



GEOPOLITICAL FALLOUT OF THE UKRAINE CRISIS FOR INDIA AND THE INDO-PACIFIC

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The Ukraine crisis has not only put Russia's hard power on full display but also forced global powers to recalibrate their strategic calculus. The biggest European crisis since the Second World War, the Russia-Ukraine war has far-reaching implications for the Indo-Pacific region. It would be interesting to evaluate some critical questions: What are the potential scenarios?, How the Ukraine crisis may conclude?, its ramifications for the Indo-Pacific? and, What role can India play in ensuring that peace and stability are restored to the region?

Questions persist over whether Japan will follow Germany in augmenting its defense spending. Since condemning the invasion, Japan has been conspicuously shifting towards a more assertive foreign policy.

Outlining Potential Outcomes

After three weeks of raging aggression and with little end in sight, the scenarios for how the Ukraine war may end range from bad to worse.¹ The **first** and most unlikely scenario, perhaps, is a Ukrainian win. It would prove to be a serious blow to Russian and Chinese propaganda against the West and a personal political defeat for Russian President Vladimir Putin, making the option of withdrawing entirely inconceivable, especially while NATO withholds full support for Ukraine.

Hence, the **second**, more plausible scenario is a sharp escalation by Russia using conventional weapons – something Moscow has already been attempting over the past week – with the aim of “bombing Ukraine into submission” and installing it as a Russian puppet state.² As the world has already witnessed, such an assault would not only result in devastating human life but also make Russia a pariah state, facing even worse economic repercussions. However, Putin faces a risk of social unrest rising to become a domestic

revolt that threatens his position within the country. In this vein, the *third* scenario would be long-term low-intensity warfare in the country, much like that in Afghanistan, which would again lead to traumatic loss of life.

The *last*, perhaps most likely, scenario that allows Russia to save face and exit Ukraine involves intervention by a third party to mediate a truce between Russia, Ukraine, and the West, with ongoing negotiations for lasting peace. Which scenario prevails and the course the war will take will be dependent on the fallouts from the conflict.

Shockwaves in the Indo-Pacific

The impact of the crisis is not limited to Eurasia but reverberates across the world, including the Indo-Pacific theatre, which is already a hotbed for global tensions. States are bracing for the anticipated impact on global value chains (especially causing shortages and price hikes of grains like wheat, barley and corn, of which Russia and Ukraine are major global exporters);³ oil and gas supply; and growing volatility of financial markets.

Seoul is anxious that Kim Jong-un could follow Putin's lead and increase aggression, if not attempt an all-out invasion in the coming times.

Figure 1: Japan-Russia Disputed Island Territories



Source: Takai Susumu, "Stalin's Definition of the Kurile Islands," *The Opri Center of Island Studies*, The Sasakawa Peace Foundation, May 1, 2018, <https://www.spf.org/islandstudies/research/a0002or.html>. Accessed March 17, 2022.

Japan

Questions persist over whether Japan will follow Germany in augmenting its defense spending. Since condemning the invasion, Japan has been conspicuously shifting towards a more assertive foreign policy. With massive support from the public (82 percent as per a poll by *Yomiuri Shimbun*),⁴ the Kishida government has offered \$100 million in aid to Ukraine, refuge to Ukrainians, and non-lethal equipment (bulletproof vests, medical supplies etc.).⁵ Such swift measures came despite potential consequences of greater military pressure from Moscow over the Japan-Russia territorial dispute (see Figure 1) and rising energy costs as supply from Russia (9 percent of Japan's natural gas imports) gets interrupted.

Former Japanese Prime Minister Shinzo Abe, who holds immense sway over the ruling Liberal Democratic Party (LDP), argued that Tokyo must accept nuclear sharing with treaty allies like the US as an unavoidable reality in the new security environment.⁶ Abe's remarks have prompted calls from senior Japanese LDP lawmakers to call for a debate on the topic, which was considered taboo amid Japan's vow to refrain from nuclear weapons post Second World War.⁷ Although any such agreement remains far-off (if not entirely a non-starter) while the Japanese public remains staunchly committed to the country's pacifist post-war constitution, the very fact that it has become a point of discussion in popular media points to an emerging shift in Japanese security perceptions prompted by the Ukraine crisis.

