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ACHIEVING SUSTAINABILITY IS IT TOO LATE?

THINKING
BIG

DEMOCRACY AND
ITS CHALLENGES

KOREA'S END
OF HISTORY?



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GLOBAL HETEROGENEITY

POLITICAL REGIMES AND WORLD POLITICS

Thierry de Montbrial

ONE OF the focal points of my writings has consisted of shedding light on the problem that arises from the heterogeneity of the international (or national) system, and the need for its components to reach agreement on the rules of the game and thus avoid collapsing into hostile blocs—as well as the need for the components of those blocs, the active units, in particular the political ones, to respect them.

Such rules are obviously not built to last eternally, but the structural stability of the system suggests that they may evolve only within the scope of procedures commonly agreed upon. Such principles lie at the root of international law, the efficiency of which is made possible only if perceived as legitimate by the relevant populations.

The heterogeneity I address in the following passages is one of political regimes. It results from an understanding that no state—even a powerful

one like the United States—has the right to unilaterally act to bring down a regime of another state. Unfortunately, this principle has been violated many times by the members of the Atlantic Alliance themselves since the fall of the Soviet Union, and we see clearly that U.S. President Donald Trump's decision to withdraw from the Iran nuclear deal, pushed by the Israeli right and American evangelicals, stems from the ideology of “regime change.”

Similarly, in 2004 and again in 2014, a large number of well-meaning Western democrats wanted to favor the birth of “democracy” in Ukraine from the outside, counting on a domino effect in Russia. This was decided despite the fiasco of the “Greater Middle East” ideology of U.S. President George W. Bush. The subsequent response was Russia's intervention in the Donbass region and the prompt annexation of Crimea.

Yet, since then, it appears that authoritarian regimes have become even

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Photo: IFRI

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more authoritarian—for example in China, Russia, and Turkey—and liberal democracies have somewhat contracted compared to illiberal ones; populism is gaining ground in the Western world, which is not immune to the rise of nationalist movements.

A number of Asian intellectuals, like Kishore Mahbubani of Singapore, are already loudly rejoicing about the superiority of “Asian values” and denouncing the decadence of the Atlantic civilization, whose ideological leadership is rapidly losing ground. Through his rhetoric and actions, Trump continues to demean “Western

values” on a daily basis without causing a major uproar from the American population or institutions. Because of his preference for strong personalities like himself, he does not shy away from showing sympathy for leaders whose aspirations are sometimes far from what we today call “liberal democracy.” In Europe, his sympathies openly go to Poland's Jarosław Kaczyński over Germany's Angela Merkel.

Thus far I have used quotation marks to underline a certain lack of precision in the characteristic terminology used in ongoing debates regarding major international and

even national questions. This lack of precision reveals that the current international system is out of balance in a fundamental sense, for many of its active units are themselves out of balance, which, again, is due to their lack of capacity to adapt to the shock of an ill-controlled globalization process.

GLOBAL POWERS

Let us examine the only two global powers today: the United States and China. America's huge success is that it has managed to produce a constitution that, despite all the obstacles of history, has maintained its legitimacy in the eyes of the overwhelming majority of the American people whilst continuing to embody their identity. This constitution is perfectly linked to culture, which very closely resembles what the Founders had envisioned: success by merit, melting pot, etc. Moreover, it remains compatible with an ideal of economic efficiency, despite resulting (and rising) inequalities. The question that lingers, however, is whether and for how much longer such a culture will maintain its essential characteristics.

Regarding China, how can we doubt the legitimacy and efficiency of a regime that has managed to pull off an

incredible *tour de force* in transforming its economy and society into the world's second largest economy? The Chinese regime is not democratic in the sense that the electoral process is very tightly controlled and the separation of powers is dubious at best. It nevertheless appears to be a sort of meritocracy, based on technical and political skillsets that are being cultivated from within the Communist Party. By political skillsets, I mean their *savoir-faire*. In this regard, we should not forget that China has more than 25 centuries of history and at least as many centuries of experience in exercising

power over both a considerable territory and equally enormous population. Western ideologists who champion the few voices of dissent as the real *avant-garde* voices of the Chinese people are committing a grave mistake.

As such, both the American and Chinese governments are well equipped to confront each other in the race for the world's top spot. This is not the case with a majority of other states in the world, beginning with those in the EU that do not suffer as much from a "democratic deficit," as we often like to repeat *ad nauseam*, but rather from an efficiency deficit, and thus a legitimacy deficit.

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After the two world wars, the countries of Western Europe chose as their line of horizon the illusory reign of bourgeois comfort and protection against the obstacles of life, seeking state protection guarantees. The French expression *État-providence*, a poor translation of "welfare state," is self-explanatory. The French understanding stands at the opposite end of the spectrum to the American ideal as defined pithily by John F. Kennedy in his Inaugural Address: "ask not what your country can do for you; ask what you can do for your country."

Because the individual is the ultimate actor in American democracy, there is no contradiction with the supposition that the citizen has a duty to serve his or her country. As such, on that side of the Atlantic, the role of the individual and the group is resolved harmoniously. In bourgeois Western Europe, we keep waiting for the State to serve the individual, without reciprocity. We speak about rights and not duties, forgetting that a nation does not merely represent a collective of its citizens at a given moment, but includes its both dead and those that are not yet born. That's why Charles de Gaulle carefully distinguished between what he called "eternal" France and France "of the moment."

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When it comes to European security and defense, we seem to have fallen asleep in the sweet lethargy of pacifism, giving ourselves away, in times of hardship, to the initiative and direction of the United States. The only exceptions to the aforementioned rule are, to some extent, the United Kingdom and France. Yet if we take a look back in time, we can conclude that the 44 years between the end of World War II and the fall of the Berlin Wall constitute only a short parenthesis in which Western Europe conducted a policy of the ostrich—for want of a better term. This parenthesis has, nevertheless, been long enough to paralyze the capacity of adaptation *vis-à-vis* people that have continued to live under tragedy and hardship, and that have maintained the sense of the group over that of the individual.

