



TRENDS GLOBAL
تريندز جلوبال

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Editorial

Germany entered the summer of 2026 at a decisive strategic moment. After two years of weak economic performance, early signs of recovery emerged alongside ambitious efforts to modernize industry, strengthen technological competitiveness, and accelerate investment. Yet economic renewal unfolded against an increasingly volatile security environment.

Russia's continued military pressure on Ukraine, NATO's evolving deterrence posture, instability across the Middle East following the Iran-Israel ceasefire, and intensifying geopolitical competition between the United States and China have fundamentally reshaped Germany's strategic outlook.

Domestically, the 2026 BfV Annual Report highlighted the growing complexity of hybrid threats, including cyberattacks, foreign espionage, disinformation campaigns, political extremism, and attacks targeting democratic institutions. Security is no longer viewed solely through a military lens but increasingly as the protection of Germany's economy, technological leadership, critical infrastructure, and democratic resilience.

Against this backdrop, Germany has assumed a broader leadership role within Europe, balancing defence modernization, industrial transformation, diplomatic engagement in the Middle East, and closer cooperation with European and transatlantic partners. This issue examines how these interconnected developments are redefining Germany's strategic position in an era of geopolitical uncertainty.

Editorial Board

52.5200° N,
13.4050° E



German Expert Opinion

Germany is undergoing a profound strategic transformation as it adapts to an increasingly complex geopolitical and technological environment. The 2025 Annual Report of the Federal Office for the Protection of the Constitution (BfV) demonstrates that Berlin has moved beyond a narrow understanding of security toward a comprehensive national resilience strategy that integrates security, economic competitiveness, foreign policy, and technological sovereignty. This reflects a recognition that contemporary threats are interconnected and require coordinated responses across multiple policy domains.

The report shows that Germany's security priorities have expanded significantly. While domestic extremism remains a major concern—particularly the continued growth of right-wing extremism and hybrid threats—the emphasis has shifted toward protecting democratic institutions, critical infrastructure, supply chains, and digital networks. Foreign intelligence activities, cyberattacks, disinformation campaigns, and economic coercion are now viewed as strategic threats alongside terrorism. Russia continues to represent the primary source of hybrid operations related to the war in Ukraine, while China is increasingly seen as a strategic competitor in technology, industrial innovation, and economic influence. This broader threat assessment illustrates that Germany now considers economic and technological resilience essential components of national security.

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German Expert Opinion

The report also reflects Germany's evolving economic strategy. The country's traditional export-driven growth model is being reshaped by geopolitical competition, energy challenges, technological rivalry, and supply-chain disruptions. Berlin increasingly links industrial competitiveness with national resilience by prioritising investment in advanced manufacturing, artificial intelligence, semiconductors, clean energy, and digital infrastructure. Strengthening innovation, improving investment conditions, diversifying supply chains, and reducing strategic dependencies have become central objectives of Germany's industrial policy, reflecting a growing convergence between economic and security priorities.

In foreign and security policy, Germany is pursuing greater strategic autonomy while reaffirming its commitment to NATO and the European Union. Rather than replacing transatlantic cooperation, strategic autonomy seeks to enhance Europe's capacity to act independently when necessary. Germany has increased defence spending, strengthened its role within NATO's deterrence strategy, and promoted deeper European defence integration through joint procurement, industrial cooperation, and coordinated military planning. At the same time, Berlin continues to balance security commitments with diplomatic engagement in regions such as the Middle East, recognising the links between regional stability, migration, energy security, and European interests.

The report sparked widespread discussion among German politicians, security experts, and civil society representatives. This report provides specific opinions and quotes from key individuals, accompanied by their portraits for better identification.

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Key Political Figures



Alexander Dobrindt

(Interior Minister, CSU)

Interior Minister Alexander Dobrindt emphasized the multifaceted nature of the threats facing Germany. He highlighted right-wing extremism as the "greatest threat" while also sounding a "serious warning signal" regarding the rise in left-wing extremist violence, specifically citing arson attacks on critical infrastructure in Berlin.

"Our free and democratic community is exposed day after day to diverse, persistent, and dangerous threats. We are fighting every form of extremism consistently and equipping our security authorities with further powers for effective action against extremists."