The Two Koreas

The Ukraine crisis could significantly destabilize the Korean Peninsula. For South Korea, the situation reflects the resurgence of Cold War-era tensions and the revival of a bipolar order that will necessarily exacerbate the fault lines drawn across the Korean Peninsula. With its northern adversarial neighbour quickly ramping up its own ballistic missile testing amid the cover of the Ukraine conflict (Table 1),⁸ Seoul is anxious that Kim Jong-un could follow Putin's lead and increase aggression, if not attempt an all-out invasion in the coming times.⁹ Furthermore, Kim Jong-un will no doubt take note of how Ukraine, which surrendered its nuclear arsenal post the Soviet Union's collapse, is now subject to assault by a great power – making any attempt at denuclearization more problematic.

Table 1: North Korean Missile Launches in 2022

Date	Missile Tested	Missile Type	Number Launched
March 4, 2022	Experimental precursor to a new full-range intercontinental ballistic missile (ICBM)	Unknown short-range ballistic missile (SRBM)	1

February 26, 2022	Experimental precursor to a new full-range ICBM	SRBM	1
January 30, 2022	Hwasong-12	Intermediate-range ballistic missile (IRBM)	1
January 25, 2022	Unnamed Cruise Missile	Land attack cruise missile (LACM)	2
January 17, 2022	KN-24	SRBM	2
January 13, 2022	KN-23	SRBM	2
January 11, 2022	MaRV Ballistic Missile	Maneuverable re-entry vehicle (MaRV)	1
January 4, 2022	MaRV Ballistic Missile	MaRV	1

Source: Prepared by the author based on the CSIS Missile Defense Project Database

<https://missilethreat.csis.org/north-korea-missile-launches-1984-present/> and news sources.

Accessed March 14, 2022.

The crisis has also spurred a debate on the implications of an autocratic great power posing an existential threat to a small neighbouring state – particularly how China’s hegemonic ambitions could impact South Korea. Seoul has long been subject to Beijing’s economic authoritarianism, such as in retaliation for hosting the American Terminal High Altitude Area Defense (THAAD) missile defense systems in 2017. Now, it must consider the merits of shifting away from its pragmatic balancing act of diplomacy between economic partner China and security partner US. Incoming President Yoon Suk-yeol¹⁰ will need to reassess Seoul’s priorities and, as the spectre of nuclear war rises, quickly realize his pledge for an enhanced US alliance and a more assertive stance vis-à-vis Beijing.

Southeast Asia

Although geographically distant, the crisis has significant economic, security, and political consequences for Southeast Asia. The Association of Southeast Asian Nations (ASEAN) shares strong economic ties with China, and while China continues to tacitly support Russia, its response to the Ukraine crisis has been carefully measured and its criticism has been implicit rather than explicit. The crisis could particularly impact supply chains and commodity price inflation in sectors like food (grains and cereals), fertilizers, tourism, oil and gas, and weapons sales, considering Russia is the region’s ninth-largest trading partner and largest arms supplier.¹¹ Ukraine is a major

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defense parts supplier for Thailand, and Ukraine and Russia combined account for 25 percent of Indonesia's wheat supplies and 50 percent of its fertilizer.¹²

