

GEOPOLITICAL CONSEQUENCES OF THE WAR IN UKRAINE

The Russian invasion of Ukraine signals a new world order that has developed from the bipolar world of 1945 to 1991 and the brief unipolar interlude from 1991 to 2008. This new world order is dominated by a relatively declining U.S. and an emerging Sino-Russo anti American alliance, a renewed sense of the West as a counter to authoritarian regimes and reversal of the globalization trends of the past thirty years. We are moving into a deglobalizing, multipolar world.

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TPQ

Summer 2022

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The Russian invasion of Ukraine is one of those pivotal geopolitical moments similar in magnitude to the fall of the Berlin Wall in 1989 and the 2001 terrorist attacks on the World Trade Center and the Pentagon. Each of these marked a global geopolitical reordering. When Russian troops crossed the border of neighboring Ukraine in 2022 in an unprovoked attack, it marked the end of an era and the beginning of a new world order. Let's place it in a broader geopolitical context.

The Bipolar World, 1945-1991

We can characterize four world orders since the ending of World War II. First, there was the bipolar world. From 1945 to 1989 the main geopolitical fracture line was between a capitalist west and a communist east headed respectively by the USA and the USSR. The Cold War waxed and waned in intensity. The long-term trend was a carefully managed rivalry. The U.S. did not, for example, directly respond to the Russian invasion of Hungary in 1956 or of Czechoslovakia in 1968. Spheres of influence were respected, although covert operations and the use of proxies were rampant. The Soviet invasion of Afghanistan in 1979 was only resisted by the U.S. through local proxies that helped to create the Taliban. This bipolar order was undergirded by a nuclear standoff which at its worst threatened the very basis of human life on the planet but whose fearsome possibilities created the frightening stability of a mutually assured destruction. To be sure, there were alternative geopolitical groupings outside the big two with various non-aligned groups. Still, the bipolarity of the East-West division was the central organizing principle of the post-1945 world order for 45 years.

The Unipolar Interlude: 1991-2008

With the fall of the Berlin Wall in 1989 and the collapse of the Soviet Union a new world order began. It was initially marked by the overwhelming global dominance of the USA. It was briefly a unipolar world. With Russia on the verge of economic collapse and China still only an emerging power, it left the U.S. as the world's largest economy and a massive military with global reach. There was even talk of a peace dividend as the U.S. perhaps no longer needed the aggressive military posture to counter the Soviet bloc.¹ When, in 1995/96, China conducted provocative missile tests to rattle Taiwan, President Clinton ordered two aircraft carrier groups into the seas off the coast of China in a not-so-subtle reminder of who was the global superpower and who was not.

¹ Writers even described the 'end of history' as if there was no counter possibility to a liberal, capitalist, U.S.-led order. See Francis Fukuyama, *The End of History and the Last Man*. (New York: Free Press, 2008).

This unipolar world was short-lived. After 9/11, the U.S. embarked on a War of Terror that involved the invasion and occupation of Afghanistan and Iraq. As U.S. geopolitical strategy shifted from confronting the Soviet Union to a worldwide commitment to combatting Islamic terrorism, blundered tactics led to an impasse of constant military intervention that failed to provide strategic advancement. The early intervention into Afghanistan did overthrow the Taliban but led to a series of regimes with limited legitimacy and little control over the national space outside of Kabul.²

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The invasion of Iraq was a fiasco. The U.S. overthrow of Saddam Hussein’s murderous regime unleashed anarchy. The collapse of the Baathist state led to the emergence of lethal conflicts between Sunnis and Shia forces. Kurds effectively broke away to form an autonomous region in the north of the country creating some anxiety for neighboring countries, such as Türkiye, with substantial Kurdish minorities. A series of blunders worsened the situation. The U.S. decision to disband the Iraqi Army was a colossal error that marginalized 400,000-armed soldiers just as the former army leadership was bringing them back into possible service. The decision left almost a half million people unemployed, alienating those who could have provided basic security, and casting people with military expertise and guns into the streets. It essentially marginalized the Sunnis, undercut the basis for immediate and effective postwar reconstruction, and provided a rich recruiting base for anti-American forces. Former military operatives and Islamic fundamentalists formed the basis for a surging ISIS that, at its height, gained considerable territorial control over part of Syria and Iraq, threatening neighbors such as Türkiye and Lebanon.

The invasion of Iraq was a disaster.³ The United States promised Iraqis freedom but gave them anarchy, guaranteed democracy but generated sectarian violence, and pledged peace but caused mass deaths. The U.S. military was severely stretched, while the emphasis on Iraq allowed the Taliban to recover in Afghanistan, and the invasion never did lead to the death or capture of senior Al Qaeda figures. Osama

² The country’s Prime Minister was accurately referred to as the Mayor of Kabul.