Sinan Selen

(President of the BfV)

BfV President Sinan Selen focused on the operational shifts in extremist activities, particularly the role of technology and the targeting of youth. He noted that Russia views Germany as a "central opponent in Europe" and employs a full spectrum of hybrid operations, including sabotage and disinformation.

"Sabotage, espionage, disinformation, terrorism, and numerous forms of extremism – our democracy is under diverse pressure from outside and inside. We are being attacked practically permanently. Freedom in security is not a matter of course."

Key Political Figures



Konstantin von Notz

(Deputy Parliamentary Group Leader,
Bündnis 90/Die Grünen)

Konstantin von Notz described the security situation as "serious as it hasn't been in a long time." He criticized past inaction regarding hybrid warfare and called for a "comprehensive prevention offensive," especially in the youth sector. He also emphasized the need for a "Democracy Promotion Law" (Demokratiefördergesetz) to strengthen civil society.

"The Verfassungsschutz report confirms how serious the security situation in our country is. The new federal government is called upon to take concrete measures with high pressure to strengthen the security authorities in the fight against diverse threats and to counteract the increasing division of our society."



Timo Reinfrank

(Executive Director, Amadeu Antonio
Stiftung)

Timo Reinfrank warned about the "rejuvenation" of right-wing extremism and its professionalization on social media. He criticized the government's budget cuts to democratic infrastructure and prevention work.

"Right-wing extremism is becoming younger, more digital, and more brutal. We are experiencing a generation that reveres right-wing terrorist attackers, publicly stages violence, and spreads misanthropic ideologies as a lifestyle."

Key Political Figures



Professor Peter Neumann

(Terrorism Researcher, King's College London)

Peter Neumann has consistently highlighted the threat from Russia as the "greatest threat – acute as well as long-term." He notes that Russia is already conducting a "hybrid war against Germany" and has expressed concerns about a new wave of violent left-wing radicalism .



Dr. Beate Küpper

(Co-author of the "Mitte-Studie")

Dr. Beate Küpper has analyzed the normalization of the AfD and its impact on the political center. She argues that the -1,100page report provided by the Verfassungsschutz in 2025 (regarding the AfD) serves as a crucial basis for understanding the party's anti-constitutional nature .

Germany's Security Landscape in Numbers Institutional Capacity

Below are the most important statistics and numerical data from the German Federal Office for the Protection of the Constitution (BfV) Annual Report 2025 (Verfassungsschutzbericht 2025).

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Institutional Capacity

Indicator	2025	2024	Change
 BfV personnel	4,649	4,549	 employees +100
 BfV budget	€551.3 million	€504.3 million	 +9.3%
 Military Counterintelligence Service (MAD) personnel	1,577	1,604	 Decrease
 MAD budget	€216.4 million	€191.0 million	 +13%
 NADIS intelligence database entries	4,234,276	4,182,080	 Increase



Extremist Groups and Individuals

Category	2025
 Right-wing extremist potential	59,850
 Left-wing extremist potential	42,200
 Violent left-wing extremists	11,600 (record high)
 "Reich Citizens" and "Self-Administrators"	26,000
 Violent members of the Reich Citizens movement	2,600

Politically Motivated Crime (PMK)

Indicator	2025	2024
 Total politically motivated crimes	85,837	84,172
 Propaganda offences	30,397	31,229
 Politically motivated violent crimes	4,156	4,107
 Extremist-related crimes	58,851	57,701
 Extremist violent crimes	3,294	2,976

Politically Motivated Crime by Ideology

Category	2025
 Right-wing motivated crimes	42,544
 Left-wing motivated crimes	13,490
 Religiously motivated crimes	1,983
 Foreign ideology-related crimes	6,886
 Other politically motivated crimes	20,934

Right-Wing Extremist Crime

Indicator	2025	2024
 Total right-wing extremist crimes	36,951	37,835
 Violent offences	1,395	1,281
 Propaganda offences	23,122	24,177
 Assaults	1,248	1,121
 Attempted murders	6	6
 Property damage	1,885	1,646
 Incitement to hatred	4,824	5,905



