



Commentary

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Global Politics in the Shadow of Ukraine

The following is adapted from a March 2023 report by Crisis Group's President and CEO Comfort Ero to the organisation's Trustees (before Chinese leader Xi Jinping's 20-21 March visit to Moscow). She looks at the Ukraine war and its knock-on effects – from big-power polarisation to middle-power activism and disquiet outside the West about the conflict.

I thought hard about whether the Ukraine war merited the prominence in this report that I gave it when we last met some months ago. I'm acutely aware that, to put it bluntly, the emphasis, especially in Western capitals, on Ukraine leaves a sour taste in much of the rest of the world. Few non-Western leaders sympathise with Russian President Vladimir Putin, and most recognise the peril his violation of Ukraine's sovereignty poses. But few buy the narrative prevalent in Western capitals that the war is an existential global threat – at least not more so than challenges closer to home, like climate change, food scarcity, debt or indeed other wars. Many question how Western capitals can find so much money for Ukraine but so little for climate change adaptation, why Europe welcomes Ukrainian refugees while Afghans, Africans and Arabs die in the Mediterranean, or what Europe's absorption with Ukraine means for its bandwidth for crises elsewhere. Many chafe at the costs their populations bear, particularly higher food and fuel prices, for a war they see as European.

Such sentiment is justified, but, like it or not, the Ukraine war is playing an outsized role

in world affairs. It is not just the impact the war and sanctions have had on supply chains, commodity prices and inflation. Western leaders often now view policy elsewhere through the lens of Ukraine. That could be good if it helps with things the rest of the world cares about; less so if countries feel forced into camps. While multilateral diplomacy has just about muddled through, collapsed Russia-West relations, alongside China-U.S. tensions, hinder efforts to deal with global challenges. Plus, of course, the standoff over Ukraine still poses the gravest danger in decades of nuclear confrontation between major powers, with terrifying global repercussions. Russia suspending its participation in – basically pulling out of – the last nuclear treaty with the U.S. may have already blown apart the entire arms control system established during and after the Cold War. The war might be European, but it is reshaping geopolitical reality.

So, what might we expect on the battlefield? For an overview of the state of play, listen to Crisis Group's Europe and Central Asia Director Olya Oliker speaking on a special *Hold Your Fire!* episode at the war's one-year marker. In

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sum, Russian forces are struggling to break through Ukrainian defences along fronts in the east and south. There have been some grinding Russian advances, but at the cost of massive losses of troops and equipment. If Russia can muster no more than it has so far, it seems unlikely to gain much ground any time soon, provided that Western support holds. As for Ukrainian forces, they are digging in until the gear, notably tanks and artillery, that Western capitals have pledged arrives, and hoping that it will enable repeats of last year’s dramatic advances in late summer and autumn.

Thus far, Western capitals have largely trodden the right line in getting Ukraine the weapons it needs while avoiding too high a risk of escalation. They are certainly sending heavier weaponry than most contemplated a year ago, but they have shown sensible caution in building up incrementally. For all the fire that German Chancellor Olaf Scholz faced for agonising over sending or allowing others to send German tanks to Ukraine, that Western leaders ponder such decisions is not in itself a bad thing. There are costs to caution: Ukraine is sometimes half a step behind what it needs. But NATO leaders are right to continue balancing the two imperatives that have guided policy so far: on one hand, help Ukraine counter Russia’s assault; on the other, avert a direct confrontation with Moscow.

While the outcome of a war that from the start has defied expectations remains hard to predict, some things are clear. Both Ukraine and Russia have fundamentally changed. Ukraine has a stronger sense of nationhood and deeper sympathy in Western countries – certainly not the outcome President Putin anticipated. But the devastation caused by Russia’s assault, especially the aerial bombardment of infrastructure throughout the country, plus the huge numbers of displaced, means a long and phenomenally

expensive recovery. As for Russia, it is angrier, more autocratic and more isolated, at least from the West. The Kremlin has silenced dissent. The economy, while more resilient to sanctions than anticipated, is militarised, with much production diverted to the war effort. Putin seems in little danger of losing his grip on power. He is preparing Russia for the long haul in Ukraine; indeed, in some ways his rule now appears indelibly associated with the war.

