

Dinsdag  
28 november 2023

VNO NCW Midden

Park Paviljoen  
Nationale Park  
De Hoge Veluwe

# Revolte in de Polder & Geopolitieke Vooruitblik 2024

Alex Krijger

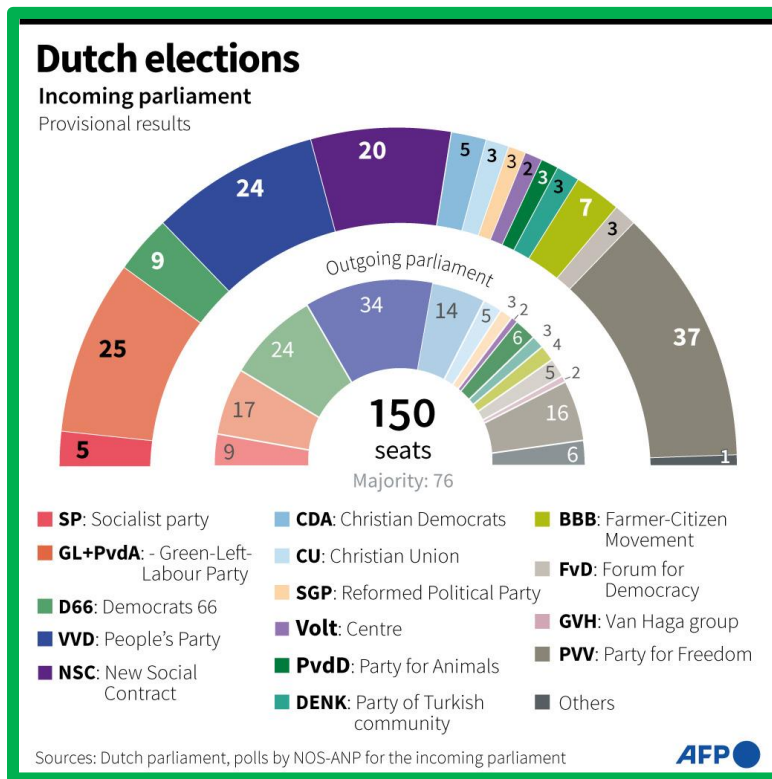


**KRIJGER & PARTNERS**

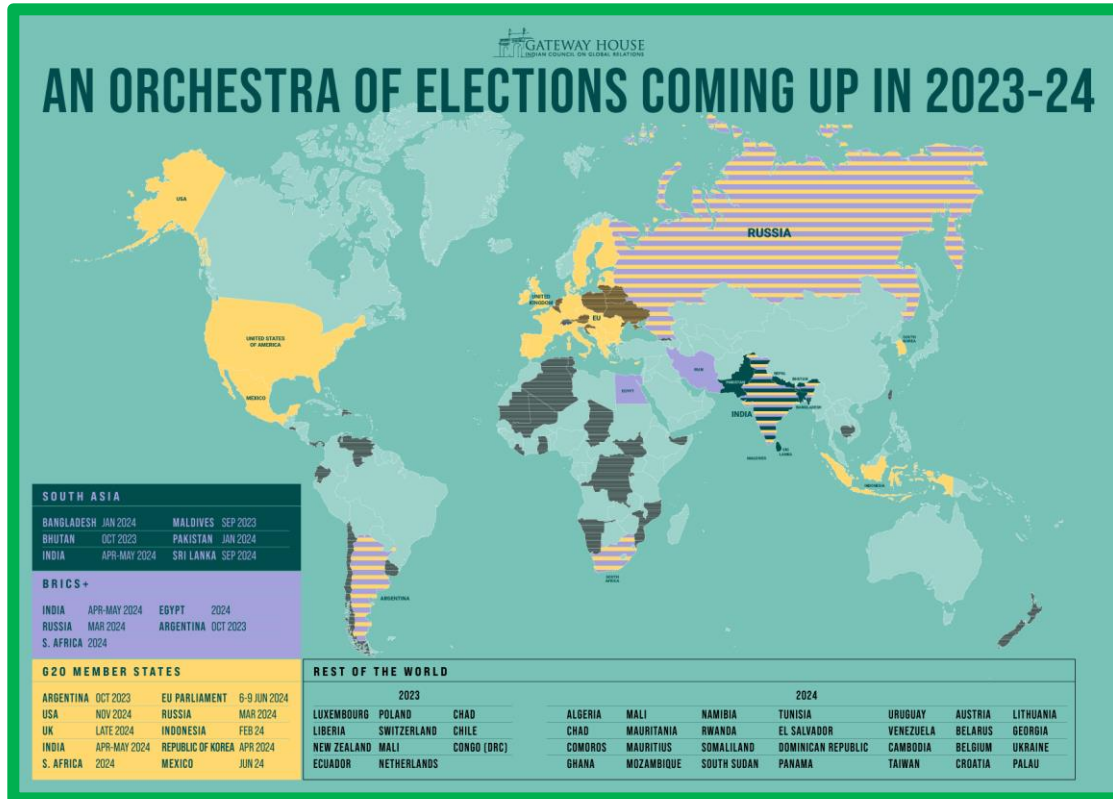
# 22 november 2023: Revolte in de Polder