During these 44 years of introversion, however, Western Europe founded an entirely new political construction that eventually became the European Union. From the very beginning, it was not perceived as an international institution among others, but as a starting point towards the establishment of a new type of political unit.

This entity helped to reorient common priorities away from waging war and towards the establishment of a force for prosperity and active peace on a global scale. As with every political entity, a form of governance was needed that would be fundamentally compliant with the principles of liberal democracy. Still, this was only done up to a certain extent, thereby provoking debate about the legitimacy of the European Commission. But this is not the most important argument. What is essential is what came to be the EU started to build itself up to the bourgeois image of its first members, away from all the global turbulence, and without preparation for a potential return of tragedy.

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If we ask ourselves why the European Union we know today manifests so many contradictions that overshadow its legitimacy, the essential answer lies in the fact that it was not capable of adapting itself fast enough, both psychologically and institutionally, to two critical aspects: the consequences of successive waves of enlargement and the strategic developments taking place beyond its own (expanding) borders.

Everyone knows that the survival of a species is contingent on its capacity to

adapt to changes in its environment and threats to which it is directly exposed. Thus we ask ourselves the question: what is the future of the EU and its member states?

TRUMP, TRUMP, AND MORE TRUMP

All eyes are on Trump, particularly as he relates to the forthcoming midterm legislative elections, but also

on speculating about the 2020 presidential elections. This is not the place to discuss at length the brutal, vulgar, and arrogant style of the current tenant of the White House; neither is it useful to examine in detail the values that he embodies, which are often far removed from the idea of democracy in

America as it understands itself.

Let us take a more useful way forward. Walter Bagehot, a nineteenth-century British economist and constitutionalist, distinguished between two essential components of executive power: the *dignified* and the *efficient*.

In the United Kingdom, the sovereign monarch holds no practical power: efficient is the responsibility of the government, and principally relies on the Prime Minister. We expect from the

government to correctly identify problems and provide necessary solutions. Sir Winston Churchill was very attached to such a distinction—one that Queen Elizabeth II has perfected so much that her long reign has managed to paper over the fact that numerous post-World War II British governments have not exactly been paragons of efficiency.

In a presidential system like that of the United States, or in a semi-presidential one like that of France, the *dignified* and the *efficient* are more or less largely carried by the same person. We can affirm that from the *dignified* point of view, Trump’s presidency has been a disaster for America’s global brand. However, it is still unclear whether this understanding will play a role in the elections to come. I also note that, using other words, such a debate takes place with some regularity in France. The French are not insensitive to the *dignified*.

Let us come back to the United States and the question of the efficiency of Trump’s actions. The defenders of liberal democracy are unable to restrain his will to firmly and selfishly promote American interests (with the doctrine of “America First”), as well as to focus narrowly on preserving his

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electoral base. As of August 2018, the American economy is doing well and Trump looks like he might actually be reelected for a second term.

During the slower years of the Cold War, the Europeans learned to be skeptical of the concept of national interest, which was mistakenly identified as *realpolitik*. We preferred instead to speak of the general interest, but those

two concepts are two sides of the same coin. In the case of the former, the focus lies more with external issues while in the latter it is domestic issues that prevail.

However that may be, the fundamental point to be made is the fact that the

outlook of politicians is reduced once they limit themselves to concentrating on the immediate conditions that allow them to remain in power. That outlook is enlarged when politicians begin to concern themselves with the nation’s future in the context of long-term actions. Politicians deserve to be called statesmen when they manage to convince voters of the pertinence of their actions that reach beyond the immediate demands of the electorate.

From this perspective, liberal democracies don’t always play to their advantage.

The notion of competency carries little to no relevance in elections, which in turn brings into question psychological issues of other forms, remaining outside of a given timeframe, which is, as it were, compressed.

As such, the Brexit referendum result is abhorrent and has caused a deviation in history. Trump was elected because he managed to raise real issues without being concerned about political correctness. By rejecting the self-absorbing rhetoric of the elites—which have now become the main scapegoats—he brought satisfaction to the contemporary spirit. However, due to his opportunism, reduced outlook, and skilled populism, he has vehemently promoted “solutions” that have not been thought through. Although such solutions may have been received as flattering by his electorate, they do carry a great danger over the mid- and long-term. And once elected, after taking months to organize himself—due to the fact that he did not foresee his victory—he started implementing his program.

QUESTIONING MULTILATERALISM

Consider this list: the future of free trade, alliances (NATO, in particular), the EU, the functioning of the G7 and G20, migration, sanctions, the Iran nuclear deal. In all of the aforementioned cases, the dysfunctions and shortcomings are numerous, and Trump’s criticisms, putting aside the

way they are formulated, are usually warranted. In this regard, we can appreciate his unwillingness to submit to the terms of political correctness. Where he might be wrong is his belief that solutions can be brought about through bilateral action or the circumventing of institutions set up in the wake of World War II, which constitute the backbone of the international order.

That being said, despite his blatant disregard for multilateralism, Trump has not yet pronounced the death of multilateral institutions. Thus the World Trade Organization (WTO) lives on, as does NATO—although, one must admit, he seems to sadistically enjoy humiliating or scaring his European partners (on display in Québec at the G7 meeting in June, and in Brussels at the NATO Summit in July).

Experts keep asking whether Trump actually aims to destroy these institutions or just shock his counterparts into giving their assent to reforms that are to his liking. What is certain is that the current tenant of the White House is at ease only in bilateral meetings, and thus considers multilateral meetings a waste of time.

