

La guerra de Ucrania y la rebelión del Sur global

Resumen:

La guerra de Ucrania se está alargando y complicando a un precio altísimo para las partes. Occidente ha respondido a la agresión militar de Rusia con un conjunto de sanciones sin precedentes, cuyo efecto, sin embargo, ha quedado reducido por la negativa del Sur global de alinearse en dicho sentido con Estados Unidos y sus más estrechos aliados.

Percibiendo el declinar de la era eurocéntrica de la historia humana, los países del Sur global han decidido actuar conforme a sus propios intereses, mantener su autonomía y no verse arrastrados a una confrontación que no perciben como suya.

También entran en juego el resentimiento por los abusos de la época colonial, la percepción de que Occidente utiliza según su conveniencia distintas varas de medir y el rechazo a que una parte del mundo le imponga al resto su sistema de valores.

En cualquier caso, la pugna entre las potencias occidentales y la Federación Rusa por intentar alinear al Sur global conforme con sus designios estratégicos será una de las claves que pueda determinar, tanto el desenlace de la contienda militar, como, fundamentalmente, la supervivencia de la Rusia de Putin cuando la guerra acabe.

Palabras clave:

Sur global, guerra de Ucrania, sanciones, Occidente, Estados Unidos, China, India.

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Introduction

The war in Ukraine has provoked a unanimous reaction against Russian aggression from the EU, the US and the US's closest allies. In the rest of the world, however, the attitude has been different. This is producing a fracture between the West and what has been termed the "global South" (figure 1).

Figure 1: Map of the global South. Source: Author's own elaboration.



To the surprise of Washington and its allies, the country leading this wave of opinion is India, a close strategic partner of the US in its rivalry with China.

It coincides with a particularly unique historical moment—considered by many to be a turning point—when it would appear that after five centuries the Western powers are ceding the leadership of history to the Asian world¹. Faced with a foreseeable new hierarchy of power, international actors are looking out for their own interests and seeking to position themselves well vis-à-vis the future international system.

This paradigm shift, dominated by intense and growing Sino-US rivalry, is compounded by a significant component of anti-Western resentment linked to the colonial past.

In a similar vein, the moral authority of Western powers has been undermined by events that have remained in the memory of various international actors, including the recent Western lack of solidarity during the COVID-19 pandemic.

¹ SHAMBAUGH, David. "International Relations of Asia", Third Edition. Rowman & Littlefield, 2022.

It could be said that the nations of the global South see themselves as having come of age and are ready to break definitively from the tutelage that, in one way or another, the West has exercised over the rest of the world, epitomised in the expression popularised by Niall Ferguson, "The West and the Rest"².

Furthermore, as Josep Piqué expresses, there is great concern about the values that will end up predominating in the world to come:

"A future based on human freedom and dignity, with a sustainable environment, where technology is not an instrument of domination and where geopolitical tensions do not lead us into situations that put our very existence at risk. Or an alternative future based on totalitarian authoritarianism and the use of force outside international law"³.

The strategic implications are enormous, and all the more so at a time of heightened uncertainty, when we do not know how the war in Ukraine will end, the nuclear threat has escalated, and some analysts are pondering whether Europe and the world are sleepwalking into the abyss⁴. While it is essential for Washington and its allies to isolate Russia to suffocate it economically, technologically and politically, for the Kremlin much of the hope of surviving this war as a great power lies in redirecting its trade flows and its network of diplomatic ties to the global South in revolt against the West, thereby breaking a world order over which Western powers have had significant leverage.

War in Ukraine becomes chronic

The Ukrainian war began on 24 February with what the Kremlin called a 'special military operation' whose main objective was to bring about a change of government in Kiev that would be favourable to Moscow. Putin's aim was to ensure that Ukraine could *de facto* not be incorporated into Washington's sphere of influence but would remain under Moscow's strategic control.

The operation which, according to the Kremlin's assessment, was to be completed in a few days—no more than a couple of weeks—failed and the war turned into an armed

² FERGUSON, Niall. "Civilization. The West and the Rest", Allen Lane. 2011.

³ PIQUÉ, Josep. "Macrotrends in the World Ahead", Foreign Policy. 28 July 2022. Available at: [Macrotrends in the World Ahead: Foreign Policy \(politicaexterior.com\)](https://www.politicaexterior.com).

