

DIAS-Kommentar

Nr. 53 • Juli 2005

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Who´ll stop the winds?

www.dias-online.org

Düsseldorfer Institut für Außen- und Sicherheitspolitik e.V.
c/o Juristische Fakultät der Heinrich-Heine-Universität
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c/o Juristische Fakultät der Heinrich-Heine-Universität
Universitätsstraße 1 D-40225 Düsseldorf

www.dias-online.org

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ISBN:

Who'll stop the winds?

Few things have stirred the languid breezes of Germany's unraveling consensus politics quite so much recently as the extraordinary proliferation of windmills. The factions contesting the approaching national election have become so wary of this disputed aspect of energy policy that each seems to have more than one position on it.

In the challenger's corner, some Christian Democrats initially sharpened the energy issue by threatening to cap the rising energy taxes along with the imbedded electricity subsidies that have been driving the boom in wind and solar power. But their allied Free Democrats, who had long advocated a rollback of energy levies, have drafted a campaign platform that retracts this demand.

In the incumbent's camp, environmental Greens praised themselves and the ubiquitous power windmills for making Germany a shining model of sustainable energy policy. Prominent Social Democrats heaped faint praise on their junior partner's environmental achievements but took a safe distance from the underlying consumer issue of what all this may cost. And the defensive stance of both parties conspicuously muted any hint of another hike in disputed "ecological" energy tax.

So, who'll stop the winds? The broader economic question has been framed diplomatically in the power-generating sector and among energy-intensive production industries, which detect a creeping existential threat in the steady growth of energy levies and power charges designed to foster alternative energy. Long steeped in the lore of environmentalism, the average German consumer has reacted with ambivalence to this intermittent energy debate.

But there may be a limit to public indifference, if the prevailing policy leads to still higher household electric bills and further dampens domestic demand, already the Achilles' heel of Germany's struggling, export-driven economy. The windmill phenomenon has emerged as the most visible and vulnerable aspect of an expensive energy policy which is suddenly being put to the test by soaring oil prices and the impact of energy levies.

There are now close to 17,000 power-generating windmills studding the German countryside from the Baltic Sea to the Alps. That represents installed capacity of around 17,000 megawatts – enough to supply about 6% of the country's electricity consumption – but only if the wind is blowing. One-third of the world's power windmills now churns in Germany,

These windmills are more than a new source of electricity. They are the heavily subsidized vanguard of a new equipment manufacturing industry that delivers clean, renewable energy for electricity customers – at an opaque but lofty price. The windmill campaign was initially promoted by government as an ecological breakthrough to squeaky-clean, sustainable energy. Yet the spreading forests of towering windmill masts, their long shadows and the low-frequency noise of the scything rotor blades are sparking environmental protests in many a rural area.

The unprecedented German windmill binge was energized by the Social Democrat-Greens government's long-range objective of phasing out atomic power plants and curtailing the burning of fossil fuels, especially coal and lignite. Atoms, coal and lignite still deliver more than three-quarters of Germany's electric power, but government wants half of all power to come from renewable sources by 2050. And a Deutsche Energie-Agentur (Dena) study pub-

lished in May said 14% of electricity could come from windmills by 2015 at an additional cost that might fall between €1.6 billion and €2.3 billion.

Since wind and solar power are far more expensive than the conventional variety, a law called EEG was enacted to force power grid operators to buy it preferentially at the elevated rates required to make it „competitive.“ The embedded subsidy, which then grows with each new windmill, is shouldered equally by all commercial and retail electric rate payers, although some heavy industrial users have won an exemption.

Since regionally monopolized German electricity isn't exactly a bargain to start with, the harnessing of power rates to finance costly sustainable energy schemes casts an advancing shadow over the competitiveness of the country's vital manufacturing base. „Sustainability must not be defined only ecologically. ‚Economical‘ also belongs in this definition,“ said Werner Brinker, president of electrical engineering industry lobby VDEW. The average power bill already consists of 40% tax for households and 22% for industry, and the new subsidies are also lifting the cost, Brinker pointed out in an April speech.

The renewable energy program would add €2.4 billion to electric bills this year alone, VDEW has estimated. Fielding questions from opposition liberal parliamentarians, the government conceded that renewable energy producers were paid €10.6 billion in the period April 1, 2000 through the end of 2004 for both their power and the unquantifiable price subsidy component to make it competitive. This official figure omits further hundreds of millions in assorted direct public grants and accelerated depreciation for windmill investors.

