primarily on Asia. Europe should shape the transition to self-responsibility in a sovereign and self-determined manner, according to its own interests and ideas, and not only react to pressure from America. Europe will remain dependent on a constructive partnership with the USA for a long time to come, for its own security, but also because both sides will benefit if they find a common approach. This is particularly true in the crisis regions: towards Russia, in the Middle East and in the Indo-Pacific. Europe is called upon to develop its own solutions instead of merely reacting to American ideas and initiatives, as has often been the case in the past.

Increasing social and political resilience from within. A central task of the political center in Germany and Europe is to counter the anti-democratic tendencies on the political fringes. We do not need to defend ourselves against autocracies if ever larger sections of our society drift into anti-democratic attitudes and vote for parties that are classified as extremist or openly welcome Russia's imperial ambitions. On the one hand, this requires politicians to close the representation gap by regaining people's trust and making them feel represented by the established parties again. On the other hand, much more must be done to educate people about external disinformation campaigns and their interplay with pro-Putin parties in Germany.

Maintaining and renewing economic strength and technological leadership. Germany must renew its economy. China is investing strategically and on a large scale in future technologies with the aim of using them to achieve global dominance. The USA has responded with a major investment program. Germany and Europe must also position themselves more strategically in the economic sector and significantly improve the framework conditions for the existing creative

minds and companies, particularly in the field of future technologies. As Chinese companies undercut the usual market prices through subsidies, European technology leaders – such as Ericsson and Nokia in the field of telecommunications infrastructure – are losing the market. In order to give these companies and their technologies a chance in the unfair competition with China, the EU needs an industrial policy for the domestic market.

Regaining military strength. Despite all the talk of a turnaround, investment in the Bundeswehr to date has been insufficient. Germany is once again only very conditionally ready for defense – also with regard to its NATO obligations. According to experts, Russia will be in a position to attack NATO by the end of the decade at the latest. Moreover, at a time when autocratic states have brought military power and violence back to the center of international politics, it is becoming clearer than ever that we will only be taken seriously internationally if we can counter the arms build-up by Russia and China with something substantial.

Establish Germany's strategic capacity to act. Germany needs a National Security Council based in the Chancellery to coordinate a truly strategic foreign policy across departments. Germany can no longer afford a competition for competence and power between the Chancellery and the Federal Foreign Office. Germany must recognize the comprehensive challenge posed by the coalition of autocrats and the changed European and transatlantic environment and bring its foreign policy thinking up to date. It must, in partnership with others, develop and implement a strategy aimed at protecting democracy and a liberal international order on which Germany's security, freedom and prosperity depend. All of this must also be made clear in a new security strategy that does not focus on taking stock, as the existing strategy does, but actually identifies forward-looking strategic goals as well as the means and instruments required to achieve them. The implementation of an updated National Security Strategy (the same applies to the China Strategy) by the departments must be monitored by the National Security Council on an ongoing basis. Where there is a need to catch up, the institutions must show what measures can be taken to rectify this and within what timeframe.

Conclusions for German foreign and security policy: What is at stake

The Russian war against Ukraine, China's increasingly aggressive stance in global politics and in East Asia, the war in the Middle East and the rise of right-wing and left-wing populist movements in Germany and Europe pose existential challenges for Germany's future foreign and security policy in Europe. At the same time, the re-election of Donald Trump as US President is expected to bring about significant changes in US foreign policy, especially towards Europe. Essentially, the main challenges are that revisionist actors such as Russia and China, but also the Islamic Republic of Iran and others, want to change the existing world order. Russia, at least, has shown that it is prepared to do this not only by economic and political means, but also by waging war.

Germany is dependent on a liberal and rules-based European and international order: due to our own identity as a democratic and liberal constitutional state in a united Europe, our fundamental security policy convictions in the transatlantic alliance and our economic interests as an export-oriented country that depends on international flows of raw materials, goods and finance. This liberal, rule-based international and European order is more at risk today than at any time since the end of the Cold War. This means that Germany must assume greater responsibility in Europe and the world in its own interests. That is why the “turnaround” (Zeitenwende) proclaimed by Chancellor Scholz in the German Bundestag on February 27, 2022 must be consistently implemented and continued.