Thus far, the Western backing that has been critical for Ukraine’s survival has held together well. Many European governments view their own security as at stake in Ukraine. NATO membership of course provides a different degree of protection, but it is still hard to argue with their sense that Putin is unlikely to stop at Ukraine if he prevails there. Besides, whenever there are rumblings of discord, Russia commits (or is revealed to have previously committed) some new monstrosity that reinforces Western will. In the U.S., a vocal caucus of Republican lawmakers outwardly questions U.S. support, but it remains a minority.

Still, complacency would be mistaken. U.S. stamina might be more brittle than the declarations of unity at the recent Munich Security Conference and U.S. President Joe Biden’s surprise visit to Kyiv suggest. The anti-Ukraine cluster in the Republican party is small but includes former President Donald Trump and Florida Governor Ron DeSantis – the two leading contenders (though DeSantis is undeclared) for the party’s presidential nomination in 2024. Even more supportive U.S. politicians acknowledge behind closed doors – and polls back them up – that constituents question the money Washington is spending on Ukraine and ask what the endgame is. The war will inevitably feature in the 2024 Republican primaries, and likely the general election as well. More opposition in Congress would not rule out maintaining

existing levels of support for Ukraine, but it would make doing that harder. This factor may give extra significance to what happens at the front in the months ahead, particularly given how pivotal U.S. military aid, which dwarfs that of other Western states, has been to Ukraine's war effort. It may also mean that Biden and other NATO leaders feel pressure to send in heavier weaponry sooner – an understandable decision, but one that could carry a higher danger of escalation.

For now, there is no peace deal in the offing. Kyiv understandably wants to capture back territory it has lost, particularly given its advances some months ago, and Ukrainian President Volodymyr Zelenskyy, for all his popularity, has no space at home for a deal that cedes much to Moscow. In any case, nothing suggests the Kremlin is open to a bargain. Putin's goals today appear to be largely what they were at the start of the war: a pliant government in Kyiv and a West that accepts Russia's sphere of influence. Besides, as Putin's rule evolves, the Kremlin may feel it is better off with war, whatever peace is on offer. At some point, calculations might change based on what happens on the battlefield. For now, though, to suggest ending the war is simply a question of talking to Putin and working out which bits of Ukraine stay under Russian occupation is to misread the Kremlin.

That means that for Western powers, as things stand, there is little credible alternative to helping Ukraine resist while minimising escalation risks. At the same time, they should avoid steps that close off options for a settlement. Ideally, that would mean circumspection in defining what the endgame looks like, though that's a hard sell for those European leaders wedded, at least rhetorically, to Ukraine recapturing all the territory it has lost since 2014. We will have to see how the new arrest warrants issued by the prosecutor of the International Criminal Court against Putin and his children's commissioner play out. Addressing them in any final negotiation will require careful thought. Judicial measures related to the crime of aggression, something that would

also, inevitably, focus on Russia's leaders would add another level of complexity. The future of Europe's security architecture will depend in no small part on what happens in Ukraine, though Western capitals can continue exploring what future arrangements might look like, particularly in terms of European Union (EU) and NATO relations with Ukraine, Georgia and Moldova, as well as controls on weapon deployments and military activities.

As for the relationship that will shape the decades ahead – that between the U.S. and China – the Ukraine war has added to the points of friction that ensure it will remain adversarial for the foreseeable future. Russia's all-out invasion has heightened threat perceptions in Taiwan, which sees in the war portents of its own vulnerability, and perhaps also in Washington. But if countering Russia's invasion shows signs of becoming a fault line in U.S. politics, countering China does not. Indeed, some of the politicians who criticise the Biden administration's support for Ukraine say it should focus more on China. For its part, the Biden administration believes it needs to do both, and is working apace to build a European and Asian coalition to compete with and deter the Chinese. Washington's allies and partners would, in many cases, prefer a less confrontational path when it comes to Beijing. But the strong U.S. backing for Ukraine has upped Washington's leverage, especially with European countries, to rally them against China. As tense as things are, were China to send Russia weapons and ammunition, which seems improbable notwithstanding fears expressed by U.S. officials, they would get worse.