Xenophobic and Antisemitic Crime

Indicator	2025	2024
 Xenophobic crimes	12,537	13,035
 Xenophobic violent crimes	1,046	983
 Share of all right-wing violent crimes	75%	—
 Antisemitic right-wing crimes	2,821	2,775
 Violent antisemitic crimes	49	54

Trends in Numbers



Germany 2026:

Economic and Security Indicators Dashboard

1. Economic Indicators

Indicator	Germany 2026 Situation	Strategic Assessment
 GDP Growth	Around 0.8% expected growth in 2026	Recovery remains weak due to industrial restructuring, export pressure, and geopolitical uncertainty.
 Inflation Rate	Around 2% range expected	Inflation has moderated compared with the energy crisis period but remains affected by energy costs and geopolitical risks.
 Unemployment Rate	Around 6% (national definition: approximately 3% ILO)	Labour market remains relatively stable, but skilled-worker shortages are a major structural challenge.
 Industrial Production	Weak recovery; manufacturing remains below previous peaks	Energy-intensive industries and automotive manufacturing continue to face pressure.
 Manufacturing PMI	Remains below the expansion threshold of 50 points	Indicates continued contractionary pressure in manufacturing.
 Business Confidence (ifo Index)	Weak but improving expectations	Companies remain concerned about regulation, costs, and global competition.
 Exports	Still one of Germany's economic strengths, but under pressure	Dependence on China, automotive exports, and global demand remains a vulnerability.

2. Security Indicators

Based on BfV Report 2025 and German Security Data

The Federal Office for the Protection of the Constitution (BfV) reported a continued increase in extremist-related threats. In 2025, Germany recorded 58,851 extremist-related crimes, compared with 57,701 in 2024. Extremist-related violent crimes increased to 3,294 cases, approximately %10 higher than the previous year.

Security Indicator	Latest Number	Assessment
 Extremist-related crimes	58,851 cases (2025)	Highest level recorded; reflects growing political radicalisation.
 Extremist violent crimes	3,294 cases (2025)	Increase of around 10% compared with 2024.
 Right-wing extremist potential	More than 50,000 persons	Remains the largest extremist scene monitored by authorities.
 Right-wing extremist crimes	Around 37,000+ offences (2024)	Includes propaganda crimes, hate crimes, and politically motivated violence.
 Left-wing extremist potential	Around 38,000 persons	Continues to pose risks through violent protests and attacks on infrastructure.
 Islamist extremist potential	Around 28,000 persons	Security authorities continue monitoring radicalisation networks and terrorism risks.
 Cyberattacks	Thousands of reported incidents annually	Increasing focus on ransomware, espionage, and attacks against critical infrastructure.
 Foreign espionage cases	Increasing activity linked mainly to Russia, China, and Iran	Targets include technology, defence, research, and government institutions.
 Disinformation incidents	Rising sharply	Foreign influence campaigns increasingly target elections and social cohesion.
 Antisemitic crimes	Thousands of reported cases annually	Remains a major security concern linked to extremism and social polarisation.
 Critical infrastructure attacks	Growing number of cyber and sabotage attempts	Energy, transport, telecommunications, and digital systems are priorities for protection.

3. Strategic Interpretation

The numbers demonstrate that Germany is experiencing a dual transformation: an economic transition from an export-industrial model toward a technology-driven economy, and a security transition from traditional internal security toward comprehensive resilience.



Economically, weak growth, industrial pressure, and declining competitiveness indicators highlight the urgency of reforms in energy policy, innovation, digitalisation, and labour markets.

From a security perspective, the rise in extremist crimes, espionage activities, cyber threats, and foreign influence operations confirms that Germany's national security environment has fundamentally changed. The state is increasingly required to protect not only territory and citizens but also democratic institutions, economic assets, technological capabilities, and information space.

The central strategic challenge for Germany in 2026 is therefore maintaining economic strength while strengthening democratic and security resilience.

