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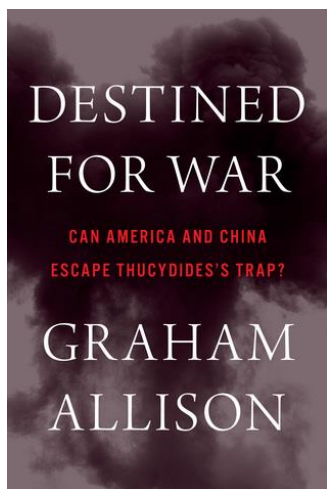


El nuevo desorden global y sus implicaciones para la Unión Europea y sus empresas

25 octubre 2023



China y Estados Unidos: ¿Destinados a la guerra?





What is the

Thucydides Trap?



"It was the rise of Athens, and the fear that this inspired in Sparta, that made war inevitable."

-Thucydides

"We all need to work together to avoid the Thucydides trap – destructive tensions between an emerging power and established powers."

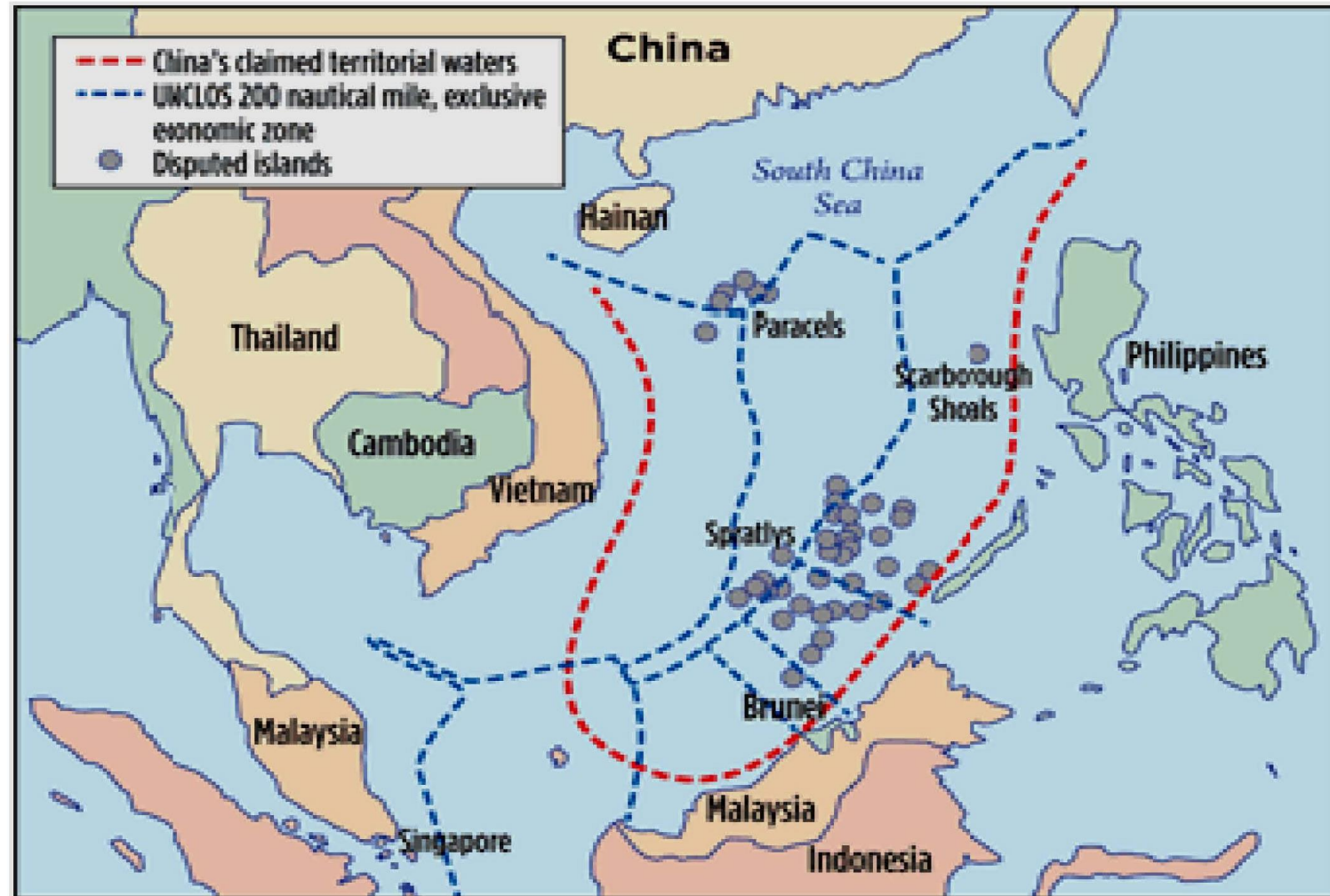
-Xi Jinping
President of China

Nº	Period	Ruling Power	Rising Power	Domain	Result
1	Late 15 th century	Portugal	Spain	Global empire and trade	No war
2	First half of 16 th century	France	Habsburgs	Land power in western Europe	War
3	16 th and 17 th centuries	Habsburgs	Ottoman Empire	Land power in central and eastern Europe, sea power in the Mediterranean	War
4	First half of 17 th century	Habsburgs	Sweden	Land and sea power in northern Europe	War
5	Mid-to-late 17 th century	Dutch Republic	England	Global empire, sea power, and trade	War
6	Late 17 th to mid-18 th centuries	France	Great Britain	Global empire and European land power	War
7	Late 18 th and early 19 th centuries	United Kingdom	France	Land and sea power in Europe	War
8	Mid-19 th century	France and United Kingdom	Russia	Global empire, influence in Central Asia and eastern Mediterranean	War
9	Mid-19 th century	France	Germany	Land power in Europe	War
10	Late 19 th and early 20 th centuries	China and Russia	Japan	Land and sea power in East Asia	War
11	Early-20 th century	United Kingdom	United States	Global economic dominance and naval supremacy in the Western Hemisphere	No war
12	Early-20 th century	United Kingdom supported by France, Russia	Germany	Land power in Europe and global sea power	War
13	Mid-20 th century	Soviet Union, France, UK	Germany	Land and sea power in Europe	War
14	Mid-20 th century	United States	Japan	Sea power and influence in the Asia-Pacific region	War
15	1940s–1980s	United States	Soviet Union	Global power	No war
16	1990s–present	United Kingdom and France	Germany	Political influence in Europe	No war