I was in Washington during "balloongate", the downing by a U.S. warplane of a Chinese spy balloon in U.S. airspace, and came away disquieted by my meetings and what the incident said about relations between the two big powers. To some degree, it has derailed the modest positive momentum that came from last autumn's G20 meeting between President Biden and Chinese

leader Xi Jinping. That meeting saw both leaders adopt more accommodating tones, potentially setting the stage for a return to direct talks. Indeed, Secretary of State Antony Blinken was preparing to travel to Beijing when the balloon was detected over the U.S., leading him to scuttle his plans.

Much about the incident and its aftermath was troubling. Perhaps most concerning was the way hawkish domestic politics shaped Biden's response. Certainly, the U.S. had cause to be aggrieved about a Chinese balloon floating, whether by accident or design, over sensitive installations. But in a more rational world, Washington might have expressed stern disapproval of the incursion, pocketed China's statement of regret and sent Blinken to Beijing for the visit the administration had planned. After all, while the balloon's shambolic journey across the continental U.S. was serious, it was not *that* serious; nor did it change either side's interest in putting a proverbial "floor" under deteriorating bilateral relations. China's embarrassment could even have given the secretary of state a leg up in his discussions.

But politics made that unthinkable. Instead, we witnessed a week-long spectacle of threat inflation, political name-calling and the widely circulated video of a U.S. fighter jet shooting down an undefended balloon. Steps the U.S. took to explain itself to the world – including an arguably over-the-top briefing broadcast to 40 countries – could not have helped with repairing the bilateral relationship. We will see whether all this noise has a lasting effect. The Biden administration appears to want to get back to talks. When they will make their bid is an open question, as is how China will respond.

Meanwhile, the danger of sliding into conflict by mistake or miscalculation is ever present, given that the two giants' militaries are bumping up against each other around

Taiwan and in the South China Sea. Especially since Nancy Pelosi, then speaker of the House of Representatives, paid her ill-advised visit to Taiwan last year, Chinese planes have been zooming up to the median line (an unofficial military boundary tacitly respected by Taipei and Beijing until China rejected its existence in September 2020), playing chicken with Taiwanese defence forces to wear them down psychologically while straining their ageing equipment. U.S. and Chinese military aircraft and vessels also regularly encounter each other in the South China Sea and the Bashi and Taiwan Straits. The last major mishap – the so-called Hainan Island incident, which in 2001 saw U.S. and Chinese planes collide over the South China Sea – was resolved through careful diplomacy, with both sides displaying sensitivity to how the public in the other country would view their statements. Today, it's hard to see space for such an approach.

As for Taiwan itself, an attempt by China to take the island by force, which was unlikely any time soon even before Ukraine, appears even less probable now. Russia's travails on the battlefield and isolation from Western markets have not been lost on Beijing. China is, however, increasingly unsettled by what it perceives as erosion of the status quo. The challenge for the U.S., broadly speaking, is to reinforce Taiwan's defences, while signalling to China that Washington's "One China" policy remains in place. That is no mean feat given the mood in Washington. But get the balance wrong, and give China the sense that the window for unification is closing, and the U.S. would make an assault on the island it hopes its backing for Taiwan will deter all the likelier.

On Ukraine, Beijing looks likely to try to maintain an image of constructive neutrality when in reality its actions and rhetoric reinforce Moscow, notwithstanding its frustration at

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Russia's recklessness in launching a full-scale invasion. Fraying U.S.-China relations push Beijing further along the path to strategic alignment with Russia. But sustaining or repairing economic ties with Europe is a top Chinese priority. Tough secondary U.S. sanctions are hardly appealing to Beijing. Beijing's assistance to Moscow has thus largely been limited to political and economic support that seems to comply with Western sanctions. That said, the Biden administration's recent warnings and separate reports of dual-use equipment parts and light weapons flowing from China to Russia suggest that Beijing is probing how far it can go in backing Moscow while still avoiding Western punishment.