Geopolitical Trends Radar

Key Indicators and Numbers

Europe and Security

Indicator	Number / Trend	Strategic Meaning
 NATO members	32 countries	Alliance expands focus from crisis management to collective defence.
 NATO defence spending	Around 2%+ of GDP for most members; rising toward 3% targets	Increased military investment after Russia's invasion of Ukraine.
 European defence spending	More than €300 billion annually (approx.)	Growing EU defence capacity and industrial cooperation.
 Ukraine military aid (EU + partners)	More than €200 billion since 2022 (approx.)	Long-term European commitment to Ukraine's defence.
 Russia defence spending	Around 6–7% of GDP	Indicates continued military mobilisation and strategic competition.

Strategic Assessment

Europe is moving toward stronger defence integration, with Germany becoming a central actor. NATO remains the main security framework, while the EU develops additional defence capabilities.

Middle East

Indicator	Number / Trend	Strategic Meaning
 Iran oil production capacity	Around 3–4 million barrels/day	Energy markets remain sensitive to Iran-related tensions.
 Hormuz Strait oil transit	Around 20% of global oil trade	Any disruption creates global economic risks.
 Gaza humanitarian impact	Millions affected; reconstruction costs estimated in tens of billions of dollars	Major regional and diplomatic challenge.
 Syrian refugees worldwide	Around 6 million+	Migration remains a European security and humanitarian issue.
 Red Sea shipping disruption	Significant decline in traffic during security crises	Threatens global supply chains and European trade routes.

Strategic Assessment

The Middle East remains a major security concern for Germany due to energy security, migration, terrorism risks, and geopolitical competition.

Global Competition

Indicator	Number / Trend	Strategic Meaning
 China–EU trade volume	Around €700 billion annually	Economic ties remain strong despite strategic rivalry.
 China share of global manufacturing	Around 30%	Creates industrial competition with Europe.
 US defence spending	Around \$900 billion+ annually	Maintains American military dominance.
 Global AI investment	Hundreds of billions of dollars projected by 2030	AI becomes a major geopolitical competition field.
 China AI investment	Among the world's largest	Challenges US technological leadership.
 Critical minerals dependence	China controls major parts of processing capacity for rare earths	Drives European diversification efforts.
 Arctic sea routes	Potential reduction of shipping distances by up to 40%	Increases strategic competition over Arctic access.