Because if the rules-based international and European order continues to break down, Germany's freedom, security and prosperity will also be at stake.

Germany must assume a leadership role in the interests of Europe

In view of the challenges and threats discussed in the previous chapters, Germany must assume a coordinated European leadership role in order to make Europe more secure again and capable of acting as a foreign policy actor. The development of a new European security architecture must take place in close cooperation with our European and – as far as possible in the future – transatlantic partners. Due to its economic strength, its central geographical location and the reputation it has built up over decades as a reliable partner (“soft power”), Germany has the potential to take on such a leadership role like no other European country. This also gives rise to an obligation of responsibility: our eastern and northern neighbors in particular have long called for Germany to play a coordinated leadership role. For many years, Washington has also expected Germany to fulfill its commitments and play a responsible role in shaping transatlantic relations. This is all the more true if the new Trump administration focuses on “America First”, neglects the transatlantic relationship, acts transactionally and unilaterally or even withdraws internationally. In any case, the USA will demand more than ever from us Europeans that we make a greater contribution to safeguarding our own security interests – and rightly so! We Europeans must become the guarantors of our own European security. If we don't, no one will.

A German leadership role in Europe does not mean imposing something on others. But our partners in Europe and the world have a right to expect us to clearly articulate our values, goals and interests and to confidently stand up for them together with our partners and the EU.

The partnership with France and Poland is particularly important in this context. In this context, one of the most urgent tasks of the new German government will be to revive the deeply fractured Franco-German relationship. The “Weimar Triangle” offers the opportunity to jointly and

strategically build security for Europe in an era in which Russia is threatening European security. The United Kingdom should also be closely involved, for example in the form of a contact group to develop proposals for the future order of Europe.

Germany has a key role to play in Europe between East and West, but also North and South: it must offer its eastern and northern partners support and reassurance as a reliable partner that takes their specific security interests seriously, while at the same time integrating those European states, particularly in the south, that do not feel equally threatened by a greater geographical distance from Russia. Because if Europe remains a continent of insecurity, marked by wars and conflicts, this will affect us all, restrict our freedom of movement and reduce prosperity. A central task here is close coordination with NATO and the EU institutions in Brussels. This coordination with Brussels, but also with our eastern, northern and southern neighbors, has been lacking in recent years.

In terms of global politics, a German leadership role means promoting our positions together with our European partners in Latin America, Africa and Asia, taking the different interests of the various countries seriously without arrogance and including them in our own considerations. Under no circumstances should we engage in a global political frontal position in which the “West” is pitted against the “rest of the world”. Such a front is currently being propagated by Russia and China and unfortunately has many supporters around the world. In contrast, it is important to note that the liberal and rule-based international order based on the UN Charter, with its protection of human rights, an open global economic order and diverse multilateral institutions, offers precisely those who are weaker in terms of power politics opportunities to promote their goals and interests. We must not allow the strength of the law to become the law of the strongest. This is precisely why we support Ukraine in its defensive struggle against a revisionist and imperialist Russia.

After all, a German leadership role in the European context can only work if public opinion supports such a project. Germans are divided when it comes to greater international involvement.³¹ A military leadership role in Europe is even rejected by two thirds; at the same time, half of the population is in favor of defense spending amounting to 3-3.5% of gross national product, but not if this is at the expense of social, environmental or development budgets.³² Against this background of ambivalent attitudes, constant political communication is required. We need to convince people that a stronger German commitment to foreign and security policy is of existential importance – especially in order to prevent another war in Europe. The issue of “peace” must not be left to the AfD and the BSW in terms of communication, who are propagating the de facto subjugation of Ukraine instead of peace.