³ From March 2003 to December 2009 around 110,000 civilians were killed, millions displaced, and mass violence was visited upon an entire country of over 31 million people. See *Iraq: The Human Cost*. <https://web.mit.edu/humancost-iraq/>

bin Laden was killed not because of the invasion of Iraq but despite it. The U.S. invasion of Iraq was a strategic catastrophe. The final humiliation was the messy and hurried withdrawal of U.S. troops from Afghanistan in August 2021. It was a poignant moment that recalled the withdrawal of Soviet forces decades earlier. It marked the end of two decades of failed interventions and costly mistakes.

The failures weakened the U.S. in the eyes of the world. They also led to mounting domestic criticisms of wars and debilitating engagements that lacked strategic significance. A more radical *grand strategy of restraint* gained strength. The broad contours of the argument are that the U.S. faces limited threats because of its geographical position, so international alliances are not needed, and the military should be drastically downsized. The proponents of restraint argue that extensive alliances come with actual costs of entanglement and the possibility of entrapment. Pursuing primacy is too costly and ineffective in reducing arms proliferation or encouraging democracy. After almost two decades of futile wars, the idea of pursuing a strategy of restraint appealed to more people in the U.S.

The end of the unipolar world is difficult to locate precisely. I will suggest September 2008. The global financial crisis (GFC) was caused by unregulated and speculative investment in the U.S. housing market. Mortgages originated in the U.S. were packaged and sold as commodities worldwide. As the market collapsed and people could not pay their mortgages, financial institutions faced huge losses. The intervention of the U.S. Federal Reserve, at terms very favorable to the banks and financial institutions, eventually righted the economy, but it was another sign of America's weakening. Not only a decade of strategic military blunders, the GFC revealed the vulnerability of a U.S. economy becoming more reliant on financial speculation. The election of Barack Obama in 2008 highlighted the growing distrust of the elites and the rising populist sentiment. While there are many differences between Obama and Trump both were insurgent candidates who spoke to a discontent with traditional U.S. foreign policy. There was growing domestic backlash to foreign interventions. In a speech to the graduating class of the military academy at West Point on the 13 June 2020, President Trump spoke about ending the "era of endless wars."

A Tripolar World Coming into Coherence: 2008-2022

We can suggest the rise of a tripolar world from 2008/2009 to 2022. It is a period marked by a relative weakening of the U.S., a resurgence of Russia, and China's rise.

The 1990s were a lost decade for Russia. Much reduced in size after the fall of

the Soviet Union, it faced economic ruin. However, as the 20th-century turned into the 21st-century Russia emerged from the wreckage of the immediate post-Soviet collapse. Its vast natural resource base, and especially its rich oil and gas reserves, provided increased government revenue and laid the basis for a rising standard of living. President Putin emerged as an authoritarian leader who squashed any opposition and established a measure of popular support with social spending primarily funded by oil and gas exports. The carbon and mineral resources were sold on the global markets and Russia gained influence and massive revenues that bought domestic support and paid for a military buildup that allowed for force projection. An emboldened Putin embarked on a strategy of annexing territory in Crimea, threatening Georgia and claiming a more global role for Russia with interventions in Syria. Ever mindful of the humiliation of the loss of empire and the decline of national power, he used his increasingly centralized authority to reimagine a more muscular Russia reclaiming former imperial territorial holdings.

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Putin saw both threat and opportunity on his western borders. The perceived threat was the extension of Western influence especially in the enlargement of NATO and the European Union into Eastern Europe and the Baltic states. Ukraine inhabited a liminal space between the East and Russia but was pulling away for the Russian orbit. In the Orange Revolution of 2004, the Russian-backed candidate was defeated and again in 2014 the same Russian-backed President was set packing by intense widespread protests.⁴ Putin imagined Ukraine’s reorientation towards the West as a direct threat.

Putin also saw an opportunity of a weakened and uncertain U.S., a fracturing European unity and dwindling support for NATO. Russia flexed its military muscles in Georgia, Syria and in its 2014 annexation of Crimea. Russian backed forces effectively took control over a swathe of eastern Ukraine. Facing little resistance

⁴ In the Maidan (Independence Square), an important symbolic public space in Kyiv, protesters chanted, “Ukraine is part of Europe. See two excellent documentaries *Maidan (2014)*, directed by Sergei Loznitsa, and *Winter on Fire: Ukraine’s Fight for Freedom (2015)*, directed by Evgeny Afineevsky.

or severe backlash, Putin saw Russia as a Great Power able to exercise its will and exert its power.

There was also the rise of China as an economic and military force. The last three decades has witnessed the impressive economic growth of China. After the economic reforms of the late 1980s China engaged directly with the global economy. It imported raw materials and exported manufactured goods all over the world. China lifted between 300-500 million out of poverty and created an expanding middle class.