El tercer mandato de Xi Jinping



Las ambiciones chinas



Arrecifes convertidos en bases militares

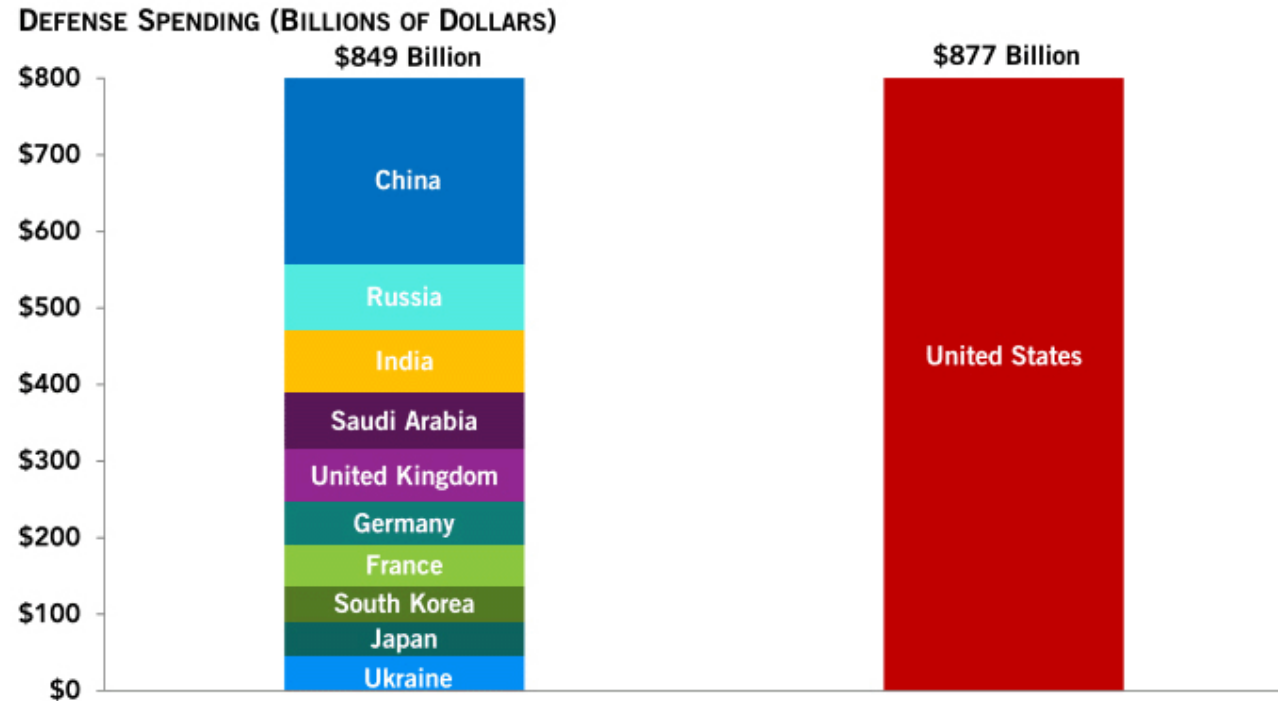


Fuente: [China Island Tracker](#)

Gasto mundial en defensa



The United States spends more on defense than the next 10 countries combined



SOURCE: Stockholm International Peace Research Institute, *SIPRI Military Expenditure Database*, April 2023.

NOTES: Figures are in U.S. dollars converted from local currencies using market exchange rates. Data for the United States are for fiscal year 2022, which ran from October 1, 2021 through September 30, 2022. Data for the other countries are for calendar year 2022. The source for this chart uses a definition of defense spending that is more broad than budget function 050 and defense discretionary spending.

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PGPF.ORG

Fuente: Peter G. Peterson Foundation, SIPRI

<https://www.pgpf.org/blog/2023/04/the-united-states-spends-more-on-defense-than-the-next-10-countries-combined>

Rusia no es un cisne negro



Someter Ucraina: de Yuschenko a Zelenski

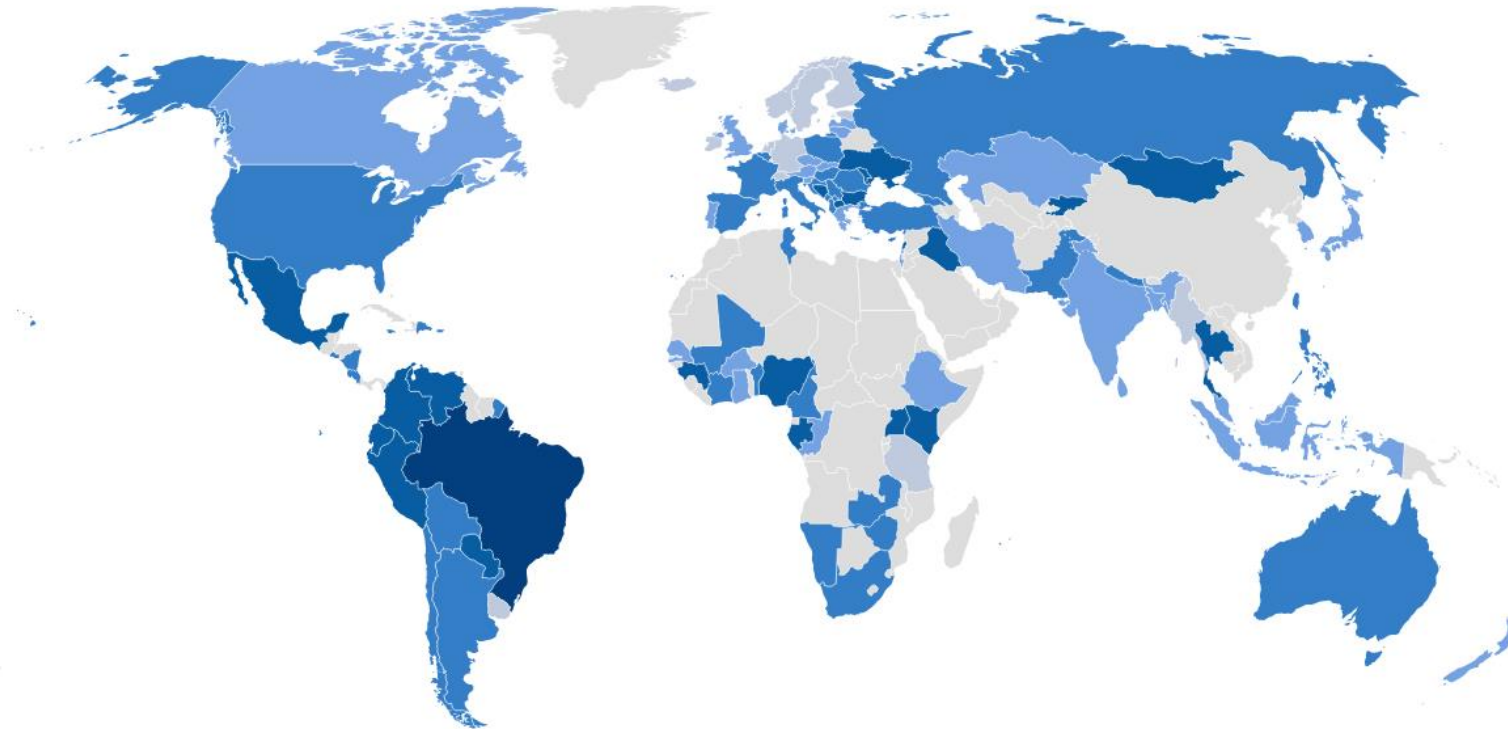


¿Un orden liberal sin liberals?