Organizing support for Ukraine on a European level

The most important task for German foreign and security policy in the coming years will be to support Ukraine – as well as other countries in the sphere of influence claimed by Russia (Moldova, Georgia) – and to deter Russia. German leadership in Europe does not mean being

³¹ According to the latest survey by the Körber Foundation, 46% of respondents are in favor of greater German involvement in international crises, while 44% are in favor of restraint. See. Körber-Stiftung (Hrsg.), *The Berlin Pulse 2024-2025*, P. 15.

³² Ibid., P. 16, 17.

solely responsible for supporting Ukraine. Rather, our task is to initiate and implement initiatives and improve cooperation within the EU. Europe needs such leadership in order to develop greater strategic autonomy. Germany will be all the more convincing in its role as initiator the more it is prepared to bear the costs associated with such initiatives and strategies, to lead the way itself and to become fully involved. There is a considerable need for action in German foreign and security policy here.

The more the Trump administration withdraws its support for Ukraine, the more important Germany's leadership role will become – a withdrawal that is at best only gradually and without major stress tests for NATO, at worst abruptly and at the expense of Ukraine and European security. This means that the European NATO partners and the EU will essentially have to take over the foreign and security policy support for Ukraine themselves in the future. If there is a ceasefire without a complete withdrawal of Russian troops from Ukrainian territory, renewed Russian aggression must be deterred. As explained above (see Chapter 1), this can only be achieved through continued military support for the country combined with credible security guarantees. The best guarantee of security is NATO membership. Here, too, Germany must assume a leading role within the European alliance, together with Poland, France, the United Kingdom and the EU. Security policy support for Ukraine must be organized at European level before the USA begins to withdraw. At the same time, EU accession negotiations with Ukraine and Moldova must be conducted swiftly. However, the requirements for democracy, human rights and the rule of law must not be compressed in the process. Intermediate goals are therefore recommended, each of which is associated with clear benefits and maintains the will for reform in both states. For the EU, this process is automatically linked to its own need for internal reform in order to bring itself into line with the constitution and admit further states.

Keeping Europe and the EU together and making them fit in terms of security policy

A united West is in a position to repel Russian imperialism and restore security in Europe. On the European side, this requires a willingness to seriously build up its own military capacities. The West's cohesion and decisive action have proven to be our greatest strength and have created the conditions for Ukraine to resist Russian aggression to this day. But the cohesion of the West is at risk and by no means secure. With Donald Trump, a US president has been elected who does not see Europe's security as an original interest of the USA, but as a matter for the Europeans. Conversely, this means that the West can only be held together if the Europeans in NATO and the EU do their homework in terms of security policy and assume the main share of deterrence against the Russian threat in transatlantic burden-sharing. This is the only way to prevent the forces in the USA, and particularly in the Trump administration, from becoming stronger, which consider the transatlantic alliance to be a burden rather than an opportunity for US interests. Germany must play a central role in organizing this cohesion, in Europe and vis-à-vis its transatlantic partners.

At the same time, it will be important to finally strengthen security and defense policy cooperation within the EU – with a view to making it a European pillar within NATO. It is often overlooked that Article 42(7) of the EU Treaty contains a political and, if necessary, military assistance clause, analogous to Article 5 of the NATO Treaty. This also means that the EU can become much more active in security and defense policy than has been the case to date – at least beyond the more than necessary cooperation in procurement and armaments issues. In this context, the new EU Commission has for the first time created the post of Defense Commissioner (Andrius Kubilius