Strategic Outlook: Germany's Position

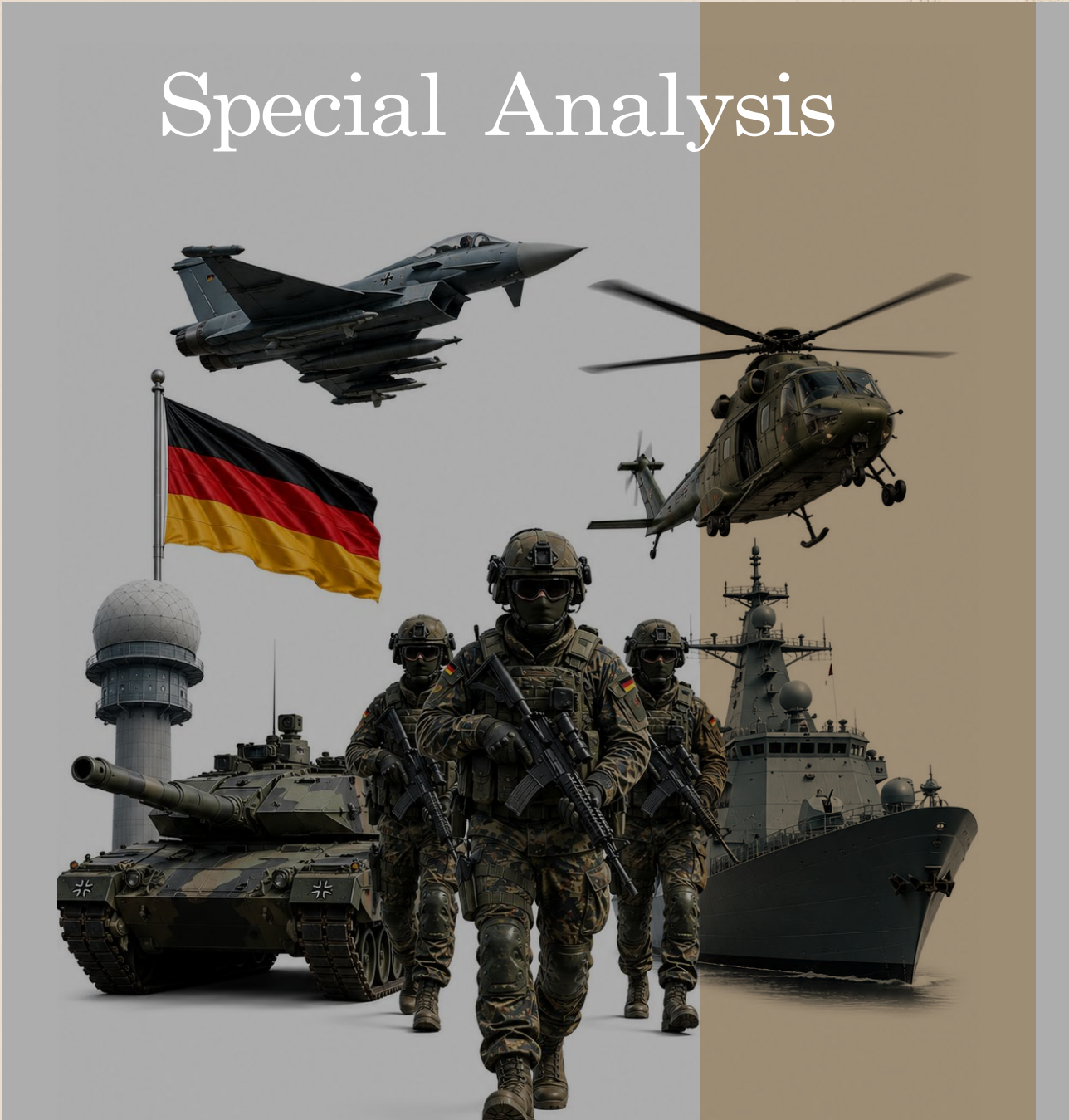
Area	Key Trend
 Security	Shift from defence of territory to comprehensive security.
 NATO	Greater German responsibility and military contribution.
 Ukraine	Long-term support remains central to European security.
 Middle East	Balancing security interests and diplomatic engagement.
 China	From economic dependence toward “de-risking”.
 Technology	AI, semiconductors, and cyber security become strategic assets.
 Resources	Critical minerals become a national security priority.



Conclusion:

The 2026 geopolitical environment is defined by three competing forces: military insecurity in Europe, instability in the Middle East, and global technological competition. Germany's strategic challenge is to combine economic strength with defence capability and technological sovereignty.

Special Analysis



Germany's New Security Doctrine: From Territorial Defence to Comprehensive Security

Germany's security doctrine in 2026 reflects a fundamental transformation from a traditional defence-oriented approach toward a broader concept of comprehensive security. Influenced by the findings of the 2026 Federal Office for the Protection of the Constitution (BfV) report and Germany's National Security Strategy, Berlin increasingly recognises that modern threats extend beyond conventional military challenges to include hybrid warfare, cyber operations, foreign interference, and economic vulnerabilities.

Hybrid warfare has become a central concern, combining military pressure with disinformation, cyberattacks, political influence operations, and economic coercion. Germany views Russia and other state actors as using such methods to weaken democratic institutions and exploit social divisions. As a result, protecting the information environment and strengthening societal resilience have become key elements of national security policy.

Cybersecurity is now considered a core component of defence. German authorities are expanding protection against attacks targeting government systems, companies, research institutions, and critical infrastructure. At the same time, foreign espionage activities, particularly targeting advanced technologies, defence industries, and sensitive research, have increased the importance of intelligence protection and counter-espionage capabilities.

Democratic resilience has become another strategic priority. The rise of extremist movements, online radicalisation, and foreign influence campaigns has highlighted the need to protect democratic institutions, public trust, and social cohesion. Germany increasingly links internal security with the defence of constitutional values.

Artificial intelligence is also reshaping security planning. AI technologies are being integrated into intelligence analysis, cyber defence, military innovation, and industrial applications. However, Germany must balance technological advancement with ethical governance and protection against misuse.