⁴ MEARSHEIMER, John J. "Playing With Fire in Ukraine. The Underappreciated Risks of Catastrophic Escalation", Foreign Affairs. 17 August 2022.

conflict of major proportions, the likes of which the world has not known since the Second World War, with extremely serious consequences for all the actors involved, as well as for the rest of the world.

In response to Russia's invasion of Ukraine, the West imposed broad economic sanctions in a way that marked a historic shift: several Russian banks were disconnected from SWIFT; Russia's largest banks, including Sberbank and VTB, were placed on comprehensive blocking sanctions lists; and more than half of the Russian Central Bank's foreign currency reserves, valued at \$640 billion, were frozen⁵.

Sanctions were also imposed in the energy field, although this was soon found to be contributing to higher prices for both oil and natural gas, which has ended up hurting as much the other European countries as Russia itself. Likewise, Russian countersanctions, notably the significant reduction of natural gas supplies to the EU, has had their desired effect. By 31 July, pipeline volumes, more than 400 million cubic metres per day (mm³/day) a year earlier, had fallen to around 100 mm³/day; the price of electricity in Germany almost doubled between January and June, from €140 to €260 per megawatt-hour; and gas shortages are already causing major industries to reduce production⁶.

The Ukrainian counteroffensive in September has, for the first time in the course of the armed conflict, forced the Kremlin to confront the possibility of losing the war⁷. The partial mobilisation of 300,000 Russian reservists, referendums on the annexation of occupied provinces, the intensification of nuclear threats and the attack on the Nord Stream pipelines—the perpetrators of which are yet to be determined—paint a very worrying picture of escalation.

Hence, in the present circumstances, there is no end in sight to the impasse into which this war has driven itself. Kiev seems determined to regain all lost territory, including Crimea; Moscow seems unwilling to accept defeat; and Washington will not allow Russia to get away with what it has done.

For the Kremlin, any outcome of the war that can be perceived as a defeat is interpreted as nothing less than an existential threat, the possibility of civil war or even territorial

⁵ SHAGINA, Maria. "Western Financial Warfare and Russia's De-dollarization Strategy. How Sanctions on Russia might reshape the Global Financial System". FIIA Briefing, Paper No. 339. May 2022.

⁶ JENTLESON, Bruce W. "Who's Winning the Sanctions War? The West has inflicted damage on the Russian economy, but Putin has so far contained those costs". Foreign Policy Analysis 18 August 2022.

⁷ FIX, Liana and KIMMAGE, Michael. Putin's Next Move in Ukraine. Mobilize, Retreat, or Something In between? Foreign Affairs. 22 September 2022.

dismemberment. For Washington, the survival of Putin's regime in a strong international position would irreparably damage its international leadership and leave the US greatly weakened vis-à-vis the Chinese challenge, which is its current strategic priority. The more desperate the situation becomes for Russia, the more likely it is that the Kremlin will use a nuclear weapon, something that conditions and tempers the White House's actions in the conflict.

The US and its allies would see a smoother path if Russia were cut off from the rest of the world. US diplomacy, and that of many of its allies, is exerting a great deal of political and diplomatic pressure in this regard. For its part, Moscow is deploying its entire network of international relations to counteract this position, to find new markets for its energy resources and to open new import channels to access the capabilities, mainly technological, that the West was supplying it with.

Russia's recent setbacks have exposed its vulnerabilities and are raising doubts in the global South about its relations with Moscow. At the recent Shanghai Cooperation Organisation summit in Samarkand, both China and India expressed concern about the direction the war is taking. Ultimately, the costs of this war will fall mainly on the weaker economies of the global South, given that their states lack buffers, be they strategic commodity reserves, liquidity or trade surpluses⁸.

The view from the global South

While initially, on 2 March, 141 of the representatives of the 193 countries that make up the UN General Assembly voted in favour of condemning Russia for its military aggression against Ukraine, and five voted against (Belarus, North Korea, Eritrea, Syria and Russia itself), with 35 abstentions (Pakistan, Iran, Sudan and Iraq), when Russia's expulsion from the Human Rights Council was subsequently proposed in the same forum, many countries of the global South abstained, added to Beijing's opposition, representing three quarters of the world's population.

