

One Year After Russia's Invasion of Ukraine: The geopolitical struggle is not where you think it is

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When Russia invaded Ukraine one year ago, there were immediate concerns about the effects on food and energy security, and on geopolitical alignment in other countries. The world was right to be concerned, but the repercussions have been much wider and deeper than many predicted. There are two main ways in which conflict dynamics have shifted, neither of them solely caused by the war but both exacerbated by it:

- **Russian's war on Ukraine has shone the lens on inter-state conflict and proxy war.** In truth, [this dynamic](#) has been taking place for some time. The majority of “old” civil wars between well-established rebel movements and governments were for the most part ended in the two decades after the end of the Cold War, some through negotiation and some militarily. Many have been replaced by complex local conflicts involving cross-border extremist movements and organized crime. At the same time, inter-state tensions have been rising for some time, whether in the [South China Sea](#) or the [Eastern Mediterranean](#). Russian's invasion of Ukraine raised the attention on inter-state threats and proxy conflicts, due to the spotlight placed on the [Wagner Group](#) and the patterns of diplomatic, military, and economic aid from the US, China, and Russia in all continents. While the most recent UN resolution marking the one year anniversary of the invasion calling again for Russia to unconditionally withdraw from Ukraine [received the support of 141 countries](#), there were still notable exemptions including from India, Pakistan, and South Africa. Those heralding the vote as a global consensus are failing to see the intricacies of the political dynamics which still points to divisions.
- **Compounding the pandemic and climate change, a war started in one corner of the world has resulted in a [global cost-of-living crisis](#) and [increasing debt](#) for almost every country worldwide**—countries that had no hand in Russia's invasion or in the failure to respond to public health and socio-economic crisis. More than 100 countries face three or more interlocking crises as a result of the events of the last three years. Most countries around the world now face domestic pressures that make them turn either inwards or towards allies who will provide immediate help. As a result, the world risks increasing polarization between blocs.

Multiple and cascading crises

The way in which rising geopolitical tension is compounded by multiple and cascading economic, political, ecological, and social crises—ranging from inflation and economic slowdowns, food and energy insecurity, the climate emergency, to social and political unrest—is the focus of this brief. **Increasingly referred to as the [polycrisis](#), these interlocking threats produce harms greater than the sum of what those crises might produce in isolation.**

The polycrisis affects how the countries around the world respond to Ukraine, and how the war in Ukraine affects other countries. This month, CIC has [published a paper](#) reviewing the polycrisis: how several emergencies at once—ranging from food insecurity, fuel price hikes, inflation, extreme climate-related events, and debt distress—interact not only with one another but also with an important sixth realm of crisis, rising social or political protests. The study had to navigate low data coverage. Only 134 out of 193 countries have data for five or more aspects of this analysis, and approximately 60 are therefore excluded. The countries with missing data include many small island states (who have been affected by both climate and economic shocks) as well as countries in conflict, such as Central African Republic, the Russian Federation, Syria, and Yemen. In many of these excluded countries, several of these emergency pressures obviously apply.

Very few countries escape the reach of at least one emergency pressure—the only countries with data in this fortunate circumstance are a small group including Singapore, Malaysia and Switzerland. At the opposite end of the spectrum, an equally small number of countries—including Kenya, Lebanon, Mozambique, Pakistan, South Africa, and Sri Lanka—face high indicators of pressure on all six of these aspects at once.

The scenario is difficult even for those not at the extreme. **Three of these crises at once is not a good picture for any political leader to face—and 72 countries, and more than 100 if we include assumptions about countries with no data—are at high or moderate risk¹ of suffering from at least three crises.** These include high income, middle income and low-income countries and large and small states, from Canada, the Netherlands, Germany, Spain, Sweden and the United Kingdom to Argentina, Bangladesh, Brazil, Chile, Egypt, Indonesia, Nigeria and Mexico, to Cabo Verde, Costa Rica, Guatemala, Haiti and Zambia. Even when you only look at the countries we have data for, this is 5.5 billion people (not just these countries, all the countries in this category). If we assume three quarters of countries without the full data set face only three out of the six emergency pressures (probably a conservative estimate, it would not be surprising if the reasons they have no data also relate to the degree of pressures they face), the number rises to 148 out of 193 countries – more than three in four countries in the world.

¹ Thresholds for what constitutes ‘high risk’ and ‘moderate risk’ can be found in Annex 1 in CIC’s [new research](#), “An Age of Polycrisis.”