Economic security has become inseparable from national security. Protecting supply chains, reducing dependency on vulnerable markets, and securing access to critical technologies and resources are now strategic objectives. Germany's experience with energy dependency and global supply disruptions has accelerated efforts to strengthen resilience.

Overall, Germany's new security doctrine represents a shift from reacting to threats toward preventing and managing risks across military, technological, economic, and societal domains. Security is no longer limited to protecting borders; it now includes safeguarding democracy, infrastructure, innovation capacity, and national sovereignty in an increasingly competitive global environment.

Germany Lens

Domestic Developments: June – July 2026
(Brief Assessment)



Gdomestic landscape during June–July 2026 was shaped by political consolidation, economic restructuring, and growing debates over security, migration, and technological transformation.

Politics

The governing coalition continued efforts to maintain stability amid economic pressures and security challenges. Policy priorities focused on strengthening defence capabilities, supporting industrial competitiveness, accelerating digitalisation, and addressing energy and migration issues. The AfD remained a significant political force, benefiting from public concerns over migration, economic uncertainty, and dissatisfaction with traditional parties. Its continued influence increased pressure on mainstream parties to respond more strongly to security and social policy concerns.

Economy

Defence spending became a central element of Germany's economic and security agenda, with increased investment in the Bundeswehr, defence technology, and European security cooperation. The automotive industry remained under pressure from the transition to electric vehicles, competition from China, and the need for technological innovation. Energy transition policies continued to focus on renewable energy expansion, grid modernisation, and reducing dependence on external energy sources. Industrial policy increasingly emphasised strategic sectors such as semiconductors, artificial intelligence, and critical technologies. Labour shortages



remained a major structural challenge, affecting manufacturing, healthcare, and skilled professions.

Society

Migration remained one of the most politically sensitive issues, linked to integration, labour needs, and domestic security debates. Authorities continued efforts to manage irregular migration while balancing economic demands for skilled workers. Domestic security concerns increased due to extremist threats, cyber risks, and foreign influence activities. AI adoption accelerated across businesses, public administration, and research institutions, while digital transformation remained a key priority for improving productivity and modernising state services.

Impact on Europe and the Arab World



Germany's Strategic Engagement with the Middle East and North Africa

Germany's evolving security and economic strategy increasingly connects European interests with partnerships across the Middle East and North Africa (MENA). As Europe seeks greater strategic resilience in energy, technology, supply chains, and security, Germany views cooperation with Arab countries as a key component of its broader foreign policy approach.

German investment in the Arab world is expanding beyond traditional energy and infrastructure sectors toward advanced industries, renewable energy, digital technologies, and manufacturing. Gulf countries, in particular, have become important partners for German companies seeking new markets and investment opportunities. At the same time, Arab sovereign wealth funds and investors are increasingly interested in German technology, industrial assets, and innovation sectors.



Migration cooperation remains a major element of Germany's engagement with the region. Berlin seeks partnerships with MENA countries to manage migration flows, combat human trafficking, and develop legal pathways for skilled labour. Cooperation with countries of origin and transit has become essential for balancing humanitarian responsibilities with domestic political pressures.

In Middle East diplomacy, Germany continues to play an active role in promoting regional stability, conflict prevention, and humanitarian assistance. Its approach combines support for diplomatic solutions, security cooperation, and economic reconstruction efforts in conflict-affected areas such as Syria and Gaza. Future reconstruction projects could create opportunities for German expertise in infrastructure, energy, healthcare, and urban development.

Artificial intelligence and digital transformation represent new areas of cooperation. Germany and Arab partners are increasingly exploring AI partnerships

involving research, smart cities, cybersecurity, and industrial applications. These partnerships could strengthen technological links between Europe and the Gulf while supporting innovation ecosystems.

Critical minerals have become another strategic priority. As Europe seeks to reduce dependence on limited suppliers, cooperation with mineral-rich countries in the Arab region and neighbouring areas could support supply-chain diversification for batteries, renewable technologies, and advanced industries.

Maritime security is also gaining importance due to the strategic role of the Red Sea, Gulf waterways, and global trade routes. Germany has an interest in protecting international shipping and ensuring stable trade connections between Europe, Asia, and the Middle East.