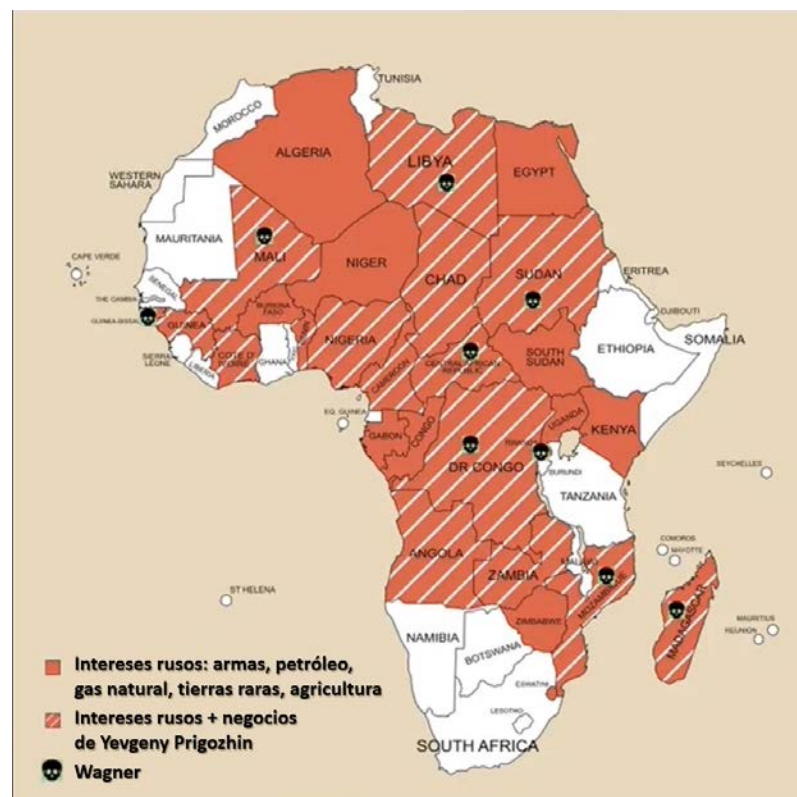
Subsequently, when on 26 April US Secretary of Defence Lloyd Austin convened the countries opposed to the invasion at the US military base in Ramstein (Germany) to establish the *Ukraine Security Consultative Group* to coordinate all support for the

⁸ MULDER, Nicolas. "The Collateral Damage of a Long Economic War. Sanctions Have Hurt But Not Felled Russia-and Are Harming the Global South", Foreign Affairs. 26 September 2022.

invaded country in its fight against Russian forces, only about forty countries attended, few more than the NATO members, the European Union countries and the Pacific democracies⁹.

Regarding the sanctions on Russia, the reaction from the global South has been minor, most of these countries continuing to trade with Moscow and even benefit in some respects from a privileged relationship with the Kremlin, reflected in their 30% reduction in the price of imported oil.

Figure 2: Presence of the Russian Federation in Africa. Source: Rusi.



Latin America, very much conditioned by domestic political issues, is maintaining a rather ambiguous and polarised position either in favour of or against Russia, with the governments closest to populism and authoritarianism the most favourable to the Kremlin. In sub-Saharan Africa, states are trying not to get involved in the Russo-Western rivalry, many of them with important relations with Russia (figure 2), reflected in increasing imports of Russian weaponry and the presence of Wagner mercenaries in 9 of them.

⁹ DACOBA CERVIÑO, Francisco José. "Ukraine: neither blitzkrieg nor lasting peace", IEEE Analysis Paper 51/2022. 13 July 2022.

In the Middle East and North Africa there is a mix of energy interests, given that Moscow's participation in OPEC+ remains key to maintaining high oil prices and its dependence on Russian and Ukrainian grain imports. The MENA region is both the world's largest exporter of hydrocarbons and the largest importer of cereals.

Diverse positions are being held in Asia. While Japan, South Korea, Singapore and Taiwan have unequivocally aligned themselves with the US, the People's Republic of China has taken the opposite stance, although rather than a pro-Russian policy, Beijing's stand is one of increasingly resolute rejection of US leadership¹⁰. China's relationship with Moscow largely determines Russia's ability to sustain this war and to survive as a power when it is over. For the time being, China has increased its imports of Russian oil, provided some military assets and intervened with statements of support, though not as fully as the pre-invasion "no limits" partnership between Russia and China implied¹¹.

