



## Mittlerer Hafen Hamburg

Anfang oder Ende der neuen Chinesischen Seidenstraße?

Start or end of the Silk road?

Wolfgang Maennig  
University of Hamburg

FILog und SGKV: Logistik-Talk am Hafen

Hamburg, 9. April 2019

# Structure

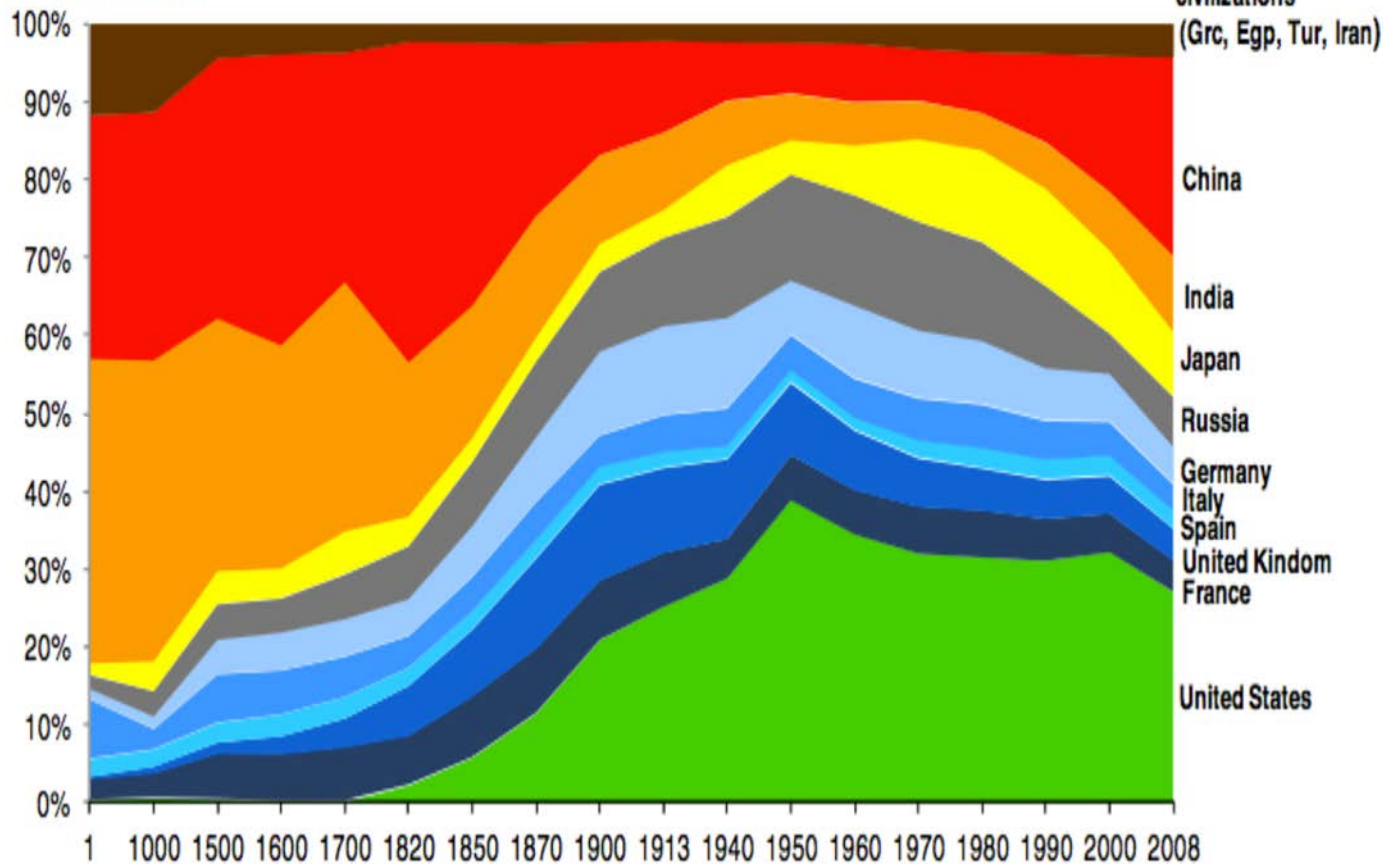
CHINA: SOME DATA AND AMBITIONS

SILK ROAD: WHAT IS IT? WHERE IS IT?

POTENTIAL EFFECTS IN EUROPE,  
GERMANY AND HAMBURG: SCOPE AND  
LIMITS

## Economic history of China and other major powers

Share of world GDP



Source: "Statistics on World Population, GDP and Per Capita GDP, 1-2008 AD", Angus Maddison, University of Groningen.

<http://cdn.theatlantic.com/static/mt/assets/business/Screen%20Shot%202012-06-20%20at%209.37.55%20AM.png>

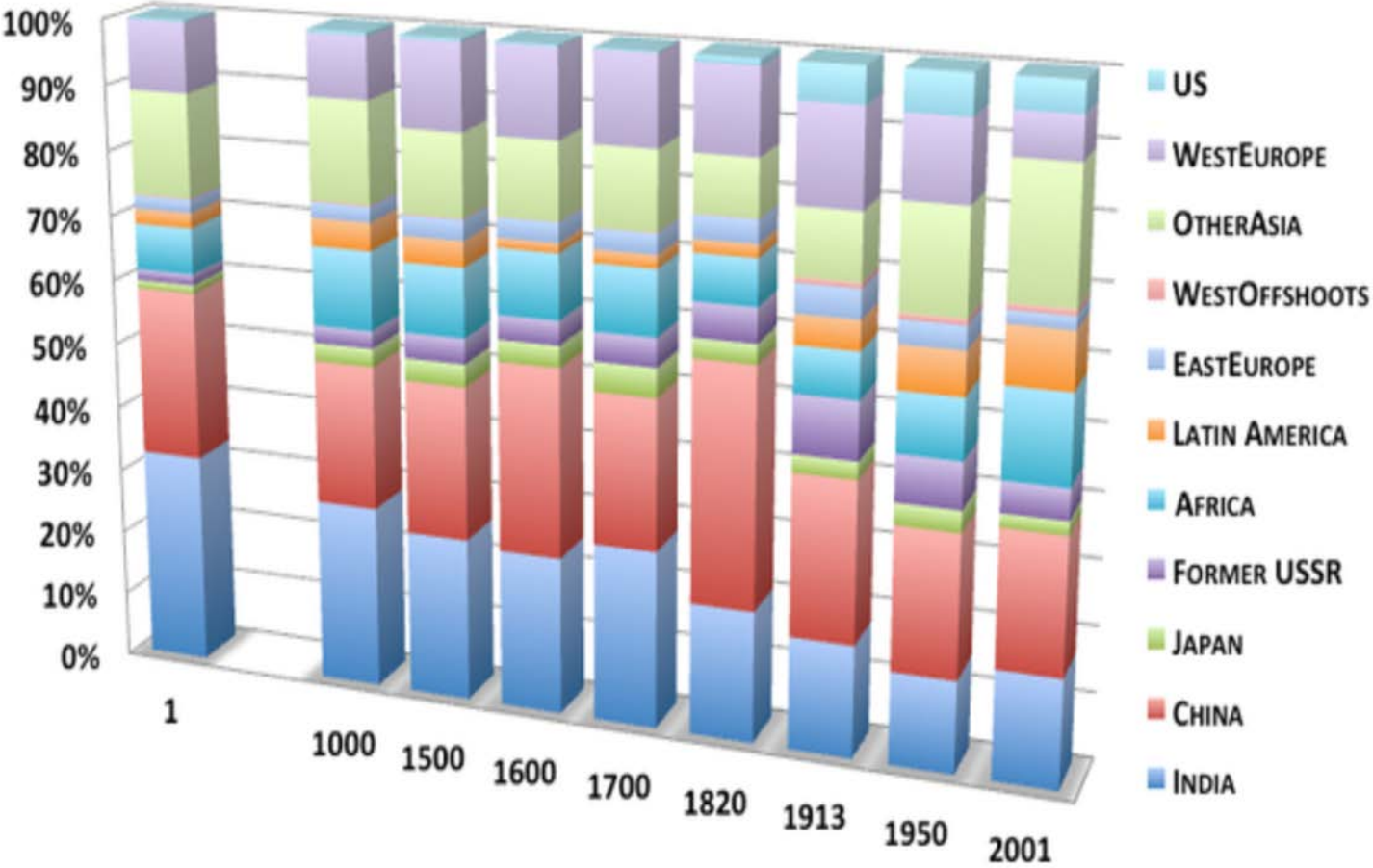
BTW: China Today is world's No 1 in PPP adjusted GDP...