But this is not all. The majority of the major international issues, be they economy- or security-related, remain complex. The correct evaluation of possible options with regards to each issue

demands an adequate understanding of independence at different scales of time, as well as thorough analytical work.

Let us take the case of trade. Trump denounces the trade deficit with China or Germany. He is right to question China’s status as a market economy—granted by the WTO—and is certainly rightfully worried by some of Beijing’s foreign investments. The Europeans are equally concerned. But he is not using the right methods in focusing on particular sectors, such as the automobile industry. He omits the services sector—increasingly important in our contemporary economies; he also does not seem to care about the balance of capital as well as the privileges granted to the U.S. dollar, the only currency known as a reserve currency, which allows America to live beyond its means. He does not see that exports are the cost of imports. He focuses on bilateral balances whereas in an open economy, the balance of payments must be considered as a whole.

By rushing like a bull on targets differently identified without stopping to anticipate the lasting consequences of his actions, Trump risks starting a chain reaction that could spiral out of control. A trade war (increases in tariffs and the

establishment of quotas) can lead to a currency war (with China in such a scenario ceasing to buy bonds from the U.S. Treasury), as well as a monetary war (competitive devaluation). When triggered, such a process leads, sooner

or later, to a financial market crash and panic-driven moves.

The Great Depression was a consequence of this sort of abuse, at a moment when the United Kingdom, weakened by the Great War, abdicated the *de facto* leadership it previously exercised over the global

economy, whilst the United States was rising in power, behaving as a free-rider.

Could it be that we have entered an era in which the United States refuses to worry about the global economic order, whilst China behaves like a free-rider? Harvard University’s Graham Allison sees a high likelihood of war between the United States and China (he is the one who popularized the term the “Thucydides Trap”). The equally highly-regarded Joseph Nye is more worried about the short-term “Kindleberger Trap,” which carries the name of the respected economist for his works on the Great Depression—had it been prevented, World War II could have been avoided. As for the current

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Photo: The Federal Government of Germany

On the same page? G7 leaders at the Québec Summit

situation, we are still far from such scenarios, and since the post-World War II institutions are still standing, with reminders still loudly resounding.

Additionally, President Trump is mainly concerned with having a good business climate and the health of the financial markets—both of these seem to condition the support of his electoral base. Currently, the financial markets are still artificially boosted by an abundance of liquidity due to quantitative easing policies that have followed the subprime crisis.

We can imagine that Trump would not like to see himself someday accused

of having provoked a financial crash. Regardless, his understanding of different mechanics of the economy remains limited, and he either lacks the humility or the intelligence to seek the expertise in others, which would compensate for his lack of knowledge. He actually built his entourage to his image, and never have we seen so many businessmen and so few think-tankers in the nucleus of Washington power.

TRUMP’S ALLIES

Similar considerations might determine the future of NATO or the fate of the Treaty of Mutual Cooperation and Security between the United

States and Japan. Alliances rarely survive the disappearance of the cause that prompted their creation. The Atlantic Alliance has survived for almost 30 years since the fall of the Soviet Union, principally because it has reinforced itself with a powerful organization, which tends, like all other organizations, to self-perpetuate, namely the European Union. Drifting away from a pure security threat assessment organization, NATO has transformed itself into the linchpin connecting the United States with Europe. The loudest pro-Atlantic voices

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Trump is right in demanding greater burden-sharing and more of a direct and independent understanding of defense by the Europeans. It seems that the Europeans have gotten the message, although this by no means guarantees they will take action. Perhaps in the future we should pay more attention to Articles 1 and 2 of the NATO Treaty. The first article stresses democracy and the rule of law. The second stipulates that each member state needs to

reinforce its own capacities to resist the attacks by which it might be targeted. Taken together, these two articles harmoniously comply with the idea of a European defense which would be more focused on cyber-security

and fighting terrorism, on the one hand; and both direct and indirect threats coming from regions to the south of Europe, on the other.

The Franco-German cooperation currently being drawn in the Sahel falls right in line with the aforementioned idea. For this to be reinforced, NATO will have to

define its missions more clearly, and an agreed interpretation of Article 5 would need to be achieved, while an even more difficult matter that will need to be addressed is Turkey’s future place in NATO.

Trump’s blunt charge against the European members of NATO has been successful in forcing them to review the situation in light of today’s realities and disregard the burden of past ideologies. This will have to be done in a concerted manner with the aim of preserving the best of what the Alliance has to offer: its efficiency in the field of military cooperation (the integrated military command), for instance.

Setting up a European defense force totally independent of the United States is not realistic in the foreseeable future. Fortunately, Trump's closest circle of advisers is replete with people of military background. It is for this reason that the risk of a sudden breakdown of the European security system should not be exaggerated.

NATO member states on either side of the Atlantic will need to reach agreement on how to engage with Russia. Some European states, like Germany, the United Kingdom, and most former Warsaw Pact members, understandably see Russia as constituting a serious to major threat. Other actors, like France and most of the European south, are more cautious.

The United States, increasingly obsessed with the prospect of war with China, may be tempted to put an end to its quasi "cold war" with Vladimir Putin. Although this was most certainly what Trump wanted, it has not come to fruition due to the ongoing investigations into his alleged collusion with Russia. Nevertheless, as things stand right now, Putin was visibly satisfied with his July 2018 meeting with Trump in Helsinki, much to the frustration of many Western commentators. The

future of NATO will be impossible to determine as long as relations with the nations to the east of the EU remain undefined.

On the Asian front, the current tenant of the White House continues to demand an increase in financial contributions from allies like Japan and South Korea. The situation in the Far East does not offer much room for maneuver,

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however, since the entire region essentially shares a common concern about the rise of China. That being said, Trump does not seem inclined to treat Tokyo or Seoul any better than his European counterparts,

let alone Ottawa or Mexico City.