Although the modern dictates of laissez-faire, market economics and globalization are frequently cited as clinching arguments for other government initiatives lumped under slogan of “urgently needed reforms,” this program advances under the much older banner of European statism. Indeed, proponents of wind and solar subsidies readily point out that government intervention on a much larger scale had established an atomic power industry and sustained domestic coal mines. High time that government also does something for the environment, they reason. „Only continuity in the terms of energy policy can assure investment and a stable domestic market,“ said Peter Ahmels, president of the German Wind Energy Association, BWE.

An input-output energy balance, such as the negative one* that can be shown for programs to make subsidized ethanol fuel from maize crops, seems much too complex to prepare for wind energy, although unflattering tallies have occasionally been made for photovoltaics. Whatever the case, it's an ill wind that blows no man good. A key enthusiast of power windmills has been the vast mechanical engineering industry, which now exports most of its output. Apart from the ecological cover story for high-priced electricity, government's supply-side industrial policy of subsidizing renewable energy takes on concrete business aspects here.

Tossing in about €1 billion a year for windmill installation and services, wind power generation has become a €4 billion-a-year industry in Germany, up from €3.8 billion in 2003, said Johannes Schiel, the expert for power systems at machinery industry association VDMA. Sales of wind generators and related hardware alone came to €3.15 billion in 2004, VDMA and BWE announced. This represented more than half the world's power windmill production, they said. And they also said that this segment of the machinery industry last year exported “around 59%” of its output.

GE Wind Energy, which produces in Lower Saxony, is the biggest of six generator manufacturers represented by VDMA, said Schiel. Another 35 member companies supply various equipment. The world's burgeoning windmill export market is led by Danish company Wes-

tas, followed by Gamesa of Spain and Enercon of Germany. The GE unit, heir to the German company Tacke, ranked fourth, ahead of such small producers as Germany's Repower and Nordex.

The global dimensions of windmill engineering can be glimpsed in the export statistics of Germany, which takes credit for pioneering this booming business. Big German customers now include the United States, Canada, China, India, France, England and Italy. Spain, the largest foreign customer for German windmills, has already jumped on the juggernaut with its own windmill production and a system of domestic power-rate incentives.

As lord of the winds, however, Germany now finds itself tilting with fresh problems at home. Rural communities are making rules to curb the height of the generator masts and their proximity to dwellings. „It's a question of acceptance,“ said Schiel. „Many communities feel there are just too many windmills in their vicinity.“

Productive wind sites in the countryside have also become rare, making upgraded replacement generators the industry's main growth driver at home. Yet, a new development frontier has opened on the Baltic and North Sea, where plans for gigantic offshore wind farms have already run into gales of opposition from beach resort communities, shippers, fishermen and yachtsmen.

Despite steady advances in the efficiency of wind generators, the cost of their power is at least twice as high as the conventional variety. And the new study by Dena, affiliated with the environmental ministry, reveals that they still won't be competitive by 2015, VDEW commented. At that point there would still have to be a „shadow“ reserve of 34,000 megawatts at conventional plants to back up the anticipated 36,000 megawatts of windmill capacity whenever the breezes die down, it said. This means that only two conventional plants would be replaced. And the subsidies would spin on indefinitely. Nevertheless, the windmill model has already inspired a budding boom in photovoltaics and power plants driven by the sun, which makes only rare appearances in the rainy German winters.

Of deeper concern are the underlying economics of the federal wind and sun-power program. „How much more will they have to pay for electricity? That's the question that really has to be put to the citizens,“ said VDEW representative Patricia Nicolai. The potential impact of high-priced alternative power on the country's manufacturing base and on retail and commercial consumers has already sparked a public policy tiff between Social Democratic Economics Minister Wolfgang Clement and Greens Environmental Minister Jürgen Trittin, a wind and solar zealot.

Windmills made their debut on the power grid at a propitious time. In the sluggish German economy of the 1990s, power demand increase by only about 1% a year, and there is still no sign of a sustained upswing. Vastly excessive capacity in rate-based generating plants became a problem for the former regional power monopolists when the electricity industry was liberalized in the late 1990s, leaving power generators in possession of their regional grids. Estimates of overcapacity in millennium year 2000 ranged from 12,900 megawatts by the power generators to the economics ministry's 23,100 megawatts and a figure as high as 35,000 megawatts from experts of the alternative energy lobby. Numerous marginal power plants were decommissioned to preserve earnings levels after the demise of rate regulation.