from Lithuania), who will in future be responsible for these issues together with the High Representative for Foreign Affairs and Security Policy (Kaja Kallas from Estonia). The new Defense Commissioner's mission letter states that "a new approach to defense should be developed and investment needs identified in order to provide the full range of European defense capabilities on the basis of joint investments and to prepare EU Member States for the most extreme military scenarios."³³ This clarity is currently lacking in German security policy, which should adopt the EU Commission's approach. The EU is therefore well positioned in terms of content and personnel, but this should not obscure the fact that it will not work without the will of the Member States. Germany has a special responsibility to build a bridge between the Commission and the Member States. Germany must support the expansion of EU foreign, security and defense policy much more strongly than has been the case to date and advocate putting national egoisms behind common security. Above all, it will be important to revitalize the Franco-German relationship and to open it up as a driving force for member states that are prepared to launch joint initiatives in European foreign and security policy. At the same time, it is important to intensify relations with the Central and Eastern European, Baltic and Scandinavian states that are directly affected by Russia's expansionist policy. Relations with Poland in particular must be placed on a new footing.

China: Minimizing risk (de-risking), but not decoupling

As outlined in detail in Chapter 2, China, as a global economic and military power, is increasingly calling into question the liberal principles of the international order. China's threatening gestures towards Taiwan, Japan and other East Asian states also pose a threat to European security, considering that around a quarter of all goods traded worldwide are transported through the South China Sea. At the same time, China will remain a key trading partner for Germany and the EU for the foreseeable future. In order to increase the costs of a confrontation for China as well, it is in our interest that economic relations remain interdependent. The majority of trade with China is not considered problematic. What must be avoided and reduced are one-sided asymmetries and dependencies on China that restrict our ability to act. The global political context of our relations with China also includes the fact that the confrontation between China and the USA could increase further under the Trump administration.

In this situation, we need a China strategy worthy of the name. A German leadership role in the European context means, firstly, setting clear guidelines for the economy on what steps to take in the context of de-risking in order to protect our critical infrastructure, to arm ourselves against Chinese influence and blackmail potential and also to protect ourselves against crisis-induced disruptions to global supply chains (e.g. pandemics, wars). This will not work against the economic players, but only in cooperation with it.

Secondly, Germany must campaign within the EU for a common European policy that specifies the areas in which we want to support the US course towards China and where we want to set our own priorities. The central principle here should be that relations with China are fundamentally mutually beneficial in areas where cooperation is possible. In cases where there are conflicts with China, Europeans see themselves as part of the West, even if our economic and political interests are not always congruent with those of the US. If the US and Europe can act

³³ Ursula von der Leyen, Mission Letter, Brussels, September 17, 2024; https://commission.europa.eu/document/download/1f8ec030-d018-41a2-9759-c694d4d56d6c_en?filename=Mission%20letter%20-%20KUBILIUS.pdf.

together on China policy, they have much greater negotiating power (e.g. symmetrical market access) than if they allow themselves to be divided.

Thirdly, we must use all the diplomatic means at our disposal to make it clear to the Chinese leadership what is at stake for both sides if there is Chinese aggression towards Taiwan or other countries bordering the South China Sea. After all, the decoupling that might then take place would not only be economically disastrous for us, but also for China itself.

Fourthly, we must also be aware that we are dependent on China's cooperation in tackling the major problems facing humanity in the future. This applies, among other things, to the fight against climate change. Europe's hand must remain outstretched in this area.

Standing up resolutely for a liberal international order

The liberal world order, as expressed in the UN Charter and in countless global and regional agreements, is based on three pillars: firstly, international law with its prohibition of the use of force and fundamental orientation towards cooperative, multilateral solutions; secondly, the open international economic order; thirdly, the protection of human rights with the corresponding global and regional agreements. This liberal world order is part of Germany's and Europe's foreign policy DNA because it corresponds to our values and our economic and security policy interests and, as a global political middle power, we can best pursue our interests within it. Its foundations are under threat in several ways: Russia denounces the liberal world order as “Western hegemony”; Putin's imperial ambitions are incompatible with this. Authoritarian populist currents in the USA (“America First”) and Europe also reject the rules-based international legal order in favor of almost unlimited protection of nation-state sovereignty. At the same time, China wants to eliminate the USA's international leadership role in favor of Chinese power interests. It does not recognize international human rights protection or other liberal core principles. China violates human rights on a massive scale in its own territory. It praises its development path as an example that modernity is not synonymous with the West and freedom - and this is attractive to many states. Finally, many countries in Latin America, Africa and Asia are critical of the liberal world order because they do not feel represented and because it not only does not eliminate the existing economic and political inequalities in the world, but actually exacerbates them.