To conclude with the question of multilateralism in jeopardy, I would like to draw certain examples linked to America's withdrawal from the nuclear treaty with Iran and the unilateral sanctions imposed Washington has imposed thereafter, as well as the effects such actions have had on the geopolitics of the Middle East. Again, international law is the matrix of multilateralism. In an ideal world, similar to the one of pure and perfect competition of economic theory in which no system would be powerful enough to manipulate the system of prices, law would be imposed on all states equally.

In the real world, every state tries to turn it to its own advantage and does so in accordance with how powerful it is at any given moment. At this general level, nothing is new with Trump.

Nonetheless, what has changed is that the technological revolution has given America leverage of unprecedented power, and that Barack Obama's successor often does not resist the temptation to use this to force the hand of both existing or potential adversaries, as well as his allies. America's unilateral withdrawal from the nuclear treaty with Iran was a grave act that further accentuated the decline of confidence

America's unilateral withdrawal from the nuclear treaty with Iran was a grave act that further accentuated the decline of confidence that the rest of the world may have had in the United States.

that the rest of the world may have had in the United States. This has made it certain that North Korea's Kim Jong-Un will remember it at the right time. What is even more important is that this withdrawal has been followed by sanctions—quite efficient ones, thanks to technological advancements.

Due to the high level of interdependence as a result of globalization, the United States is capable of punishing foreign companies that wish to do business with Iran as soon as their professional activities interact with American territory or anything they consider to

be under their jurisdiction, including much of the world's banking system. When it comes to American unilateral sanctions, allies and adversaries are put on the same level.

Never have America's NATO partners found themselves in such a position of dependence, which verges on the border of submission. A photo which notoriously went viral all over the world during the catastrophic June 2018 G7 Summit in Québec was more telling than any long speech would have been: we see the dominant Trump sitting with a half-in-different, half-arrogant look directed at his

"colleagues," who are all standing and trying to convince him of something or another. General de Gaulle must be rolling in his grave.

As for the conundrum surrounding the Iran nuclear deal, we are facing an unbelievable situation in which the so-called partners of the United States are forced to submit to a *de facto* policy of disapproval, thus weakening their own credibility. Even the Chinese have found themselves handicapped, as illustrated by the case of ZTE, a company threatened due to its dependence on American electronic components. This



Photo: NATO.int

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episode will leave open wounds and have far-reaching consequences.

What can we say about the partners, allies and otherwise, who do not wish to be reduced to the position of vassal state? Until now, China has taken enormous advantage of the system put in place by the WTO, and definitely hopes to continue benefiting from that institution. But we can be certain that Beijing will only ramp up policies that aim to ensure complete technological independence from the United States. The Chinese system of government, in principle, guarantees success. China will also attack the

international payment system to distance itself from the U.S. dollar. This will take time but, here again, the Chinese have the advantage of being able to take a strategic, long-term approach.

The question of traditional American allies remains, but for now they are powerless and paralyzed by stupor.

CHINA

The end of 2017 was marked by the 19th Congress of the Chinese Communist Party and its decision to break with the presidential two-mandate limit. This decision has global

reach because the fate of China is undoubtedly one of the most fundamental issues the world will be dealing with over the next three decades.

The year 2049 will most likely mark the 100th anniversary of the People’s Republic of China, and no one can doubt the willingness of the Chinese Communist Party to secure global recognition for the Middle Kingdom as the world’s number one power. This is realistically achievable but by no means certain.

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China’s expansion is being made manifest on both continental and maritime fronts. The language employed by Beijing is now overtly emphasizing strength rather than weakness. That being said, the Communist Party’s aristocracy knows better than all external commentators that a derailment remains possible.

Reforms that still need to be undertaken on the economic, environmental, and social fronts remain difficult and are facing powerful resistance. Corruption remains a real issue.

On the territorial front, anyone who follows the situation in Hong Kong knows that its absorption by Beijing is all but complete. Every Hong Kong-based business tycoon has already pledged allegiance to the capital. The pressure on Taiwan is slowly but surely increasing, and China is sophisticated enough to use technology to this end, more precisely through cyber-attacks. We are already speculating about the day when the host of the Forbidden City will cordially invite the tenant of the White House to withdraw his navy from the South China Sea, echoing the day from the beginning of the twentieth century, when U.S. President Theodore Roosevelt successfully extended an invitation to the British cabinet to evacuate the Caribbean Sea.

The Chinese elites know their country’s history. They know that no dynasty is eternal and that dynastic transitions have always occurred in periods of war and misery. Yet, the ruling dynasty today does not belong to any dynastic family. The “family” is the Party itself, which is still formally communist whilst having managed to superbly adapt itself to pressing realities since the death of Mao Zedong.

Xi Jinping is not an emperor; he is merely a delegate of the party. To reach the 2049 objective, it will be necessary to consolidate the dynasty and fortify its representative, which does not necessarily mean granting him an unconditional *carte blanche*. Referring to Xi as a new Mao thus appears inaccurate, in my view. On the contrary, what the

aristocracy of the Party sees wrong in the founder of the dynasty is the perception of him as the man whose mistakes put it in peril. Such criticism can obviously be expressed only in *mezza voce*.

In this context, consider what French novelist Gustave Flaubert wrote in

Madame Bovary (1856): “one must not touch one’s idols; a little of the guilt always comes off on one’s fingers.” By imposing a limitation on presidential powers in the long run, Deng had wisely judged to avoid dooming the blossoming dynasty to perish in the short term. Today the

situation is quite different. It consists of delegating powers to the representative of the emperor, by which we mean the Party, in order to reach the final goal. The latter must have his hands sufficiently liberated in order to deliver necessary reforms. If he were to fail, his competencies would be withdrawn. This is how I feel we must interpret the decisions of the 19th Congress.