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# Population



<https://www.theatlantic.com/business/archive/2012/06/the-economic-history-of-the-last-2000-years-part-iii/258877/>

China

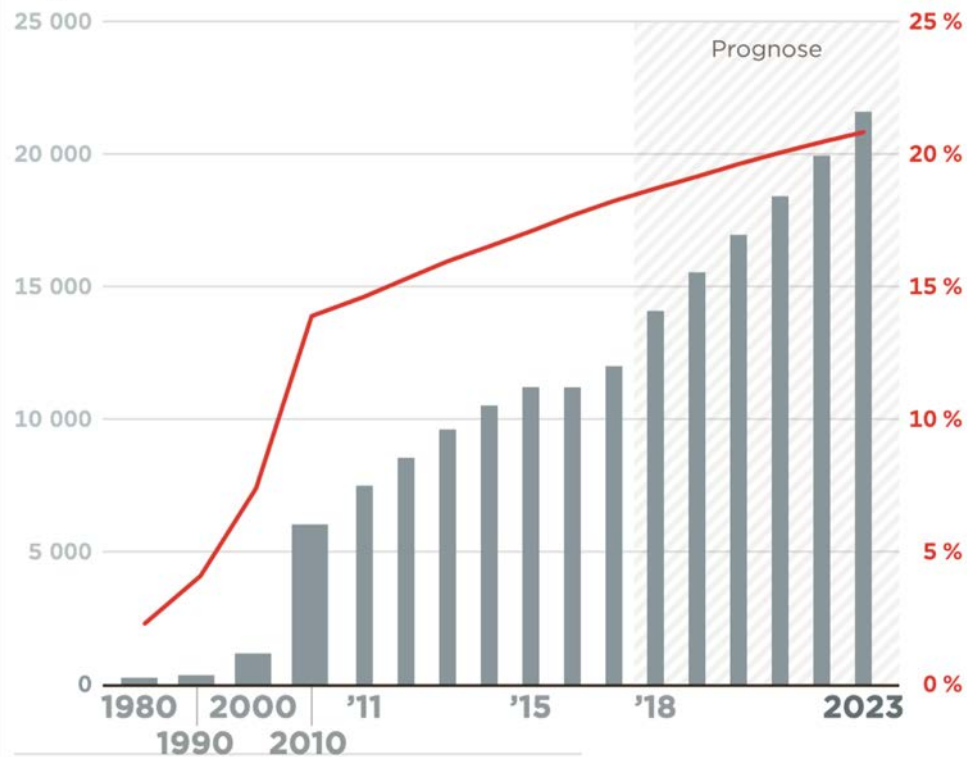
## Die boomende Weltmacht



### Rasanten Wachstum

Chines. BIP in jeweiligen Preisen in Mrd. US-Dollar

Chines. Anteil am kaufkraftbereinigten globalen BIP



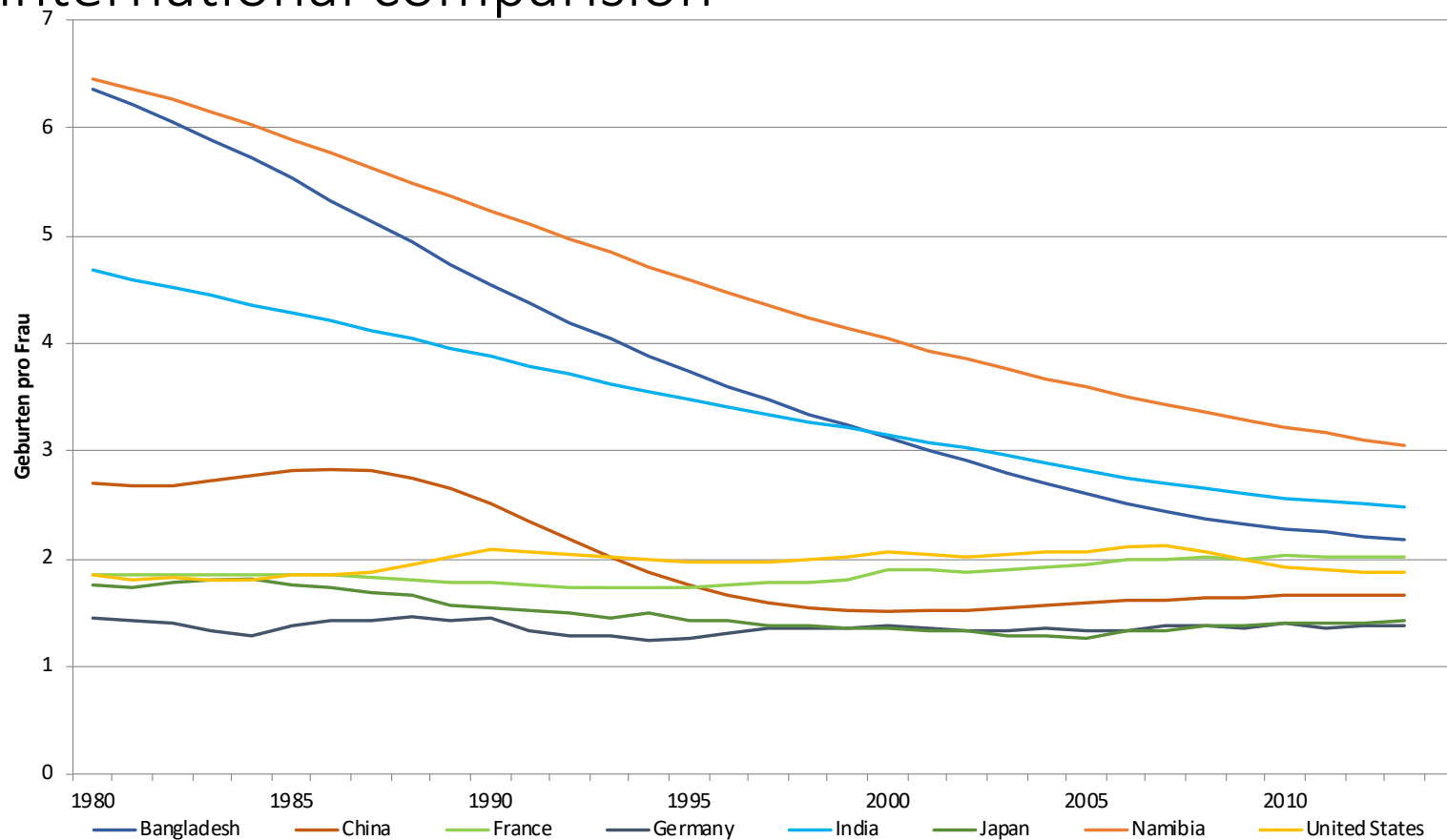
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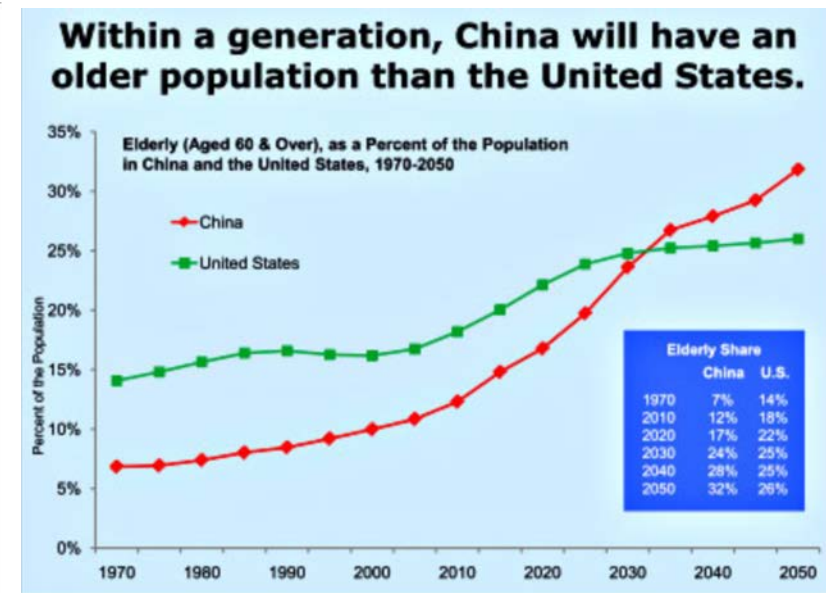
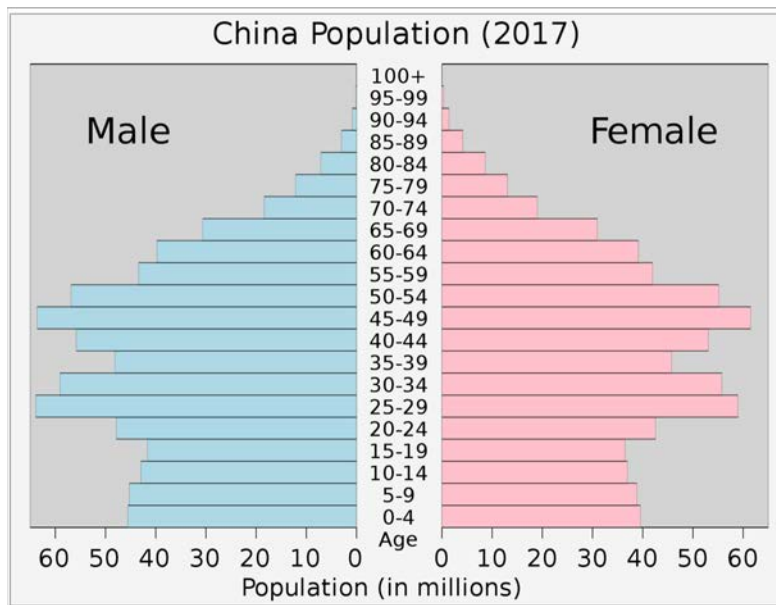
Potential Effects

# Birth rates: international comparision



Data source: Worldbank, 08. Mai 2015 <http://data.worldbank.org/indicator/SP.DYN.TFRT.IN>

