

Snížení kreditu USA signalizuje „velký globální posun k multipolárnímu světovému řádu“

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Důsledky rozhodnutí agentury Fitch Ratings snížit rating dlouhodobého selhání emitenta v cizí měně v USA nadále víří, přičemž indexy Nasdaq, New York Stock Exchange a Dow Jones Industrial Average se ve střeďečnřm obchodování propadají mezi jednřm a dvřma procentnř body .

Ministrynř financř Janet Yellenovř, kterř Finchřv krok označila za „svřvolnř“, ujjistila , že snřžení ratingu nezmění status americkřch střtnřch dluhopisř jako „přednostnřho, bezpečnřho a likvidnřho aktiva svřta“ ani „zřkladnř sřlu“ americkř ekonomiky.

Analytici varovali , že dlouhodobř dopad snřžení ratingu by mohl zahrnovat zvřšení vřpřjčnřch nřkladř na obsluhu mamutřho nřrodnřho dluhu ve vřři 32,7 bilionu dolarř , coř je na cestř k překonřnř dluhu přřřtřch čtyř zemř s nejvřřřm zadluřenřm (vřechny zemř G7) dohromady.

Tikajřcř časovanř bomba

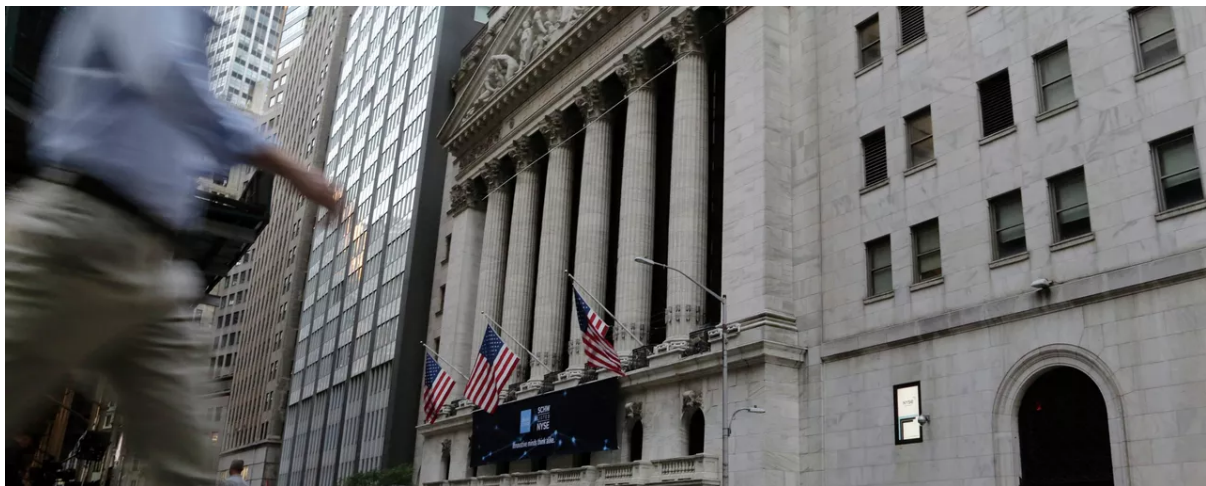
Snřžení ratingu nenř ve skutečnosti nic neočekřvanřho, pokud se podřvřte na zřklady americkř ekonomiky, řekl Sputniku *Dr. Rodney Shakespeare* , renomovanř ekonom, politickř komentřtor a autor .

„Problřmy vyvolřvajřcř snřžení ratingu zahrnujř a) dřsivř a zvyřujřcř se řrovnř dluhu, b) rostoucř povřdomř o tom, že pyramida s derivřty vzhřru nohama [trh] je ‚zbranř finančnřho hromadnřho ničenř‘ ...c) inflace a rostoucř řurokovř sazby, kterř majř čelit inflace, d) neschopnost řeřit sociřlnř a infrastrukturnř problřmy ae) ztrřta dobrřch střlřch pracovnřch mřst a vzestup „gigovř“ ekonomiky,“ řekl Shakespeare.

Pozorovatel se domnívá, že drama kolem obvinění proti bývalému prezidentovi Donaldu Trumpovi, které by „mohlo dohnat již tak rozdělenou Ameriku k politickému i sociálnímu kolapsu“, plus „rostoucí povědomí“ o „zahraničněpolitické katastrofě“ na Ukrajině, také přispělo k vysvětlení. pro Fitchovo rozhodnutí.

„Uznání agresivního hnutí NATO během dvaceti pěti let a dopadů sankcí na Rusko na globální systém se spojily s velkým globálním posunem od unipolárního k multipolárnímu světu [posloužilo] k šokování analytiků Fitch. Země po celém světě plánují – nějak se vymanit z d'ábelského sevření amerického dolaru. Analytici mají "Ach můj bože!" okamžik, ve kterém poznají, že se situace mění, negativně, přímo pod jejich očima,“ řekl Shakespeare.

Ekonom neočekává, že Washington bude věnovat pozornost varování Fitch, aby změnil svou měnovou a fiskální politiku. Varování „avšak upozorní zbytek světa na pohnutou katastrofu, kterou se USA rychle stávají“.