Despite the federal liberalization to permit competition, generators rushed to purchase stakes in some local public power distributors, their wholesale customers. And the grid owners were also accused of imposing capricious charges or erecting access barriers to discourage competing power supplies from traversing their former turf. Upstart suppliers and the EU demanded

regulatory intervention in lieu of self-regulation. There has also been mounting pressure to sever the transmission networks from the generators, as had been done with apparent success in Britain and Scandinavia.

Nevertheless, electricity prices began to decline noticeably following liberalization. Yet, that trend reversed a couple of years ago for reasons that are in dispute. Since then, green energy advocates have been accusing the big power companies of price gouging. But the conventional power generators place the blame for rising prices on alternative energy subsidies and rising energy taxes.

This Byzantine energy tableau became even more complicated last winter with the latest spike in oil prices and the advent of EU-wide trading of emissions rights to curb carbon dioxide – a 37-year-old U.S. idea that simmers on a low flame in its homeland. EU power companies have been buying emissions rights from industrial producers on the forward market, London traders say. This thin new market has proven extremely volatile, with an initial upward bias attributable to an estimated EU shortage of rights coverage for 130 million metric tons of carbon dioxide.

Rights buying by electricity generators, which can switch fuels, has also been driving forward rates for steam coal in lieu of expensive oil. The high oil price in turn has encouraged electric companies to sell power forward. Costly emission rights could eventually force power companies to burn less coal and more gas, which emits less but is more expensive. That would serve the EU goal of curbing emissions. But it could also sting retail electricity customers and such energy-hungry industries as steel, chemicals and light metals. Parts of the German aluminum industry are already threatening to leave the country. And some observers fear that the rising price of emission rights may now be helping to lift the price of traded power. Forward power quotes, more than 20% higher for 2006 base-load delivery, have been taken by some observers to presage coming increases in electricity charges in the EU.

Such an outcome would certainly focus more critical attention on Germany's power tax component. Escalating energy taxes were the cornerstone of the sweeping "ecological energy" reform launched by the Social Democrat-Green coalition that took power in 1998. These have targeted everything from motor fuels to natural gas, ostensibly to promote conservation while reducing air pollution from fossil fuels and dependency upon foreign petroleum. Oddly enough, though, the industrial production sector, the biggest fuel burner, was largely excused from this ecological crusade. And the government has continued its 10-digit annual subsidies to deep German anthracite coal, which has been uncompetitive for decades and is now mined by only one company, headed by a former economics minister.

The statist winds of redistribution by means of politically orchestrated energy pricing have blown much good to a select few. Yet, the bill comes home to the millions of ordinary consumers who actually power the faltering domestic economy. During the 1998 election campaign, when the plan for an "ecological" regime of rising excise taxes on energy consumption was first unveiled, the "Commerce Germany" magazine of the American Chamber of Commerce in Germany detected both bad news and good news. A crushing weight of other taxes, it observed, was already threatening to choke the life out of the country's once thriving economy. With new, open-ended environmental levies, it quipped, "at least it will die clean."

Remark:

Ethanol made from corn (maize) uses the fossil fuel equivalent of 29% more energy to grow and make than it can deliver as a motor fuel, concluded a recent input-output study by engineer Tad Patkek of University of California at Berkeley and ecologist David Pimentel of Cornell University. Encouraged by the farm lobby, the U.S. Senate has prepared an energy policy

bill to raise U.S. output of ethanol from corn for motor fuel to an annual 8 billion gallons by 2012 from 3.3 billion in 2004. Annual subsidies estimated at \$10 billion already make corn the most heavily subsidized U.S. crop