Protecting and developing the free international order is in Germany's and Europe's own best interests. Here, too, Germany needs to play an active leadership role – together with our partners in the EU, NATO, Europe and the world. Germany could play a much more active role in the United Nations, for example. The most important thing here is to win allies for our positions in Latin America, Africa and Asia. Germany and the EU still have considerable “soft power” and a high standing in the world. We should use this soft power with determination. As mentioned above, we must not allow ourselves to be divided into the “West” and the “rest of the world”. This rhetoric is deliberately stirred up by opponents of the free world order in order to weaken it in the long term. This also means that we must resolutely tackle the reform of many international institutions.

For Germany, the new challenges have both a social and a military side. “Peace is an emergency”, this statement by Federal President Heinemann in his inaugural address on July 1, 1969 remains valid. But this peace is under threat. From a military point of view, it is necessary to expand the personnel base of the Bundeswehr and to continuously increase the defense budget in order to meet NATO requirements. Civilian defense must also be strengthened. This requires an integrated

approach that understands security comprehensively and communicates the requirements of civilian defense to the population.

In view of the challenges outlined in this paper, the coming years will decide the future of the European and international order. This requires Germany's will to shape the future – as part of the European Union! If we want to defend our liberal values, our security and our market economy, we must resolutely counter the illiberal and revisionist challenges posed by autocracies. Only if this is done with staying power will we create the conditions for restoring a multilateral order that protects core principles of freedom and controls armaments internationally.

Appendix

Overview of dates and topics

At its meeting on May 14, 2024, the CDU/CSU parliamentary group in the German Bundestag set up its first Enquete Commission dedicated to the topic of “Peace and Security in Europe”, which consisted of 14 members of the CDU/CSU parliamentary group, two members of the EPP parliamentary group and ten external academics.

The schedule and topic roadmap agreed at the constituent meeting on 26 June 2024 provided for a meeting of the commission lasting at least three hours for each month from September 2024 to June 2025, to which further experts were to be invited. The end of the traffic light coalition has thrown the timetable for the parliamentary group inquiry into disarray: The meetings from December 2024, including a closed meeting, were canceled and another meeting was convened in November, so the actual schedule can be summarized as follows:

Tuesday, May 14, 2024 (parliamentary group meeting)
Establishment of the commission

Wednesday, June 26, 2024
Constitution and public kick-off event³⁴

Tuesday, September 10, 2024
War in Europe

Wednesday, October 9, 2024
Economic dependence/China

Wednesday, November 6, 2024
Subversion of the democratic order

Thursday, November 21, 2024 (digital)
The axis of autocrats: How China, Russia, Iran and North Korea work together

December 2024
Completion of the final report and handover to the parliamentary group

³⁴ See also:

- <https://www.cducusu.de/veranstaltungen/auftakt-der-fraktions-enquete-frieden-und-sicherheit-europa-gefahren-erkennen-eindaemmen-und-entgegenen>
- <https://www.cducusu.de/themen/enquete-frieden-und-sicherheit-europa>

Members of the enquete commission „Peace and Security in Europe“

Members of Parliament

a) German Bundestag

CDU

Dr. Norbert **Röttgen** (Chairman)

Knut **Abraham**

Peter **Beyer**

Serap **Güler**

Kerstin **Vieregge**

Catarina **Dos Santos**

Dr. Ottilie **Klein**

Moritz **Oppelt**

Stefan **Rouenhoff**

CSU

Thomas **Silberhorn** (Deputy Chairman)