Figure 1a: Countries with high and moderate risk of experiencing six multiple and compounding crises

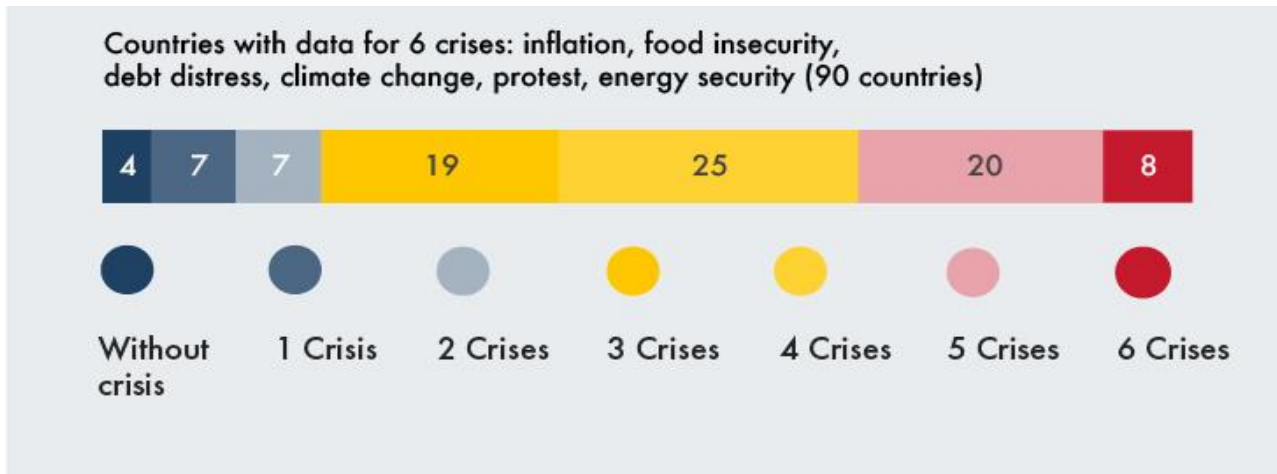
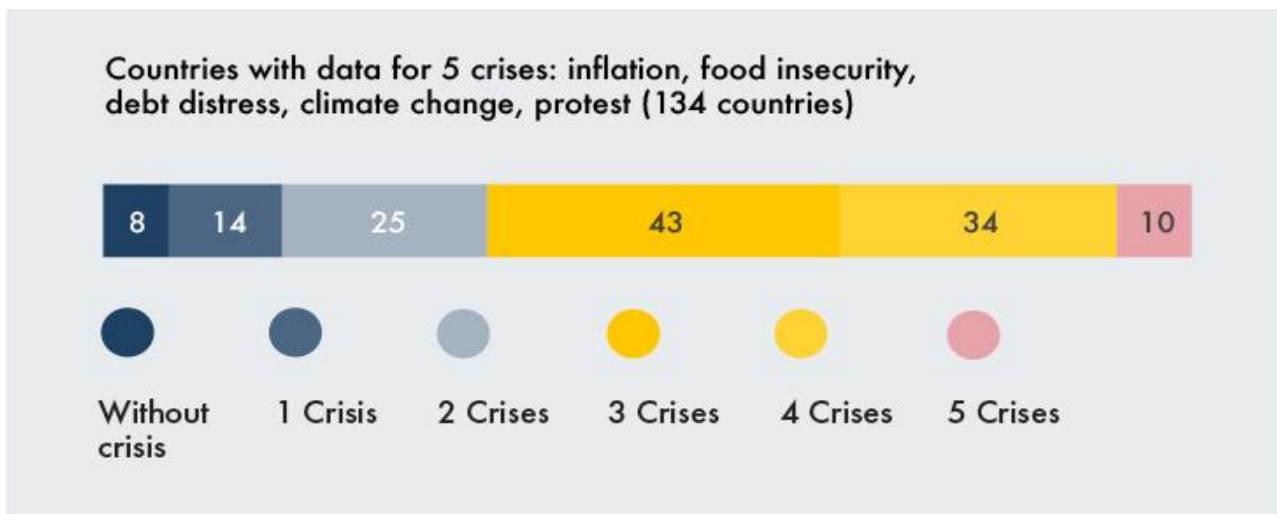