India is a unique case, being a country close to Washington, while so far preferring to refrain from any condemnation that identifies Vladimir Putin's government as the aggressor. The relationship with Russia plays an important role in India's aspirations to become a great power on the basis of greater strategic autonomy. New Delhi does not want a severely weakened Russia to help prevent it from falling completely under Chinese influence.

Moscow is not only a historical partner that has always remained loyal to their alliance but is providing India with oil at heavily discounted prices—thereby increasing Indian imports from Russia from 1% to 20%—and is its largest military partner. Although India has diversified its sources of arms imports, to the effect that its main arms suppliers in the period 2016-20 were Russia (49%), France (18%) and Israel (13%)¹², it nonetheless remains dependent on Moscow to sustain its armed forces.

For its part, the US, which has pressed India so far to no avail, has maintained in official statements a difficult balance between evident disappointment with New Delhi's attitude and the need for India's continued support in diplomatic efforts to contain China's influence in the Indo-Pacific region¹³.

¹⁰ HOLBIG, Hieke. "War in Ukraine and the Global South: Perceptions, reactions and Implications", GIGA Forum (online). May 2022.

¹¹ JENTLESON, Bruce W. "Who's Winning the Sanctions War? The west has inflicted damage on the Russian economy, but Putin has so far contained those costs". Foreign Policy Analysis 18 August 2022.

¹² SIPRY report 2021.

¹³ RIDAO, José María. "India and the World", Foreign Policy Review, 1 July 2022.

The reasons that drive the countries of the global South to act in this way are a combination of specific interests, the search for greater autonomy, and the rejection of the West as a reference point for global order and behaviour, with an important component of resentment towards the Western powers, both for the excesses of imperialism in the colonialist era and for the West's determination to impose its values on others as universal ones.

Moreover, the global South—which calls for greater representation in international institutions, particularly the UN Security Council—sees Ukraine as a distant conflict that is not its war, despite its states suffering equally from its consequences: rising energy and food prices, inflation and the risk of a serious downturn in the global economy.

In relation to climate policies, the global South also has a clear difference in perspective, with rich countries feeling increasing urgency to reduce emissions and developing countries remaining focused on the need to deliver growth for their citizens. Given that climate change is the result of the accumulation of CO₂ emissions over time and half of the total emissions since the beginning of the industrial era have come from the US and Europe alone—only 2% have come from the entire African continent—a just transition cannot fall equally on both. While at the same time facing the worst consequences of climate change, to reach half the standard of living of more developed nations, emerging countries would have to increase global energy consumption by 50%, entirely in contradiction to the goals of the energy transition¹⁴.

Resentment and the desire for revenge never lead to positive outcomes, but they must be factored into the equation of human behaviour. Hence, there is a responsibility for the abuses that have generated these feelings. Actions have consequences, and the outrages committed by the imperialist powers from the mid-19th to the mid-20th century which the victims, because of their relative weakness, were powerless to resist, are now being prosecuted. The case of China and the Opium Wars is illustrative of the point, serving Beijing to close ranks and strengthen its nationalism by appealing to the "century of humiliations".

In August this year, at an event celebrating India's 75th anniversary of independence, Narendra Modi—who never wears Western clothes in a clear sign of cultural self-assertion—proclaimed the desire for India to become a developed state by 2047, the

¹⁴ BORDOFF, Jason, O'SULLIVAN, Megan L. Op. Cit.

centenary of its independence. One of his goals is to rid his country of all traces of colonial mentality and to take pride in its own roots. Modi is a fervent nationalist and, as such, delves deeply into his own historical references. He is also the first post-independence Indian leader who does not come from the country's Westernised elite.

This emerging India does not forget that between 1750 and 1900, because of the policies of the British Raj, its manufacturing output fell from 24.5% of the world's output to a meagre 1.7%¹⁵; that London encouraged the partition of India to retain greater control over the resulting parts; and the structural racism of the British Empire that rejected intermarriage as demeaning, in stark contrast to the miscegenation practised by the Iberian nations¹⁶.

Against this well-known backdrop, the moral authority of the Western powers has been greatly weakened and is no longer backed by their overwhelming material, scientific and organisational superiority¹⁷. Thus, from other regions of the world, powers are accused of hypocrisy when they dismiss as nineteenth-century attitudes that led them to their current position of prosperity and power, especially when Western nations self-appoint as the judges of others' behaviour, something that is always annoying for those who are being reprimanded and, furthermore, never fails to expose the contradictions of those who, from a moral pedestal, are pointing the finger¹⁸.