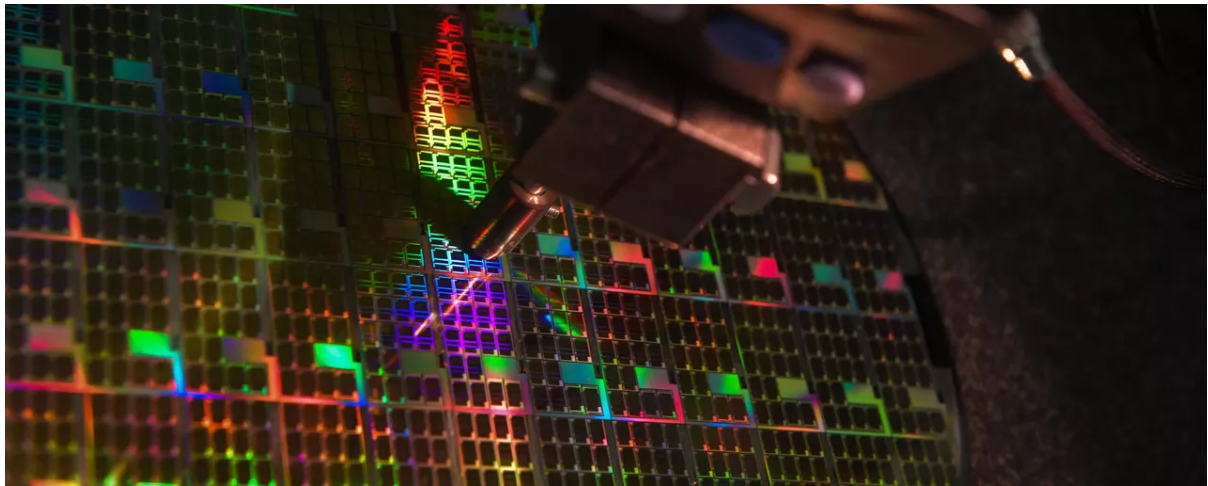
Včera

'úklid'

Senior tržní analytik a publicista Jim Wyckoff zastává konzervativnější pohled na důsledky snížení ratingu. Wyckoff to charakterizoval jako „druh úklidu založeného na věcech, které se děly posledních několik let,“ řekl Wyckoff Sputniku, že neočekává, že „z toho vzejde něco významnějšího“ nebo že to něco způsobí. za

„vlněním na trhu“, pokud Finchův příklad nebudou následovat další velké ratingové agentury.

„Myslím si, že všeobecná reakce trhu nebyla extrémní. Na trhu vidíte trochu silnější averzi k riziku, ale tady je to zajímavé: mysleli byste si, že kdyby USA snížily svůj úvěrový rating, že je to úder proti americké ekonomice, úder proti americké vládě, úder proti důvěře amerického dolaru. Ale přesto jsme dnes svědky růstu indexu amerického dolaru na třítydenní maximum při nákupu v bezpečném přístavu kvůli snížení ratingu Fitch. Teď to zní trochu matoucí, ale je to skutečně tak,“ řekl analytik.



Svět

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Včera

Zákulisní bitva mezi Yellenem a Fedem?

Zkušený analytik trhu a geopolitický pozorovatel Tom Luongo má úplně jinou perspektivu a řekl Sputniku, že snížení ratingu Fitch bylo „dlouhou dobou“ uprostřed marnotratné hospodářské politiky Bidenovy administrativy a že je to důkaz bitvy mezi strojem na tisk peněz z ministerstva financí a Jeromem. Powellova Federální rezervní banka se snaží zvládnout inflaci.

„Podle prohlášení Fitch čelí USA fiskální noční můře kvůli svým rozpočtovým deficitům, navrhovaným výdajům a agresivnímu Federálnímu rezervnímu systému. Vzhledem k tomu, že sazba Fed Funds je nyní na 5,5 procenta a... Powell očekává, že bude sazby nadále zvyšovat, úroky v USA převýší federální rozpočet,“ řekl Luongo.

The observer pointed out that Yellen recently announced plans to raise over \$1.7 trillion in additional debt before the end of 2023. Accordingly, Fitch may have “timed this as a warning to Powell to stop raising rates and get back with the coordinated policy that was in place when Janet Yellen was in charge. This downgrade is aimed squarely at Powell and the Fed. Powell, for his part, has been resolute, saying that DC’s fiscal problems are their problems, not a matter of Fed policy.”

“This downgrade reeks of political blackmail. This is all about reversing the collapsing US dollar liquidity overseas to save a system that is well past time to be replaced,” Luongo stressed.

“Fitch gave away the real story of this downgrade by advising scrapping the debt ceiling. This was an open tell that they were acting in concert with Janet Yellen at Treasury,” he added.



World

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'A Good Thing'

Ultimately, Luongo believes the downgrade may increase America's borrowing costs, putting a hamper on the Biden administration's proposed spending, and "accelerate the fiscal crisis coming between conservatives and spendthrifts," which is ultimately "a good thing."

