

On March 24, 2022, the Cascade Institute convened eight experts to identify unanticipated spillover effects of the Ukraine-Russia war (URW) for world political, economic, and ecological systems. The experts' knowledge spanned relevant topics including food systems, risk governance, global finance, international security, civil instability, climate policy, and social innovation. Members of this URW Expert Panel included:

Evan Fraser, Director, Arrell Food Institute; Professor, Department of Geography, University of Guelph, Canada.

Chris Higson, Associate Professor, Accounting Practice, London Business School, UK.

Jonathan Leader Maynard, Lecturer, International Politics, Department of Political Economy, King's College London, UK.

Ellen Quigley, Senior Research Associate, Climate Risk and Sustainable Finance, Centre for the Study of Existential Risk, UK.

Johan Rockström, Director, Potsdam Institute for Climate Impact Research, Germany

Jennifer Welsh, Canada 150 Research Chair, Global Governance and Security, McGill University, Canada

Frances Westley, Professor and Director Emeritus, Waterloo Institute on Social Innovation and Resilience, University of Waterloo, Canada.

Panelists recognized the need for humility in such complex, rapidly evolving, and deeply uncertain circumstances. They understood the exercise not as an effort to predict the future but as an attempt at detection—a thoughtful probing of the new possibility space that the war is creating for the world. The Institute will ultimately summarize the group's key findings for communication to commentators, analysts, and policymakers.

The panel's observations can be grouped under five main headings.

1. Hunger, anger, and political instability

Four key dynamics—each unlikely to have significant impacts on the global food system—could, if combined, produce catastrophic consequences. First, the world's number one (Russia) and number five (Ukraine) wheat exporters will export very little grain to the rest of the world in 2022. Second, there's an existing lack of supply in the food system (the food stock-to-use ratio is at an 8-year low). Third, food prices are already high, in part as a result of low supply, but also due to inflation and supply-chain issues related to the pandemic. And fourth, there's a possibility of an unproductive Canadian prairie winter wheat crop this spring and poor yields in India or China later this year—perhaps because of climate change's impacts.

Combined, these four factors could put an unprecedented strain on the global food system—a strain that will be amplified by the fact that food has a different psychological impact (both personal and

social) than other commodities. Problems in the food system like soaring food prices are more likely to trigger anger than other systemic stresses, and this anger then puts pressure on existing social fault lines. We observed this dynamic during the Arab Spring, which was triggered, in part, by rising food prices. Food system pressure is most likely to affect net-importing countries, countries in the global south, and BIPOC communities, because they are more likely to be food insecure.

As a response to rising food insecurity, we will see countries decrease (but not abandon) reliance on food imports by increasing self-sufficiency. The comments on food set the stage for panelists' later observations about how the war might be redrawing the contours of the global economy.

2. Deglobalization and the reconstitution of world order

Panelists identified several trends that are both pulling the global economic order apart and reconstituting it in new ways. To the surprise and dismay of the West, a significant number of “non-aligned” states—including such democracies such as India and South Africa—have not rushed to join the West’s “moral high ground” in denouncing Russia. We may not see a clean schism between two camps as occurred in the Cold War, but a far more fragmented world order.

Many of these non-aligned states and states that are sympathetic to Russia could be learning from Putin’s mistakes and adapting their behavior. Seeing the West’s swift and coordinated response to damage Russia’s economy, they will likely conclude that being deeply embedded in a global economy dominated by the US and Europe poses a major risk to regime survival. Countries may seek out or build alternative economic structures, such as the China-led Asian Infrastructure Investment Bank.

Panelists also identified dynamics knitting countries together in new ways. For example, Russia’s inability to achieve a quick, decisive victory in Ukraine shows that waging a largescale modern war carries immense costs—even for a country with one of the largest and most technologically advanced militaries in the world. Simultaneously, the West’s ability to coordinate sanctions quickly and effectively signals that it can still impose great costs (and benefits) on other states. Both outcomes raise incentives for international cooperation.