# The chinese population structure



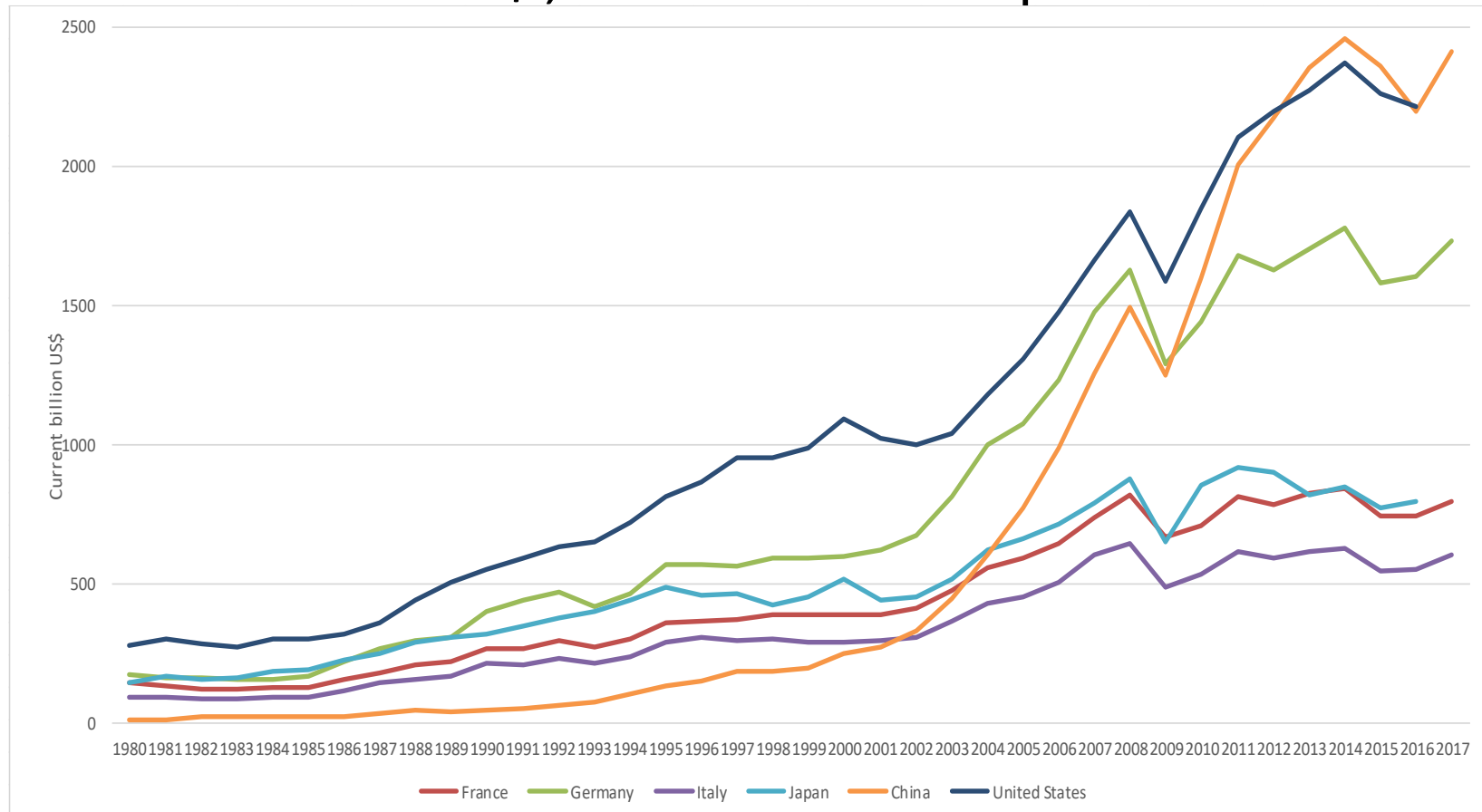
<https://www.motherjones.com/kevin-drum/2011/01/demographics-and-destiny/>

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# Export of Goods and Services in current US\$, intern. Comparision



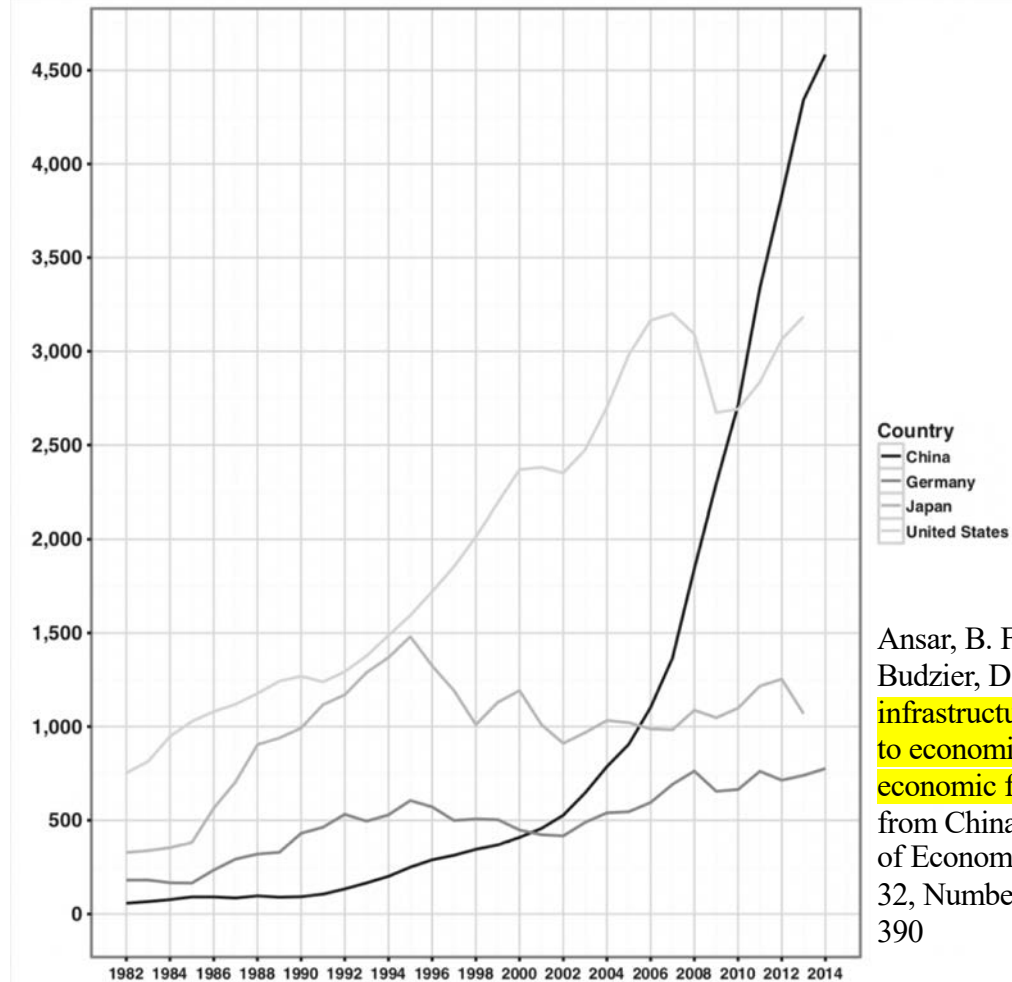
Data Sources: World Bank <https://data.worldbank.org> last updated: 12.09.2018

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# Gross investments, 1982-2014 (in Bn US-Dollar)



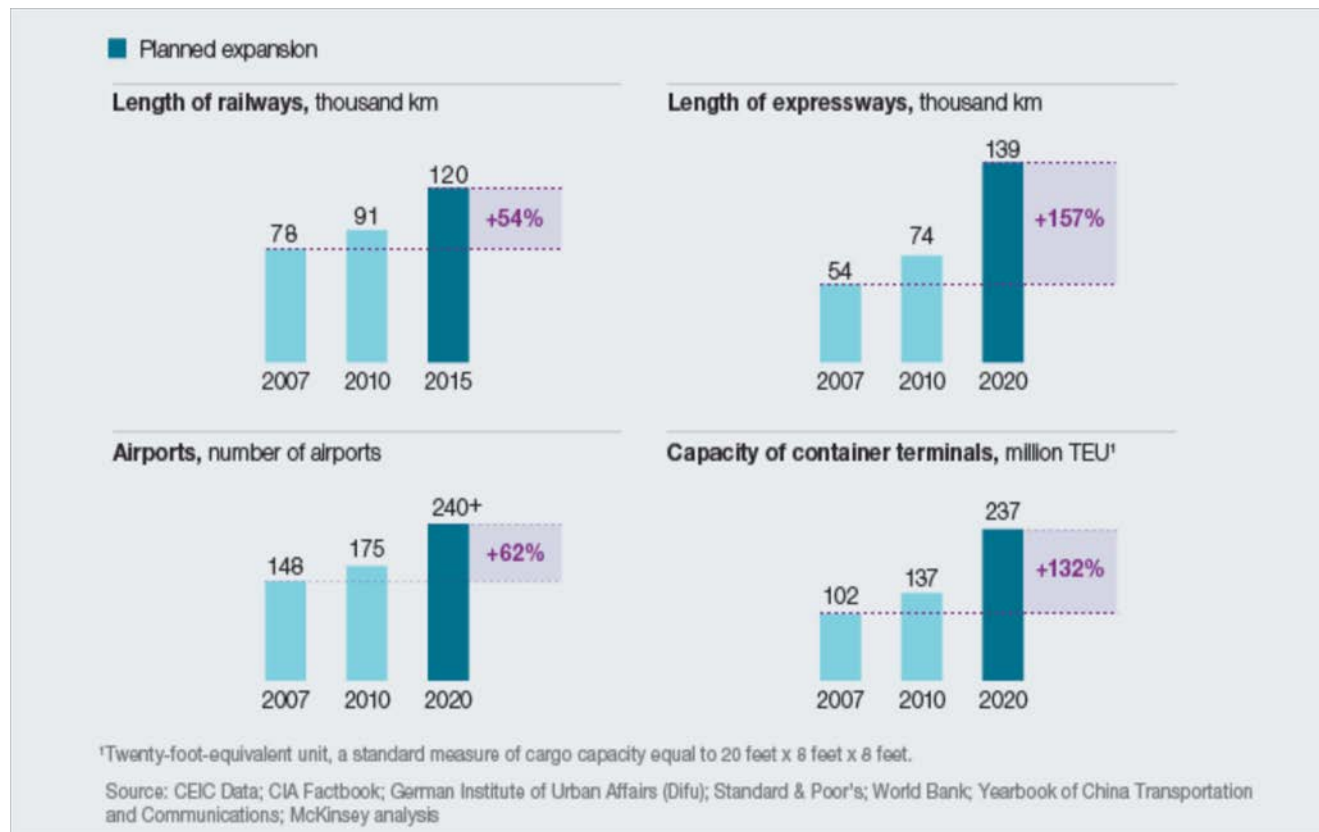
Ansar, B. Flyvbjerg, A. Budzier, D. Lunn (2016), Does infrastructure investment lead to economic growth or economic fragility? Evidence from China, in: Oxford Review of Economic Policy, Volume 32, Number 3, 2016, pp. 360–390

