

# Ukraine war: The global geopolitical consequences

The invasion is not going to plan for Putin. A look at the ripple effects

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Nobody can read Vladimir Putin's mind. But I think whatever his goals may have been at the beginning of this war, they have surely changed by now. Even if he had intended to move beyond Ukraine, that is now not on the cards. Mr Putin has his hands full. Ukrainian resistance and the international response have been firmer and more widespread than Mr Putin probably expected.

Moving beyond Ukraine would entail a direct confrontation with The North Atlantic Treaty Organisation and that is simply too dangerous. Mr Putin's announcement of a higher nuclear alert was a signal that he understood this reality and that Europe and the United States should not intervene directly. Nuclear deterrence will keep the peace between Nato and Russia, as it did during the Cold War, and contain the war to Ukraine.

But, tragically, the price of this peace will be Ukraine. The Ukrainians are fighting heroically, but in the end, the sheer mass of the Russian offensive will overwhelm them. It will not be an easy victory for Russia but a grinding and bloody war with heavy casualties on both sides.

How will the war end? When the invasion began on Feb 24, there were two broad possibilities: the "Donbass solution" i.e. the installation of a puppet government in Kyiv; and the "Crimea solution" i.e. annexation.

Having failed to achieve a quick victory, politically Mr Putin now needs a clear victory and a decisive victory. It is increasingly difficult for him to compromise without looking weak and looking weak is an outcome he cannot accept. Mr Putin's right to rule rests on his having restored Russia's strength and the world's respect for Russia's strength or at least the perception of strength and respect. Now that his war is proving more difficult than expected and doubts have been raised about the competence of his military, Mr Putin's legitimacy to rule Russia is ultimately what is at stake for him in Ukraine.

After the bitterness of a bloody war, it is also difficult to conceive of any quisling government in Kyiv



A Ukrainian soldier on guard in Maidan Square in Kyiv on Wednesday. The norm of international behaviour that is at stake in Ukraine is of existential importance to small countries: That it is wrong for big countries to try to subjugate small countries by naked force and that there will be costs to such aggression. PHOTO: NYTIMES

being able to rule without the direct support of Russian forces. So one way or another, even after the fighting stops, Ukraine will be under direct or indirect Russian occupation for the foreseeable future. Some sort of insurgency may develop under Russian occupation and Moscow cannot take Ukraine's stability for granted.

### FOUR GEOPOLITICAL CONSEQUENCES

This will have four broad geopolitical consequences.

First, Mr Putin has succeeded where all post-Cold War American presidents have failed: he has got the Europeans to take their own defence seriously. Overnight, Germany doubled its defence budget and overcame its long-standing taboo on transfers of weapons. Even neutral Switzerland has joined sanctions. This is a new structural factor in international relations.

Second, Mr Putin has reinvigorated the idea of "The West" which after the Cold War had loosened considerably and was in some danger of decomposing entirely. As long as Ukraine remains under Russian

occupation, The West generally, and Europe specifically, will continue to cohere, even if some internal strains eventually appear.

Third, Ukraine has underscored the importance of regional balances and the vital role of the US in such regional balances. Anxieties about China had always made Asian countries more aware of this strategic reality than other regions, even if not every Asian country was prepared to say so explicitly. This strategic reality is now evident in the Middle East and Europe as well. Everybody may have some reservations about the US, but nobody has any strategic alternative to the US except subordination to China or Russia.

Fourth, Russia's invasion and China's refusal to express disapproval of it will further complicate US-China relations and sharpen the line between them.

### THE CHINESE DILEMMA

War in Ukraine has confronted China with three mutually irreconcilable objectives and placed Beijing in a dilemma.

First, China wants to preserve respect for sovereignty, territorial integrity and non-interference as

key norms of international relations. The reasons for this can be summarised in three words: Tibet, Xinjiang and Taiwan. The Russian invasion of Ukraine was a direct challenge to these norms.

Second, China wants to preserve its partnership with Russia because Beijing has no other partner anywhere with Russia's strategic weight. Beijing and Moscow also share a common discomfort with a Western-oriented global order. China has not criticised Russia and I do not expect it to ever do so. Beijing hopes to play some role in brokering a ceasefire or a settlement, but China is not and cannot be a neutral party.

But at the same time, China is much more integrated into the global order than Russia and has benefited much more than Russia from that order.

The US and China are connected to each other and other components of the global system by supply-chains of a scope and complexity that are unprecedented in history. Russia too is part of this system but apart from the energy market and certain commodities, it is a relatively peripheral economic player.

Chinese growth is already

slowing for a variety of other reasons. With the 20th Party Congress scheduled for this autumn, the disruptions that a war in the heart of Europe are creating in an already fragile global recovery from the pandemic recession must be of serious concern to Beijing. The watchword of the on-going "two sessions" (lianghui) is stability. Ukraine is the antithesis of stability.

The third Chinese objective is to try and stabilise its relations with Europe and the US as much as possible and, more crucially and immediately, avoid suffering collateral damage from sanctions directed at Russia.

This will be very difficult. Chinese netizens are still cheering Russia. Being subject to sanctions of an unprecedented scope, Russia has nowhere to turn to except China and whatever its reservations, I doubt Beijing can entirely spurn Russia without exposing the hollowness of the "no limits" partnership and raising inconvenient questions among its own people. Russia will become even more dependent on China, but this will be as much, or perhaps even more, a liability than an asset for Beijing.

There is no neat or easy way for Beijing to reconcile these three objectives. Balancing these three objectives will be a distraction and a serious complication for China in its strategic competition with the US.

China is now walking a fine and precarious line. The US and Europe will not cut China any slack in implementing sanctions against Russia. China is Russia's largest trading partner. But Western markets are far more important to China than Russia, and will remain so for the foreseeable future.

China's efforts to become more self-reliant in key technologies or to rely more on domestic household consumption to drive growth will not show significant results for a long time, if ever.

The Chinese and Western systems have bifurcated in some domains and we can expect more bifurcation, particularly in domains with security implications. But across-the-board separation of China's economy from the rest of the world such as occurred between the US and the Soviet Union is highly improbable.

China's economic relations with every country will be closely scrutinised on two counts: US-China relations, and also for compliance with Russia sanctions. This is something we in Singapore should bear in mind. Maintaining close defence and security relations with the West while having close economic ties with China is not impossible, but will become more complicated and will require greater alertness and agility from governments and businesses.

### SINGAPORE'S INTERESTS

A final word on Singapore's interests. A line that I observe is beginning to be propagated, I think deliberately, is that as a small country, Singapore should not take sides on Ukraine. This is a pernicious and dangerous argument that seeks to instil a fatalistic sense of helplessness in small countries.

The norm of international behaviour that is at stake in Ukraine is of existential importance to small countries: That it is wrong for big countries to try to subjugate small countries by naked force and that there will be costs to such aggression.

Is it so difficult to understand why this is crucially important to Singapore? In defending this norm, the only "side" we are taking is our own side, in our own interest.

Singapore exists because in the very dire circumstances that we found ourselves after Aug 9, 1965, our people and leaders refused to accept that we were helpless. If we lose the will and courage to do what we can to support our own interests, our future will indeed be very bleak.

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