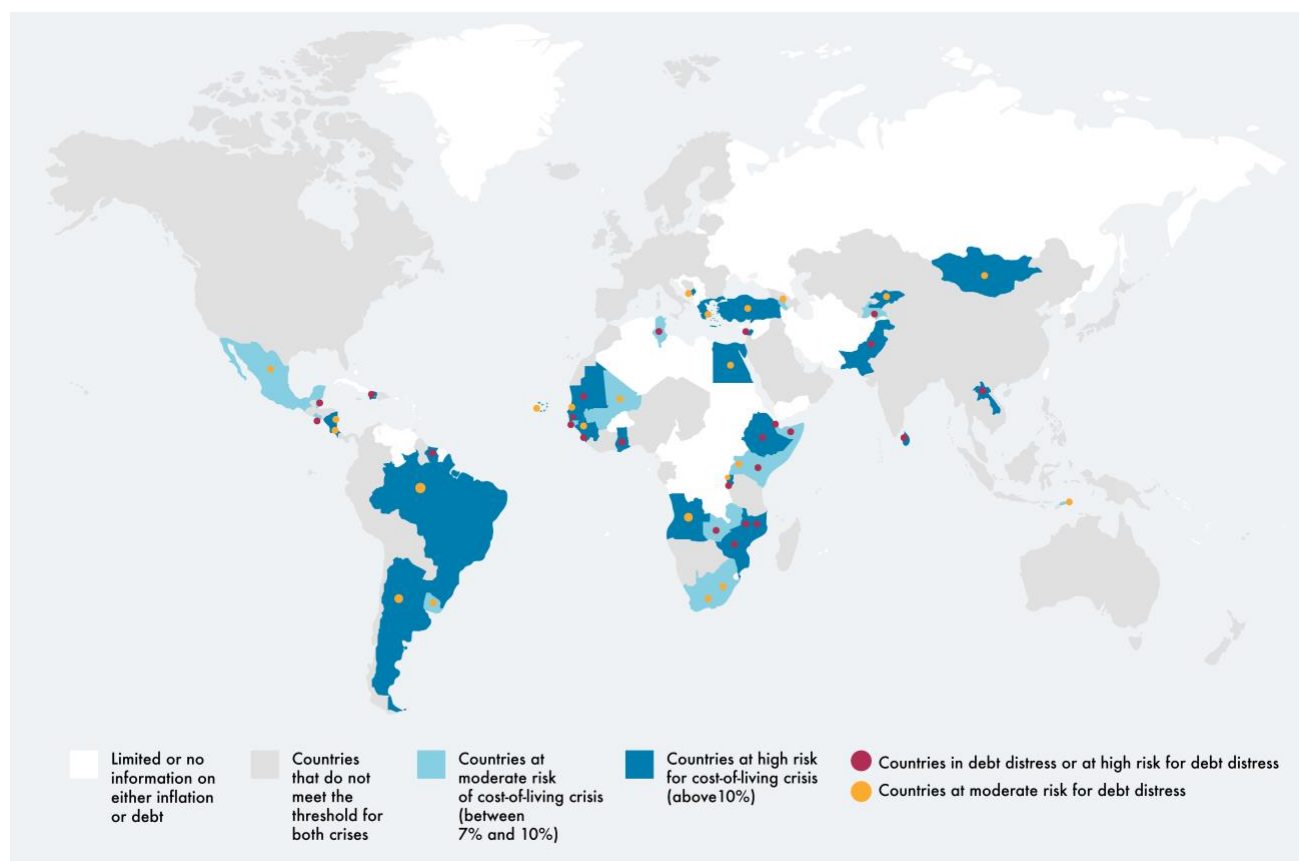
Figure 1b: Countries with high and moderate risk of experiencing five multiple and compounding crises—all except energy insecurity



Note: For Figure 1a, the Pathfinders analysis is based on data for food price shock, energy insecurity, inflation, climate risk, debt, and protest. For Figure 1b, the Pathfinders analysis is based on data for food price shock, inflation, climate risk, debt, and protest. Note that an analysis of five crises increases data availability considerably across countries, therefore the total number and composition of countries undergoing 0 or more crises changes. See Annex 3 of the [An Age of Crises publication](#) for full details on the methodology used.

These crises compound because of how they cause problems in response. Many countries are now at risk of finding themselves in the double bind of coping with high inflation, while not having the fiscal space to cushion their populations against the impacts of these price hikes. This is because they also suffer from a heavy debt burden, which limits their ability to protect people from the more severe and immediate impacts of cascading crises, provide basic services, and promote social development (see Figure 2).