The increase in foreign trade also involved a greater involvement in the global economy and governance. China's engagement was promoted by a U.S. that saw the more significant economic integration of China as leading to greater global stability and new investment opportunities. There was a naive belief that increased globalization of China's economy would lead to greater democratization of Chinese society. China became an essential hub of the global economy; it is now the leading trading partner of at least 80 countries. China has also embarked on a global investment program. The Belt and Road initiative involves vast infrastructure investment at selected hubs along land and sea routes linking China with the rest of the world.

China's rise was initially in the economic sphere. There is a famous Chinese saying: China stood up under Mao, got rich under Deng and is getting strong under President Xi Jinping. Since Xi came to power as President of the PRC in 2013 he has embarked on a more assertive geopolitical stance. He has centralized control and has committed China to a more aggressive posture in the South and East China Seas and a more confrontational attitude with Japan and the USA. China makes claims to most of the South China Sea and is building up its military capabilities to push U.S. power projection from the Chinese coast and create a Sino-dominated, maritime space further east to the island chains of the Pacific Ocean.

The rise of China and its more aggressive posture under Jinping has caused a significant shift in U.S. and to some extent European attitudes. In the U.S., the pro-Chinese interest—known as 'panda huggers'—has been eclipsed by the 'dragon-slayers' who see the need for a more forceful response to China's rise. The Greek historian Thucydides, writing around 2,500 years ago, observed that still have relevance for the contemporary U.S.⁵ If it does nothing, it risks the competitor becoming stronger, hastening a confrontation. If it confronts, it creates the conditions for war.

⁵ The *Thucydides Trap*, now often employed to describe U.S.-China relations, states that when an existing power is threatened by rising power it has two options. See G. Allison, *Destined for War: Can America and China Escape Thucydides Trap?* (New York: Houghton Mifflin Harcourt, 2017).

Thucydides is now widely quoted when analysts assess the possible trajectory of U.S.-China relations.

U.S. geopolitical strategy has shifted over the years from the confrontation of the bipolar world to the incoherence of the unipolar world to the recognition that China is now a peer competitor that poses a severe threat to U.S. power and the existing global order.

A Multipolar World?

The Russian invasion of Ukraine has prompted a crystallization of a new world order. Four elements can be noted.

First, the invasion and the image of war and destruction have prompted a revival of the idea of the West as a liberal democratic ideal and geopolitical force as a counter against an unpredictable and expansive Russia. In the past three decades NATO as an idea and practice was weakened. Many Western European commentators and even some in the U.S. saw little use for military organization shaped by the Cold War. It seemed to be losing its relevance and most member contributions did not increase. Defense spending was widely unpopular in many NATO member countries. This was not a view shared by those countries formerly part of the Soviet Union, such as Estonia, and former Soviet bloc members such as Poland, but key members such as Germany saw less relevance. As Germany and other European states signed more energy deals with Russia, they were not only becoming more dependent on Russia but also allowing themselves to imagine a postwar-Europe where war was a very distant possibility. The Russian invasion of a vulnerable Ukraine reminded many countries of the need for military alliances. Finland and Sweden joined NATO, domestic opinion in the West shifted toward more military spending and acceptance of the greater need for tighter security arrangements. The Russian invasion led to a renewed demand for NATO. It resurrected the idea of the West as a bastion against an authoritarian and brutal dictator eager to reclaim lost empire even at the cost of existing and settled international borders. Russia morphed from a trading partner and member of international community to a threat to the West and the rule governed behavior of the international order. Russia's actions strengthened the idea of the West as military alliance and as a geopolitical and geo-economic force. The combined economic power of the West was mobilized in punishing sanctions.

In effect, Russia's actions reminded the West of the need for mutual defense treaties and military alliances. Countries on the border or near border with Russia such as Finland and Sweden, that had long eschewed NATO, joined the alliance as a security

umbrella to protect themselves from an unsettling neighbor. European economies realized the dangers of their reliance on Russian gas and oil. It will take some time to make the transition but Russian energy dominance in western markets has been seriously undermined. Russian integration into the global economy has been dealt a severe blow. Russia is now seen in the West as a rogue state.

In summary, Russia has strengthened the idea of NATO and created a greater sense of Western coherence as a set of shared values about the rule of international law. Russia's action has enlarged the size and reach of NATO, brought Western powers together, shown the economic power of a coherent anti-Russian response, and deepened the ideological sense of a West pitted against an expansionist Russia. It is Putin's worst nightmare. It has renewed security and diplomatic ties between the U.S. and its NATO allies and has sensitized the rest of Europe to the idea of a Russian threat that was unimaginable before the Ukrainian invasion.