While there are undoubtedly fair assessments in all this, there are also distorted approaches. In many cases, countries of the global South blame Western states for their own failures, something deeply rooted in human psychology, or they commit real barbarisms against their own population in the name of their cultural or geopolitical singularities with impunity; in other cases, they complain quite justifiably about the double standards applied, particularly in the treatment of war refugees when they come precisely from the global South, and they question the legitimacy of the US invasion of Iraq in 2003, which lacked a UN mandate¹⁹.

¹⁵ PAUL, T. V. "India's Role in Asia", Edited by SHAMBUAGH, David. "International Relations of Asia", Third Edition. Rowman & Littlefield, 2022. Chapter 7, p. 164.

¹⁶ GULLO, Marcelo. "Motherland", Espasa. 2021.

¹⁷ MAHBUBANI, Kishore. "The Asian 21st Century", Springer. 2022.

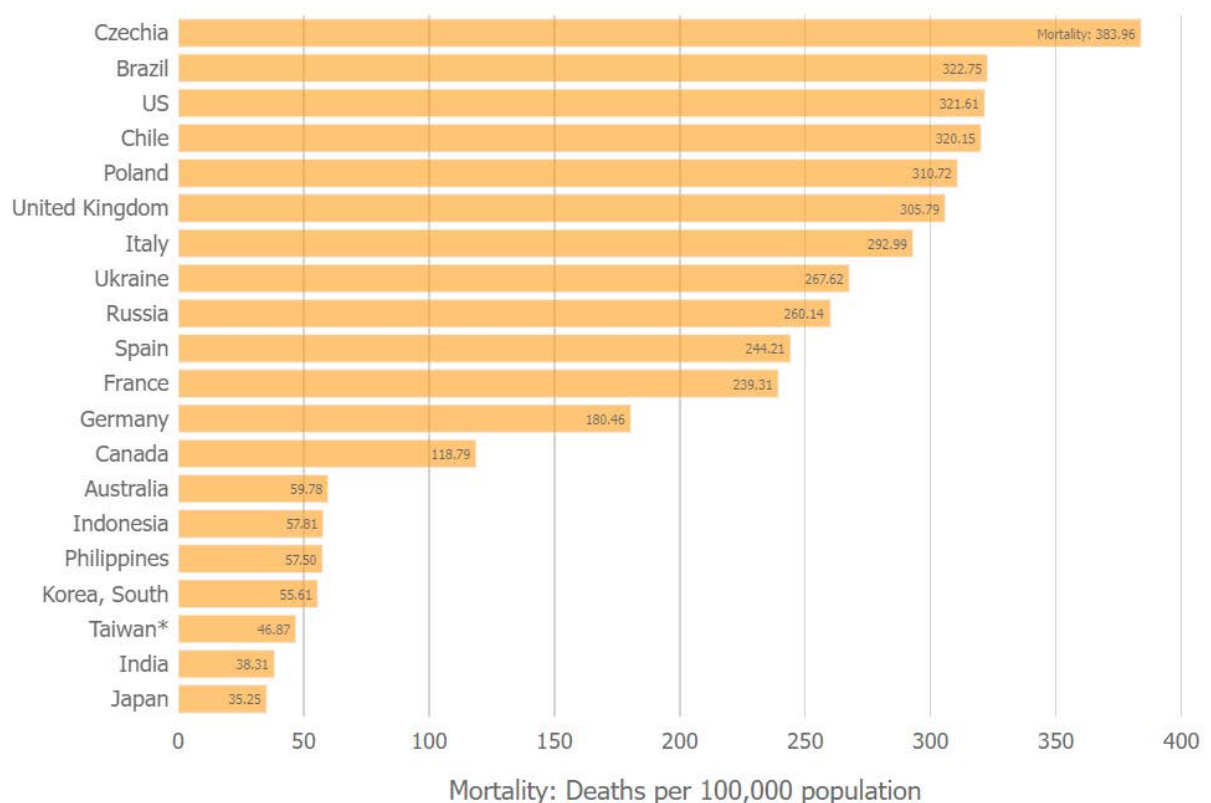
¹⁸ STUBB, Alexander. Video "Understanding the War in Ukraine (11) - West and the Rest". Available at [Understanding the War in Ukraine \(11\) - West and the Rest - YouTube](#).