DIAS-Kommentare

- | | | |
|----|--|--------------------|
| 1 | Alexander Alvaro
Der globalisierte Terror | 29. April 2003 |
| 2 | Michaela Hertkorn
Why do German-US Relations matter to the Transatlantic Relationship | 17. Juni 2003 |
| 3 | Henricke Paepcke
Die Rolle der UNO im Nachkriegs-Irak | 17. Juni 2003 |
| 4 | Panagiota Bogris
Von Demokratie und Bildung im Irak nach Saddam Hussein | 18. Juli 2003 |
| 5 | Ulf Gartzke
Wirtschaft und Gesellschaft: Eine Partnerschaft ohne Alternative | 19. Juli 2003 |
| 6 | Lars Mammen
Herauforderung für den Rechtsstaat – Gerichtsprozesse gegen den Terroristen | 11. September 2003 |
| 7 | Ulf Gartzke
Von der Wirtschaft lernen heißt voran zu kommen | 21. September 2003 |
| 8 | Daniel J. Klocke
Das Deutsche Völkerstrafgesetzbuch – Chance oder Farce | 21. September 2003 |
| 9 | Elizabeth G. Book
US Guidelines a Barrier to German-American Armaments Cooperation | 10. Oktober 2003 |
| 10 | Dr. Bastian Giegerich
Mugged by Reality? German Defense in Light of the 2003 Policy Guidelines | 12. Oktober 2003 |
| 11 | Barthélémy Courtment
Understanding the deep origins of the transatlantic rift | 22. Oktober 2003 |
| 12 | Rolf Schwarz
Old Wine, New Bottle: The Arab Middle East after September 11th | 09. November 2003 |
| 13 | Ulf Gartzke
Irrelevant or Indispensable? – The United Nations after the Iraq War | 15. November 2003 |
| 14 | Daniel J. Klocke
Das Ende der Straflosigkeit von Völkerrechtsverbrechern? | 15. November 2003 |
| 15 | Panagiota Bogris
Erziehung im Irak – Ein Gewinn von Bedeutung | 21. November 2003 |
| 16 | Jessica Duda
Why the US counter – terrorism and reconstruction policy change? | 21. November 2003 |
| 17 | Elizabeth G. Book
Creating a Transatlantic Army: Does the NATO Response Force subvert the European Union? | 29. November 2003 |
| 18 | Holger Teske
Der blinde Rechtsstaat und das dreischneidige Schwert der Terrorismusbekämpfung | 29. November 2003 |
| 19 | Niels-Jakob Küttner
Spanische Momentaufnahme: 25 Jahre Verfassung | 11. Dezember 2003 |

20	Unbekannt Der große europäische Teppich	11. Dezember 2003
21	Unbekannt Die Reform des Sicherheitsrates der Vereinten Nationen und ihre Auswirkungen auf das System Internationaler Friedenssicherung	14. Januar 2004
22	Dimitrios Argirakos Marx reloaded – einige Gedanken zum 155 jährigen Jubiläum des kommunistischen Manifestes	08. März 2004
23	Ulf Gartzke Regime Change à la El Kaida	20. März 2004
24	R. Alexander Lorz Zur Ablehnung des Annan-Plans durch die griechischen Zyprer	27. April 2004
25	Alexander Siedschlag Europäische Entscheidungsstrukturen im Rahmen der ESVP: Möglichkeiten und Grenzen der Harmonisierung	02. Mai 2004
26	Niels-Jakob Küttner Mission stabiler Euro: Eine Reform des Stabilitäts- und Wachstumspaktes ist dringend notwendig	17. Juni 2004
27	Karim Zourgui Die innere Selbstbestimmung der Völker im Spannungsverhältnis von Souveränität und Entwicklung	02. Juli 2004
28	Dimitrios Argirakos Rückkehr zum Nationalismus und Abschied von der Globalisierung	02. Juli 2004
29	Alexander Alvaro Man zäumt ein Pferd nicht von hinten auf – Biometrische Daten in Ausweisdokumenten	14. Januar 2005
30	R. Alexander Lorz Zurück zu den "Vereinigten Staaten" von Europa	14. Januar 2005
31	Harpriye A. Juneja The Emergence of Russia as Potential Energy Superpower and Implications for U. S. Energy Security in the 21st Century	22. Januar 2005
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33	Caroline Oke The New Transatlantic Agenda: Does it have a future in the 21st Century?	22. Januar 2005
34	Dustin Dehez Globalisierte Geopolitik und ihre regionale Dimension. Konsequenzen für Staat und Gesellschaft	01. Februar 2005
35	Marwan Abou-Taam Psychologie des Terrors - Gewalt als Identitätsmerkmal in der arabisch-islamischen Gesellschaft	01. Februar 2005
36	Dimitrios Argirakos Die Entente der Halbstarken, die neue Weltordnung und Deutschlands Rolle in Europa	10. Februar 2005