- Formatie: hoe verder?
- Impact voor bedrijfsleven
- Geopolitieke implicaties



# Na Argentinië en NL verkiezingsjaar 2024



Let vooral op:

- VS
- India
- EU
- Taiwan
- Indonesië
- Iran
- Rusland
- Zuid-Afrika
- Egypte
- Pakistan

# Economische vooruitzichten

## WORLD ECONOMIC OUTLOOK JULY 2023 GROWTH PROJECTIONS BY REGION

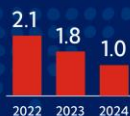
### GLOBAL GROWTH



(Real GDP growth, percent)

IMF.org

### UNITED STATES



### LATIN AMERICA & THE CARIBBEAN



### EURO AREA



### SUB-SAHARAN AFRICA



### MIDDLE EAST & CENTRAL ASIA



### EMERGING & DEVELOPING ASIA



Source  
IMF, World Economic Outlook, July 2023.

Note  
Order of bars for each group indicates (left to right): 2022, 2023 projections, and 2024 projections.

## World Economic Outlook Growth Projections

(Real GDP, annual percent change)	PROJECTIONS		
	2022	2023	2024
<b>World Output</b>	3.5	3.0	3.0
<b>Advanced Economies</b>	2.7	1.5	1.4
United States	2.1	1.8	1.0
Euro Area	3.5	0.9	1.5
Germany	1.8	-0.3	1.3
France	2.5	0.8	1.3
Italy	3.7	1.1	0.9
Spain	5.5	2.5	2.0
Japan	1.0	1.4	1.0
United Kingdom	4.1	0.4	1.0
Canada	3.4	1.7	1.4
Other Advanced Economies	2.7	2.0	2.3
<b>Emerging Market and Developing Economies</b>	4.0	4.0	4.1
Emerging and Developing Asia	4.5	5.3	5.0
China	3.0	5.2	4.5
India	7.2	6.1	6.3
Emerging and Developing Europe	0.8	1.8	2.2
Russia	-2.1	1.5	1.3
Latin America and the Caribbean	3.9	1.9	2.2
Brazil	2.9	2.1	1.2
Mexico	3.0	2.6	1.5
Middle East and Central Asia	5.4	2.5	3.2
Saudi Arabia	8.7	1.9	2.8
Sub-Saharan Africa	3.9	3.5	4.1
Nigeria	3.3	3.2	3.0
South Africa	1.9	0.3	1.7
<b>Memorandum</b>			
Emerging Market and Middle-Income Economies	3.9	3.9	3.9
Low-Income Developing Countries	5.0	4.5	5.2

Source: IMF, World Economic Outlook Update, July 2023

Note: For India, data and forecasts are presented on a fiscal year basis, with FY 2022/2023 (starting in April 2022) shown in the 2022 column. India's growth projections are 6.6 percent in 2023 and 5.8 percent in 2024 based on calendar year.