¹⁹ STUBB, Alexander. Video Cit.

Furthermore, as Parag Khanna points out, Asia is now beginning to speak of differentiate Asian values, less individualistic, more accepting of hierarchy and more conservative in relation to the family model. This emerging view of Asian values has been strengthened by the successes of the more advanced countries in the region linked to the pandemic, reflected in the higher mortality figures per 100,000 population in the West (Figure 3): The US 321, Poland 310, the UK 305, Italy 292, Spain 244, France 239, Germany 180, Canada 118; South Korea 55, Taiwan 46, India 38, Japan 35²⁰.

Certainly, within Asian societies there is divided opinion in relation to the West and some important sectors are very westernised or favourable to its approaches, which is producing a growing polarisation between varying positions in terms of the western model of society and its geopolitical designs.

Figure 3: COVID-19 mortality per 100,000 population. Sources: Johns Hopkins University (04/10/2022)



²⁰ "Mortality in the most affected countries", John Hopkins University, Coronavirus Resource Center. Consulted on 4/19/2022. See [Mortality Analyses - Johns Hopkins Coronavirus Resource Center \(jhu.edu\)](https://www.jhu.edu/).

All's fair in troubled waters

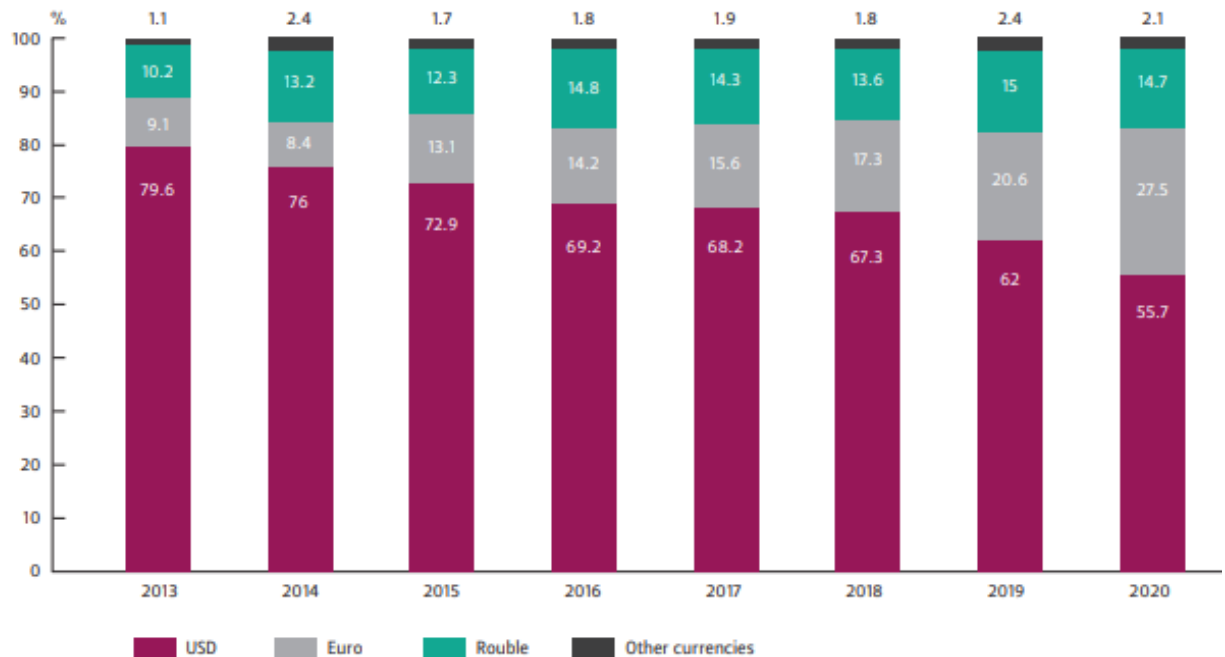
In the context described above and building on a broad network of relations and interests that link Russia to the global South, the Kremlin is finding ways to redirect its trade flows and to partly circumvent Western sanctions. Certainly, infrastructures do not change overnight and it will particularly take years for natural gas exports to be redirected even if, in the short term, higher prices are compensating for the reduction in export volumes of both gas and oil—not counting the revenues from hidden Russian oil exports, which have tripled²¹.