37	Jessica Heun Die geplante Reform der Vereinten Nationen umfasst weit mehr als die Diskussion um einen deutschen Sitz im Sicherheitsrat wiedergibt...	17. Februar 2005
38	Dustin Dehez Umfassender Schutz für Truppe und Heimat?	01. März 2005
39	Dimitrios Argirakos Über das Wesen der Außenpolitik	02. Mai 2005
40	Babak Khalatbari Die vergessene Agenda- Umweltverschmutzung in Nah- und Mittelost	02. Mai 2005
41	Panagiota Bogris Die Überwindung von Grenzen – Toleranz kann man nicht verordnen	09. Mai 2005
42	Jessica Heun Quo vadis Roma?	17. Mai 2005
43	Patricia Stelzer Politische Verrenkungen - Schröders Wunsch nach Neuwahlen trifft auf Weimarer Spuren im Grundgesetz	27. Mai 2005
44	Daniel-Philippe Lüdemann Von der Notwendigkeit der Zusammenarbeit von Non-governmental Organisations	02. Juni 2005
45	Dr. Michaela Hertkorn France saying 'Non' to the EU Constitution and Federal Elections in Germany: The likely Impact on Intra – European Dynamics and Transatlantic Relations	03. Juni 2005
46	Babak Khalatbari Freihandel versus Demokratisierung: Die euromediterrane Partnerschaft wird 10 Jahre alt	04. Juni 2005
47	Edward Roby A hollow economy	13. Juni 2005
48	Patricia Stelzer Operation Murambatsvina - Mugabes „Abfallbeseitigung“ in Simbabwe steuert auf eine humanitäre Katastrophe hinzu	02. Juli 2005
49	Lars Mammen Terroranschläge in London – Herausforderungen für die Anti-Terrorismus-politik der internationalen Gemeinschaft und Europäischen Union	08. Juli 2005
50	Daniel Pahl Die internationale Ratlosigkeit im Fall Iran	19. Juli 2005
51	Michaela Hertkorn An Outlook on Transatlantic Relations – after the 'no-votes' on the EU constitution and the terror attacks in London	22. Juli 2005
52	Dustin Dehez Der Iran nach der Präsidentschaftswahl – Zuspitzung im Atomstreit?	24. Juli 2005
53	Edward Roby Who 'll stop the winds?	29. Juli 2005
54	Patricia Stelzer Lost in global indifference	01. August 2005

55	Dustin Dehéz Der Friedensprozess im Südsudan nach dem Tod John Garangs	04. August 2005
56	Dr. Dimitrios Argirakos Die diplomatische Lösung im Fall Iran	12. August 2005
57	Jessica Heun Entsteht mitten in Europa eine neue Mauer?	23. August 2005
58	Wilko Wiesner Terror zwischen Okzident und Orient – neue Kriege ohne Grenzen?	31. August 2005
59	Edward Roby Where do Jobs come from?	04. September 2005
60	Lars Mammen Remembering the 4 th Anniversary of 9-11	11. September 2005
61	Ulf Gartzke The Case for Regime Change in Berlin And Why It Should Matter to the U.S	16. September 2005
62	Sascha Arnautovic Auge um Auge, Zahn um Zahn: Im Irak dreht sich die Spirale der Gewalt unaufhörlich weiter	27. September 2005
63	Dustin Dehéz Ballots, Bombs and Bullets – Tehran's stirrings in Southern Iraq	25. Oktober 2005
64	Michaela Hertkorn Security Challenges for Transatlantic Alliance: an Initial Assessment after German Elections	07. November 2005
65	R. Alexander Lorz The Eternal Life of Eternal Peace	07. November 2005
66	R. Alexander Lorz International Constraints on Constitution - Making	08. November 2005
67	Unbekannt The NATO Response Force – A 2006 Deliverable?	15. November 2005
68	Jessica Heun 10 Jahre nach Dayton – Selbstblockade statt Entwicklung	15. November 2005
69	Hendrik Schulten Wie ist die Feindlage? Umwälzungen im Bereich des Militärischen Nachrichtenswesens der Bundeswehr	02. Dezember 2005
70	Edward Roby Transatlantic financial market: integration or confrontation?	12. Dezember 2005
71	Dustin Dehéz Terrorism and Piracy – the Threat Underestimated at the Horn of Africa	25. Dezember 2005
72	Franz Halas/Cornelia Frank Friedenskonsolidierung mit polizeilichen Mitteln? Die Polizeimission EUPOL-PROXIMA auf dem Prüfstand	16. Januar 2006
73	Mark Glasow Neue strategische Überlegungen zur Rolle des Terrorismus` auf der internationalen Bühne	07. Februar 2006