The declining legitimacy of democratic elections

Share of people who do not trust the electoral process

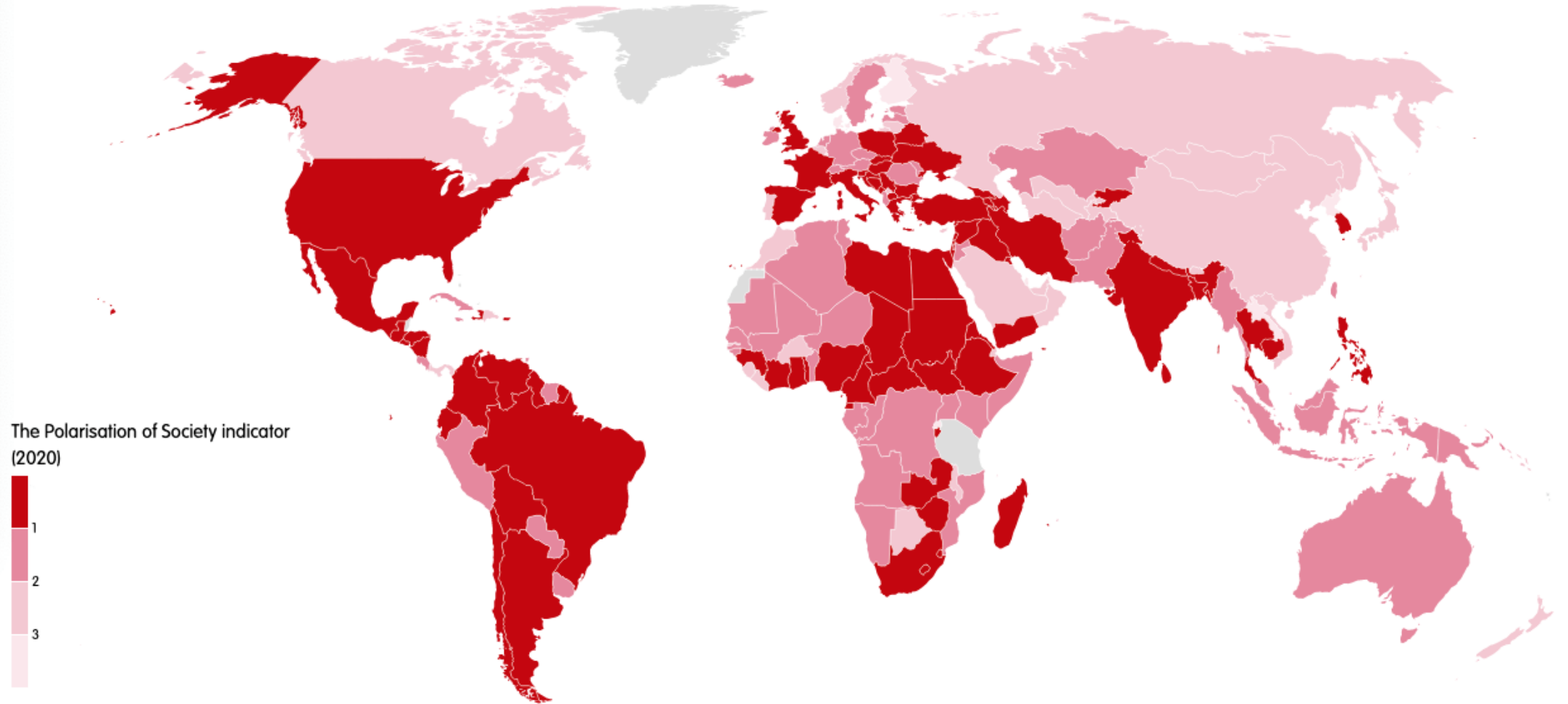
Share of population that does not have confidence in the honesty of elections (2020)



Source: Gallup World Poll (2020)
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Las democracias están en retroceso

The polarised world



Desinformación, manipulación informativa e injerencia electoral

Election interference

Cyber-enabled foreign interference in elections and referendums between 2011 and 2020



Source: O'Connor S., Hanson F., Currey E., & Beattie, T. (2020) (2020) Cyber-enabled foreign interference in elections and referendums, The International Cyber Policy Centre at ASPi

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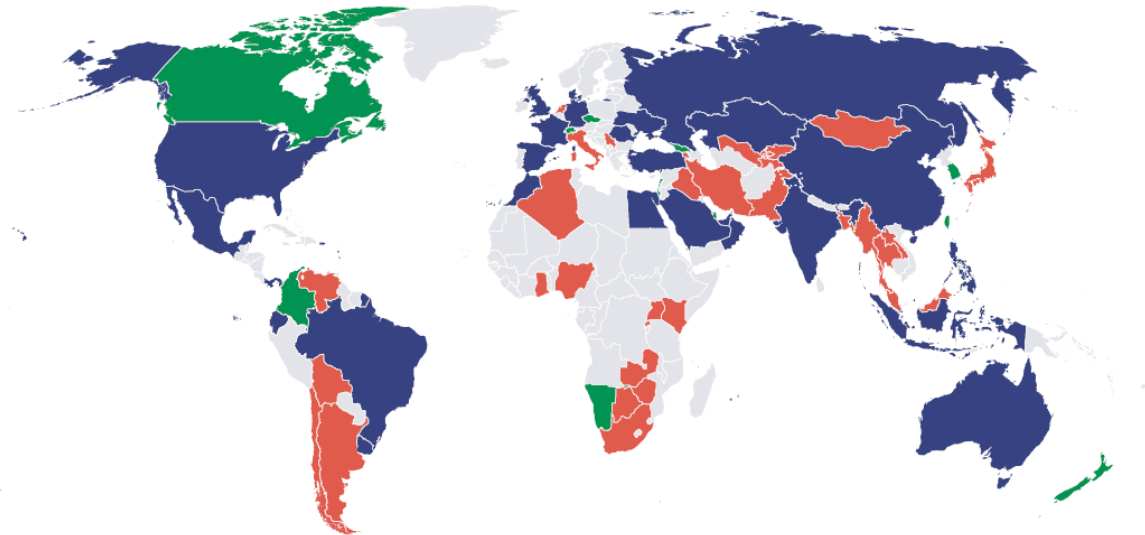
Tecnologías para la democracia, ¿o el autoritarismo?

How technology helps dictatorships

China's role in spreading surveillance technology

US and Chinese surveillance technology (2019)

- Chinese surveillance technology
- US surveillance technology
- Both



Source: Carnegie Endowment for International Peace (2019), AI Global Surveillance (AIGS) Index

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The Power Atlas
Technology #10

Geoeconomía

El giro geopolítico de la globalización

La UE está cada vez más amenazada por la coerción económica

Ejemplos seleccionados



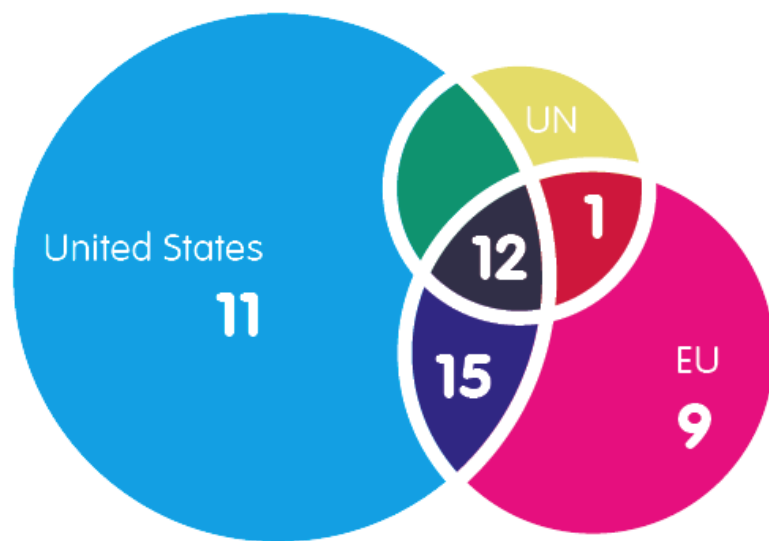
- 1 Freno chino a las exportaciones australianas para contrarrestar una investigación sobre los orígenes del Covid-19 (2020)
- 2 Amenaza china de imponer aranceles a los automóviles para presionar a Alemania a que acepte la infraestructura 5G de Huawei (2019).
- 3 Prohibición rusa a las importaciones polacas de frutas y verduras tras las sanciones de la UE por la guerra de Ucrania (2014)
- 4 Amenaza estadounidense de aranceles de la sección 301 para impedir que Francia y otros países europeos apliquen impuestos a los servicios digitales (2020)
- 5 Boicot popular chino a empresas europeas como Adidas y H&M tras las sanciones de la UE a funcionarios chinos implicados en violaciones de los derechos humanos en Xinjiang (2021).

- 6 Boicot turco a productos con etiqueta francesa tras el anuncio del presidente Emmanuel Macron de políticas para combatir el extremismo (2020)
- 7 Amenaza rusa de prohibir las importaciones de cerveza checa tras la declaración del Gobierno checo de vínculos entre los servicios de inteligencia rusos y las explosiones en almacenes checos en 2014 (2021)
- 8 Suspensión por parte de China del transporte de mercancías por ferrocarril a Lituania y bloqueo de los permisos de exportación para los productores lituanos como reacción al anuncio de la apertura de una oficina de representación taiwanesa en Lituania (2020).