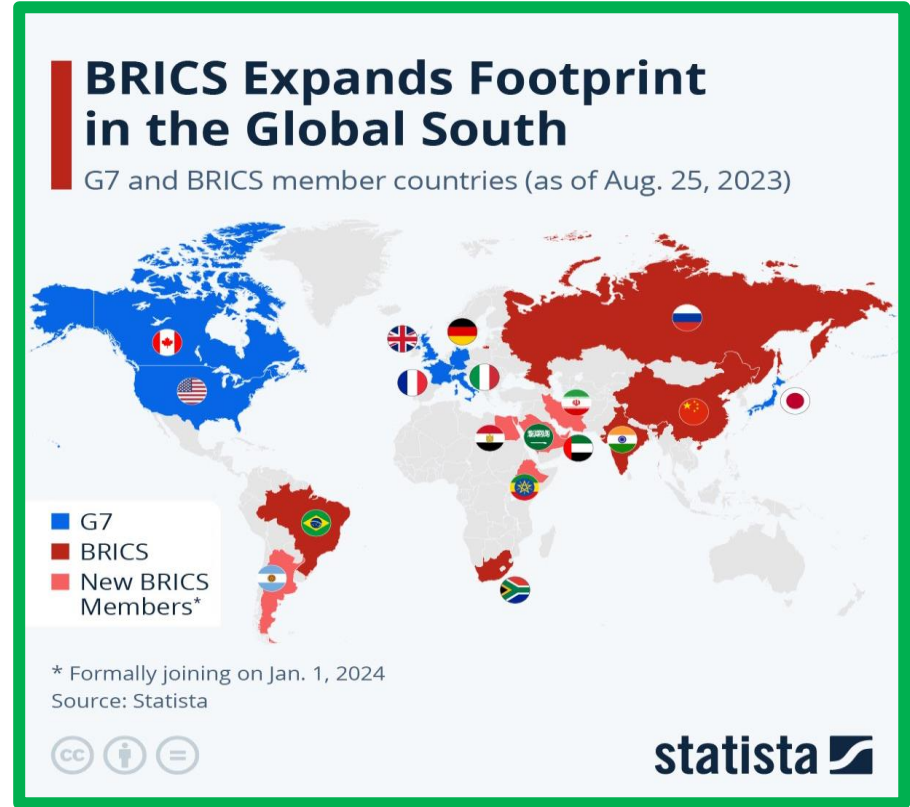
INTERNATIONAL MONETARY FUND

IMF.org

# Kantelende Wereldorde: opkomst Global South



Let vooral op India. Grootste democratie, land met meeste inwoners en op termijn 3<sup>e</sup> economie



# Geopolitiek: Biden's strijd op 4 fronten



- Oekraïne
- Israel / Gaza
- Taiwan
- Trump 2024



# Weer oorlog in het Midden-Oosten



# Russische oorlog in Oekraïne: Korea-scenario?



# Kantelende Wereldorde: grootste economieën

Ranking	1980	2000	2022	2050	2075
1	<b>United States</b>	<b>United States</b>	<b>United States</b>	<b>China</b>	<b>China</b>
2	<b>Japan</b>	<b>Japan</b>	<b>China</b>	<b>United States</b>	<b>India</b>
3	Germany	Germany	<b>Japan</b>	<b>India</b>	<b>United States</b>
4	France	United Kingdom	Germany	Indonesia	Indonesia
5	United Kingdom	France	<b>India</b>	Germany	Nigeria
6	Italy	<b>China</b>	United Kingdom	<b>Japan</b>	Pakistan
7	<b>China</b>	Italy	France	United Kingdom	Egypt
8	Canada	Canada	Canada	Brazil	Brazil
9	Argentina	Mexico	Russia	France	Germany
10	Spain	Brazil	Italy	Russia	United Kingdom
11	Mexico	Spain	Brazil	Mexico	Mexico
12	Netherlands	Korea	Korea	Egypt	<b>Japan</b>
13	<b>India</b>	<b>India</b>	Australia	Saudi Arabia	Russia
14	Saudi Arabia	Netherlands	Mexico	Canada	Philippines
15	Australia	Australia	Spain	Nigeria	France