74	Ulf Gartzke What Canada's Prime Minister can learn from the German Chancellor	09. Februar 2006
75	Edward Roby Control of oil is dollar strategy	13. Februar 2006
76	Dr. Lars Mammen Erster Prozess zum 11. September 2001 in den USA – Beginn der richterlichen Aufarbeitung?	10. März 2006
77	Edward Roby New asset class for cosmopolitan high rollers	18. März 2006
78	Daniel Pahl Thoughts about the military balance the PRC and the USA	18. März 2006
79	Dustin Dehéz Deutsche Soldaten ins Herz der Finsternis? Zur Debatte um die Entsendung deutscher Truppen in die Demokratische Republik Kongo	18. März 2006
80	Lars Mammen Zum aktuellen Stand der Debatte in der Generalversammlung um eine Umfassende Konvention gegen den internationalen Terrorismus	26. März 2006
81	Edward Roby Clocking the speed of capital flight	17. April 2006
82	Ulf Gartzke Turkey's Dark Past and Uncertain Future	17. April 2006
83	Lars Mammen Urteil im Prozess um die Anschläge vom 11. September 2001 – Lebenslange Freiheitsstrafe für Moussaoui	04. Mai 2006
84	Jessica Heun See no evil, hear no evil, speak no evil... sometimes do evil	23. Mai 2006
85	Tiffany Wheeler Challenges for a Transatlantic Cohesion: An Assessment	23. Mai 2006
86	Dustin Dehéz Obstacles on the way to international recognition for Somaliland	29. Mai 2006
87	Dustin Dehéz Islamismus und Terrorismus in Afrika – Gefahr für die transatlantischen Interessen?	01. Juni 2006
88	Samuel D. Hernandez Latin America's Crucial Role as Transatlantic Player	21. Juni 2006
89	Sarabeth K. Trujillo The Franco – American Alliance: The Steel Tariffs, Why the Iraq War Is Not A Deal – Breaker, & Why the Alliance Still Matters	21. Juni 2006
90	Matthew Omolesky Polish – American Security Cooperation: Idealism, Geopolitics and Quid Pro Quo	26. Juni 2006
91	Eckhart von Wildenradt A delicate Relationship: Explaining the Origin of Contemporary German and French Relations under U.S. Hegemony 1945 - 1954	26. Juni 2006

- | | | |
|-----|---|--------------------|
| 92 | Gesine Wolf-Zimper
Zuckerbrot und Peitsche - zielgerichtete Sanktionen als effektives Mittel der Terrorbekämpfung? | 01. Juli 2006 |
| 93 | Edward Roby
The geopolitics of gasoline | 10. Juli 2006 |
| 94 | Michaela Hertkorn
Gedanken zu einer Friedenstruppe im Südlibanon | 01. August 2006 |
| 95 | Edward Roby
Germany's 2% boom | 11. September 2006 |
| 96 | Lars Mammen
Die Bekämpfung des Internationalen Terrorismus fünf Jahre nach den Anschlägen vom 11. September 2001 | 12. September 2006 |
| 97 | Dustin Dehéz
Running out of Options – Reassessing Western Strategic Opportunities in Somalia | 28. September 2006 |
| 98 | Edward Roby
Asian energy quest roils worldwide petroleum market | 02. Oktober 2006 |
| 99 | Christopher Radler
Ägypten nach den Parlamentswahlen | 11. Oktober 2006 |
| 100 | Michaela Hertkorn
Out-of-Area Nation – Building Stabilization: Germany as a Player within the NATO- EU Framework | 16. November 2006 |
| 101 | Raphael L'Hoest
Thailändische Energiepolitik – Erneuerbare Energien: Enormes Potenzial für Deutsche Umwelttechnologie | 10. Januar 2007 |
| 102 | Klaus Bender
The Mystery of the Supernotes | 11. Januar 2007 |
| 103 | Dustin Dehéz
Jahrhundert der Ölkriege? | 11. Januar 2007 |
| 104 | Edward Roby
A Nutcracker for Europe's energy fantasies | 14. Januar 2007 |
| 105 | C. Eduardo Vargas Toro
Turkey' s Prospects of Accession to the European Union | 25. Januar 2007 |
| 106 | Unbekannt
Davos revives Doha: Liberalized world trade trumps bilateral talk | 30. Januar 2007 |
| 107 | Edward Roby
Healthy market correction or prelude to a perfect storm? | 19. März 2007 |
| 108 | Edward Roby
Upswing from nowhere | 25. Mai 2007 |
| 109 | Daniel Pahl
Restraint in interstate – violence | 29. Juni 2007 |
| 110 | Michaela Hertkorn
Deutsche Europapolitik im Zeichen des Wandels: Die Deutsche EU-Ratspräsidentschaft aus der Transatlantischen Perspektive | 02. Juli 2007 |