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# Infrastructure in China presence and future



Source: McKinsey, <https://www.mckinsey.com/featured-insights/winning-in-emerging-markets/chinese-infrastructure-the-big-picture>, vom 8.7.2018

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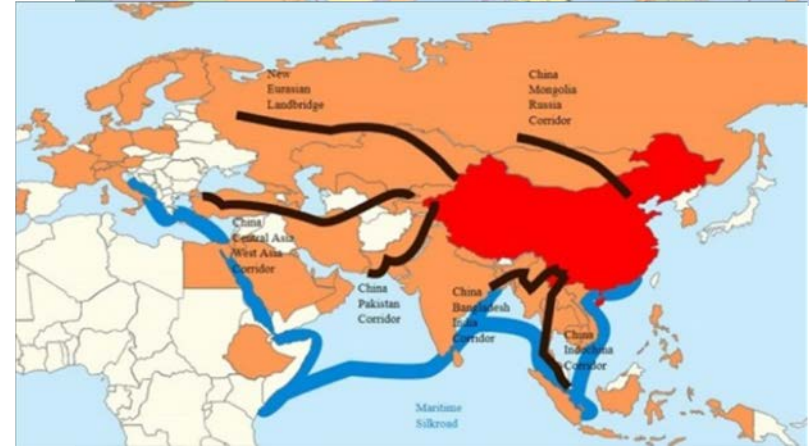


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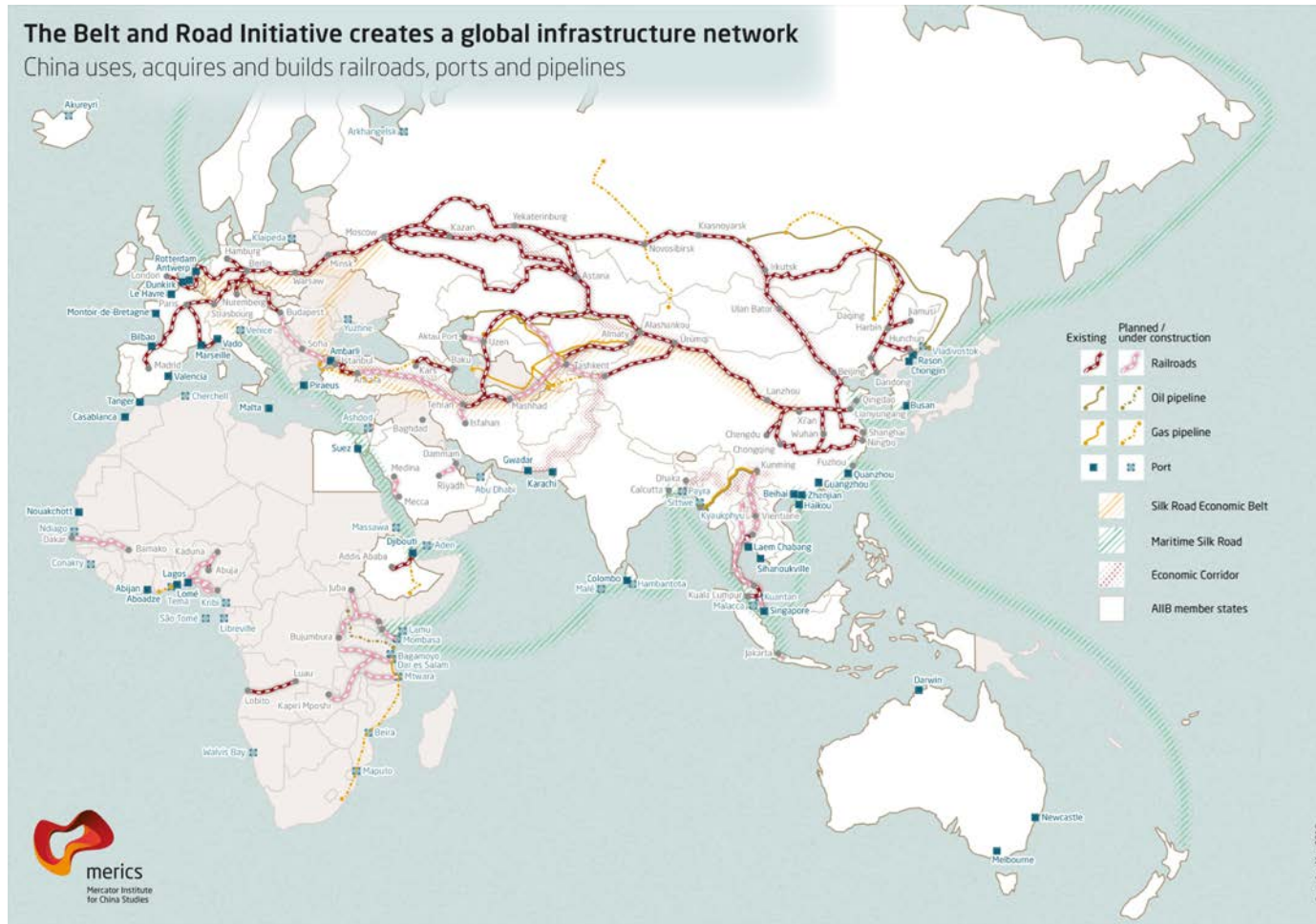
# BRI Action plan includes

- Streets, railways, waterways, harbours and airports
- Maglev- und space technology
- Integration of energy infrastructure
  - oil and gas pipelines
  - coal -, water-, und nuclear power stations, fusion power plants
- Cross-border Special Economic Zones
- New Cities
- Centers of science and research
- Modern, automated industries
- Investment volume of 1-8 trillion (GDP EU 2017: 19,9 trillion USD)
- alternative international financial system:
  - Silk Road Fund (>55 bn USD) and
  - Asian Infrastructure Investment Bank (AIIB, funded in 2015 > 100 bn USD)
  - China Development Bank (ADB),
  - Export-Import Bank
- Alternative regulation system

Australia	Austria	Azerbaijan	Bangladesh
Brazil	Brunei	Cambodia	China
Denmark	Egypt	Finland	France
Georgia	Germany	Iceland	India
Indonesia	Iran	Israel	Italy
Jordan	Kazakhstan	Kuwait	Kyrgyzstan
Laos	Luxembourg	Malaysia	Maldives
Malta	Mongolia	Myanmar	Nepal
Netherlands	New Zealand	Norway	Oman
Pakistan	Philippines	Poland	Portugal
Qatar	Russia	Saudi Arabia	Singapore
South Africa	South Korea	Spain	Sri Lanka
Sweden	Switzerland	Tajikistan	Thailand
Turkey	United Arab Emirates	United Kingdom	Uzbekistan
Vietnam			



→ A global integrating development concept



10.04.19

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# Global Innovation Index

Rang	Land	Score
1	Schweiz	67,7
2	Schweden	63,8
3	Niederlande	63,4
4	USA	61,4
5	Großbritannien	60,9
6	Dänemark	58,7
7	Singapur	58,7
8	Finnland	58,5
9	Deutschland	58,4
10	Irland	58,1
11	Südkorea	57,7
12	Luxemburg	56,4
13	Island	55,8
14	Japan	54,7
15	Frankreich	54,2
16	Honkong	53,9

17	Israel	53,9
18	Kanada	53,7
19	Norwegen	53,1
20	Österreich	53,1
21	Neu Seeland	52,9
22	<b>China</b>	<b>52,5</b>
23	Australien	51,8
24	Tschechien	51,0