Thomas **Erndl**

Tobias **Winkler**

Mechthilde **Wittmann**

Hansjörg **Durz**

b) European Parliament

Lena **Düpont** MdEP

Michael **Gahler** MdEP

Science

Dr. Stefanie **Babst**

Former senior member of the NATO International Staff

Dr. Benedikt **Franke**

Deputy Chairman and CEO of the Munich Security Conference (MSC)

Dr. Lykke **Friis**

Director at the Danish Think Tank Europe

Dr. Claudia **Major**

Research Group Leader for Security Policy at the SWP (Stiftung Wissenschaft und Politik)

Prof. Dr. Carlo Masala	Professor of International Politics at the Faculty of Political and Social Sciences at the University of the Federal Armed Forces (Bundeswehr) Munich
Prof. Dr. Thomas Risse	Senior Professor at the Cluster of Excellence “Contestations of the Liberal Script” (SCRIPTS), Freie Universität Berlin
Andrea Rotter	Head of Department for Foreign and Security Policy at the Academy for Politics and Current Affairs of the Hanns-Seidel-Foundation
Prof. Dr. Haya Schulmann	Professor of Cybersecurity at the Institute of Computer Science at the Johann Wolfgang Goethe University Frankfurt am Main
Prof. Dr. Martin Schulze Wessel	Professor of Eastern European History at the Ludwig Maximilian University of Munich
Prof. Dr. Guntram Wolff	Professor of Economics at the Solvay Brussels School of Université libre de Bruxelles

List of other experts invited to individual meetings

Minna Ålander	Finnish Institute of International Affairs
Dr. Hans Christoph Atzpodien	Managing Director of the Federal Association of the German Security and Defense Industry (BDSV)
Prof. Dr. Tanja A. Börzel	Freie Universität Berlin, Otto Suhr Institute for Political and Social Sciences, Head of the European Integration Unit
Dr. Ali Fathollah-Nejad	Director Center for Middle East and Global Order (CMEG)
Prof. Dr. Niall Fergusson	Milbank Family Senior Fellow
Generalmajor Dr. Christian Freuding	Head of the Planning and Command Staff and the Special Staff Ukraine at the Federal Ministry of Defense, on the threat situation in Europe in the context of Russian imperialism
Dr. Arndt Freiherr Freytag von Loringhoven	Former Ambassador
Ferdinand Alexander Gehringer	Konrad Adenauer Foundation, Consultant for Domestic and Cyber Security
Dr. Mikko Johannes Huotari	Mercator Institute for China Studies (MERICS)
Dr. Bruno Kahl	resident of the Federal Intelligence Service (BND)
Nico Lange	Senior Fellow at the Munich Security Conference (MSC)
Jürgen Matthes	Institut der deutschen Wirtschaft Köln e.V. (IW), Head of the International Economic Policy, Financial and Real Estate Markets Cluster
Hanna Katharina Müller	Central Office for the Detection of Foreign Information Manipulation at the Federal Ministry of the Interior and for Home Affairs
Dr. Janka Oertel	European Council on Foreign Relations (ECFR), Director, Asia programme, Senior Policy Fellow

Dr. Mareike Ohlberg	German Marshall Fund of the United States (GMF), Senior Fellow, Indo-Pacific Program
Johannes Perger	German Mineral Resources Agency (DERA) at the Federal Institute for Geosciences and Natural Resources (BGR)
Dr. Albert Pferr	Federal Office for the Protection of the Constitution (BfV), Head of the Cyber and Counterintelligence Department
Claudia Plattner	President of the Federal Office for Information Security (BSI)
Jörg Wuttke	Partner Dentons Global Advisors-Albright Stonebridge Group
Dr. Jeromin Zettelmeyer	Bruegel Director