But the influx of Ukrainian refugees into Eastern Europe and beyond is a reminder of how migration flows are expected to grow exponentially in the coming decades, as people flee countries ravaged by the impacts of climate change—creating new (and likely conflictual) connections among countries. International humanitarian organizations are ill-equipped to handle this growing crisis.

3. Moribund institutions for international cooperation

The war could dramatically accelerate the ongoing erosion of institutions set up to prevent and address wars and humanitarian crises. The UN Security Council, in particular, has proved utterly ineffective. Great powers have filled this global-governance vacuum with ad hoc processes, underlining the fact that

in a world fraught with common challenges, countries still need to communicate and coordinate their actions with one another. But in a more fragmented or even “club-based” world order, we can expect international institutions will become even more “ideologically defined.”

The Russian invasion has further eroded humanitarian norms and underlined the failure of international humanitarian law. For example, the International Committee of the Red Cross, which requires consent to operate from all warring parties, has been unable to provide adequate relief in Ukraine. Also, as Russia has failed to achieve its war aims through conventional combat, its military has increasingly turned to indiscriminate bombardment that has caused humanitarian atrocities; this military failure has also increased Russia’s incentives to use unconventional tactics like cyberwarfare, and (potentially) chemical, biological, and nuclear weapons. The world needs a different kind of humanitarian actor that can operate effectively in extremely hostile military environments.

4. A tightening of ideological competition

Panelists observed an acceleration of ideological competition in world politics. States such as Russia and China, which analysts once falsely labeled as “nonideological” or “strategic opportunists,” are clearly motivated by distinct worldviews, beliefs, and goals that run contrary to the West’s dominant ideology. For states more sympathetic to Putin’s worldview, the war has likely entrenched their perception of globalization and economic integration as vehicles for Western values that threaten their regimes. Heightened ideological competition will increase incentives for states to interfere in foreign elections.

Deepened ideological cleavages at the international level will likely stimulate greater domestic ideological polarization, especially in countries with ideological interests that pull them towards both Western and non-Western camps (e.g., Saudi Arabia).

The Ukraine-Russia war will embolden the increasingly transnational fascist and white-nationalist movements. Putin’s actions and ideology are a reaction to a fear of societal decline. A collective “psychology of decline” is rapidly propagating in once-prosperous communities around the world. Wholesale restructuring of the global economy as it decarbonizes will help this psychology spread further in communities that the energy transition leaves behind.

5. Two trajectories in the Anthropocene

The Ukraine-Russia war presents us with two pathways for how humanity could navigate the climate crisis in this critical decade. On the one hand, rising energy and fertilizer prices, food crises, and a reenergized nuclear rivalry could lead us down a dark path, where states build higher and higher walls while climate change accelerates. In many countries that have recently committed to decarbonizing their economies (e.g., Canada), special interests seeking investment in new oil and gas production are once again arguing for “democratic energy” and “energy sovereignty.” These pressures could help

further entrench natural gas as a “transition fuel,” despite the fact that methane leakage from natural gas infrastructure is unavoidable and now a major contributor to climate change.

Conversely, the strain that the war has put on global energy systems could be a tipping point that fundamentally reframes climate change as a security crisis. Instead of responding to spiking energy prices by locking in fossil-fuel production for another 30 years, the war could spur countries to fully commit to a net-zero vision of independence from fossil-fuel energy. Widespread recognition that the world’s dependence on Russian oil and gas is funding the country’s war effort could translate into recognition that inaction on climate change props up authoritarian regimes and undermines global security.

It is still far from clear which of these pathways the world will ultimately follow.

Next steps

The Cascade Institute’s UWR Expert Panel will soon reconvene to explore in greater depth the interconnections and dependencies between these various trends, stresses, and risks. The discussion will focus on three questions:

1. What areas of the possibility space (systems, topics, fields of expertise) are missing from this exploratory exercise?
2. Which interconnected trends, stresses, and risks are missing from existing commentary and analysis of the war?
3. What cross-cutting policy strategies might simultaneously address more than one of these trends, stresses, and risks?