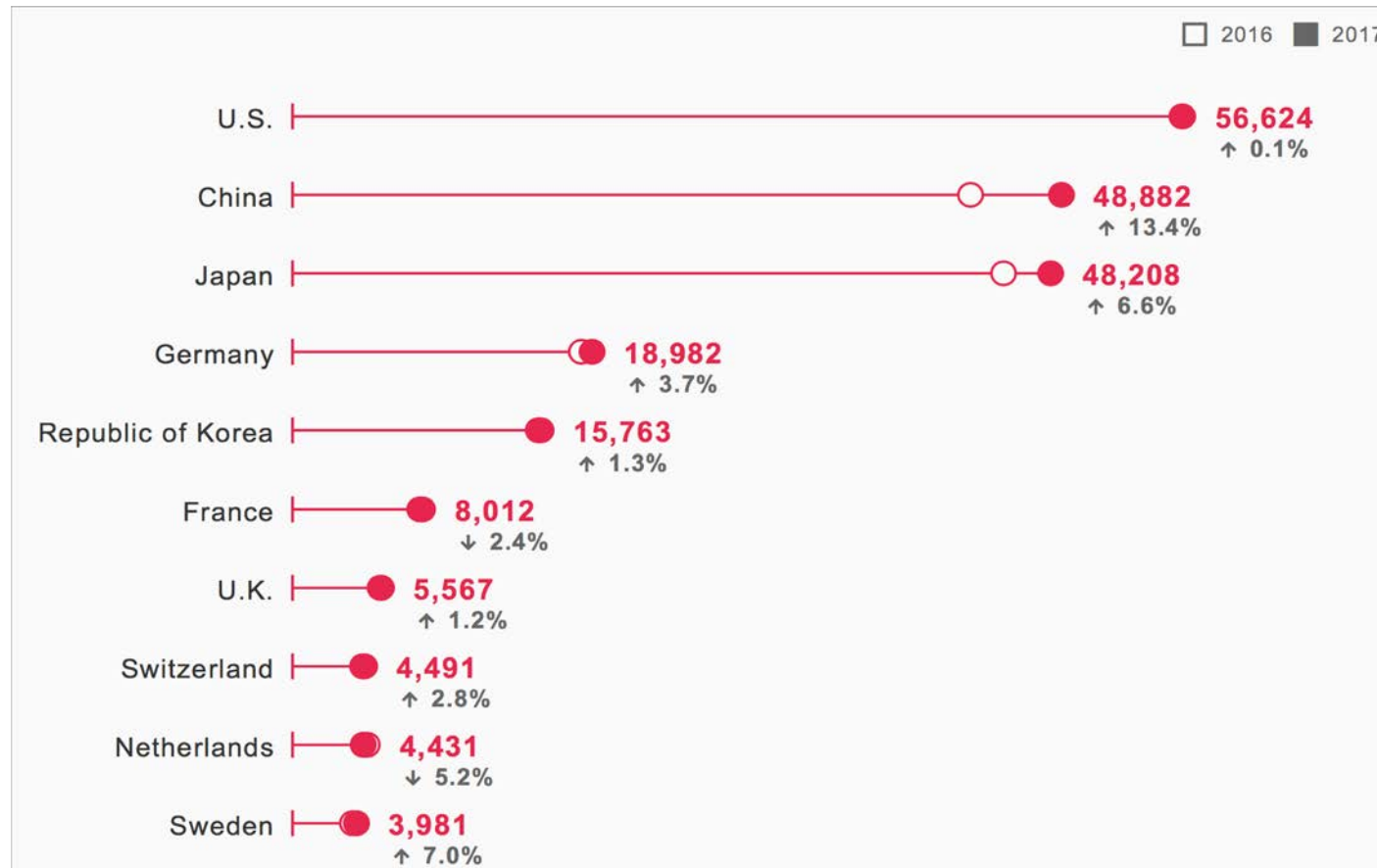
<https://www.globalinnovationindex.org/analysis-indicator>,  
 Aufruf vom 25.6.2018

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## The Top Ten Home countries of Patent applications, 2016–2017



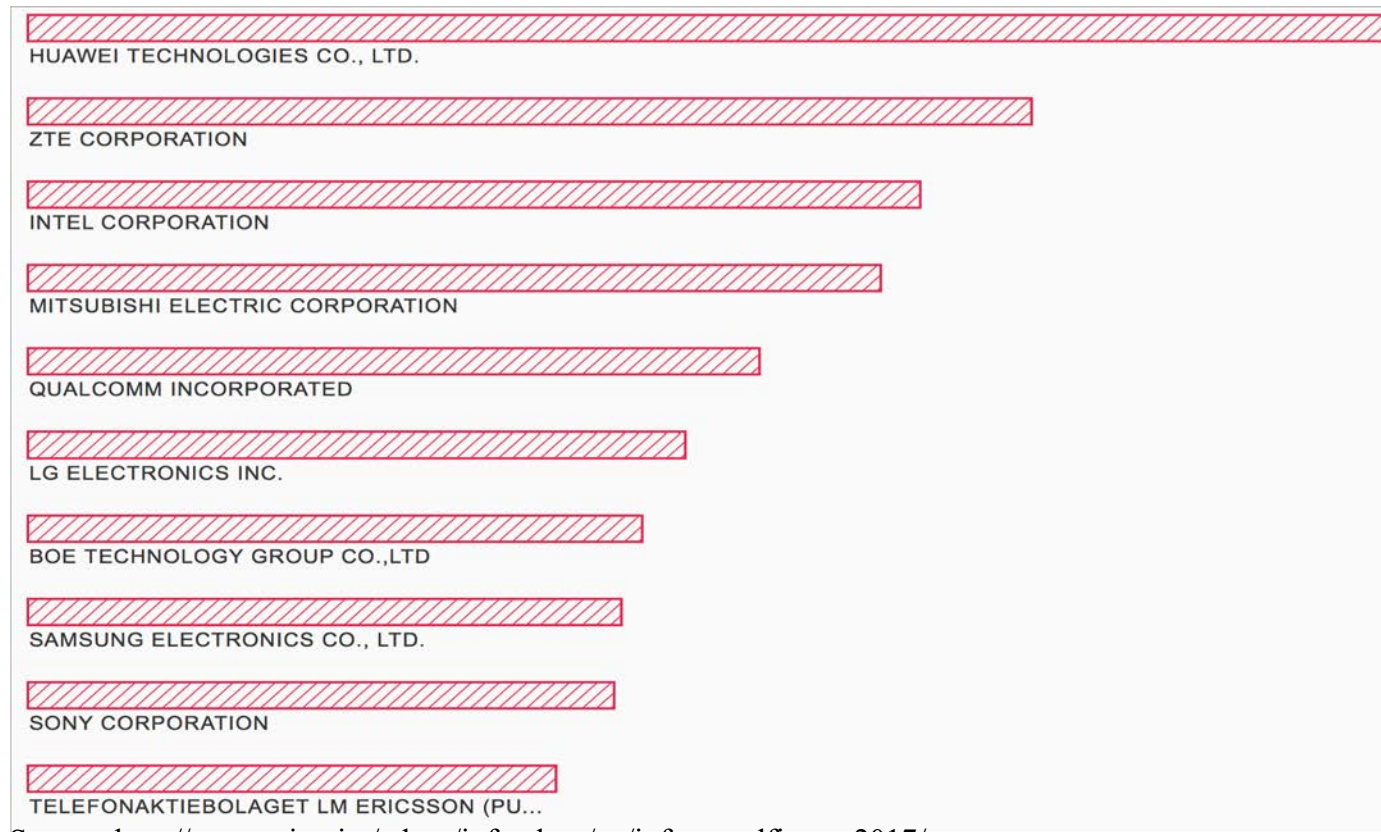
Source: <http://www.wipo.int/edocs/infodocs/en/ipfactsandfigures2017/>

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## TOP Ten Enterprises with most patent applications



Source: <http://www.wipo.int/edocs/infogdocs/en/ipfactsandfigures2017/>

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# Cultural Impact: International Ranking

Rang im „kulturellen Einfluss“-Ranking	Land	Rang im „Bestes-Land“-Ranking
1	Italien	15
2	Frankreich	9
3	USA	8
4	Spanien	19
5	Vereinigtes Königreich	4
6	Japan	5
7	Schweiz	1
8	Brasilien	29
9	Australien	7
10	Schweden	6
11	Kanada	2
12	Niederlande	10
13	Singapur	16
14	Deutschland	3
15	Griechenland	28
16	Dänemark	11
17	Vereinigte Arabische Emirate	23
18	Neuseeland	13
19	Thailand	27
20	Mexiko	31
21	China	20

Quelle: US News Best Countries Ranking,  
<https://www.usnews.com/news/best-countries/influence-full-list>

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## International ranking of cultural heritage

<b>Rang im kulturellen Erbe</b>	<b>Land</b>	<b>Herausragendes Erbe</b>
1	China	Kaiserpalast, Peking
2	Spanien	Historisches Zentrum von Cordoba
3	Italien	Historisches Zentrum von Rom
4	Frankreich	Kathedrale von Chartres
5	Mexiko	Prähispanische Stadt der Chichen Itza
6	Deutschland	Markgräfliches Opernhaus in Bayreuth
7	Japan	Historische Monumente in Nara
8	Indien	Taj Mahal
9	Vereinigtes Königreich	Stonehenge
10	Iran	Meidan-e Eman, Isfahan