China's emphasis on its readiness to serve as mediator – perhaps now also by pointing to its role in pushing a recent Saudi-Iranian deal across the line – is part of this balancing act. Thus far, the messaging seems to be more a means for Beijing to fend off Western capitals' accusations that it is backing Russia and to portray itself as an honest broker to the rest of the world than a serious bid for peace. The position paper China released on the war is a list of generalities, not a roadmap. Of course, even a slim hope that Xi's diplomacy with Putin and Zelenskyy yields, against all odds, some sort of opening is worth pursuing. Still, it appears at best a long shot.

Beyond big-power rivalries, the Ukraine war has shifted calculations along other geopolitical fault lines and cast into sharp relief other features of world affairs. It has contributed to new dangers in the South Caucasus and related to Iran's nuclear program. It has also revealed the increasing influence and autonomy enjoyed by several activist "middle powers" (as noted by Crisis Group Trustee Ivan Krastev at our November 2022 Board meeting and in his excellent *Financial Times* piece). Reaction in non-Western capitals to the war says much about their determination to pursue

their interests without getting caught up in a new global confrontation.

The South Caucasus, in particular, has felt the war's knock-on effects. In 2020, Azerbaijani forces routed Armenians from parts of the Nagorno-Karabakh enclave and nearby areas, all of which Armenian forces had held since the early 1990s. Since then, Baku, with Turkish and Israeli support, has ramped up its military further. Heightened European demand for Azerbaijani gas has also emboldened Baku. Moreover, Russian peacekeepers, deployed as part of the Moscow-brokered ceasefire in late 2020 to areas of Nagorno-Karabakh still settled by Armenians, do not offer the deterrence they did before Moscow was bogged down in Ukraine and have not stopped several flare-ups this past year. Russia has also ended cooperation with the U.S. and France on this file, thus curtailing peacemaking efforts that it traditionally led. The EU has stepped in and is now deploying monitors along the Armenian border with Azerbaijan. But the danger is that Baku loses patience with diplomacy, senses an opportunity and takes what it can by force.

The Ukraine war's fallout has also contributed to the brewing crisis over Iran's nuclear program. The Islamic Republic's isolation, especially from Western governments, owes in large part to its merciless crackdown on young protesters in recent demonstrations touched off by the regime's policing of women's appearance and behaviour. Yet Western fury at Tehran's supply of weapons to Russia has also diminished appetite for diplomacy with Iran. Talks to revive the 2015 nuclear deal are in a deep freeze. Tehran's nuclear capabilities have advanced leaps and bounds; its uranium enrichment capacity has reached near weapons grade and its breakout time is down to almost nil. While the parties have not yet declared the nuclear deal dead, it cannot be revived in its current form, given the rapid advances in Iran's nuclear program. The deal, which China helped broker, between Iran and Saudi Arabia is a positive step for Gulf security. With the right

follow-up, it could help peace efforts in Yemen, where Tehran backs Huthi rebels and Riyadh the internationally recognised government. But the deal does not touch on the nuclear question.

An escalation looms all too large. The U.S. and its allies will soon have to choose between seeing Iran acquire the capability to manufacture a nuclear bomb and trying to stop that from happening by force. Indeed, Israel's far-right government appears to be continuing its predecessor's covert sabotage of Iran's nuclear program. Iran's rivals in the Gulf, who have tried to quiet tension with Tehran, largely recognise the peril of renewed confrontation – hence the Iran-Saudi Arabia deal. Nor does Tehran or any Western capital want to alter the “no deal, no crisis” status quo. But it is not out of the question that in response to further Israeli strikes, Tehran retaliates by crossing a red line toward weaponisation or, at the very least, lashing out directly or through proxies across the Middle East.

Beyond its impact on other crises, the Ukraine war has shone light on influential regional powers' activism. Take Türkiye, for instance, which has long walked a tightrope between NATO membership and ties to Moscow. Over the past year, it has kept open lines of communication to the Kremlin and Turkish markets to Russian businesses, while sending weapons to Kyiv and stopping Russian ships off the Syrian coast from entering the Black Sea via the Bosphorus. Most importantly, it helped broker, with the UN, the deal that got Ukrainian grain back onto global markets via the Black Sea. In contrast, President Recep Tayyip Erdoğan's obstruction of Sweden's NATO membership seems like a misstep. Sweden's concessions might have won Erdoğan extra support among nationalists at home ahead of forthcoming elections, but at the cost of further bad blood in other NATO capitals. Still, on balance, the war, coming after years of Turkish assertiveness abroad, including tipping the battlefield balance in Libya and the South Caucasus and expanding drone sales, has given Ankara even greater sway.