The current Chinese regime seems in sync with the political culture of a state that had already lived through 1500 intense years. I don’t see any set of terms in the vocabulary of Western political science capable of accurately drawing a picture of that history. The Party

is a demanding school of power, and to this day still oversees a large number of think tanks where foreign experiences, geographically near or far from the Middle Kingdom, are studied carefully. Many of these think tanks are interacting with their foreign counterparts.

To quote Singapore’s Kishore Mahbubani: “every year, 120 million Chinese citizens leave the country, and 120 million come back into it.” This is not a typical feature of a dictatorship.

Concretely, if we consider the French motto *Liberté, Égalité, Fraternité*, Chinese ideologies can with no difficulty comply with the ideals of equality and fraternity, but only to a certain degree with those of liberty. As mentioned previously, we live in a culture where the affir-

mation of one’s individualism is limited by the duties linked to the sense of belonging to the group, with the group being the family or the State. Thus, freedom of speech, expression, or action are submitted to obstacles that are difficult for a Western intellectual to admit.

Since the election of Xi Jinping, Chinese intellectuals are more carefully monitored, and their relationships with the outside world are increasingly controlled. Nevertheless, this does not prevent a vibrant culture of local democracy from blooming when it comes to dealing with practical affairs of the *polis*, nor does it hinder the development of global mass tourism. To quote

Kishore Mahbubani once again: “every year, 120 million Chinese citizens leave the country, and 120 million come back into it.” This is not a typical feature of a dictatorship.

Some pretend that a new cultural revolution is actually brewing in

China. For those who can actually call to mind the real Cultural Revolution, such an argument is nonsense. Additionally, we must say that the Chinese youth are mainly ignorant of this tragic episode in the political life of Mao, due to censorship. It is more accurate to say that on top of the obstacles and

challenges it still needs to overcome, the Party is increasingly trying to control a culturally obedient population.

In this regard, the party resorts increasingly to intimidation rather than brutality. And that is taking place in a phase where China is opening itself to the world, in contradistinction to the 1960s and 1970s when China was on lock down and the Maoist spirit was thrilling to many Western intellectuals who were dumbed down. At the time of their *mea culpa*, they could barely recover a sense of moderation. What this moderation means is that foreign political regimes can only be judged with

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sensibility and refrain from attempts to change them as long as they do not pose an unbearable and real threat to us.

Right now, EU member states need to organize their future against the odds of the massive competition for global leadership between the United States and

China, bearing in mind the symbolic deadline of 2049. In order to achieve this, our first duty is to correctly analyze the current means of power put into work between these two giants, as there is no good prediction without good analysis, nor good political action without good prediction.

THE KOREAN PENINSULA

Let me turn next to North Korea. The first point to make is that none of the parties with a stake in the Korean Peninsula wish to see a rushed reunification. This is largely due to unforeseeable local and global consequences. The directly concerned parties are: the two Koreas, China, Japan, Russia, the United States, and much more indirectly, the two European permanent members of the United Nations Security Council: the UK and France.

Second, the permanent members of the Security Council, the principal nuclear powers, unanimously reject

North Korea's membership in the club of nuclear powers.

Third, the Pyongyang regime knows that only the acquisition of a nuclear arsenal, even if at bare minimum, will allow it to carry on with reforms that would ensure its long-term survival in power.

These reforms would suggest economic liberalization to an extent. The latter threatens any regime that finds itself in a weakened position. This is one of the fundamental lessons drawn by Alexis de Tocqueville in his magisterial work *The Old Regime and the Revolution* (1856). Indeed, "Tocqueville's Law" sheds light on the division between the short- and the long term, and was constantly verified in history—notably in Russia, with the fall of the Romanovs or the fall of the Soviet Union. Deng Xiaoping had learned this lesson, and reacted accordingly by repressing the Tiananmen protesters of 1989, in part to prevent a return to the chaos of the Cultural Revolution.

Yet, taken as a whole, these three arguments are contradictory. The strategy of the young North Korean leader has been progressively revealed as a series of acts showing rationality

The strategy of the young North Korean leader has been progressively revealed as a series of acts showing rationality and self-restraint, whereas so many Western observers saw him as a lunatic.

and self-restraint, whereas so many Western observers saw him as a lunatic. He started mercilessly eliminating all those who could be manipulated by foreign powers like China, and who could be seen as potential substitutes for him.

Having done so, he then multiplied the Hermit Kingdom's nuclear and ballistic tests, and showcased them without being concerned with the threats made by Trump, any approbation by Xi Jinping, and across-the-board global indignation. He did not hesitate to implement

a near-destruction tactic towards the poker-loving American president until the moment when, having deemed the tests conclusive, he stated that his objectives had been reached and that he was now ready to negotiate the destruction of a carefully built arsenal.

At that point, the immediate threats of the American President no longer made sense, and with the help of the pacifist South Korean government, a face-to-face meeting between Trump and Kim Jong-Un was arranged. This meeting, which took place in Singapore, carried with it an implication that he, the North Korean head of state, was one of the world's most important players.

This meeting had been China's long-time objective, and Beijing had been doing everything in its power to push the United States to the front line. This is what Xi Jinping did well by hosting Kim Jong-Un with full honors on a number of occasions. No one can doubt that the Chinese and North Korean heads of state have gone quite far in their discussions, much to Seoul and Moscow's satisfaction—less Tokyo's—and Trump had already seen himself as a Nobel Peace Prize winner.

Kim Jong-un has successfully achieved his tour de force goal of being admitted to the international community. North Korea is no longer an outcast.

That is where we are currently. What can we expect next? If Trump seriously thought that the meeting in Singapore was going to end up in a unilateral and quick dismantlement of the North Korean arsenal, then he got what he paid for. No matter how loud he may protest or how angrily he may tweet, the other stakeholders will go against him. Even Japan will remain careful in the short term.