Since February 2022, the Kremlin has redoubled its efforts to protect the country's economy, shift it away from the US dollar and promote the rouble in international trade. Moscow, guided by geopolitical and security considerations, had as early as 2014 initiated a plan to de-dollarise Russia. To this effect (Figure 4), between 2013 and 2020, the dollar's share of Russian exports fell from almost 80% to 55%. Russia's de-dollarisation effort coincides with China's strategy to weaken the dominance of the US dollar and internationalise its currency. Following this dynamic, the global financial system is gravitating towards fragmentation and monetary multipolarity. It remains to be seen how this will affect Russia's ability to escape Western sanctions and the unintended impact on the global financial system²².

²¹ JENTLESON, Bruce W. "Who's Winning the Sanctions War? The West has inflicted damage on the Russian economy, but Putin has so far contained those costs". Foreign Policy Analysis 18 August 2022.

²² SHAGINA, Maria. Op. Cit.

Figure 4: Currency composition of Russian exports. Source: FIIA.



Opinions differ on the Kremlin's ability to overcome the effect of sanctions. According to IMF data, Russia's economic contraction forecast for 2022 went from -8.5 % at the beginning of the war to -6 % in July. However, the escalation we are witnessing is likely to have devastating long-term effects for Russia.

More than 1,000 multinational companies have terminated or significantly reduced their relationship with Russia. The weakest points are Russia's enormous technological dependence on European countries such as Germany and France, and the embargo on semiconductors. Russia will have a hard time countering this exodus and the effects are already being felt on its military operations.

To reduce the accumulating costs, the Kremlin has resorted to a combination of economic compensatory measures and political repression. The central bank's interest rate hikes and capital controls helped the rouble move from its initial steep decline to a seven-year high at the end of June. Increases in retirement pensions and company bailouts have helped to cushion the effects on the average Russian. Political repression quelled the initial wave of internal protests. The few oligarchs who have dared to speak out have paid a high price.

It is difficult to assess how much Russia and Ukraine are willing to suffer in this war. The US will support Ukraine for as long as it takes to bleed Russia in the process. Putin is probably hoping that winter will work in his favour and that his energy dominance will allow him to divide European countries, damage the Ukrainian economy and

combat capability, thereby turning the outcome of the war around. Additional concern in the Kremlin comes both from the resistance of part of the Russian population to forced mobilisation and from the behaviour of some of the former Soviet republics which, sensing Russian weakness, are beginning to defy Russian diktat.

"Border skirmishes between Armenia and Azerbaijan in the Caucasus and between Kyrgyzstan and Tajikistan in Central Asia have exposed the power vacuum created by the war in Ukraine on the Russian periphery, where until recently not a leaf was overturned without the Kremlin's consent."²³.

All of this means that time is turning against Putin's strategic designs. Nonetheless, the degree of barbarism this war is generating is pushing the parties into an unknown abyss.

In the meantime, the Kremlin's ability to sustain the war and, above all, to remain a power when it is over will be heavily conditioned by the struggle between the West and Russia to align the global South according to its strategic interests.

Conclusion

Russia's invasion of Ukraine has degenerated into a devastating war of attrition with a very uncertain and increasingly dangerous future. Neither side seems willing to compromise. Kiev is unwilling to cede territory to Russia; Moscow sees defeat as an existential threat; and Washington would lose its prestige and international leadership if Putin's Russia is not severely punished for military aggression in Ukraine.

To bring Russia to its knees, the US and its allies have launched an unprecedented series of sanctions. However, the global South, most notably India, has not aligned itself with the West in the desired economic, technological and political encirclement of Russia, thereby giving the Kremlin leeway both to wage this war and to defend its great power status once it is over.

For the countries of the global South, it is a distant war, not their own, but one whose consequences they are suffering all the same. Their reaction is as much a matter of self-interest as of defence of their autonomy and resentment of the behaviour of the imperialist

²³ "Russia loses control of its periphery", Foreign Policy Weekly, no. 1293. 3 October 2022.

powers in the colonial era, in a global context where the decline of the West is looming ever closer.

For the moment, the Kremlin is surviving sanctions and Western pressure better than expected. It remains to be seen how this war will end, and the threats to global security are manifold. The struggle between Western powers and Russia to align the countries of the global South in their broad-based strategy could prove to be one of the keys to the final outcome.

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