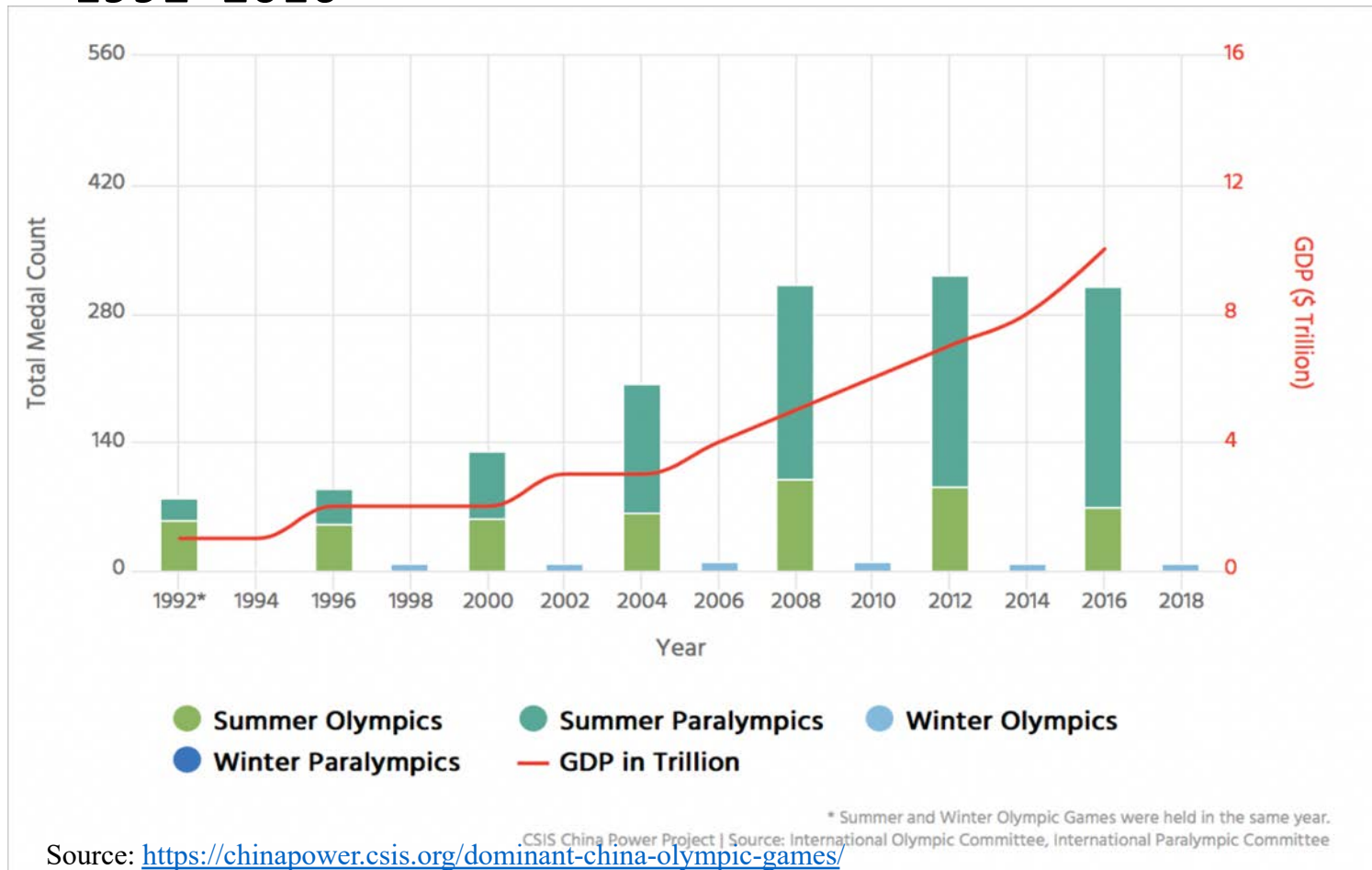
<https://www.theactivetimes.com/countries-richest-cultural-heritage/slide-10>, Aufruf vom 27.7.2018

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## China's GDP and Olympic medals, 1992–2016



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# Criticism on BRI

- Running counter (to the EU agenda for) liberalizing trade
- Transparency issues: biddings are kept closed and nontransparent, circumventing EU regulations
- Pushes the balance of power in favor of subsidized Chinese companies
- Debt trap: Future debt problems and dependency for target countries
- Memorandum of understanding including respect on chinese military interest, for example
- Dominance versus cooperation, „One-way“ versus „win-win“
- CHINESE CRITIQUE: “Flashy” Spending Abroad

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# European political attitudes

**Germany:** *Trade and Invest* promotion agency starts a initiative of information, but:

- „German construction industry badly positioned for mega infrastructure constructions“
- „Hermes“-export guarantees hardly available in many silk road contries“

*Contract of governing coalition:* „China´s economic development is especially for the German economy a great chance. The Silk road initiative of China is exemplary for chances and risks. We want to develop an european answer, in order to protect our interests, and in order to better equipe und focus german and european financing instruments.“

**Italy:** BRI-China-Taskforce in ministry of Economy, organisation of successful conference in Rome

**Austria,** programm of the government, 2017-2022:

„We want to make sure, that large international und geo-strategic infrastructure projects as ... the Silk road project do not pass by Austria, but that we as a hub are part of it.“

**EU: Connectivity Strategy**

- A „sustainable, comprehensive and rules-based approach“ towards Euro-Asian connectivity covering all modes of transport links including land, sea and air as well as digital and energy links.
- Covering people-to-people connectivity by way of cooperation in the fields of research, tourism, culture, innovation and education.

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## Birgt Chinas Handels- und Infrastrukturprojekt „Neue Seidenstraße“ Ihrer Meinung nach mehr Risiken oder mehr Chancen für Europa?

Handelsblatt-Leser   Repräsentative YouGov-Ergebnisse (538 Erwachsene)

[Methodik](#)

### Mehr Chancen



### Chancen und Risiken halten sich die Waage



### Mehr Risiken



### Weiß nicht/keine Angabe



[Werden Sie Handelsblatt-Mitglied](#)

Handelsblatt & YouGov

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# Countries engaging with BRI

Region	Countries <sup>8</sup>
Southeast Asia	Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, Viet Nam
South Asia	Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka
East Asia	Mongolia, Republic of Korea
Central Asia	Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan,
Middle East	Armenia, Azerbaijan, Bahrain, Georgia, Iran, Iraq, Israel, Jordan, Lebanon, Kuwait, Oman, Qatar, Saudi Arabia, Palestine, Syria, Turkey, United Arab Emirates, Yemen
Africa	Egypt, Ethiopia, South Africa
Europe	Albania, Bosnia And Herzegovina, Croatia, Belarus, Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovenia, Slovakia, Ukraine
Oceania	New Zealand

+ Italy, Portugal, Tchech Rep., Greece, Malta, ...

8. List of Countries engaged with the BRI according to the official webpage of the Government of China drafted by the Leading Group on the construction of the Belt and Road, hosted by the State Information Center: [https://www.yidaiyilu.gov.cn/info/List.jsp?site\\_id=CMSydylgw&cat\\_id=10037&cur\\_page=1](https://www.yidaiyilu.gov.cn/info/List.jsp?site_id=CMSydylgw&cat_id=10037&cur_page=1) retrieved 28 March 2017.

Source: UNDP (2017) Global Governance Report

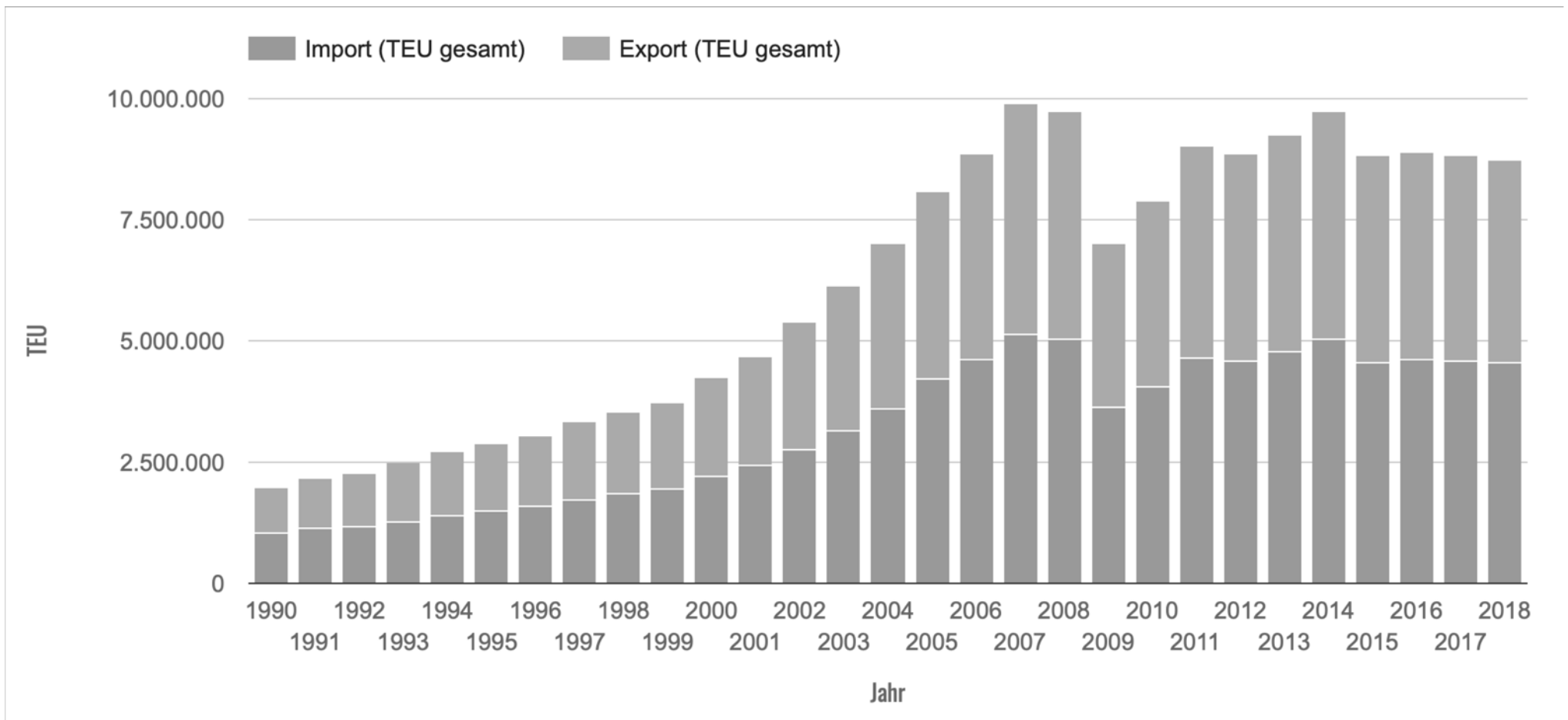
<http://www.cn.undp.org/content/china/en/home/library/south-south-cooperation/a-new-means-to-transformative-global-governance-towards-sustaina.html>