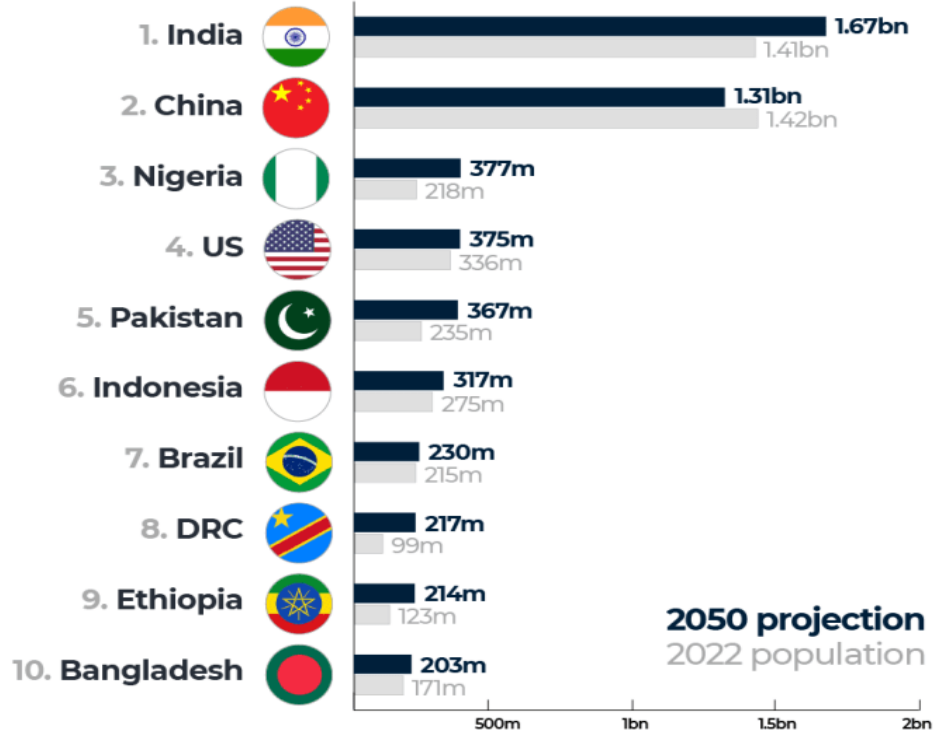
2023

- ☐ Wereldbevolking  
8,1 miljard
- ☐ EU-landen:  
448 miljoen
- ☐ EU: 5,5 % van  
wereld

WORLD POPULATION DAY

## Most populous countries by 2050

The world's population is expected to reach 9.7 billion by 2050, as per UN projections.



Source: UN Population Division (2022) | July 11, 2023

# Kwetsbaar Europa

- ❑ Zwakke Euro tov sterke Dollar
- ❑ Inflatie blijft hoog
- ❑ Economische stagnatie
- ❑ Tekort aan personeel
- ❑ Zorgen over Duitse economie
- ❑ ECB: renteplafond in zicht
- ❑ Prijzen energie en voedsel blijven stijgen
- ❑ Loonstijgingen
- ❑ Zwakke productie industrie
- ❑ Consumenten houden hand op de knip
- ❑ Impact oorlogen
- ❑ Herstel verwachting 2025: inflatie lager, koopkracht omhoog



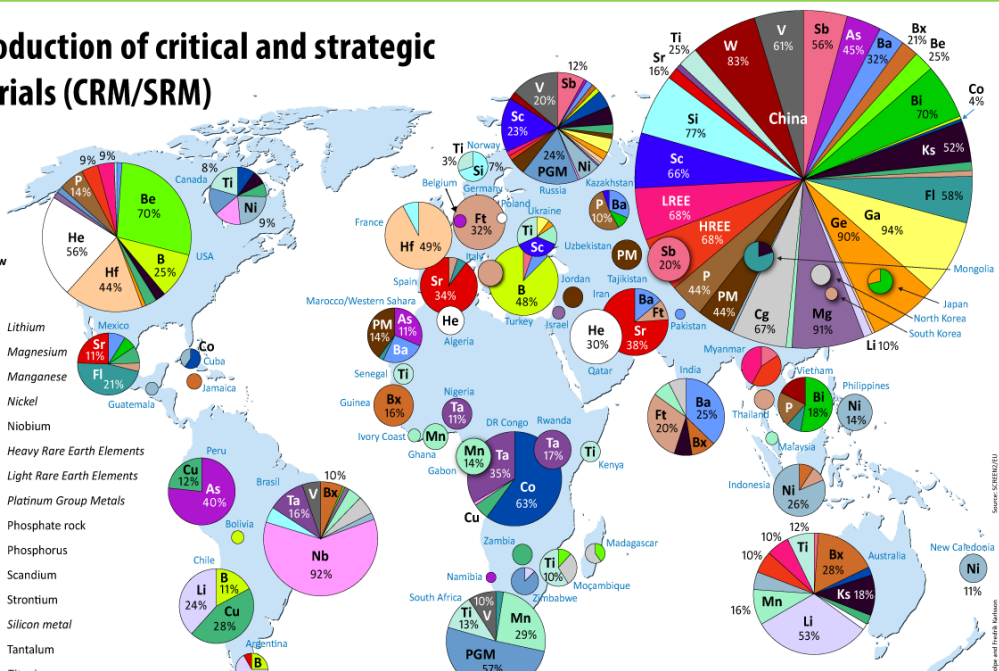
# Grondstoffen en Logistieke ketens: afhankelijk Europa