Second, the invasion of Ukraine has weakened Russia in both the short and longer term. In the short term, the abysmal performance of the Russian forces revealed the hollowness to Russian military power. With poorly trained troops, inadequate strategy and poor tactics, the Russian military was exposed as a lumbering, inefficient, fighting machine. Russia's superior numbers may well win the day against a much smaller opponent, but reputational damage to the Russian war-machine is immense. Russia is also facing major economic consequences as it faces sanctions, loses traditional energy markets in Europe for its oil and gas, struggles to obtain credit on international capital markets, its oligarchs face humiliating sanction, and its middle class find it difficult to travel to the West. Due to Putin's actions, the Russian people may face a fall in the quality of life and standard of living. Russia is shrinking as a global economic force.

Third, the reaction to the invasion seems at least in the immediate aftermath to have strengthened a Sino-Russian alliance. There were already significant trading ties between the two countries and a series of joint military exercises in the Far East. They both share distrust of the U.S. and seek to undermine U.S. led world order. China's tacit support for Russia raised issues of hypocrisy for a Chinese regime that has long placed respecting national sovereignty as a cornerstone of the global order.⁶ China's embrace of Russia has strengthened Western and U.S. fears of China's global ambitions. Its effective support of a rogue state has heightened anti-Chinese sentiment.

China can profit from the event. As Russia loses European markets China is ready to

⁶ Chinese attempts to justify the Russian invasion with arguments about the NATO expansion seem weak and unconvincing.

take up much of the demand. However, this places China into a stronger bargaining position. So, while Russia can sell its carbon and mineral products to China it is from a weaker bargaining position. So, it is not quite accurate to describe a tripolar world as the U.S. and China far outweighs Russia in both military capabilities and economic heft. Russia is emerging as a secondary prop to China's expanded global role. Russia will function as a cheap energy source for China, and as a source of ideological and possible military support in the conflict with the U.S.

The invasion and its aftermaths have brought China and Russia closer together as trading partners. They share an anti U.S. stance and have also become more closely allied with shared military maneuvers along their shared boundaries in Central Asia and the Far East. Both China and Russia have ongoing territorial disputes with Japan, and we can expect them to integrate their security arrangements in this part of the world. As Russia recedes from the global economy, ties with China will increase but China's overwhelming economic advantage will ensure an unequal partnership. The reinvigorated sense of the West as both a commitment to a liberal democracy order, a geo-economic force and a security alliance may also block China's aggressive global expansion. The West is finding its voice as China has blundered. Issues over rampant intellectual property theft, crude use of trade deals to enforce a pro Chinese stance, the treatment of Uighurs, the crackdown of protests in Hong Kong, and the secrecy over the outbreak of COVID have all tarnished China in the eyes of not only the West but also some of its near neighbors in Asia. With its tacit support for the brutal invasions of Ukraine, China can no longer position itself as force for good against a corrupt, war mongering U.S. To some extent the renewed geopolitical bluster of Chinese diplomats and academics may be a reaction to a China that faces problems of an ageing population, a weakening economy and property market collapse. Foreign enemies are always easier to portray as sources of disorder rather than the need for domestic structural reforms.

China is committed to taking back Taiwan. However, its actions in recent years especially the crackdown in Hong Kong does not make Chinese incorporation a popular project in Taiwan. A Western alliance mobilized to cut off Russia from the global banking system. China now must factor in this coherent and powerful Western reaction as a likely response to a Chinese invasion of Taiwan.

Finally, we may be witnessing a period of deglobalization. After almost fifty years of accelerating globalization, we may see marked deceleration and even a more pronounced deglobalization. It is taking several forms. Russia is being decoupled from the global economy. China is preparing for possible decoupling if it invades Taiwan. Across the world states are more concerned with the risk of pandemics,

financial contagion, and the need to secure supply chains of vital goods. The pandemic revealed the vulnerabilities of global supply chains and the importance of domestic supply and manufacture. A flattening world is being replaced by a world of various archipelagoes of trading blocs, security groupings and hardening supply chains. The major economies will try to reinforce domestic production and secure supply chains with stable partners. After Ukraine, strategic and security preferences will factor much more into economic considerations of nation states than connecting to the global economy.

We are moving from the flattening world of rapid globalization to a world of separate networks; perhaps towards a more complex pattern with a Europe bloc, a North American bloc, and a Chinese dominated Sino-Russian bloc. Strategically we are also witnessing the increasing role of regional powers beyond this U.S.-China/Russia- Europe axis. Regional powers such as Türkiye and India will no doubt play a more prominent role in their regional realms exercising power and influence. If their power expands, we may be moving into a world of separate blocs and the more explicit power projections of regional powers.

We are moving into a more distinctly multipolar world.