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# Hamburg: Das Verfahren um den Mittleren Hafen I



<https://www>

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# Hamburg: Mittlerer Hafen

- Markterkundungsverfahren :  
Ergebnis 2017-07-13 veröffentlicht. CCCC-ZPMC Terminal-Konzept gewinnt den Ersten Preis.
  - Central Business District
  - Automatisierte Container-Terminal (mit 500.000 TEU Umschlagskapazität)
  - Logistik Park
  - Automatisierte Fabrikationsanlagen.
- Realisierung/ Ausschreibung noch unklar
- HPA kümmert sich um Herrichtung der Flächen zwecks Verkürzung Time to market

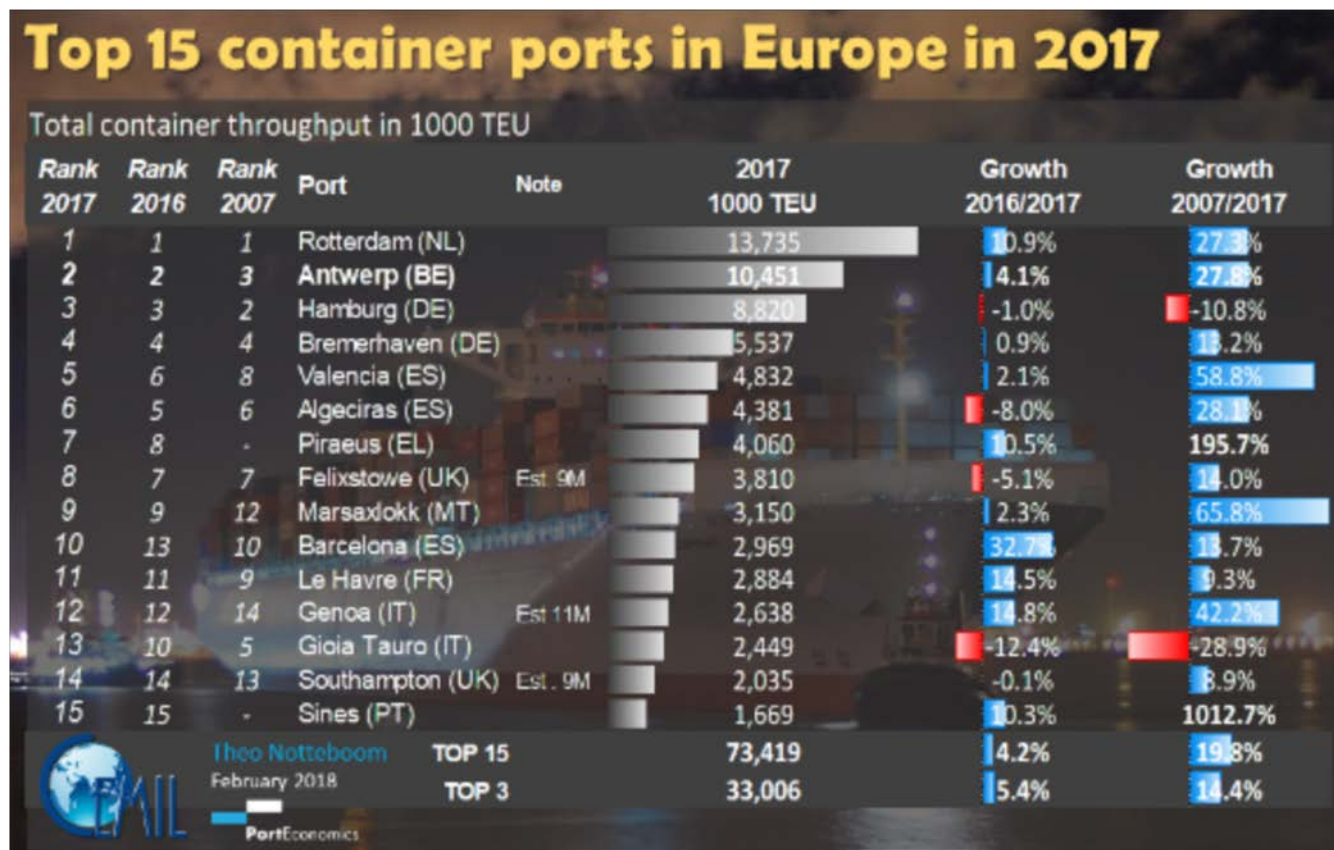
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In April 2016, following an open international public tender process, the Hellenic Republic Asset Development Fund and COSCO Purchase Agreement for the acquisition of 51% in the share capital of PPA.

In June 2017, Memorandum of Understanding was signed between PPA S.A. and Shanghai International Port Group, which high Piraeus in the global port industry and especially on the silk road.



<http://www.porteconomics.eu/wp-content/uploads/2018/02/2018-Top15-container-ports-in-Europe-in-2017-Notteboom.png>

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## Italian Port of Trieste to Collaborate with China's CCCC

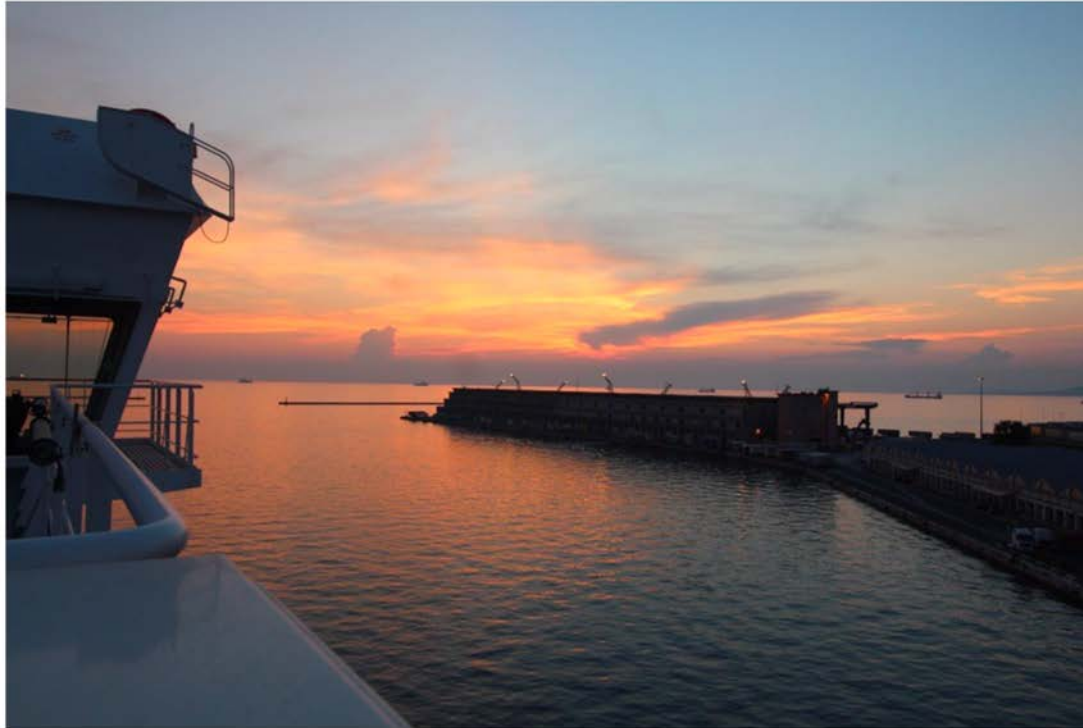


Illustration. Image Courtesy: Pixabay under CC0 Creative Commons license

Italian Port of Trieste and China Communications Construction Company (CCCC) have signed an agreement that will enable Italian products of small and medium companies to access Chinese markets as well as facilitate infrastructure development in central Europe.

The agreement between the duo was signed in Rome on March 23, 2019.

