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<https://www.kas.de/de/web/schwerpunktthemen/laenderberichte/detail/-/content/kontinuitaet-oder-neuausrichtung>

Verteidigungspolitik

Eine Wende hingegen zeigt sich teilweise in der Verteidigungspolitik. Polen werde nicht zulassen, dass sich das ukrainische Szenario auf polnischem Boden wiederhole, betont der polnische Verteidigungsminister Mariusz Błaszczak: „Wir werden es nicht zulassen, denn unsere Armee ist und wird noch größer sein, sie ist und wird noch stärker sein“. In den kommenden Monaten will Polen militärische Ausrüstung und Waffen für ungefähr 300 Mrd. Zloty (umgerechnet 65 Mrd. Euro) beschaffen. Die Ausgaben des polnischen Verteidigungshaushaltes sollen hierbei auf einen Rekordwert von drei Prozent des Bruttoinlandsprodukts (BIP) steigen. Gemessen am Prozentsatz des BIP an den Verteidigungsausgaben könnte Polen damit auf einen der ersten Plätze unter den NATO-Ländern aufsteigen. Der Haushalt des Verteidigungsministeriums wird sich im nächsten Jahr auf über 80 Mrd. Zloty (17 Mrd. Euro) belaufen. Im Jahr 2025 soll er 100 Mrd. Zloty (22 Mrd. Euro) erreichen. Laut Minister Błaszczak wird dies die Beschaffung neuer Ausrüstung und Waffen beschleunigen und eine schnellere Vergrößerung der Armee ermöglichen. In Folge wird auch das polnische Militär wesentlich stärker als in der Vergangenheit anwachsen. Obschon Polen seit 2010 keine Wehrpflichtigenarmee mehr besitzt, wird ein Berufsheer von 250.000 Soldaten sowie weiteren 50.000 Angehörigen der freiwilligen Truppen zur Territorialverteidigung (WOT) angestrebt. Und obschon diese Zahl höchstwahrscheinlich verfehlt wird, dürfte der Krieg die Bereitschaft zum Dienst an der Waffe in Polen erhöht haben. „Die beste und effektivste Antwort auf die russische

Bedrohung“, so Minister Blaszczak, „ist die Stärkung der polnischen Streitkräfte“. Deshalb habe die Regierung beschlossen, eine Kampagne zur Förderung eines freiwilligen Grundwehrdienstes zu starten.“

Enge Zusammenarbeit mit der Ukraine

Unterdessen verfolgt die polnische Regierung aber nicht nur einen die Ukrainer unterstützenden Kurs in der polnischen Innenpolitik, sondern auch außenpolitisch gegenüber dem ukrainischen Staat. Anfang Juni unterzeichneten beide Staaten im Zuge gemeinsamer Regierungskonsultationen, an denen u.a. die Regierungschefs beider Länder teilnahmen, acht Memoranden über eine zukünftige Kooperation. Sie betreffen die Bereiche Energie, militärische Verteidigung, grenzüberschreitende und zollrechtliche Zusammenarbeit, Umweltpolitik, Regionalpolitik, Wiederaufbau der Ukraine und Zusammenarbeit in der Geschichtspolitik.

Alternative geopolitische Konzeptionen

Unlängst hatte auch Boris Johnson ein neues politisches, wirtschaftliches und militärisches Bündnis vorgeschlagen, an dem sich neben Großbritannien, Polen, die Baltischen Staaten sowie – zu einem späteren Zeitpunkt – auch die Türkei beteiligen könnte. Auch Kiew könnte die Idee zukünftig aufgreifen, wenn auf dem nächsten bzw. den kommenden EU-Gipfeln die Ukraine nicht zum Beitrittskandidaten erklärt würde. Boris Johnson, der sich durch den Brexit aus dem europäischen Mainstream ausgegrenzt hat, möchte nun erneut eine größere Rolle in Europa spielen und sieht den Krieg in der Ukraine als Gelegenheit dazu.