Green hydrogen represents one of the most promising areas of future cooperation. Germany views North Africa and the Gulf as potential suppliers of renewable hydrogen needed for Europe's energy transition.

Thought Corner



Security Is No Longer Only Military

Germany's understanding of national security is undergoing a profound transformation. In the past, security was primarily associated with military defence, territorial protection, and the ability to respond to armed threats. Today, Germany increasingly recognises that modern security challenges extend far beyond traditional military domains and require a comprehensive approach combining economic, technological, societal, and strategic resilience.



Economic resilience has become a core element of national security. A strong industrial base, secure energy supplies, and reliable supply chains are essential for maintaining strategic independence. Germany's experience with energy dependency, global disruptions, and geopolitical competition has demonstrated that economic vulnerabilities can directly affect national security.

Industrial competitiveness and technology leadership are now closely linked to geopolitical influence. Sectors such as artificial intelligence, semiconductors, advanced manufacturing, and digital infrastructure have become strategic assets. Germany's ability to innovate and compete internationally will determine its capacity to protect economic interests and maintain influence within Europe.

Cybersecurity and information integrity have also become central security priorities. Cyberattacks, disinformation campaigns, and foreign interference operations threaten not only government institutions

but also businesses, democratic processes, and social cohesion. Protecting critical infrastructure and strengthening digital resilience are therefore essential components of modern security policy.

The protection of democratic institutions represents another important dimension. Germany increasingly views societal stability, public trust, and resistance to extremist movements and external manipulation as vital national assets.

Overall, Germany is moving toward a model of comprehensive security, where military strength is only one component of resilience. The future security of the country will depend on its ability to combine defence capabilities with economic strength, technological innovation, secure supply chains, cyber protection, and democratic stability. In the 21st century, protecting a nation means safeguarding not only its borders but also its economy, information space, infrastructure, and social foundations.

Forward Outlook



Germany and Europe: Strategic Developments Ahead

Germany's future trajectory will be shaped by the interaction between domestic political stability, economic transformation, and a rapidly changing international security environment. The coming period is likely to witness continued efforts to strengthen resilience while balancing economic competitiveness with strategic priorities.

Coalition stability and political dynamics will remain a key factor. The government is expected to face pressure from economic concerns, migration debates, and the growing influence of opposition forces, particularly the AfD. Maintaining coalition cohesion will depend on the ability to deliver practical reforms on growth, security, and social policy.

At the European level, the EU competitiveness agenda will focus on reducing regulatory burdens, increasing investment, and strengthening industrial capacity. Germany will play a central role in shaping policies aimed at improving Europe's position in artificial intelligence, clean technologies, and strategic industries.

NATO adaptation and European defence integration will continue as major priorities. Germany is expected to increase its defence contribution, modernise the Bundeswehr, and support stronger European defence cooperation while maintaining NATO as the foundation of collective security.

AI regulation and digital policy will become increasingly important. Germany and the EU will seek to balance responsible AI governance with the need to compete globally. Investment in digital infrastructure, data capabilities, and technological innovation will be critical.

The industrial transformation of Germany will accelerate, particularly in automotive manufacturing, energy-intensive sectors, semiconductors, and green technologies. Companies will continue adapting to electrification, automation, and changing global supply chains.

The Russia-Ukraine conflict will remain central to European security planning. Regardless of battlefield developments, Germany will likely continue supporting Ukraine while preparing for long-term deterrence and security challenges related to Russia.

Relations between China and the EU will continue shifting from economic



cooperation toward strategic competition. Germany will seek to reduce vulnerabilities while preserving important trade links.

Migration policy will remain politically sensitive, with greater emphasis on controlling irregular migration while attracting skilled workers needed by the German economy.

Finally, hybrid threats, including cyberattacks, espionage, and disinformation, will remain a defining security challenge. Germany and Europe will increasingly prioritise resilience, intelligence cooperation, and protection of critical infrastructure.

Overall, Germany is moving toward a future defined by stronger defence responsibility, technological competition, and economic adaptation within a more contested global order.

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