Sanciones a países, entidades e individuos

Sanctions

List of sanctions programmes (2021)



Total number of sanctioned individuals/entities

UN 966

EU 15,618

US 29,116

US Sanctions - 11

- Counter-narcotics trafficking
- Cuba
- Foreign Interference in a United States election
- Lebanon
- Non-proliferation
- Rough diamond trade controls
- Transnational criminal organizations
- Chinese military companies
- Ethiopia
- Hong Kong
- Russian harmful foreign activities

EU and US and UN Sanctions - 12

- Central African Republic
- Counter-terrorism (including al-Qaeda and the Taliban)
- Democratic Republic of Congo
- Iran
- Iraq
- Libya
- Mali
- North Korea
- Somalia
- South Sudan
- Sudan
- Yemen

EU and US Sanctions - 15

- Balkans (Bosnia and Herzegovina, Moldova, Montenegro, Serbia)
- Belarus
- Burundi
- Cyber-attacks
- Human rights (Magnitsky Sanctions)
- Lebanon
- Myanmar (Burma)
- Nicaragua
- North Korea
- Russia
- Syria
- Ukraine
- Venezuela
- Zimbabwe

EU Sanctions - 9

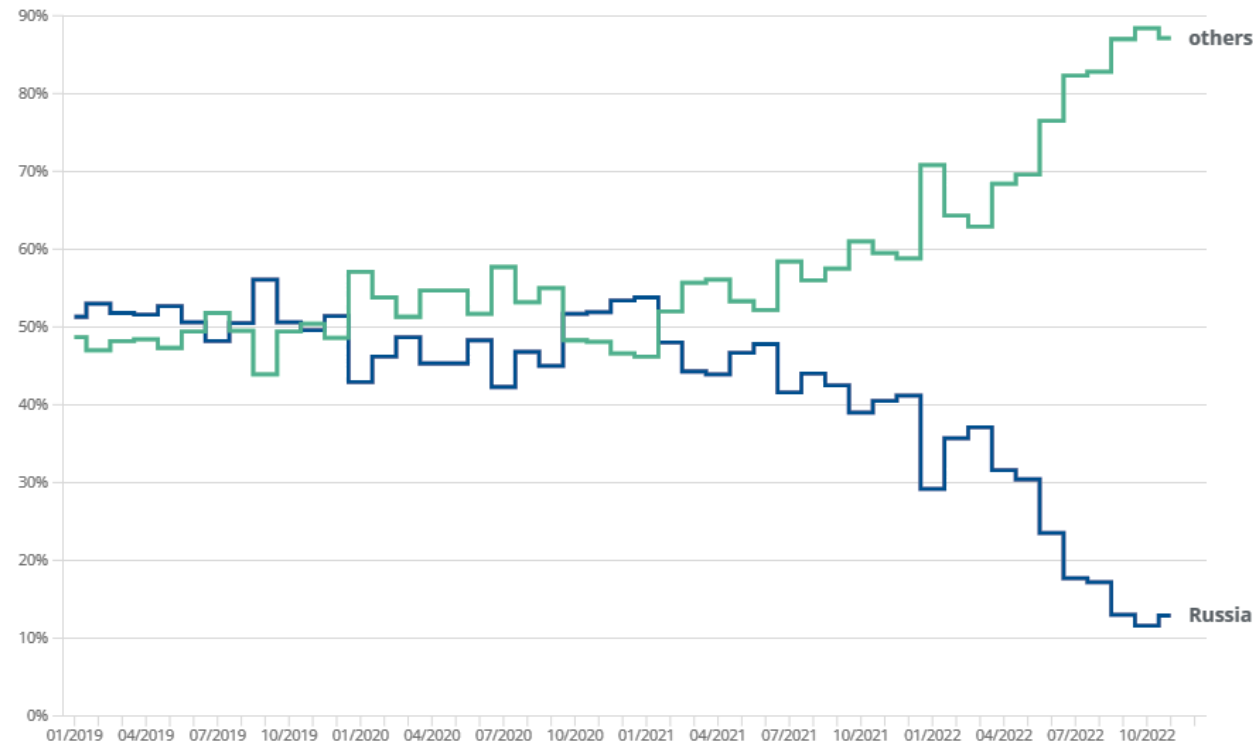
- Chemical weapons
- China
- Guinea
- Haiti
- Tunisia
- Turkey
- United States
- EU and UN Sanctions
- Guinea-Bissau

EU and UN Sanctions - 1

- Guinea-Bissau

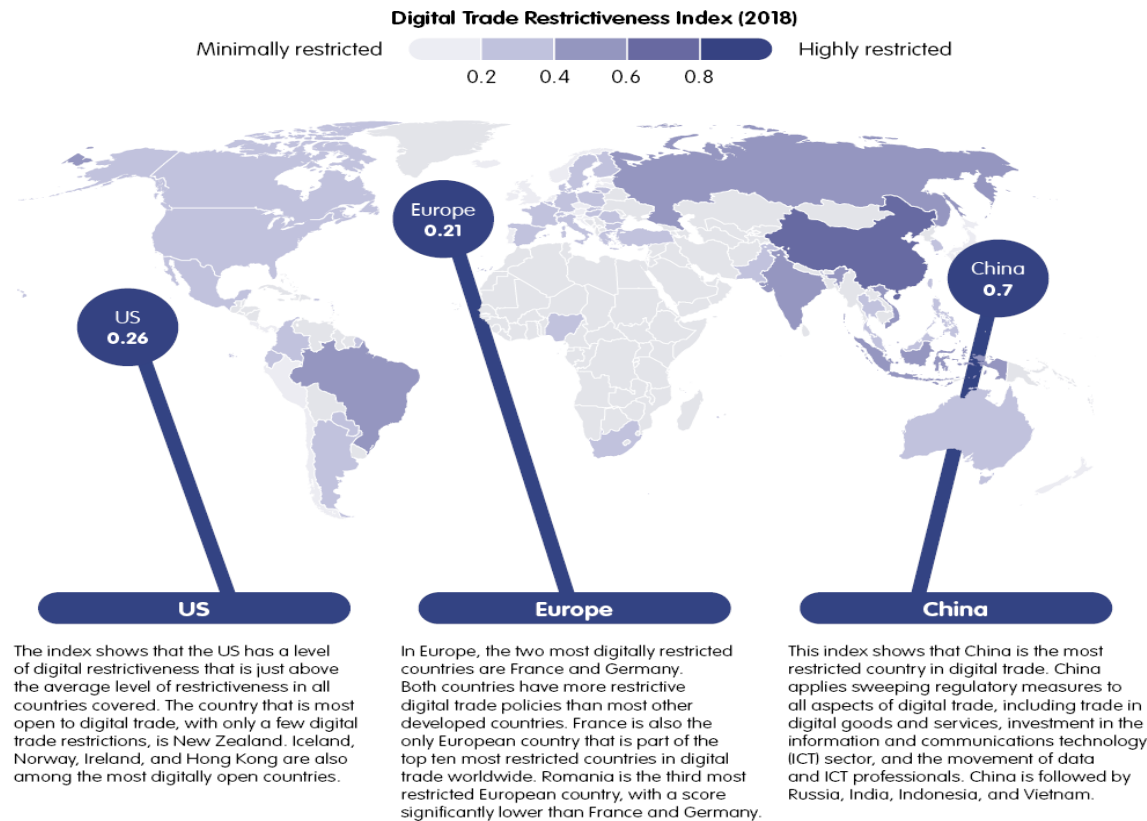
Decoupling / Derisking: las palabras de moda

EU's diversification away from Russian gas (Feb 2023)



Source: European Commission <https://www.consilium.europa.eu/en/infographics/eu-gas-supply/>

Restricciones a los servicios digitales y tecnológicos



Methodology: The Digital Trade Restrictiveness Index (DTRI) measures how 64 countries restrict digital trade. The DTRI is based on a wide spectrum of digital trade policies, covering more than 100 categories of policy measures. The index is based on the Digital Trade Estimates database that the European Centre for International Political Economy has developed and that is freely available for anyone to use. The database and the index are clustered around four larger areas of digital trade policy, namely: fiscal restrictions and market access; establishment restrictions; restrictions on data; and, finally, trading restrictions. The DTRI ranges between 0 (completely open) and 1 (virtually closed).

