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Smoke rises over Kyiv after a Russian missiles strike in April 2022. The strike hit a residential building. (John Moore/Getty Images)

World Order Scenarios Post Russia-Ukraine War

Raffaele Marchetti

The war in Ukraine is further advancing a polarizing trend that has been emerging in international affairs for at least the past 15 years. Horrible as any war is, the Russian invasion of Ukraine is not going to change structurally the world in which we have been living the past few decades; the change is quantitative, not qualitative. In fact, the Russian actions, rather than revising, are indeed accelerating a pattern of polarization and compartmentalization that has been growing in the political, economic, military, and cultural realms of global affairs.

From 1989 to 2008 (and 2022): The End of the Global Village

With the end of the Cold War and the fall of the Berlin Wall in 1989, the world entered a period of unmatched unipolarity that lasted for almost two decades and was marked by growing global integration. The 1990s began with the first Gulf War and were later shaped incisively by Bill Clinton's two presidential terms in the United States. Several significant events occurred during this decade, including the war in Yugoslavia (1991-95) on the security front; the creation of the WTO in 1995, with Chinese membership in 2001, on the economic front; and Russian membership in the Council of Europe in 1996 on the political front. All in all, the world moved clearly toward global integration under uncontested American leadership.

From 2001 on, however, the path of global integration came into question. Most acutely, the terrorist attacks of 9/11 posed a challenge to unrivaled American leadership. In a very different form, but equally challenging, was the creation of the World Social

Forum in Brazil as a place of radical contestation from below. Under U.S. President George W. Bush, the U.S. entered two conflicts, in Afghanistan (in 2001) and Iraq (in 2003), both of which have generated numerous controversies. On a more institutional note, the creation of the Shanghai Cooperation Organisation in 2001 marked the first major institutional divergence from the universal multilateralism led by the West that dominated the 1990s.

Arguably, 2008 can be considered a turning point for the international system. A systematic change seems to have begun that year that is slowly pushing the world order toward a more multipolar or multicentric model. The American economic crisis, which began in 2007 but erupted in 2008 with the Lehman Brothers bankruptcy, weakened U.S. status at the international level. The EU followed a similar pattern a few years later. Precisely as the West was experiencing these moments of weakness, a number of other major powers began to be more assertive and confrontational toward the Western international system that had dominated the scene since 1989. As a consequence of the crisis, in 2008, the first G-20 heads of state summit was organized in Washington with the intention of tackling the economic crisis by bringing in the emerging economies. The G-8 was no longer seen as an adequate means of properly addressing this major instability. In the same year as this institutional revolution, the (re)emerging powers asserted their role in world politics in other ways too. Russia intervened militarily in Georgia to reassert its influence in its immediate region. China hosted the Summer Olympic Games in Beijing to assert its return to the world stage.

The world after 2008 looks like a world in which the project for single global integration in political, economic, and security terms is ever further away, and instead, regional fragmentation and West versus BRIC tension has been accentuated. Regional blocs increasingly seem to be in competition: The Eurasian Customs Union was created in 2010 as a barrier to the European Union's power of attraction and a further response to the flashpoints in Ukraine, Georgia, and Armenia. Interregional trade agreements were signed (TTP, 2015) and are being negotiated (TTIP) as a substitute for the multilateral WTO rounds and as a way of reestablishing Western leadership by systematically excluding the BRICs from the negotiating table. New financial institutions were created — the New Development Bank (formerly, the BRICS Development Bank) in 2014, and the Asian Infrastructure Investment Bank in 2015 — that altered the U.S.-centrism of the world economy. Finally, huge infrastructure projects such as the Chinese Belt and Road initiative aimed to connect the entire Eurasian region within a single platform while excluding the U.S.

The most recent events in Syria, Kazakhstan, Belarus, and Ukraine on the Russian front, and in Xinjiang, Hong Kong, the South China Sea, and Taiwan on the Chinese front are just proxy episodes of a larger global confrontation between the American-European bloc and the Sino-Russian bloc. We need to look at the China-U.S. tension, which is the pivot of global affairs, to understand better such episodes.

The PRC-USA Tension

The international system will most likely pivot on the interaction between the declining hegemon the U.S. and the emerging power China. It is with reference to such interaction that we need to envisage possible future world orders. It is clear that the other remaining powers, not to mention other countries, will have to strategically adapt to the behavior of these two superpowers.

Trends for U.S. power are controversial. A number of authors argue that the decline is significant and clear (Layne, 2012). Other analysts argue instead that the U.S. is bound to remain the leader of the international system for decades to come (Nye, 2010). The economic weight of the American economy as a proportion of global GPD is not expected to change significantly. Similarly, U.S. political and military power will remain very significant. What is changing is the diminishing edge the U.S. has enjoyed vis-à-vis other powers. While the American economy will constitute slightly more than 20% of the global economy, other economies will expand and actually outgrow their U.S. counterpart.

China's growth is undeniable. Economically, China will become the largest economy in the world in the next few years. It already has the largest banking asset, the largest import-export gains, and is a leader in R&D. Militarily, Chinese growth is significantly reducing the

U.S. Treasury Secretary Janet Yellen (3rd from right) and Chinese Vice Premier Liu He (3rd from left) and their respective delegations wait ahead of their meeting in Zurich on Jan. 18, 2023. (Sebastien Bozon / AFP via Getty Images)

gap between it and its American counterpart year by year. Socially and politically, China is becoming a magnet of attraction for an increasing number of countries and individuals around the world.