IRIS

Cours mondial du blé : « Rien ne dit que la baisse de la production ukrainienne sera comblée par les autres pays »

<https://www.iris-france.org/168061-rien-ne-dit-que-la-baisse-de-la-production-ukrainienne-sera-comblee-par-les-autres-pays/>

Va-t-il y avoir un trou dans la production de blé ?

Dix pays produisent 90% du blé de la planète. Or pour la plupart d'entre eux (Inde, Chine, Etats-Unis, France), le contexte climatique est mauvais cette année, à cause des sécheresses. Le marché anticipe donc un déficit dans les volumes et des accidents productifs à cause de la hausse des prix de l'engrais. Pour faire des engrais azotés, il faut du gaz. Or la Russie a un poids considérable, au niveau mondial, dans le secteur des engrais. Leur prix a été multiplié par quatre en un an. Sans engrais de synthèse, les rendements céréaliers s'effondrent. L'agriculture se place toujours dans le temps long. On regarde l'avenir, il y a des effets de décalage, de cas cascade, cette crise peut s'étirer sur plusieurs mois. On ne fabrique pas du blé comme on fabrique des smartphones : il ne suffit pas d'appuyer sur un bouton pour augmenter la production. Il n'y a qu'une seule récolte par an, et si elle n'est pas bonne, il faut attendre la suivante ! En juin, nous rentrons sur le marché post-invasion russe. Jus que-là, ce qui se passait sur le marché des céréales avait été pensé à l'hiver. Désormais, on porte le regard vers les récoltes de cet été. En Ukraine, devenu en 2021 le quatrième exportateur mondial (derrière la Russie, les Etats-Unis et le Canada), elles devraient être divisées par deux ou trois à cause de la guerre. Ce manque est

préoccupant, car pour l'instant, rien ne dit qu'il sera comblé par d'autres producteurs.

Quels pays seront les plus touchés ?

En Europe, il n'y a pas de dépendance au blé ukrainien ou russe. Mais beaucoup de pays africains, notamment d'Afrique du Nord, gros consommateurs de blé, en ont besoin. L'Ukraine ne peut plus approvisionner ses clients, comme l'Égypte ou le Maroc. La Russie, elle, exporte actuellement des volumes habituels, voire un peu plus importants. C'est d'ailleurs le seul pays qui va faire une récolte record cette année. Bien entendu, Moscou rappelle que ses céréales iront en priorité à ses « partenaires ».

La Russie exerce-t-elle forme de chantage alimentaire ?

Elle est en train de faire la démonstration, tragique, de l'utilisation non pacifique d'une arme agricole. Quand Poutine est arrivé au pouvoir il y a vingt ans, il a misé sur les hydrocarbures, l'armement... et les céréales. La Russie est un producteur de céréales historique. La parenthèse soviétique nous l'avait fait oublier, mais la Russie produisait la moitié du blé mondial à la fin du XVIIIe siècle. Les empires ont la mémoire longue. Cette fois, la Russie s'est d'abord attaquée au marché égyptien, puis au Maghreb et au Proche-Orient. Le blé russe est vendu au Liban, en Syrie, en Iran, en Irak. Le Kremlin s'en sert de toute évidence comme d'un levier géopolitique. Depuis le milieu des années 2010, la Russie vend aussi du blé en Afrique subsaharienne. Ce n'est pas, traditionnellement, un gros

consommateur, mais la consommation de pain, qui va de pair avec l'urbanisation, explose.

CSIS

<https://www.csis.org/analysis/european-union-imposes-partial-ban-russian-oil>

European Union Imposes Partial Ban on Russian Oil

The European Union has imposed a partial embargo on Russian crude oil and petroleum products, as well as a ban on shipping insurance for oil exports from Russia. But it may be hard to achieve its goal of taking Russian oil off the market and cutting Russian export revenue without hurting consumers in Europe and elsewhere.

Q1: What is included in the EU sanctions package?