Source: European Centre for International Political Economy (2018). Digital Trade Restrictiveness Index
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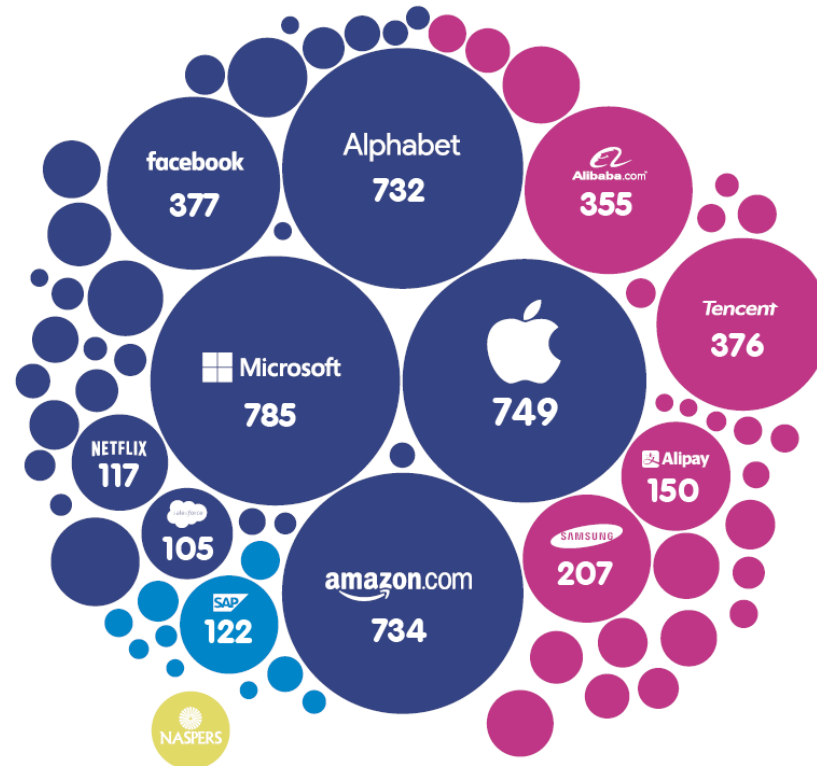
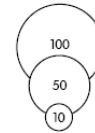
Guerra fría tecnológica

Technological bipolarity

Geographical distribution of technology companies

Market capitalisation
in \$billion (2018)

- America
- Asia
- Europe
- Africa



Source: UNCTAD (2019), Digital Economy Report 2019.
Retrieved from: https://unctad.org/system/files/official-document/der2019_en.pdf

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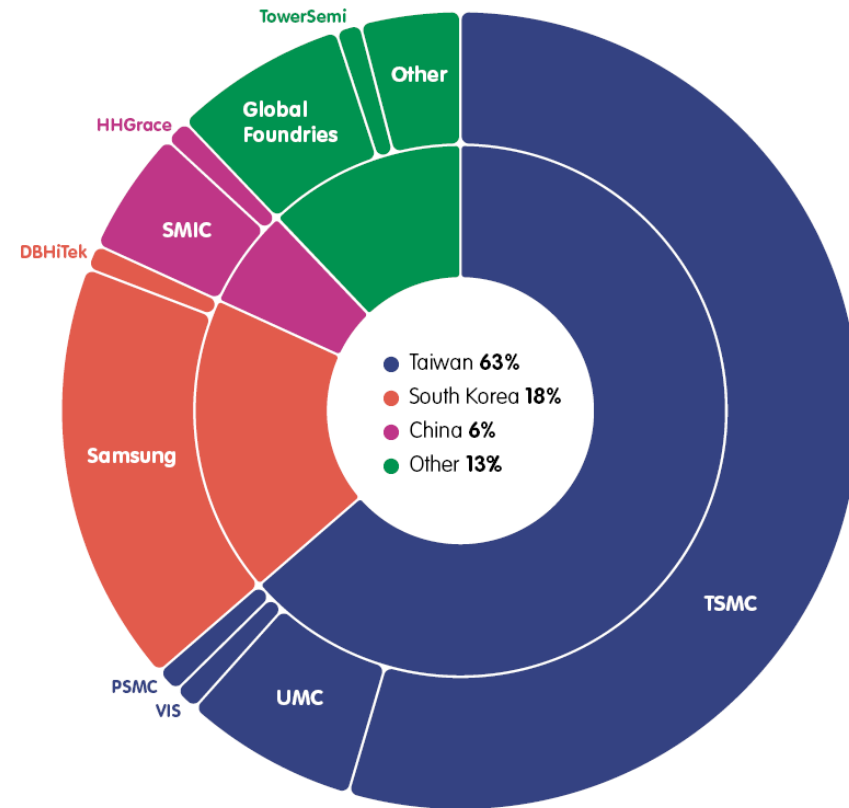
The Power Atlas
Technology #2

Las nuevas dependencias: semiconductores

The heart of the digital economy

Concentration of semiconductor production

Foundry revenue (2020)