Agendas in the original

Mittwoch, 26. Juni 2024

a) Konstituierung

1. Begrüßung
2. Vorstellungsrunde der Enquete-Mitglieder
3. Generelle Aussprache
4. Themenplanung
5. Terminplanung inklusive Klausurtagung

b) Öffentliche Auftakt-Veranstaltung

- 17:30 Uhr **Begrüßung**
Dr. Norbert Röttgen MdB
Vorsitzender der Fraktions-Enquete
- 17:35 Uhr **Einführung „Deutschland und Europa in der Zeitenwende“**
Friedrich Merz MdB
Vorsitzender der CDU/CSU-Fraktion im Deutschen Bundestag
- 17:45 Uhr **Keynote „European Security: Why Germany matters!“**
Prof. Dr. Niall Ferguson
Milbank Family Senior Fellow, Hoover Institution der Universität Stanford und Senior Fellow, Belfer Center an der Universität Harvard
- 18:15 Uhr **Moderiertes Gespräch**
Dr. Jana Puglierin, Büroleiterin Berlin ECFR (Moderation)
- *Friedrich Merz MdB*
- *Prof. Dr. Niall Ferguson*
- 18:35 Uhr **Publikumsdiskussion**
Dr. Jana Puglierin (Moderation)
- *Prof. Dr. Niall Ferguson*
- *Dr. Norbert Röttgen MdB*
- *Thomas Silberhorn*
- 18:55 Uhr **Schlusswort**
Thomas Silberhorn MdB
Stellv. Vorsitzender der Fraktions-Enquete

Dienstag, 10. September 2024

Krieg in Europa

1. **Begrüßung**
2. **Nicht öffentliche Unterrichtung durch Generalmajor Dr. Christian Freuding, Leiter des Planungs- und Führungsstabs und des Sonderstabs Ukraine im Bundesministerium der Verteidigung, zur Bedrohungslage in Europa im Kontext des russischen Imperialismus**
3. **Analyse der politischen Rahmenbedingungen und Bedrohungsszenarien**
 - 3.1. Impuls zur imperialistischen Orientierung Russlands
Prof. Dr. Martin Schulze Wessel
 - 3.2. Impuls zur aktuellen Lage in der Ukraine
Nico Lange, Senior Fellow bei der Münchner Sicherheitskonferenz
 - 3.3. Diskussion der militärischen Szenarien
4. **Was bedeuten diese Rahmenbedingungen und Szenarien für die deutsche Außenpolitik?**
 - 4.1. Impuls zu den außen- und sicherheitspolitischen Implikationen eines Waffenstillstands
Prof. Dr. Thomas Risse
5. **Was sind Definitionen der Ziele und Mittel/Instrumente?**
 - 5.1. Impuls zu der Führungsrolle Deutschlands
Prof. Dr. Carlo Masala
 - 5.2. Impuls zur Wachstumsdimension, die in der Verteidigungsfähigkeit Deutschlands und Europas besteht
Prof. Dr. Guntram Wolff
 - 5.3. Impuls zur deutschen / europäischen Rüstungsindustrie
Dr. Hans Christoph Atzpodien, Hauptgeschäftsführer des Bundesverbandes der Deutschen Sicherheits- und Verteidigungsindustrie
6. **Planung der Oktober-Sitzung zum Thema „Wirtschaftliche Abhängigkeit/China“**

Mittwoch, 9. Oktober 2024

Wirtschaftliche Abhängigkeit/China

1. Rahmenbedingungen deutscher Außenpolitik

- 1.1. Warum ist China eine Bedrohung?
- 1.2. Welche Strategien verfolgt China zur Begründung von Abhängigkeiten?
- 1.3. Taiwan, andere mögliche Territorialkonflikte und ihre wirtschaftlichen Folgen

Impulsvorträge:

- Dr. Janka Oertel (European Council on Foreign Affairs)
- Mikko Huotari (Mercator Institute for China Studies)

2. Unsere Abhängigkeiten in und von China

- 2.1. Absatzmarkt und Produktionsstandort

Impulsvorträge:

- Jörg Wuttke (Albright Stonebridge Group)
- Jeromin Zettelmeyer (Bruegel)

- 2.2. Beschaffung, Lieferketten und Importe (Rohstoffe, Medikamente usw.)