A1: On June 3, the European Union adopted a sixth package of sanctions, including a partial embargo on Russian oil. The sanctions will ban seaborne imports of Russian crude oil as of December 5, 2022, and ban petroleum product imports as of February 5, 2023. Pipeline imports of crude oil and petroleum products will be exempt, in a compromise with EU member states like Hungary, Slovakia, and the Czech Republic, which depend on imports via the Druzhba pipeline. The sanctions package bars those countries from reselling Russian crude oil and petroleum products to other EU member states or elsewhere. The sanctions will allow Bulgaria to continue imports until the end of 2024 and will let Croatia

import Russian vacuum gas oil (a refinery feedstock) until the end of 2023. Last year, Russia exported about 3.1 million barrels per day (b/d) of crude oil, natural gas liquids, and refinery feedstocks to Europe, and about 1.3 million b/d in diesel and other petroleum products. It exported approximately 750,000 b/d of crude oil by pipeline and the remainder by tanker.

It took nearly a month of negotiations to achieve unanimous support for this round of sanctions, and a compromise on pipeline imports was unavoidable. But the EU claims that the ban on seaborne imports—as well as Germany and Poland's voluntary move to halt pipeline imports—will allow it to cut oil imports from Russia by 90 percent.

A critical part of the sanctions package (Article 3n) concerns shipping insurance. After a six-month phase in period, EU companies cannot provide "technical assistance, brokering services or financing or financial assistance, related to the transport, including through ship-to-ship transfers, to third countries of crude oil or petroleum products" from Russia. The United Kingdom is expected to follow suit. Cutting off shipping insurance and reinsurance from the European Union and United Kingdom—the heart of the maritime insurance industry—will hinder Russia's ability to redirect crude oil and petroleum products to other regions. Shipowners will be reluctant to lift Russian cargoes that cannot be insured or reinsured, and such vessels could even be barred from some ports. It is possible that alternative insurance providers in Russia, China, India, or other countries will step up in the coming months to facilitate this trade. But the shipping insurance provision is the most consequential move yet to restrict Russian exports.

Q2: Can Europe cope without Russian oil?

A2: Global crude flows are changing quickly. In the past few months, Europe has started to import more oil from the United States, West Africa, and the Middle East. European refiners seeking substitutes for Urals blend could turn to crude oil streams from Norway, Nigeria, Iraq, and the United States, although spot cargoes of many crude oil streams are limited in a tight market. Replacing lost volumes from Russia is no small task, but refiners frequently adjust to changing supply conditions.

The drop in Russian exports in the past two months has been lower than expected. Even as more oil and gas majors and commodity traders have stopped lifting Russian cargoes, the country has been able to sell more volumes to Asia, particularly India. Because there is a phase-in period before the sanctions take place, it is possible that Russian oil exports to Europe will increase in the next six to eight months before the trade becomes illegal. Refiners may have incentives to ramp up imports from Russia—possibly at discounted prices—to build inventories. There are some parallels to the natural gas market. Russian gas flows to Europe actually rose earlier this spring, as countries sought to avoid risks related to currency exchange and payments, and to fill inventories ahead of next winter.

Q3: What does this mean for Russia?

A3: The key question is whether EU sanctions will force Russian oil off the market or simply redirect it to other regions. Russia aims to reorient its oil and gas exports from Europe to Asia, principally India and China. So far it has been relatively successful. India may have imported nearly 800,000 b/d from Russia in May, and could buy even more this month from an extremely low base last year. India depends heavily on oil imports to meet domestic demand, and as a price-sensitive buyer, it has taken advantage of deeply discounted volumes from Russia. Russia has been forced to offer cargoes of Urals blend at \$30 to \$35 per barrel below Brent crude oil prices. Russian oil exports to China have also picked up, with China importing up to 1.1 million b/d in seaborne volumes last month, compared with a monthly average of around 800,000 b/d last year. Sinopec, Zhenhua Oil, and others appear to be ramping up purchases of Russian crude oil, particularly Russia's ESPO blend.