Unlike in 2011 and the S&P rating downgrade of US credit, "this time there will be big winners and big losers. The BRICS are exiting the game to start their own. The fight now is over whether the US will continue to subsidize its own destruction through cheap money and bad policy. If I'm reading Powell correctly, he's winning that fight," the observer summed up.



Sputnik Explains

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2 August, 12:58 GMT

What's Behind Biden's Shift to Arm Taiwan?

1 minute ago



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The Biden administration's focus on Taiwan and the Asia-Pacific could translate into new lucrative deals for the US naval industry; as well as raise the stakes and create unnecessary risks too, retired Lieutenant Colonel Earl Rasmussen told Sputnik.

The Biden administration announced a \$345 million military package for the island of Taiwan last week – the first tranche of a \$1 billion package allocated by Washington for Taipei earlier this year. US weapons will come directly from Pentagon stockpiles to the island under the so-called Presidential Drawdown Authority, a mechanism typically used for seeding-up arms supplies.

It turned out on Tuesday that the US president was going to ask Congress to fund arms for Taiwan as part of a supplemental budget request for Ukraine. The move was interpreted by the Western press as an effort to further speed up the delivery of new weapons to the island under the pretext of "the rising threat from China."

However, prospects of a war in the region would not necessarily pan out as Washington thinks, argued our pundit, Earl Rasmussen.

"It's going to be interesting in the Pacific area because it would not be a land war like Ukraine, it would definitely be a naval conflict or heavily navy," the retired lieutenant colonel with over 20 years in the US Army and an international consultant, told Sputnik.

"I think it would be unwise though. They could be thinking that it's another poor strategy and poor assumptions. We could see a lot of different carrier fleets eliminated by the Chinese I think quite quickly which I think would catch the West off by surprise. But they could look for a limited conflict they'd hope that would create new things to increase the relations with other countries in the Pacific region. New submarines, new battleships and things like that. I could picture that looking for an opportunity on that side. But I think it would be unwise."



An MQ-9 Reaper, a hunter-killer surveillance UAV

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Per the US press, the \$345 million weapons package will include MQ-9 Reaper drones as well as small arms ammunition. Earlier, the island bought Reapers, as well as missiles, fighter jets and other sophisticated weapons from the US. In particular, the list includes 400 land-launched Harpoon missiles, the F-16 Block 70 fighters, the MK-48 torpedoes, the M109A6 Paladin self-propelled howitzers and the Stinger missiles, per the US press.

Even though the US does not formally recognize Taiwan – as Washington still complies with the One China policy – it nevertheless supplies the island with weapons despite protests from Beijing that considers Taiwan an inalienable part of the People's Republic of China.



Analysis

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Yesterday

Why is Biden Fast-Tracking Taiwan Arms Sales?

There are multiple theories as to why the Biden administration is racing against time to arm Taiwan. In some sense, it could be an attempt by Biden to command support from the GOP in the US Congress, as per Rasmussen.

"I think there may be some bending on that to get more Republican support on the military budget. It's balancing on the political side there too. The Republicans do seem to be more anti-China than they

are anti-Russian," the expert said.

Apparently, Biden is also under pressure from America's China hawks who are fuming over delayed arms deliveries to Taiwan. Last year, US lawmakers complained that the island is facing a \$14 billion backlog in foreign military sales from the US. They lamented the fact that some of those unfulfilled agreements date back to 2017.

The delays were blamed on increased weapons deliveries to Ukraine and the US defense industry's limited production capacity. Presently, the volume of Taiwan's military orders, which have yet to be delivered to the island, stands at almost \$19 billion in value.

There is yet another possible reason for the Biden administration to speed up arms supplies to the island: the Taiwanese US-backed **Democratic Progressive Party (DPP)** appears to be losing both international grip and domestic popularity ahead of the January 2024 presidential election.

In contrast, a somewhat "pro-China" **Kuomintang** is said to have good odds of returning to power. Previously, the Kuomintang maintained working relations with **the Communist Party of China** which were disrupted after the DPP won the majority in parliament in 2016 and presidency in 2020.



12 April, 14:57 GMT

US Military-Industrial Complex Set to Profit From 'Pivot to Asia'

Rasmussen agreed that the US military-industrial complex could profit from the further escalation over Taiwan. Moreover, the US naval industry has already been granted a years-long submarine deal, struck by the US, the UK and Australia within the framework of the tripartite AUKUS pact. The Indo-Asia-Pacific is clearly in focus of the present US administration, despite vocal concerns from **China** and even **ASEAN** states about a potential nuclear arms race and militarization of the region.

Still, the map of new possible conflicts which could see NATO's involvement includes more regions than just Europe and Asia-Pacific, according to Rasmussen.

"We've got potential new conflicts occurring as well," the military expert said. "I think you need to keep an eye on and then maybe even Central Asia too. But, but definitely I think we need to look at what's going on in Syria. We are going to get more intense there. Or look at Niger and what's going on with Niger. Are we going to try to ramp up tensions there? France is talking about intervening. We've got the Western embassies withdrawing their citizens out of that region. But it's not just Niger. If you go in with Niger, you're going to confront multiple African countries at once. It could be a nightmare."



7 June, 15:02 GMT

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