Impulsvortrag:

- Johannes Perger (Deutsche Rohstoffagentur [DERA] in der Bundesanstalt für Geowissenschaften und Rohstoffe [BGR])

3. Unsere Abhängigkeiten in Deutschland

- 3.1. Kritische Infrastruktur

Impulsvorträge:

- Claudia Plattner (Präsidentin BSI)
- Dr. Janka Oertel

4. Strategien zur Reduzierung von Abhängigkeiten

Impulsvorträge:

- Guntram Wolff (Bruegel)
- Jürgen Matthes (IW)

5. Vorbereitung der nächsten Sitzung und Terminausblick

Mittwoch, 6. November 2024

Unterwanderung der demokratischen Ordnung

1. Analyse der Bedrohungen und unserer Verwundbarkeiten

- 1.1. Was sind hybride Bedrohungen und was nicht? Welche Zielsetzung wird verfolgt? Z.B.: Einflussnahme auf Entscheidungsprozesse; Destabilisierung demokratischer Institutionen.

Impuls:

- Dr. Ulrich Pferr (*Bundesamt für Verfassungsschutz, AL Cyber- und Spionageabwehr*)

- 1.2. Welche gesellschaftlichen oder politischen Verwundbarkeiten bestehen, die uns angreifbar machen?

Impuls:

- Prof. Dr. Tanja A. Börzel (*FU Berlin*)

2. Welche Instrumente werden von wem eingesetzt?

- 2.1. Cyberangriffe

Impuls:

- Prof. Dr. Haya Schulmann (*Goethe-Universität Frankfurt/Main*)

- 2.2. Foreign Information Manipulation / Desinformation

Impulse:

- Dr. Arndt Freytag von Loringhoven (*Botschafter a.D.*) [*Russland-Fokus*]

- Dr. Mareike Ohlberg (*GMF*) [*China-Fokus*]

- 2.3. Sabotage / Spionage

Impuls:

- Ferdinand Gehringer (*KAS, Innere- und Cybersicherheit*)

3. Instrumente zur Abwehr von hybriden Bedrohungen

- 3.1. Welche Instrumente zur Abwehr haben wir? Welche beherrschen wir und setzen wir bereits ein? Wo besteht Nachholbedarf?

Impuls:

- Hanna Katharina Müller (*BMI, Zentrale Stelle für die Erkennung ausländischer Informationsmanipulation*)

- 3.2. Best Practice: Was können wir von anderen Ländern lernen?

Impuls:

- Minna Ålander (*Finnish Institute of International Affairs*)

4. Vorbereitung der nächsten Sitzung

Donnerstag, 21. November 2024 (digital)

Die Achse der Autokraten:

Wie China, Russland, Iran und Nordkorea zusammenarbeiten

1. Welche Ziele verfolgt die Allianz der Autokraten?

Impuls:

- Dr. Bruno Kahl, Präsident des Bundesnachrichtendienstes

2. Welche Instrumente/Mittel verwendet die Allianz der Autokraten?

Impuls:

- Dr. Bruno Kahl

3. Wachsende Zusammenarbeit innerhalb der Achse

3.1. China

3.2. Russland

3.3. Nordkorea

Impuls:

- Dr. Bruno Kahl

3.4. Iran

Impuls:

- Dr. Ali Fathollah-Nejad, Direktor Center for Middle East and Global Order (CMEG)

4. Strategien zur Abwehr der Allianz der Autokraten

Impulse:

- Dr. Bruno Kahl

- Dr. Ali Fathollah-Nejad

5. Folgen der Neuwahl für die Arbeit der Fraktionsenquete

6. Verschiedenes

Diese Veröffentlichung der CDU-CSU Fraktion im Deutschen Bundestag dient ausschließlich der Information.
Sie darf während eines Wahlkampfes nicht zum Zweck der Wahlwerbung verwendet werden.

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