Further, Vietnam, Myanmar, Malaysia, and Indonesia are long-standing defense equipment customers, including for Russian jets. In 2000, Russia supplied Vietnam with 11 Su-27 and 35 Su-30 fighter jets, four frigates, 12 corvettes, six missile patrol boats, and six Kilo-class submarines.¹³ In 2020, Hanoi concluded a deal to purchase 12 Yak-130 combat training aircraft with an indication to further acquire the Su-35 and 5th generation Su-57 combat aircraft.¹⁴ Since 2000, Myanmar has acquired 30 MiG-29s, 12 Yak-130s, 25 Mi-17 transport and Mi-35 attack helicopters, and eight Pechora-2M anti-aircraft missile systems from Russia.¹⁵ In fact, Russia has supplied over 80 percent of Vietnam's military equipment and a major portion of Myanmar's military junta's ammunitions.¹⁶ Furthermore, Malaysia has 18 Su-30s in service and is currently in discussions to acquire a new fleet of Light Combat Aircraft (LCA) like Russia's Yak-130 in the coming times.¹⁷ With Indonesia, although the deal for Su-35 aircraft (worth USD 1.14 billion) remains uncertain amid the US' threat of CAATSA sanctions, Jakarta has previously purchased both fighter jets (five Su-27 and 11 Su-30) and helicopters (18 Mi-17 and three Mi-35) from Russia.¹⁸ Table 2 projects the details for Russia's total arms trade with the region.

However, the direct economic impact will be limited to a small percentage of China's total economic activity. The real danger is the exacerbation of political tensions with the West that could detract from the grandeur and momentum of China's power to shape global affairs.

**Table 2: Russia's Defense Exports to Southeast Asia by Country
(USD million)**

	2000-04	2005-09	2010-14	2015-19	Total	As a % of Total Arms Imports
Vietnam	446	404	3,278	2,387	6,515	84%
Malaysia	63	1,221	14	156	1,454	31%
Myanmar	341	443	651	-	1,435	39%
Indonesia	267	206	675	-	1,148	16%
Laos	8	4	14	76	102	44%
Thailand	-	3	20	27	73	2%
Total	1,125	2,281	4,652	2,646	10,704	-

Source: SIPRI Arms Transfer Database,
<https://www.sipri.org/databases/armstransfers>. Accessed March 18, 2022.

More importantly, several ASEAN states (like Vietnam, Cambodia, and the Philippines) share strong positive ties with Russia. Political elites like Cambodia's Hun Sen and the Philippine's Rodrigo Duterte hail Putin as a "friend"¹⁹ and a "hero,"²⁰ pointing to a

difference in perceptions of individual member states. Such divisions are evident in the individual responses of ASEAN member states: Singapore both condemned and imposed economic sanctions on Russia; Brunei followed suit in condemning the “violation of sovereignty” but did not declare any sanctions; Vietnam has thus far been silent on the matter; Malaysia, Thailand, and Indonesia’s response comprised a mild (and rather vague) statements criticizing violations of sovereignty and territorial integrity and support for a peaceful settlement; while Myanmar has outright supported Russia’s actions.²¹ Should the crisis persist, however, ASEAN may be pressed to take a stronger stance and take a call on Moscow’s continued participation in ASEAN-centric forums, which could complicate internal synergy.

Despite its diplomatic speak of a peaceful solution, Beijing is reportedly open to providing military support to Russia (including equipment like surface-to-air missiles, drones, armoured vehicles and intelligence-related apparatus), which would constitute a firm alliance and be a gamechanger for Indo-Pacific and global geopolitics.

China

China’s macro-economic policy has long centred on minimizing financial risks, but these have grown exponentially with the Ukraine crisis. In the short term, China’s trade with Russia (US \$147 billion) and Ukraine (US \$19 billion) will suffer due to Western sanctions.²² Chinese tech companies like Xiaomi, Lenovo, and SMIC that have a large market in Russia will incur heavy losses; aluminium and nickel supplies may suffer, and prices of natural gas will become volatile. In contrast, China’s Yuan is quickly emerging as a safe haven currency due to its resilience in the face of growing commodity prices and the risk of imported inflation, adding to its economic prowess.²³

However, the direct economic impact will be limited to a small percentage of China’s total economic activity. The real danger is the exacerbation of political tensions with the West that could detract from the grandeur and momentum of China’s power to shape global affairs.²⁴ Since 2014, Xi Jinping has strengthened ties with Russia to form a quasi-alliance that rejects NATO’s expansion in Eastern Europe and America’s alliance-building in the Indo-Pacific.²⁵ Now, Beijing is concerned that the crisis represents a “pivot in world history”²⁶ that has put the West on high alert, making it all-that-more difficult for China to achieve its hegemonic ambitions. China’s tacit condoning of the invasion and support of Putin’s narrative of blaming the West²⁷ will galvanize Washington and Brussels to bridge persistent gaps in their postures and strategies towards China as they make a robust effort to revitalize the liberal international order in the wake of the Ukraine crisis. This will include an invigorated transatlantic alliance to strengthen collective competitiveness and oppose any unilateral actions by China.