In fact, Kim Jong-un has successfully achieved his *tour de force* goal of being admitted to the international community. North Korea is no longer an outcast. What remains crucial is to find long-term solutions that will allow Pyongyang to start a long process of economic reform, while providing assurances to the global community on the nuclear

front. Pyongyang will remain open on that last point, but will naturally demand the lifting of sanctions, as well as a considerable and sustainable aid from the global community. There should be no doubt, Pyongyang will not back down easily.

Among the more complicated questions is that of financing. From the looks of it, it appears that South Korea, China, and possibly Japan will have to do most of the heavy lifting. The main question mark,

however, remains the United States. I must add, as I have previously underlined, that when the time comes, Kim Jong-Un will certainly raise the issue of how credible America is when it comes to its commitments.

The negotiations to come will take time. They will face obstacles and challenges. In the long run, China will expect a strengthening of its role on the Korean peninsula at the expense of the United States. This could result in a rapprochement between Seoul and Tokyo. To avoid increasing marginalization, the United States will have to commit to massive investment in the development of North Korea—a not-so-likely prospect.

It is highly likely that the new equilibrium will be notably shaped by regional

powers, including Russia, which cannot allow its scarcely populated Far East to become China's playground. Nothing permits us to lend credence to the prospect of a speedy reunification of the two Koreas. At most, we can speculate about the level of progress that remains to be achieved in the time ahead, much like we did with the two Germans in the 1970s, albeit with much more reservation. We could possibly even speculate about the prospect of the entire process ending in a sort of confederation whose boundaries are yet to be defined. These questions will keep geopolitical scholars, economists, and diplomats busy for many years to come. China would be an essential actor in such a confederation. We can never stress enough that the Middle Kingdom has institutions that allow it to think strategically over the long term, whereas the Western systems are more concerned with current affairs and electoral cycles.

IRAN AND ITS REGION

Outside of East Asia, the Middle East remains the region with most geopolitical risk exposure. So far, the principal event of 2018 has been the unilateral withdrawal of the United States from the Iran nuclear deal, the external effects of which I have already discussed.

I now wish to focus on regional implications. For domestic political reasons, Trump has publicly aligned himself with the point of view of the Israeli right wing and the American neocons that the time has come to precipitate regime change in Tehran. Contrary to the 2003 invasion of Iraq, such an objective would not be pursued

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by military means. Instead, Trump demands a total and unconditional capitulation of the mullah regime, asking for complete disarmament.

He believes that the toughening of sanctions he threatens to impose

on the rest of the world is enough to bring the Supreme Leader and the government to its knees. Like in 1989, when the protesters of Tiananmen Square were carrying signs with the statue of liberty, just like in 2003, when the Baghdad masses overthrew the statue of Saddam Hussein, the American leadership is once again convinced that the “liberated” people will simply throw themselves into their arms.

Yet Trump and his friends might repeat the mistakes of their predecessors. First, as in previous cases, there is no credible alternative to the regime at the moment. The Islamic Revolutionary Guard Corps and their supporters represent a minority of the

population, but that minority is well organized and powerful. It controls the levers of the economy and benefits from sanctions thanks to contraband goods and the black market.

To this we must add that the Iranians are proud, and that the pressure to unilateral disarmament can only stimulate patriotic reflexes to the benefit of the regime. Ayatollah Ali Khamenei has always manifested his defiance towards the Americans and even the Europeans.

Thus far, nothing could surprise the Ayatollah, not even Trump's “betrayal” or the impotency of the European leaders who will now have to bow in the face of the brutality of the White House's tenant. That being said, he has not yet abandoned support for President Hassan Rouhani, who is trying as hard as he can to save the nuclear deal and thus avoid opening a Pandora's Box. Rouhani hopes that the Europeans will find a trick to maintain the deal. But the Europeans do not have the means to prevent their companies from submitting themselves to the dictate of Trump, and the Islamic Revolutionary Guard Corps is becoming extremely impatient.

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The more probable hypothesis going forward seems to be the reinforcement of conservative forces within Iran, who will gladly play the card of American responsibility for the Islamic Republic's misery. Even if significantly weakened economically, Tehran could still maintain the means to foster chaos in a region that has already been gravely wounded by the disastrous wave that began with the Arab Spring.

Circumstantial alliances, surprising or not, might very well start arising soon. While Bashar al-Assad has nearly completed

the re-conquest of his country, a rapprochement between Turkey, Iran, and Syria does not look impossible, especially if one considers the unfolding alliance between Saudi Arabia, Egypt, and Israel.

Many observers and experts wonder about the risk of an Israeli military intervention against Iran in the event that Tehran restarts its nuclear activities. Many of these observers believe that the United States would then have no other choice but to follow Israel's charge. It is, indeed, not impossible. But it is not certain, at least in some measure. For

Israel, indeed, what is most important now is to prevent attacks coming from Syria.

Russia has an interest in facilitating mutual assurances between these two Middle Eastern states. However, even then the situation would be unstable, similar to what we had prior to the commencement of the JCPOA negotiations.

SAUDI ARABIA AND THE REGION

With Crown Prince Mohamed bin Salman (MBS), Saudi Arabia started a real revolution, taking some considerable risks and following in the footsteps of the United Arab Emirates and its leader Mohammed bin Zayed. MBS has opted for moderate Islam, unhesitatingly demonstrating even violent opposition to religious conservatives, notably the Muslim Brotherhood, in complete agreement with Egyptian President Abdel Fattah Sisi. This has only resulted in the furthering of the rapprochement with Israel and also explains the ongoing feud with Qatar.

The Crown Prince's moderate views are reflected in the driving authorization he has issued to women and the decision to open—with some caution—the door to popular distractions, such

as cinema and greater fraternization between the sexes. MBS has also announced an extremely ambitious plan for economic transformation called Saudi Vision 2030. This plan leaves us skeptical, since its core ideas derive from a McKinsey report rather than

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representing an organic product of Saudi society, which has yet to accept and implement it. But international observers see real efforts in the drive to reorganize and restart.