China

## Die neue Seidenstraße



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China

## Die neue Seidenstraße



### Routen der Seidenstraße



### Güterzug-Verbindungen\*

- China-Mongolei-Russland
- Neue eurasische Landbrücke



### Containerschiffsrouten

- China-Piräus-Rotterdam mit Drehkreuz Hafen Piräus

Ein Plädoyer für mehr Selbstvertrauen I:  
Nullsummenspiel oder win-win-strategy

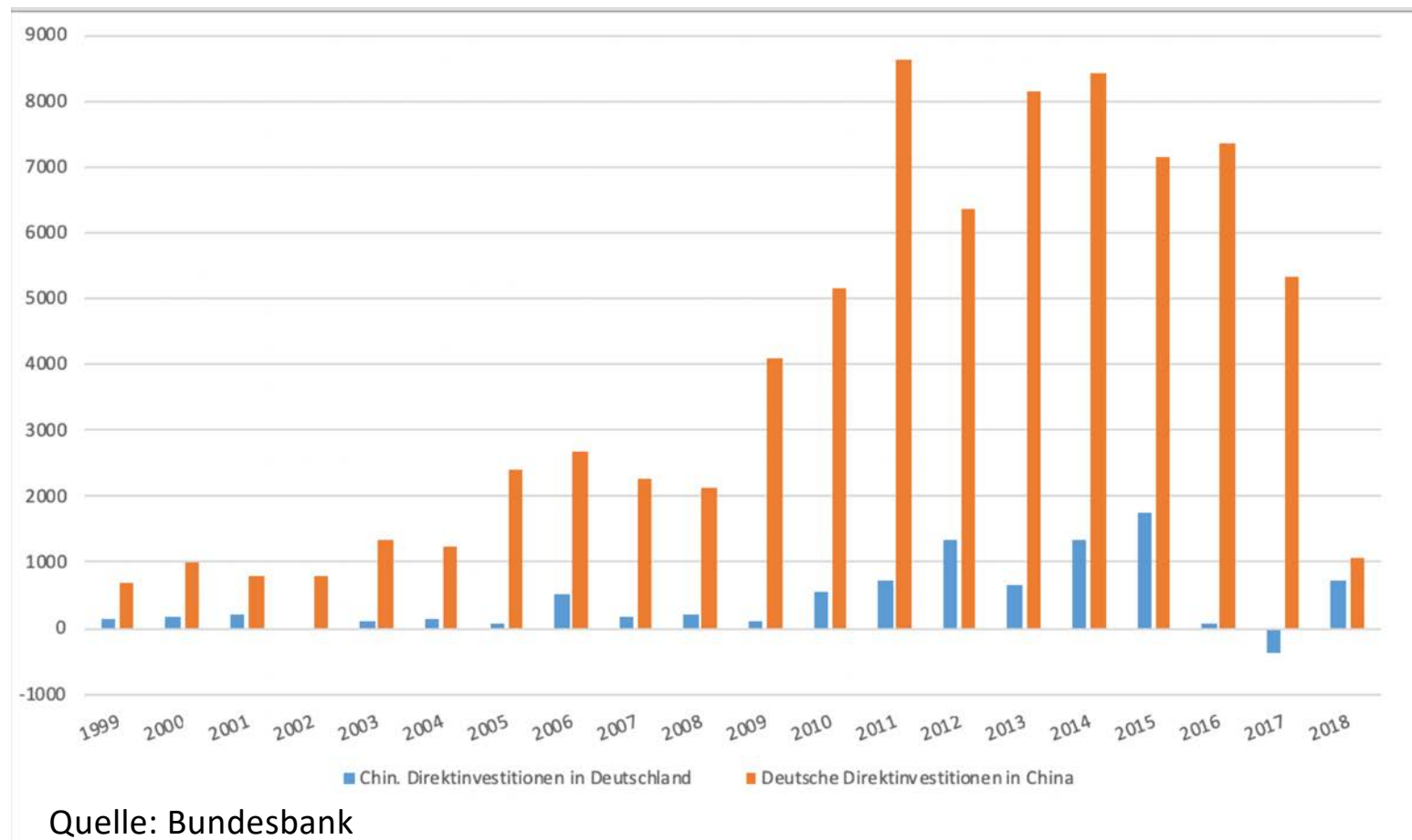
# Ein Plädoyer für mehr Selbstvertrauen II: Grenzen der Industriepolitik

- Wer bestimmt Existenz und Ursachen eines Marktversagen?
  - Infomängel?
  - Kapitalmarktrestriktionen?
- Identifizierung der Sektoren, Prinzip der Komparativen Kosten
- Mangelhafte Reversibilität
- Positiver Barwert der Politik?
- Gibt es auch Staatsversagen?

” Mich stört vor allem, dass sich der Minister anheischig macht zu entscheiden, welche Industrien in diesem Land Aussicht auf Erfolg haben und welche einseitig gefördert werden müssen.

Präsident des Familienunternehmerverbandes, **Reinhold von Eben-Worlée**,

# Ein Plädoyer für mehr Selbstvertrauen IIIa: Bilanz der Direktinvestitionen



# Ein Plädoyer für mehr Selbstvertrauen IIIa: Bilanz der Direktinvestitionen

## I. Deutsche Direktinvestitionen im Ausland (Aktive Direktinvestitionen)

noch: 3. Unmittelbare und mittelbare Direktinvestitionen nach Anlageländern und Wirtschaftszweigen  
a) der deutschen Investoren

Stand am Jahresende; Mio €

Jahr	Alle Wirtschaftszweige	darunter:									
		Verarbeitendes Gewerbe						Erbringung von Finanz- und Versicherungsdienstleistungen 1)		Verwaltung und Führung von Unternehmen und Betrieben (Beteiligungsgesellschaften mit Managementfunktion) 2)	
		zusammen	Herstellung von chemischen Erzeugnissen	Herstellung von elektrischen Ausrüstungen	Maschinenbau	Herstellung von Kraftwagen und Kraftwagen-teilen	Handel; Instandhaltung und Reparatur von Kraftfahrzeugen	zusammen	Beteiligungsgesellschaften ohne Managementfunktion		
<b>Asien</b>											
2013	109 784	53 428	9 323	8 456	6 788	21 117	1 447	10 971	.	39 687	
2014	133 556	67 559	10 471	13 843	7 601	27 011	1 461	46 234	33 246	13 954	
2015	148 977	76 582	12 853	15 430	8 376	29 347	2 577	48 798	34 558	15 833	
2016	160 051	80 886	12 943	16 515	8 594	32 239	2 420	54 251	39 057	16 706	
<b>darunter: China, Volksrepublik 3)</b>											
2013	48 147	28 266	3 394	4 318	3 430	13 889	326	2 498	.	16 215	
2014	63 125	39 021	4 302	9 108	3 822	17 930	440	16 551	13 609	6 269	
2015	71 518	44 271	5 361	10 135	4 000	20 389	550	18 394	14 890	7 107	
2016	76 259	47 037	5 319	10 800	4 075	22 622	590	19 691	16 040	7 651	

Deutsche Bundesbank  
Bestandserhebung über Direktinvestitionen  
April 2018  
2

<https://www.bundesbank.de/resource/blob/729620/6a6a0d29e8a6a9937a4c580132f5161c/mL/statso10-2018-data.pdf>

# Ein Plädoyer für mehr Selbstvertrauen IVa: Bilanz der Direktinvestitionen

Asien											Jahr
zusammen	Länder des Nahen und Mittleren Ostens							Andere asiatische Länder			
	zusammen	darunter:						zusammen	darunter:		
		Iran, Islamische Republik	Israel	Katar	Kuwait	Libanon	Vereinigte Arabische Emirate		China, Volksrepublik 1)		
<b>Unmittelbare ausländische Direktinvestitionen in Deutschland in Mio €</b>											
Verbindlichkeiten aus passiven Direktinvestitionsbeziehungen											
33 517	2 901	1 368	1 033	213	188	33	- 34	30 616	2 158	2013	
36 471	3 343	1 325	1 224	201	200	7	252	33 128	2 601	2014	
39 336	3 453	1 561	1 299	.	193	7	217	35 883	3 253	2015	
42 133	3 439	1 452	1 363	.	197	20	254	38 694	3 690	2016	
Forderungen aus passiven Direktinvestitionsbeziehungen											
4 844	435	69	108	51	15	3	35	4 410	422	2013	
5 170	517	53	312	58	7	0	47	4 652	466	2014	
6 599	565	75	328	.	14	0	85	6 034	535	2015	
6 774	521	70	305	.	15	0	97	6 254	692	2016	
Unmittelbare Direktinvestitionsbestände (saldiert)											
28 673	2 466	1 299	925	163	173	30	- 69	26 207	1 736	2013	
31 301	2 826	1 272	913	143	193	7	205	28 475	2 135	2014	
32 737	2 889	1 486	970	.	179	7	132	29 849	2 719	2015	
35 359	2 918	1 382	1 058	.	183	20	157	32 441	2 997	2016	

Deutsche Bundesbank  
Bestandserhebung über Direktinvestitionen  
April 2018  
2

<https://www.bundesbank.de/resource/blob/729620/6a6a0d29e8a6a9937a4c580132f5161c/mL/statso10-2018-data.pdf>

# Ein Plädoyer für mehr Selbstvertrauen III: Soziale Marktwirtschaft bleibt die beste Lösung



Wolfgang Maennig:

Der letzte deutsche  
VWL-Professor, der  
an den Markt  
glaubt!

# Summary

- China probably the world's leading economy for the next 100 years
- China demanding a (decent) political, military, innovative, academic, cultural, athletic ... leadership position
- „New Silk Road“ a constitutive element of an integral Chinese development strategy
- Silk road itself (one of?) the largest investment project of human mankind
- Agglomerations near to hubs of Silk road may enjoy significant increases in population, density, productivity and income
- Regions apart from Silk road may suffer
- Blocking chinese investments will not help; a competition for chinese investments will emerge. EU/ Germany/ Hamburg should look for a close cooperation
- We should have more self-confidence and more trust into the power of market economies!

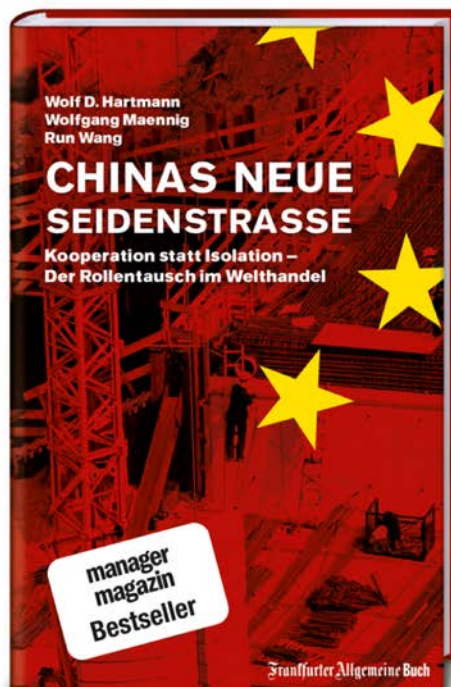
Thank You for Your attention/

Data sources and literature

[Raw data:](#)

[www.destatis.de](http://www.destatis.de)

Deutsche Bundesbank



[Run Wang](#), [Wolfgang Maennig](#), [Wolf D. Hartmann](#)

## CHINAS NEUE SEIDENSTRASSE: KOOPERATION STATT ISOLATION – DER ROLLENTAUSCH IM WELTHANDEL

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😊 Vorrätig