Figure 2: Countries experiencing a cost-of-living crisis (inflation) and debt distress



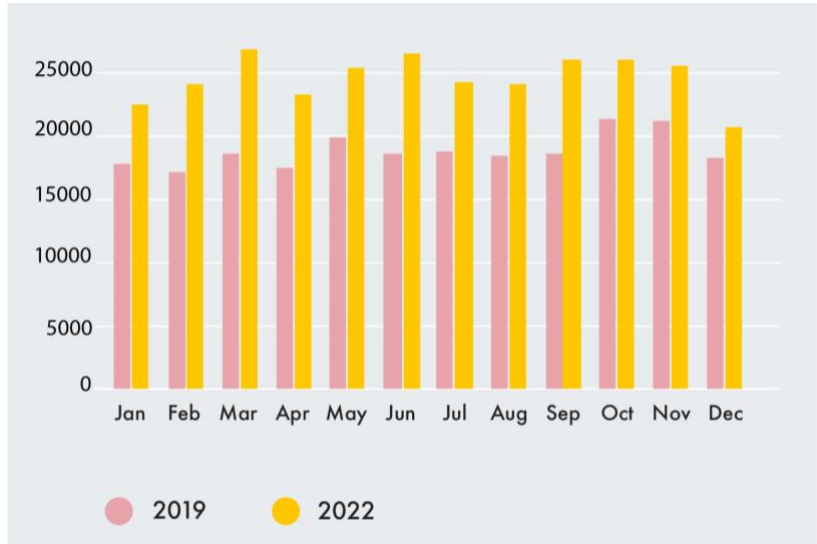
Source: Data on inflation based on Consumer Price Index from Trading Economics (latest between June and August 2022); Data on debt from IMF-World Bank's list of DSAs for LICs and MACs, as well as the Moody's rating. Some judgement was also used for limited countries (see Annex 1 in the [An Age of Crises](#) publication for details).

Pakistan is a case in point: one-third of the country was under water by September 2022 after catastrophic flooding caused by climate change. Yet, the country was already drowning in debt prior to the physical floods: rising prices, food insecurity, and a growing debt burden had made Islamabad's other challenges all the more pressing, compounded by persistent internal corruption and governance issues.

This lays the groundwork for social and political unrest, as trust in governance structures have plummeted. [The Edelman Trust Barometer](#) shifts between 2020 and 2023 to show a generalized increase in distrust, but perhaps more importantly increased polarization across the 28 countries surveyed. Interestingly, income-based inequalities appear to have created two 'trust realities' with those in the top quartile of income holding a profoundly more positive view of institutions than the vast majority in the bottom quartile, potentially leading to a loss of shared identity and national purpose. In fact, in response to a question regarding if a country is more divided today than in the past, the majority in 15 out of 26 countries stated that their country was more divided. On a question on divisive forces that exploit and intensify differences, nearly half (49 percent) of all respondents claimed government leaders themselves were a dividing (not unifying) force.