Total Foundry Revenue: **\$85,124m**

Source: TrendForce Department of Semiconductor Research (2021). Foundry Revenue Projected to Reach Historical High
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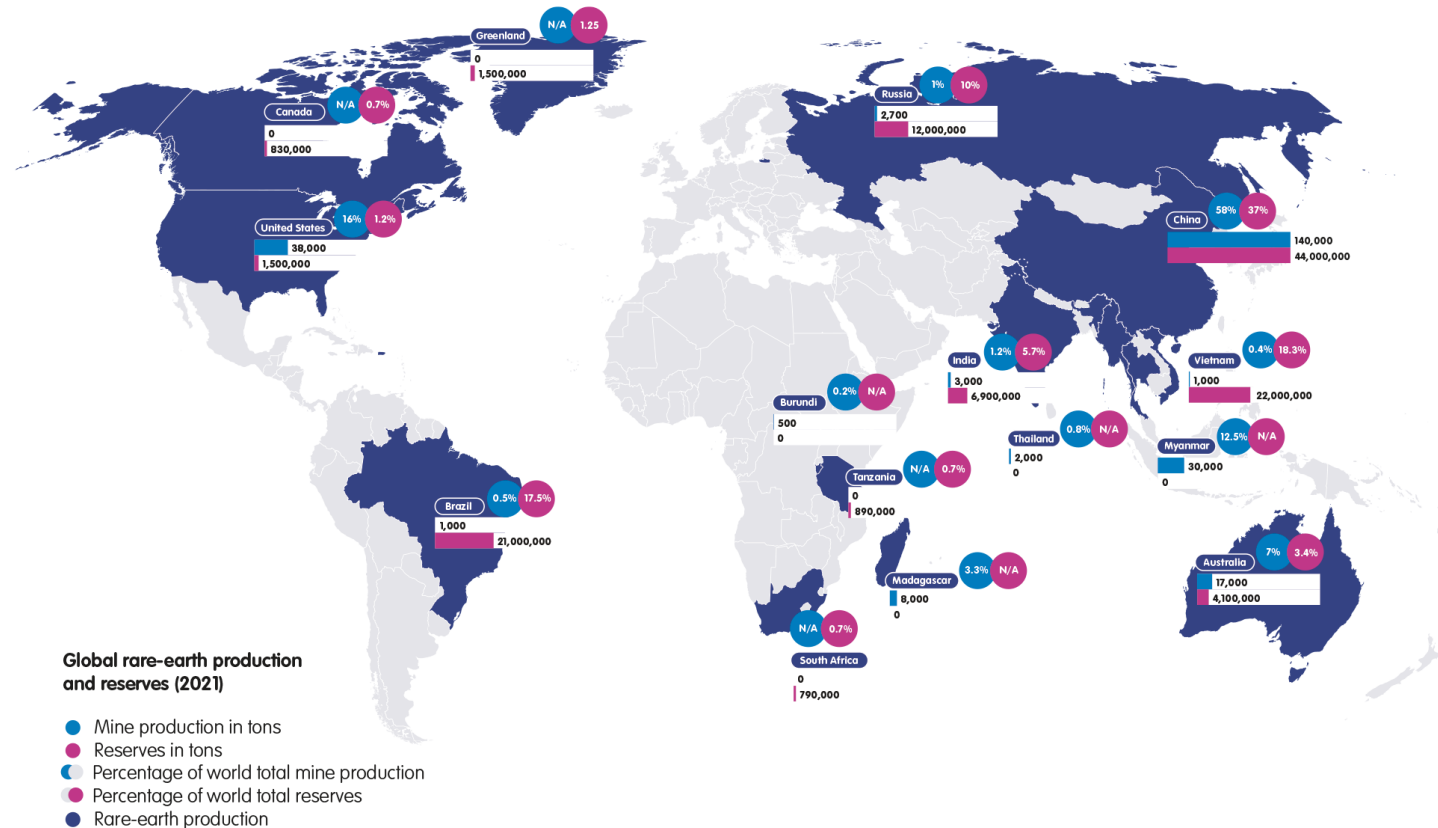


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Technology #4

Las nuevas dependencias: tierras raras

Mining rare-earth materials

How geography compromises the green tech revolution



Methodology: Data for metric tons of rare-earth-oxide equivalent content.

Source: U.S. Geological Survey (2021). Mineral commodity summaries 2021: Rare Earths, <https://doi.org/10.3133/mcs2021>

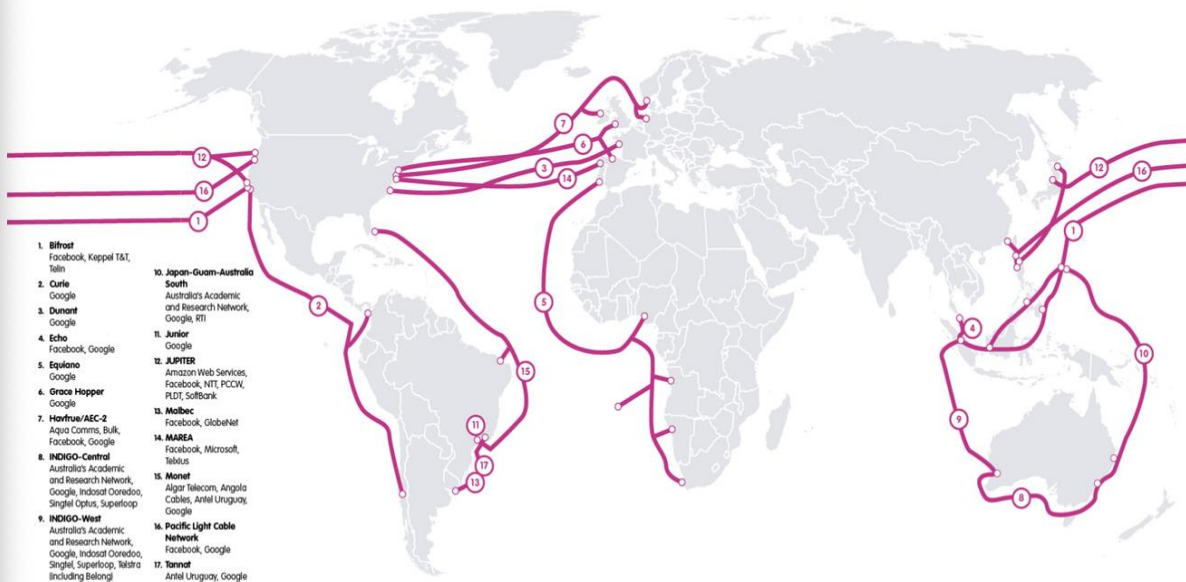
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Nuevas dependencias: cables submarinos y data centers

US companies control most private submarine communication cables

Submarine communications cables owned by tech giants

● Owned by a tech giant
(at least partly)



Source: TeleGeography (2021). Submarine Cable Map.
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The Chinese government leads state-sponsored development