111	Tatsiana Lintouskaya Die politische Ausgangslage in der Ukraine vor der Wahl	10. August 2007
112	Edward Roby Western credit crunch tests irreversibility of globalization	10. August 2007
113	Holger Teske Freiheit, Gleichheit, Brüderlichkeit: Der Niedergang der fünften Republik?	31. August 2007
114	Edward Roby Euro shares reserve burden of wilting dollar	22. Oktober 2007
115	Peter Lundin The Current Status of the Transatlantic Relationship – 4 Points of Consideration	07. November 2007
116	Michaela Hertkorn Challenge of Successful Post – War Stabilization: More Questions than Answers for the NATO-EU Framework	01. Dezember 2007
117	Dimitrios Argirakos Merkels Außenpolitik ist gefährlich	07. Dezember 2007
118	Edward Roby Crisis tests paradigm of global capital – a European perspective	07. Dezember 2007
119	Dr. Christian Wipperfürth Afghanistan – Ansatzpunkt für eine Zusammenarbeit Russlands mit dem Westen	05. Januar 2008
120	Dustin Dehéz Somalia – Krieg an der zweiten Front?	06. Februar 2008
121	Edward Roby Can Europe help repair the broken bubble?	10. Februar 2008
122	Dr. Christian Wipperfürth Bevölkerungsentwicklung in langer Schicht: Mittel und langfristige Konsequenzen	18. März 2008
123	Philipp Schweers Jemen vor dem Kollaps?	18. März 2008
124	Philipp Schweers Pakistan – Eine „neue Ära wahrer Politik“ nach der Wahl?	01. April 2008
125	Christian Rieck Zur Zukunft des Völkerrechts nach dem 11.September – Implikationen der Irakintervention	02. April 2008
126	Christian Rieck Iran and Venezuela: A nuclear "Rogue Axis" ?	02. April 2008
127	Philipp Schweers Towards a " New Middle East" ?	09. April 2008
128	Christian Rieck Ein Versuch über die Freiheit - Nur die Freiheit von heute ist die Sicherheit von morgen	02. Mai 2008
129	Christopher Radler Islamischer Fundamentalismus und Geopolitik – vom europäischen Kolonialismus bis zum Globalen Dschihad	06. Mai 2008

130	Ulrich Petersohn Möglichkeiten zur Regulierung von Privaten Sicherheitsunternehmen (PSF)	09. Mai 2008
131	Edward Roby Food joins energy in speculative global price spiral	09. Mai 2008
132	Edward Roby Central Banks declare war on resurgent inflation	12. Juni 2008
133	Daniel Werdung Airbus vs. Boeing: Neue Tankerflugzeuge für die US - Luftwaffe	12. Juni 2008
134	Christian Rieck Bemerkung zum europäischen Traum	13. Juni 2008
135	Philipp Schweers Zukunftsbranche Piraterie?	13. Juni 2008
136	Philipp Schweers Yemen: Renewed Houthi - Conflict	19. Juni 2008
137	Philipp Schweers Iran: Zwischen Dialogbereitschaft, äußeren Konflikten und persischem Nationalismus	20. Juni 2008
138	Dustin Dehéz Der Ras Doumeira-Konflikt – ist ein Krieg zwischen Eritrea und Djibouti unausweichlich?	09. Juli 2008
139	Philipp Schweers A new security paradigm for the Persian Gulf	09. Juli 2008
140	Edward Roby Mission Impossible: Quell "stagflation" with monetary policy	27. August 2008
141	Edward Roby Wallstreet on welfare, dollar on Skid Row	25. September 2008
142	Burkhard Theile Bankenkrise und Wissensgesellschaft	21. November 2008
143	Christopher Radler Die Anschläge von Mumbai als Machwerk al- Qa'idás?	30. Dezember 2008
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