There are limits to how much India and China can absorb, and Russia may not be able to redirect all of the roughly 1.6 million b/d in seaborne exports it previously sent to Europe. But Russian exports have proven fairly resilient in recent months, and there is good reason to believe that Indian and Chinese buyers will take advantage of the opportunity to secure discounted crude oil from Russia at a time of high prices.

For now, Russian oil and gas revenue is soaring. The International Energy Agency estimated

that in the first four months of this year, Russia's oil export revenue rose by 50 percent over the previous year, with crude oil and products generating about \$20 billion per month. So far, the price effect—higher revenue per barrel, even with discounted Urals and ESPO blend—is outweighing the volume effect of lower exports. Over the years, policymakers have learned to deploy energy sanctions with greater precision. But it is not clear that this round of sanctions will accomplish the stated goal: to deprive Russia of revenue that fuels its war machine, while minimizing the cost to European consumers and the global market.

BBC

<https://www.bbc.com/korean/features-61533571>

우크라 전쟁: 터키가 핀란드·스웨덴의 나토 가입을 반대하는 이유

스웨덴과 핀란드가 18일(현지시간) 서방의 군사 동맹 북대서양조약기구(NATO)에 공식 가입 신청서를 제출했다. 그러나 터키가 두 나라의 가입에 강력히 반대하고 있다.

NATO 회원국인 터키의 반대에 부딪혔다.

쿠르드족의 분리독립을 외치는 '쿠르드노동자당(PKK)' 등 터키와 인근 지역에서 활동하는 무장단체에 대한 스웨덴과 핀란드의 옹호적인 태도를 문제 삼았다.

터키는 이들 단체를 자국의 안보 위협 세력으로 여기며 반목을 거듭하고 있다.

NATO 규정에 따르면 기존 30개 회원국의 만장일치가 있어야만 신규 회원국으로 가입할 수 있다.

터키가 반대하는 이유

그러나 이번에는 다르다. 레제프 타이이프 에르도안 터키 대통령은 터키가 테러단체로 지정한 PKK와 그 분파로 여기는 '인민수비대(YPG)'에 맞서 벌여온 전쟁을 이들 북유럽 국가가 지지하지 않는다는 명분을 내세웠다.

PKK는 또한 유럽연합(EU), 미국, 영국 등이 '테러 조직'으로 지정한 단체다.

터키 당국은 스웨덴과 핀란드 모두 PKK 조직원을 숨겨주고 있다고 주장했다.

실제로 스웨덴과 핀란드는 지난 2019년 터키가 시리아 북부에서 YPG를 겨냥한 군사 공세를 벌이자 무기 금수 조치에 동참하기도 했다..

터키가 바라는 것은?

울겐 또한 "터키는 스웨덴에 압력을 넣고자 하는 것이다. 특히 PKK와 이들의 활동에 대한 스웨덴의 입장을 재검토하길 원하는 것"이라고 말했다.

그러면서 "터키는 이번 사태를 계기로 동맹국에 자국의 국제 및 국내 안보 우려를 상기시키고, 국제 사회에서 영향력을 확대하려 하고 있다"라고 덧붙였다.

영국 싱크탱크 '채텀하우스'의 중동 및 북아프리카 담당 갈립 달레이 연구보좌관은 BBC와의 인터뷰에서 터키 대통령의 입장은 "불만을 드러내는 신호에 오히려 가깝다"라며 "외교적 해결의 여지가 있다"라고 설명했다.

향후 전망은?

스웨덴과 핀란드는 공식 신청서를 제출한 데 이어 가입 의정서를 마련해 NATO에 제출할 예정이다.

그러나 현재의 지정학적 상황을 고려할 때 올 6월 말 마드리드 NATO 정상회담 전에 여러 절차가 마무리될 것으로 예상되며, 스웨덴과 핀란드의 가입은 기존보다 더 빠르게 진행될 것으로 예상된다.

NATO 회원국들이 이번 정상회담에서 스웨덴과 핀란드의 동맹 가입을 승인할 것으로 예상되지만, NATO의 모든 30개 회원국의 의회 비준이 있어야 최종적으로 가입이 승인된다.