The question then arises: How will China’s posture shift in response to the crisis?

Will Beijing sustain its ‘friendship without limits’ with Russia? Will it follow the precedent set by Russia and invade Taiwan militarily? For now, Beijing is adopting a ‘pro-Russia neutrality’ stance, wherein it abstained, not vetoed, in the United Nations vote to condemn Russia’s invasion and offered to play a constructive role in mediating peace. Yet, despite its diplomatic speak of a peaceful solution, Beijing is reportedly open to providing military support to Russia (including equipment like surface-to-air missiles, drones, armoured vehicles and intelligence-related apparatus), which would constitute a firm alliance and be a gamechanger for Indo-Pacific and global geopolitics.²⁸ Such a changing regional calculus, in addition to the potential diversion of US resources away from the Indo-Pacific theatre, could give Xi the impetus he needs to take action on Taiwan and further solidify his place in history.

India’s dilemma is between its long-term, Cold War-era ‘friend’ Russia and growing ties with the West built on synergy over China. India’s stance is, in fact, necessitated by its precarious security environment.

India's Role and Options?

Considering India’s major dealings with Russia, the market reverberations caused by the Ukraine crisis have negatively impacted India’s economic growth forecast amid a supply shock, inflating fuel, food, fertilizer, and base metal costs. More importantly, while the conflict continues, India will be unable to source military spares for critical equipment, thus impacting its ability to respond to Chinese threat.²⁹ India’s dilemma is between its long-term, Cold War-era ‘friend’ Russia and growing ties with the West built on synergy over China. Although the US and EU are disappointed over India’s neutral position on the issue – Delhi abstained from the UN vote and has not joined international sanctions on Moscow – India’s stance is, in fact, necessitated by its precarious security environment. With Russia (and Ukraine) being a major arms trade partner (responsible for 50-80 percent of India’s outsourced military equipment) that has supported India post its controversial nuclear tests in the 1990s, India’s neutral position in the UN can be understood. Furthermore, New Delhi’s priority is the security challenge it faces from China on its northern border, and it recognizes that tilting away from Russia will only push Moscow and Beijing further together, creating a formidable adversary in India’s neighbourhood.

For India, the incident exposed Western hypocrisy in condemning India for considering buying Russian oil at discounted prices to secure its energy supply chains, even as Europe continues to purchase about half its oil and gas from Russia. In this context, the crisis has exposed a gap in priorities between India and its Western partners and only reinforced India’s commitment to strategic autonomy. Further, the Chinese foreign minister’s visit to India, the first high-level visit since the Galwan clash, signals the changing global dynamics. While it may not de-escalate border tensions at Ladakh or resolve their trust deficit, the visit could further high-level exchanges on Russia and enhance cooperation through shared

international/regional forums, including the Brazil-Russia-India-China-South Africa (BRICS) and Russia-India-China (RIC) groupings.

India has thus far employed skilful diplomacy to manage the situation. This has strategically placed India as the only major power with high-level access to Moscow and positive ties with both Russia and the West; therefore, perfectly positioned to facilitate negotiations and mediate peace between the warring factions. As India's Defense Minister declared, India wants peace to prevail³⁰ to ensure global focus reverts to China. Although China too enjoys continued and robust ties with Russia, its interests are not necessarily peaceful as it looks to take advantage of the unrest to further its ambitions. Further, China would not be an acceptable mediator for the US while intense tensions between them persist. Here, perhaps the only way to ensure the last outcome scenario is with India acting as a mediator. Such a position would be in line with New Delhi's efforts to assume a more active and vocal role in international politics. However, for this, India will need to ensure that its diplomatic tactics do not become ambivalent but continue to vigorously and deftly promote peace by bringing involved parties to the table.

Notes:

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