Submarine communications cables owned by governments and state-owned enterprises

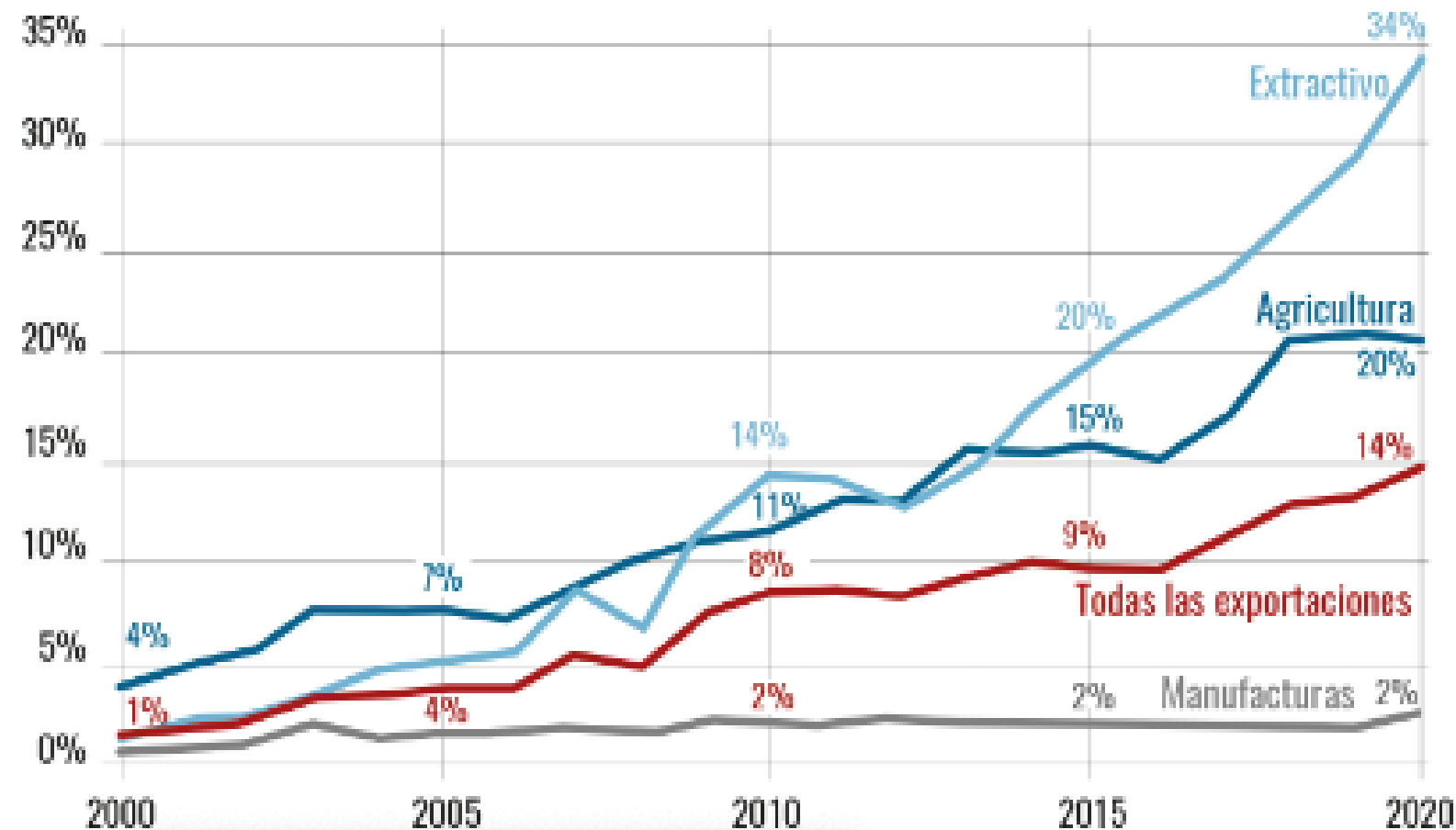
● Chinese (partly)
● American
● Russian



Source: TeleGeography (2021). Submarine Cable Map.
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Neocolonialismo / Extractivismo

Exportaciones de América Latina y el Caribe hacia China



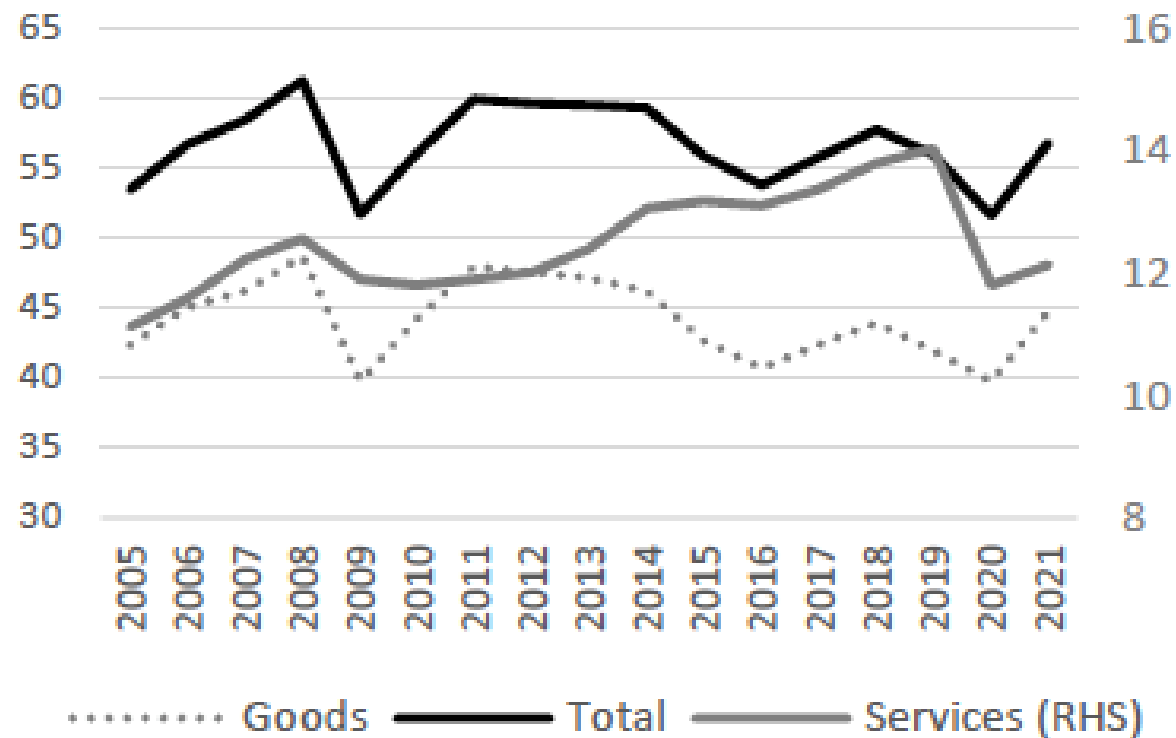
[Nota: Cf. China y América Latina, 'terra ignota' China-Latin America and the Caribbean].

Source: <https://ecfr.eu/article/default/latam-and-china-2020>



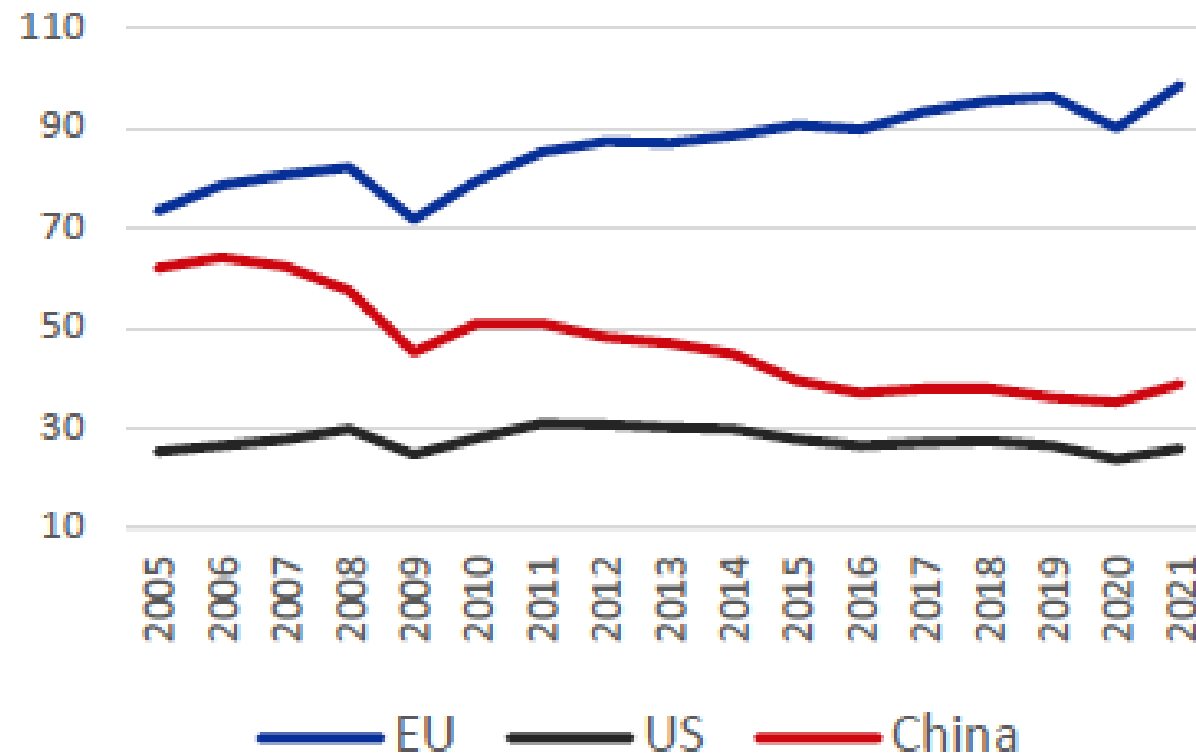
La globalización no se ha detenido

Fig. 1. World Trade
(sum of imports and exports on GDP)



La Unión Europea sigue apostando a la apertura

Fig. 2. Trade openness by region
(sum of imports and exports on GDP)