Many see the relative decline of the U.S. and the growth of China as setting the two countries on a collision course (Allison, 2017). It is difficult to predict whether a real armed conflict will occur between the two superpowers. There are significant balancing dynamics between the two countries, first and foremost their economic interdependence: The U.S. needs China to buy its treasury bonds, and China needs the U.S. to buy its products. This remains true despite the recent attempt at delinking the two economies, especially for security concerns in the tech dimension. What is more certain is that there will be a continuing, if not growing, tension between the two, and the other two remaining players, the EU and Russia, will have to align with one or the other. As an outcome of this tension, one of three main scenarios of world order is likely to occur.

Three Scenarios

My take is that the potential scenarios after the Russia-Ukraine war may take one of three shapes. The first seems the most obvious in the short term; it is, in fact, already materializing. And yet we cannot totally exclude the other two, even if only as residual, long-term scenarios, or we would run the risk of having limited foresight analysis. Key in these three scenarios is the tension between the USA and the PRC. At the same time, secondary powers the EU and Russia will carry significant weight depending on with which global power they choose to ally.

World Order 1: The West Versus the Rest

In this scenario, tension remains a central feature that polarizes the world in a new bipolar system. The EU is

pulled toward and even more greatly integrated into the transatlantic community, while Russia follows a similar trajectory within the Sinocentric Asian community. Tensions increase between the U.S. and China, but do not reach the point of an armed conflict. China is not ready yet for a military confrontation. The U.S. could be tempted to crush the would-be challenger before it is no longer possible; however, a number of parameters suggest that any unilateral American military containment may be too late. Economic relationships, political groupings, and military alliances all tend to be polarized. As a consequence, the two junior partners, the EU and Russia, are bound to align themselves with one of the two great powers. Economic pressure is developed through a revival of intraregional blocs, protectionism, economic geopolitics, economic cyber warfare, and technological competition. Political pressure is exerted indirectly on minor allies and directly through attempts to discredit rivals within their local constituencies. Military escalation is visible in an arms race, a corresponding increase in the military budgets of the two countries and their allies, and the repetition of minor skirmishes in East Asia, especially in the area of the South China Sea. More proxy wars like the one in Ukraine should be expected.

World Order 2: Eurasian Integration and U.S. Solitude

In this scenario, a process of interregional integration is promoted by China and accepted by both Russia and the EU. The Eurasian mass is progressively integrated into the largest economic area in the world. All other regional aggregations suffer a strong pull effect. The U.S. and the American continent at large goes adrift in geopolitical solitude, generating inward-looking isolationist stances. The U.S. economy enters a stark decline, the country loses political leadership, and the military apparatus gets silenced. Domestic politics become fragmented, ethnic issues become dominant, and the territorial integrity of the federation is challenged, with states such as California and Florida demanding independence. The tight grip of American global alliances weakens, and one after the other, former allies open up channels of communication and cooperation with the emerging hegemon. China's power continues to expand, and its attractiveness continues to grow. The global narrative changes and becomes Sinocentric. A new Pax Sinica, with Chinese political and economic principles, is established. Eurasian integration develops significantly due to promotion from Beijing. First ASEAN and African countries, then countries in Central Asia, then South Korea, Russia, and Iran all move toward deeper integration with China. Finally, the European Union, India, Japan, and the Gulf countries all enter the Chinese orbit. The U.S. is isolated and barely manages to maintain its few "light" anti-China alliances with individual countries in Latin America, Europe, the Middle East, and Asia.

World Order 3: Enlarged West Versus China

In this scenario, the West remains predominant, China is more and more isolated, and Russia is pulled back, after a regime change, toward Europe and the larger transatlantic community. The enlarged West, now strengthened by the addition of a traditional rival, reestablishes its global leadership. China is relegated to the role of a regional power with no global ambition. The U.S. is able to exert considerable pressure on China such that China actually gives up its international ambitions. Economic constraints, political pressure, and a number of minor military confrontations suffice to deter China from further developing its global ambitions. China is internally destabilized by domestic revolts that weaken its leadership and challenge its territorial integrity, especially in Tibet and Xinjiang. China is thus inhibited and only manages to preserve its autonomy on a regional basis within East Asia. Under these tense circumstances, Russia is persuaded to give up its strategic alliance with China and to return to Europe and the broader Western world with the status of a junior partner.

Conclusions

The world is entering a phase of significant geopolitical shifts. With the end of the Western world order that has dominated the last three decades, the international scene is becoming more pluralist and complex. Traditional American leadership is being challenged by a number of increasingly powerful competitors that have growing international ambitions. I argue that in coming years, four main actors will play the game of global politics: China, the European

Union, Russia, and the U.S. The era of globalization understood as a system of all-inclusive political and economic cooperation is over. Compartmentalization and competition will become the core values for the future world order. The key question for the future of humanity is whether the two blocs (however drawn, as in scenario 1, 2, or 3) will be able to coexist in a more or less peaceful accommodation, or whether the logic of aggressive expansionism will lead to an escalation that may endanger the whole of mankind.

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