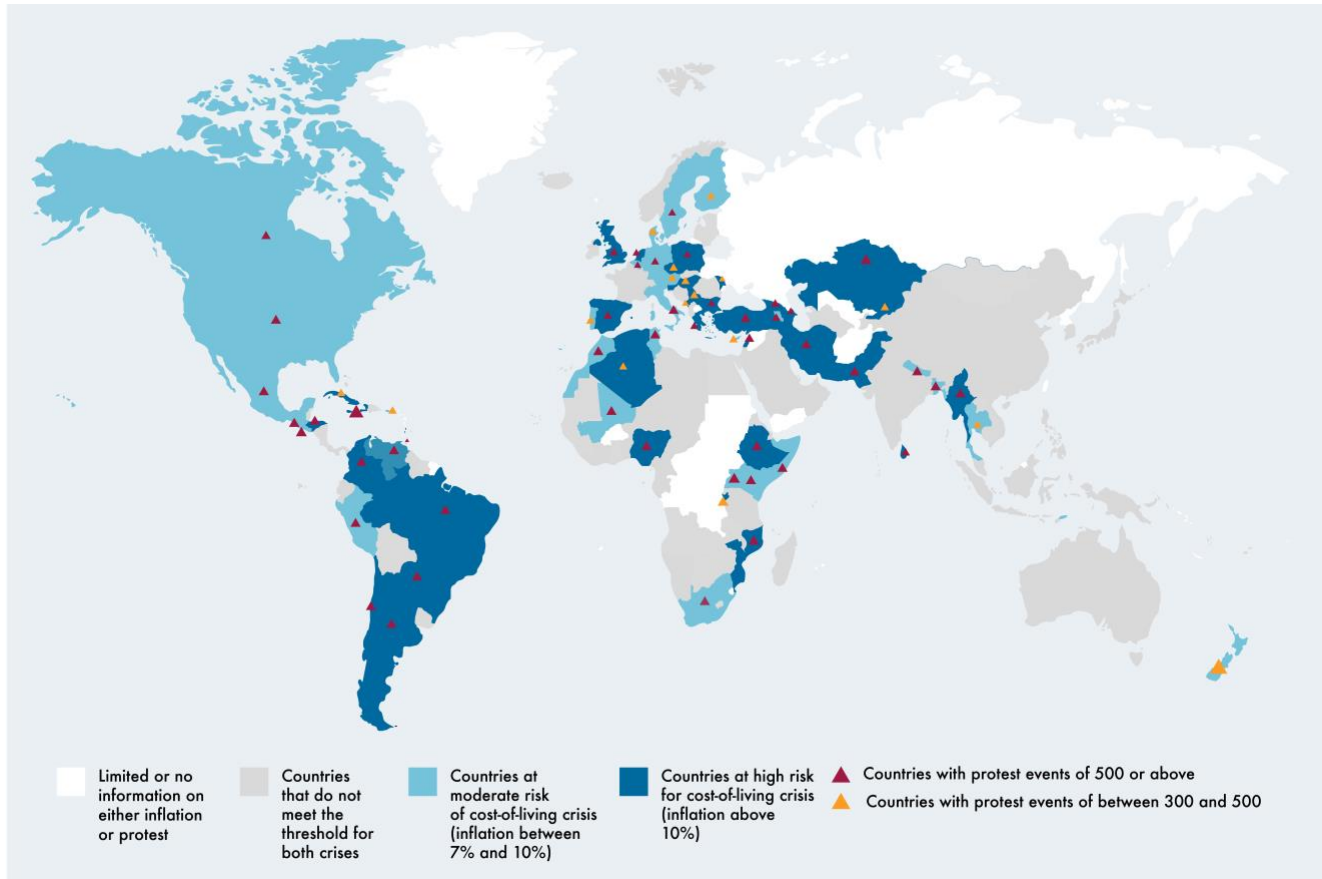
Our analysis has found the level of protest worldwide has increased by 44 percent since the beginning of the pandemic, covering at least 83 countries, which have seen at least moderate to high occurrences of protest (see Figure 3). This largely overlaps with inflation, since at least 64 countries of this 83 have experienced both moderate to high levels of protest, as well as moderate to high levels of inflation (see Figure 4).

Figure 3: Total number of protests by month, in 2019 and 2022



Source: ACLED, 2022.

Figure 4: Countries undergoing a cost-of-living crisis (inflation) and high incidence of protest



Source: Data on inflation (latest between June and August 2022) based on Consumer Price Index taken from Trading Economics; Data on protest from ACLED, 2022.

These risks are affecting many regions. In Jordan, trucker-led [protests](#) beginning in early December 2022 over rising gas prices turned violent. This anger reflected multiple public grievances on high unemployment, nepotism, and weak governance. The [Arab Barometer data](#) shows that the proportion of Jordanians who trust the government declined from 71.5 percent in 2011 to 43.3 percent in 2020, which is a much sharper decline (albeit from a higher starting point) than other countries in the region including Morocco and Kuwait. In Canada, truckers blockaded infrastructure, attacked civilians, harassed journalists, and eventually shut down Ottawa's city center with a rally that initially began as protests against COVID-19 measures, but degenerated into a [convoy](#) consisting of a wide variety of groups and agendas, including scrapping pandemic measures and overthrowing the government. In Spain, protests against [gender equality](#) and [inequality between rural and urban areas](#) stopped traffic last year in Madrid for several days.

While high-income countries have also grappled with increasing prices and protests, with elevated incidences of protest recorded in several countries including Canada, France, Germany, Italy, Spain, Sweden, the United Kingdom, and the United States, **it has been much easier for these countries to dial up social protection measures** where there is political will, highlighting the growing disparity in the ability to contain crisis between wealth and non-wealthy countries. The *Financial Times* (FT) [recently highlighted](#) the **emergence of a lost decade for development—and for convergence between higher and lower income countries**. As the FT put it:

"COVID was not these countries' fault. The lack of global cooperation in tackling it was not their fault. The war is not their fault. But if high income countries do not offer the help they now evidently need, it will be unambiguously their fault."