Others, too, have done well despite – or even thanks to – more fraught geopolitics. For Saudi Arabia, the oil price hike and abrupt removal of Russian crude from the market was a boon, forcing a visit to the kingdom by President Biden, who had entered office promising to shun Saudi Crown Prince Mohammed bin Salman. Despite U.S. pleas, Riyadh, with other oil producers, ended up keeping prices high, much to Washington's fury. Saudi officials have also mediated between Kyiv and Moscow, helping secure at least one prisoner exchange. India, at once a U.S. security partner and major purchaser of Russian arms, has abstained from UN votes condemning Russia and bought knock-off Russian oil. Yet Indian Prime Minister Narendra Modi has been ready to publicly chide Putin for Moscow's nuclear sabre-rattling – a testament to New Delhi's increased global clout as well as, perhaps, to Putin's diminished standing. Modi overall, and notwithstanding India's non-alignment, has tilted westward in recent years, sharing with the U.S. an interest in checking Chinese influence; Washington, for its part, seems more than ready to look past the backsliding of Indian democracy on the premier's watch.

But if India, Saudi Arabia, Türkiye and other regional powers like Brazil or South Africa share an interest in charting their own course, we don't see a new non-aligned movement emerging. Activist middle powers will seize the opportunity that multipolarity brings, even if they mostly regard hostility among big powers as unwelcome. Thus far, though, they do not coordinate positions on the war or form a cohesive bloc.

As for other capitals outside the West, it's hardly news now that the war has touched a raw nerve. While big majorities have voted at the UN General Assembly to condemn Russia's invasion, few non-Western leaders condemn Putin publicly or have imposed sanctions. Many prefer not to break with Moscow, for reasons mostly related to trade but also sometimes due to historical ties to Moscow or reliance on Kremlin-linked Wagner Group mercenaries. It's

not just regional heavyweights that see no value in picking a side or incurring costs for the war. Many leaders want to be able to define foreign policy on their own terms, reflecting what they see as their own sovereign ends, not big powers' priorities. They feel a responsibility to protect their citizens' interests in an era of turbulence.

But the global tendency to sit the Ukraine war out reflects something else, too: the war has revealed frustration in much of the world at the way Western power has been exercised over the past few decades. Some of the annoyance relates to recent memory: COVID-19 vaccine hoarding, migration policy or the perceived stinginess of Western capitals in ponying up for damage from climate change. Many leaders believe, particularly when it comes to sanctions, that Western governments have put fighting Russia over the global economy. The war has also revealed a sharp divergence between the way the West understands global politics after, or even during, the Cold War, and the lived experiences of people in other parts of the world. Many roll their eyes at Western outrage over Ukraine, given the horrors of the war on terror and bungled interventions in Iraq, Libya and elsewhere.

Certainly, some Western officials recognise they need to claw back credibility. European ministries regularly invite me or other

colleagues to help them assess “what the Global South thinks” or how Western capitals can do better. For its part, the Biden administration realised quickly after Russia's all-out assault that it needed also to tackle things that African and other countries care about, making a concerted effort to bring food and fuel prices down over the course of the last year. Biden's recent meeting with Brazilian President Luiz Inácio “Lula” da Silva also sensibly focused on areas of shared interest beyond Ukraine.

But Western leaders still sometimes sound a little tone-deaf. Too often, they depict the struggle as one of narratives and blame Russian disinformation. Too often, they frame efforts to woo leaders in the Global South in terms of zero-sum competition with Russia or China. Too often, even Western officials who recognise previous mistakes – the Iraq war, for instance – brush off injustice today. Non-Western capitals notice when top U.S. officials, even as they loudly condemn Russia at the Munich Security Conference, work behind the scenes to obstruct a vote in the UN Security Council condemning illegal Israeli settlements. No Western politician should be under any illusion about what such double standards mean for their claim to be defending a rules-based international order. Too often, in other words, it's not the narrative that needs changing but reality. ■