Naturally, the young prince is facing resistance that he has so far successfully broken, sometimes with force. We saw that with the corruption-related arrests of powerful Saudis who were unceremoniously held at the Ritz Carlton Hotel in Riyadh, as well as the stripping of the Saudi religious police of its authority.

The number of enemies MBS has made is exploding. This is especially true given the fact that the exterior adventures in which he was engaged have not gone as planned. The situation in Yemen is far from being resolved, and Qatar is now stuck in a long-term resistance campaign against Saudi pressure. Obviously, these are two different sorts of challenges. The former is a real war in a politically and

geographically complex environment, whereas the latter resembles a family feud that could by its very nature resolve itself at any point.

An essential question that remains for the short-term future of Saudi Arabia is the relationship between the prince and his father, King Salman bin Abdulaziz Al Saud. The question is essential, because Salman is the last of the sons of the founder of the modern Saudi state. Success in achieving a jump to the next generation will have to follow an economic, social, political, national, and international revolution.

No one now believes in the prospect of Turkey joining the EU in the foreseeable future. The question of its membership in NATO must be raised too, but it is in no one's interest to raise it prematurely.

Those that know him characterize King Salman as having a remarkable personality and tremendous experience. He knows his country and his Who's Who to perfection. MBS was raised in his proximity, although with such discretion that until recently it was still believed that he could not even speak English. There is no doubt that the king is physically weak, but his activity is visible enough to allow one to believe that he is still aware and in charge.

The more likely hypothesis is that the father and son have been discussing all-important matters in the kingdom all

along, and that it is just a matter of MBS not wanting to be the principal instigator of the initiated reforms.

How long can all this last? Long enough, we hope, so that at the right time, a young monarch will be strong enough to start a deep transformation of his kingdom, foster reconciliation, and contribute to the restoration of a stable regional balance.

PIVOTING TURKEY

The third major development in the region is Turkey. President Recep Tayyip

Erdogan's early election gamble has paid off: he is now head of the country's executive government and the leading party, which gives him virtually all the power in the country. He immediately took advantage of his victory by cracking down on intellectuals with even greater severity.

His current principal challenge is now economic. Like Iran and Saudi Arabia, Turkey has both geopolitical and socio-political ambitions. Erdogan does not want to renounce economic modernity, but he does wish to bring his country back to its Islamic roots—at the expense of Kemalism. This starts with education. Ataturk's secular project is dead, and the West will just have to accept it.

No one now believes in the prospect of Turkey joining the EU in the foreseeable future. The question of its membership in NATO must be raised too, but it is in no one's interest to raise it prematurely. In both cases, the concerned stakeholders have an interest, for now, in sticking to the French expression that says that getting out of ambiguity is always on par with a weakening of sorts.

On the geopolitical front, the great ambition of the contemporary sultan of Turkey is to emerge as the leader of Sunni Islam—in other words, to replicate the state of affairs

that existed in Ottoman times. Erdogan dreams of a mosque and a university that would replace those of Al Azhar, which are to this day considered the Vatican of Sunnism. In order to achieve such goals, he faces the alternative project crystallizing around Saudi Arabia and Egypt, and a merciless fight against the Muslim Brotherhood. But quite contrary to the Saudis and the Egyptians, Erdogan—much like his Qatari friends—views the Muslim Brotherhood with a sympathetic eye.

CONFUSION, COMPLICATION, UNRAVELING

Shia Islam maintains its strength against Sunni Islam. Saudi Arabia vehemently fights on its territory. The

leader of Shia Islam is still clearly Iran, which extends its tentacles wherever it can, most notably in countries like Iraq, Syria, and Lebanon. But the competition between the two Sunni projects can justify a rapprochement that would otherwise be difficult to conceive. Such a rapprochement would occur, as noted

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previously, between Turkey, Iran, Syria and Qatar, with a degree of support from Russia. The Kurds are to be seen as the collateral damage of such a situation.

Further in the past, before the 1979 Iranian Revolution, Iran too was a great friend of the Jew-

ish state. At the time of the Arab Spring, the United States contributed to the ousting of Egypt's Hosni Mubarak and to the rise of the Muslim Brotherhood. Today they support President Abdel Fattah Saeed Hussein Khalil el-Sisi and his struggle to restore Egypt's prestige. Turkey and Iran are now being seen as major opponents of the American empire, which includes their overt support for the Palestinian cause. Russia exploits this situation, more laterally than frontally. All this represents quite an embarrassing situation for NATO.

In order to add one more factor of complexity, we must remind ourselves that China is itself ambitious in

its own imperial posture in the Middle East, even if this is only to safeguard its access to resources. As such, it increases its influence in Iran by taking advantage of the retreat of European companies, as a result of Trump's sanctions. Similarly to Russia, however, it does so with caution and discernment, for it does not want to pick sides prematurely. India, under the ambiguous Narendra Modi, also wishes to have greater access to, and influence in, the Middle East.

This is how, little by little, a new configuration of the Middle East is being drawn. The incompatibility of various geopolitical projections means that a state of order in the region remains unlikely in the near future. This benefits Israel, for it allows the Jewish State to pursue a policy of expansion and mercilessly quench any Palestinian resistance. The Israeli-Palestinian conflict must be resolved someday. It remains, however, at the bottom of the list of priorities for pretty much all the relevant players.

EUROPE AND THE WEST

By way of a conclusion let me now come back to the EU and its crises. A problem is never fully understood if seen outside of its framework,

so how should one understand what we Europeans have to deal with today?