## Global production of critical and strategic raw materials (CRM/SRM)

Critical and strategic raw materials included in the EU list

<b>Sb</b> Antimony	<b>Li</b> Lithium
<b>As</b> Arsenic	<b>Mg</b> Magnesium
<b>Bx</b> Bauxite	<b>Mn</b> Manganese
<b>Ba</b> Baryte	<b>Ni</b> Nickel
<b>Be</b> Beryllium	<b>Nb</b> Niobium
<b>Bi</b> Bismuth	<b>HREE</b> Heavy Rare Earth Elements
<b>B</b> Borate	<b>LREE</b> Light Rare Earth Elements
<b>Cg</b> Natural gas	<b>PGM</b> Platinum Group Metals
<b>Co</b> Cobalt	<b>PM</b> Phosphate rock
<b>Fl</b> Fluorspar	<b>P</b> Phosphorus
<b>Ft</b> Feldspar	<b>Sc</b> Scandium
<b>Ga</b> Gallium	<b>Sr</b> Strontium
<b>Ge</b> Germanium	<b>Si</b> Silicon metal
<b>Hf</b> Hafnium	<b>Ta</b> Tantalum
<b>He</b> Helium	<b>Ti</b> Titanium
<b>Ks</b> Coking coal	<b>W</b> Tungsten
<b>Cu</b> Copper	<b>V</b> Vanadium

italic= strategic



SGU Geological Survey of Sweden

Naast transitie van energie ook transitie van grondstoffen nodig:

- Circulariteit
- Waterstof
- Mijnen in EU
- Innovatie
- Plantaardig

# Kansen voor Europa



28<sup>ste</sup> Klimaattop VN:

Focus op:

- Voortgang sinds Parijs 2015: 'Global Stocktake'
- Impact nieuw alarmerend rapport
- Afspraak over uitfaseren fossiel?
- Schadefonds
- Green Climate Fund

# 22 november 1963 – de boodschap van JFK



# Kansen in een Kantelende Wereldorde

Maak  
geopolitieke  
risico analyse

Grondstoffen  
strategie

Nieuwe  
logistieke  
ketens

Focus op  
circulariteit,  
recycling

Meer lokaal,  
regionaal en  
Europees

Zoek sterke  
internationale  
partners

Andere tijden,  
andere  
stakeholders

Leer van  
andere  
bedrijven

Ga altijd uit  
van eigen  
waarden

**Partner in  
Transitie**

Reshoring  
Nearshoring  
Friendshoring



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Where Business meets Politics

*"Krijger & Partners has the experience, network and trust to support businesses and organisations with high value, sensitive, political-business issues"*

Rein Willems, Chair Advisory Board K&P  
Former President-Director  
Royal Dutch Shell in the Netherlands



## GOVERNMENT AFFAIRS

Supporting businesses & organisations with advocacy, government affairs and stakeholder management

## POLITICAL RISK

Managing geopolitical business risk & issues by leveraging scenarios and intelligence-based analysis

## K&P ACADEMY

Connecting next generation with current leaders & experts in business, society and politics

## WHO WE ARE

Our highly experienced international network of trusted advisors helps you navigate current and emerging geopolitical challenges and protect your business value and reputation in turbulent times

*"Krijger & Partners prepares leaders to incorporate political risk scenarios into business strategies"*  
EY World Entrepreneur of the Year Conference  
Monte Carlo



# KRIJGER & PARTNERS

Where Business meets Politics



## WHY WORK WITH US

- We develop bespoke strategies through in-country knowledge and intelligence
- Discretion, integrity and diversity are at the core of our business
- We are dedicated to making a positive impact

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- Companies and organisations in energy, industry and other sectors in e.g. U.S., China, Europe and the MENA-region
- Assignments relate to either a political business issue or the organisation's overall advocacy, government affairs and stakeholder strategy

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The Hague, The Netherlands  
info@krijgerandpartners.com  
www.krijgerandpartners.com