It is not the core business of the *Financial Times* to point to geopolitical issues, but these can be added to the clarion call above. The West cannot expect countries to continue to agree with them in terms of condemnation of Russia's war on Ukraine unless they address these problems. Neither China nor the West can expect unity in addressing global public goods unless practical assistance is given to low and middle-income countries to address the spillovers they face. This is arguably even more of an issue for China than the West, given the rapidly rising portion of public debt in low and middle-income countries that China holds (see Figure 2).

Taking action in the face of polycrisis

So, what needs to be done? **Part of the approach is an issue of tone.** It is not in the Ukrainians' best interest to come to the multilateral system asking for support on the basis of their unique struggle. Rather, they should highlight similarities with challenges faced by other countries facing conflict and make alliances on this basis. For example, they could stress that accountability for war crimes and crimes against humanity is not unique to Ukraine, but spans many conflicts, and seek solidarity with those countries that have faced those situations in the past. The formation of an alliance advocating that the destruction of infrastructure is a war crime and requires compensation would be fruitful for Ukraine as well as others.

Globally, some of the economic solutions have been sitting on the table for the last two years but not implemented—Special Drawing Rights by the International Monetary Fund (IMF), issued in 2021, have USD 300 billion in potential to recycle from high-income countries who do not need the extra reserves to low-income countries, who need them. This just needs political will, as the technical solutions to apply these more quickly through development banks are already there. Others are on-going but need a shot of energy and diplomatic concertation—the failure of the G20 Common Framework on debt, for example, can be solved by a more inclusive discussion in which the West and China find common ground, with a platform that they both trust for discussions that bring in the private sector.

Other issues need out of the box thinking. The disillusionment of Southern countries with multilateral systems and international action can be addressed by following through on damage and loss (related to climate change) and tax agreements that have seen some progress in the last year, but remain to be realized in practical terms. The shift into different Cold War-like blocs can be mitigated by early thinking about how to avoid the worst effects of this. For example, the IMF has recently proposed that in an era of geo-economic fragmentation, “guardrails” can be developed that help safeguard economic exchange, such as “safe corridors” for food and medicine. The critical grain initiative brokered by the United Nations and Turkey in July 2022, is an example.

Yet other issues require more fundamental thinking about the different military, diplomatic, economic, technological, and cultural tools available. As some of the lessons from the Cold War teach us, geopolitical struggles are won “...by which participant better orchestrates support from other nations...by which country masters the multilateral context.” This is about great powers listening to other countries and aligning with them on issue that they want and need, when concessions are in the interest of larger global stability. This has started to happen in New York—see [our piece on optimism](#) going into 2023—but it has a way to go.

Since we are ending with Cold War lessons, another is that “**Winning the contest of systems requires managing domestic democratic performance and pressures.**”² This is an issue for all the protagonists in the war and their supporters, for Russia, Ukraine, Russia’s supporters, and the Western European and Others Group (WEOG). And perhaps more importantly, it is an issue for China and the West in their longer-term

² Hal Brand, *The Twilight Struggle: What the Cold War teaches us about Great Power Rivalry Today*, (New Haven: Yale University Press, 2022)

contestation. In addition to alliances with other countries, the major powers need to look at how their own domestic issues of governance and societal well-being are being viewed from abroad. The situation has not been positive for the WEOG group in the last 10-15 years, with rising inequality, increased social polarization, and volatile political leaders dominating the news. For China, more recently, the picture of how to deal with COVID-19 has not been positive. This will be of course a competition of systems in how it plays out in the next two decades—but it is important that the rival systems are seen at their best, not at their worst.

Ultimately crisis can be an opportunity for change and for levelling up to a better future. Just as with the COVID-19 pandemic, a framework for an approach to the global crisis has largely been missing, and in a world where multiple crisis remains a reality this leaves us all vulnerable. As the secretary-general's report, *Our Common Agenda*, has pointed out, humanity faces a stark and urgent choice between breakdown and breakthrough.

The choices we make—or fail to make—today can result in perpetual crises or a breakthrough to a better, more sustainable, and peaceful future for the world.

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