Too often, European citizens and their representatives lose sight of the European war of three generations,

The chaos of the contemporary Middle East or the potential instability of East Asia—two good examples of regions lacking a collective security system in the broad sense—allow us to imagine what could happen in Europe if we were to progressively lose the Union.

starting from the 1870 Franco-Prussian War to World War II. A fortiori they consider the previous history of the Old Continent as a sort of prehistory. However, the chaos of the contemporary Middle East or the potential instability of East Asia—two good examples of regions lacking a collective security system in the broad sense—allow us to imagine what could

happen in Europe if we were to progressively lose the Union.

The project of constructing a new type of political unit—capable of ensuring the security and prosperity of each and every one of its members without abolishing personal identities, with the ambition of playing an active role in the consolidation of a global security collective—remains as pertinent a century after World War I as it was the day following the end of World War II. This must now be understood from a very different context, which accounts for the 2049 deadline I have previously noted.

Thirty years is a time horizon that is pertinent enough for very important decisions to be made. Examples include the construction of systems of defense and security and building an international currency that would fulfill three of its most basic functions—namely to ensure value and become an instrument of both exchange and reserve.

Without renouncing the idea that, in the very long run, the EU’s ambition is to extend and enlarge, we must look at the 30-year framework as a deadline to first reinforce its social and economic structures, and considerably improve methods of cooperation between existing member states in order to harmonize their action.

Secondly, it should implement—without disregarding the last-resort safety net provided by NATO—a true common security policy oriented towards domestic affairs (domestic aspects of the fight against terrorism or cyber-security, for instance) and foreign affairs (prevention and dissuasion of specific threats, especially coming from the southern and eastern flanks).

Thirdly, it should reinforce the Eurozone (Monetary union; European Monetary Fund) and beyond that effectively make the Euro an international currency that would have guarantees of independence from political instru-

mentalization of the dollar and, at some point, the renminbi.

The Union will necessarily have to learn to be in sync with the essential aspects of a common foreign policy. Beyond immediate security issues, such as the need to strengthen borders, the EU has an interest in supporting the development of Africa, giving priority to the areas north of the equator and working for the establishment of a

stable order in the Middle East. This is a necessary long-term condition for every migration policy. The EU must also work with Ukraine and Russia on the renewal of the collective security system stemming from the 1975 Helsinki Accords. Finally, the EU will have to imperatively define a framework for the relationship of its members with China.

All of this requires huge long-term determination, while our political culture and existing institutions are not

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preparing us well enough. The member states of the EU today seem more conscious of the necessity to overcome the deep differences between them—be it on the defense culture, or in terms of economic policies that sharply reflect the north-south divide. This is too narrow.

Every major project starts with a long-term vision—something that is sorely lacking in today’s Europe. I do not think such a vision will emerge spontaneously from governments, commissions, or individual or associative initiatives. However, with IFRI’s 40th anniversary around the corner, I don’t hesitate to say that European think tanks could work towards this goal and cooperate in order to produce a text that, at the right moment, could be used by policy makers.

When we have a long-term vision, albeit one that’s initially only burgeoning and blurry, it is much easier to treat its mid-term problems. And these are not missing in the Union today: We must achieve a successful Brexit which—to paraphrase what French historian Jacques Bainville wrote long ago in an entirely different context—would be neither too soft for what was hard in it, nor too hard for what was soft in it. We must put in place an immigration

policy and avoid populist games regarding the refugee crisis that risk fracturing us even more. We must fight to take back the countries where populist parties have taken power. And we should not forget that we must strive to achieve the monetary union.

In the years to come, the principle risk is that, without completely disintegrating, the Union could degrade to a mere confederation. Following the fall of communism, debate took place to decide whether we would have an immediate enlargement of the European Community to encompass the countries that we were still

calling Eastern Europe, or to maintain the Community as it was—while also implementing a vaster and less ambitious Confederation. The former option was picked. A quarter of a century later, we must now try to avoid becoming a Holy Empire, more or less Roman and Germanic, as well as to avoid putting the European Parliament in the role of Imperial Diet. And we know that this “empire” never prevented wars between its members.

In order to provide a point of inflection, the Union must now promote the *efficient* over the *dignified*. This will only come after a shared long-term accord between its members.

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But the *efficient* is difficult to achieve when the institutions are inefficient. Hence the importance of leadership, which Emmanuel Macron is trying to exert—unfortunately without the support he could have obtained had Angel Merkel done better in the 2017 German elections.

I think the foremost of priorities is not institutional reform or bringing closure to the never-ending ideological debate about whether their character is more or less democratic; it is, rather, the quest for concrete solutions to problems which affect people in every member state.

The time for action is now, and perhaps even more so for the Europeans, since the American president glows in limitless self-satisfaction and embodies the West's complete absence of a long-term vision. Some mistakenly say that Trump has isolationist tendencies. Surely, globalization can be more or less deep, but as technological innovations keep appearing, it becomes more and more irreversible. America is not isolationist. It is now introverted.

Globalization can be more or less deep, but as technological innovations keep appearing, it becomes more and more irreversible. America is not isolationist. It is now introverted.

Trump is not made in the image of Harvard, but of those of the American Wild West's conquerors who did not care about ideas but wanted results to serve their interests *hic and nunc*. As Margaret Thatcher wanted her money back, so Trump wants others to pay up for everything.

Even if he were to disappear from the political scene today, he would have given the world the huge service of demonstrating that the United States can step over what would not have existed without it: a system of institutions capable of ensuring interdependence. Europe now knows that Euro-Atlantic institutions are mortal, even in the short term. The entropic principle teaches us that the destruction of an order leads to chaos.

But in human affairs, as in the inanimate world, from chaos a new order emerges that is sometimes completely unforeseeable. If we do not look closely, the world beyond tomorrow could look more like an interwar period than the "end of history." Therefore, leaving aside all complexes, it is now time for the Europeans to wake up. ●