The Power Atlas

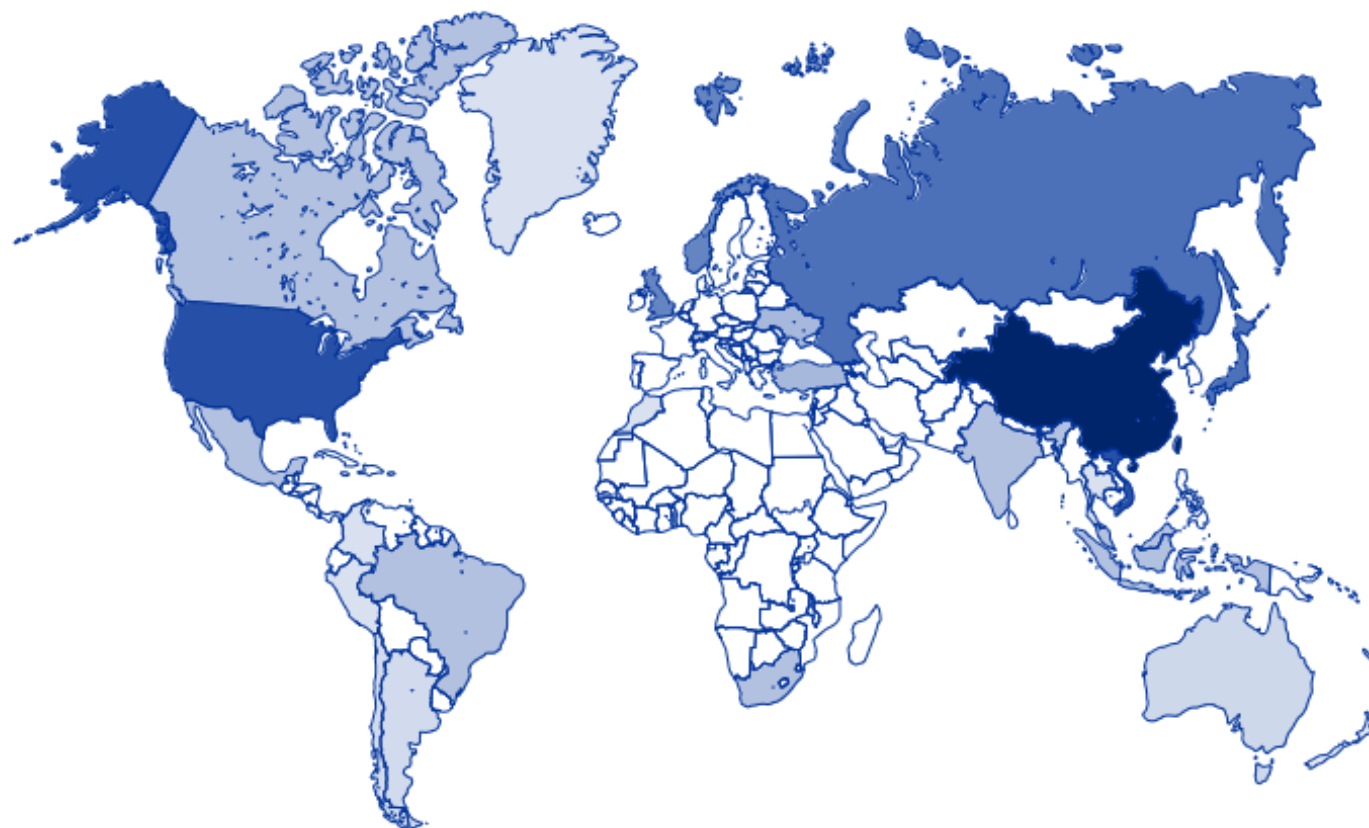
Seven battlegrounds
of a networked world



¿Alguna buena
noticia?

Autonomía estratégica (¿abierta?)

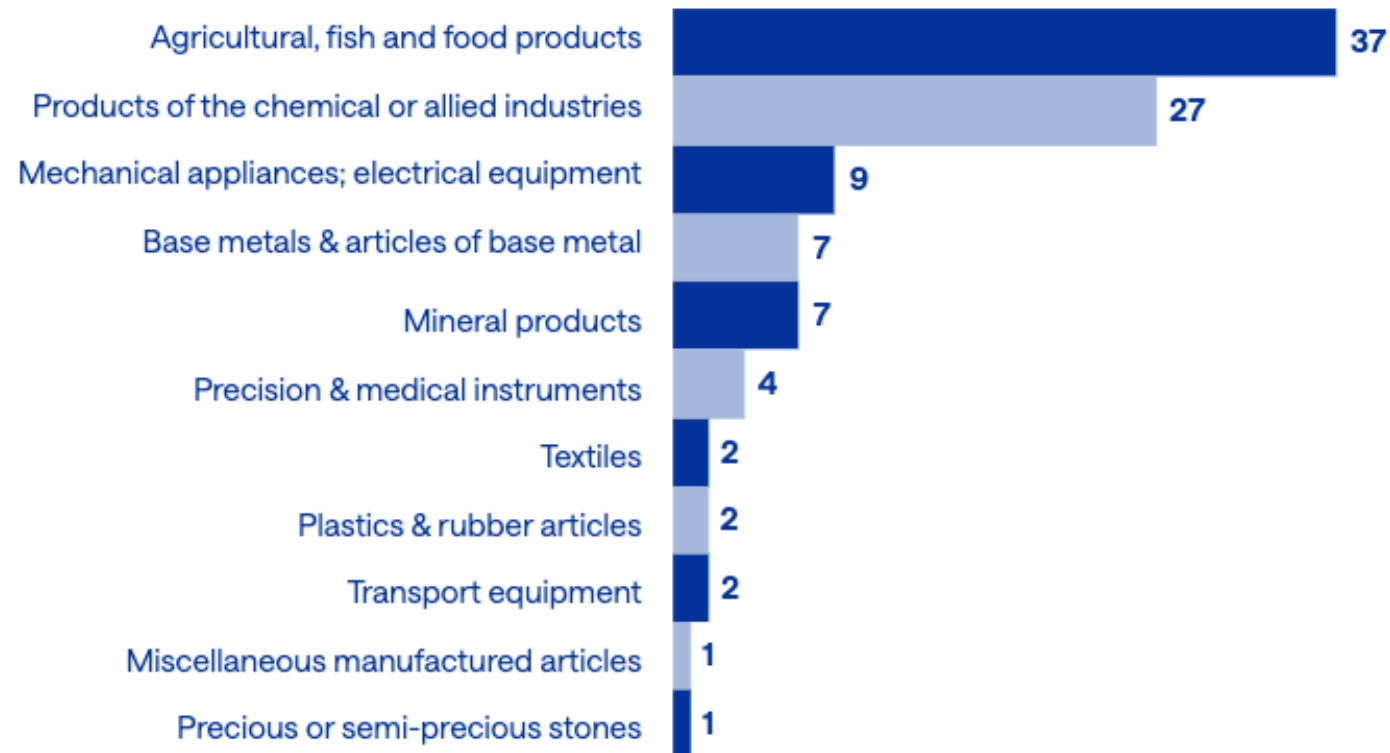
Distribution of 323 dependent products by origin (% value of total imports; colors reflect concentration)



Source: Own elaboration based on Arjona et. al., 2023.

Nuevas dependencias

Distribution of 323 dependent products across trade sectors (%)



Nuevas oportunidades



- Estrategia de Seguridad Económica de la UE
 - Promover la innovación, la tecnología y la capacidad industrial.
 - Proteger la seguridad económica de la UE
 - Asociarse con terceros
- Autonomía estratégica
 - Tecnologías de descarbonización
 - X 2 en aerogeneradores
 - X 4 en bombas de calor
 - X 6 en motores eléctricos
 - Salud y alimentación
 - Piensos basados en proteínas vegetales
 - Fertilizantes orgánicos
 - Precursores e industria farmacéutica
 - Tecnologías críticas
 - Ciberseguridad
 - IA, data centers, servicios digitales, cloud services (85% US), e-commerce (75%), digital payments (90%)
 - Baterías alternativas
 - Electrolizadores
 - Minería responsable