

How cascading turbulence may impact foreign relations

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October 30, 2023

The global strategic landscape at present defies description. Words such as “polycrisis”, “black swan” and “cataclysm” are thrown about by scholars, yet each one of them is promptly rendered obsolete by the next emerging crisis. Not so long ago it was the pandemic, just yesterday it was the war in Ukraine, and today it is the imbroglio in Gaza. This level and scale of cascading strategic turbulence is truly unprecedented.



Smoke rising from the Gaza Strip due to Israeli bombardment on October 29. (AFP Photo)

The above conundrum poses serious challenges to politicians and diplomats alike. The first implication of this is that policy makers can only think of tactical responses to events and there is simply no time to conceive of strategic policy responses. Second, most countries simply do not have the strategic bandwidth to deal with multiple crises all at once. Even the most preeminent global power, namely, the US, suffers from this disability. Third, the cumulative impact of the multiple crises is to introduce an element of instability and unpredictability in the world order seldom seen before. Finally, at a time when international organisations are needed like never before, they have simply not risen to the challenge. This is as true of the United Nations Security Council as it is of the Bretton Woods Institutions or indeed the World Trade Organization. There is a structural deficit when it comes to global cooperation.

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The outsized influence of geopolitics on diplomacy, foreign and security policy has been the dominant feature of the past few years, and it is likely to stay that way for the foreseeable future. This means that the world order, such as it is, may fracture even further leading to discrete blocs. Furthermore, geopolitics will strongly impact the military aspects of international relations. Thus, in security terms it will become sharply evident that China-Russia-Iran will constitute an axis even as the US, NATO and EU draw closer. Major theatres of military action will continue to be Ukraine and Gaza; but Taiwan will always be susceptible to a hair trigger response by China. While these three theatres are most liable to implosion, other sub-theatres cannot be overlooked: the Sino-Indian border, the Korean peninsula and the East/South China Sea. Incessant conflicts in multiple theatres will stretch geopolitics to breaking point with serious repercussions for the emerging world order.

Geopolitics will also strongly impact the global economy and trade. It is a fact that escalating geopolitical tensions pose a threat to the global financial system amid risk of higher inflation and slower economic growth. Borrowing costs have surged globally and in the event of inflationary pressures, there are possibilities of market volatility and significant slowdown of the global economy. The integrity of the multilateral trading system has been under assault and there is no sign it will recover. Resilient trade and preferential supply chains will rule the roost, at least for critical minerals and sensitive emerging technologies.

China is so big that what happens there seldom stays there. So, China's economy slowing down in ways not previously imagined is bad news for the global economy. It remains to be seen how bad this is from a domestic perspective and whether parts of the Chinese society can bear the pain. An ageing population, a real estate sector which is cratering, and significant youth unemployment are not trifling matters. It is a fair bet that China may turn even more assertive when it comes to protecting its core interests. This Chinese assertion will be felt mainly, but not exclusively, by the US, EU, Taiwan, Japan and India.

There are serious attempts afoot by both the US and China to lower tensions in the relationship. There is a strong possibility of a Joe Biden-Xi Jinping tete-a-tete in November on the sidelines of the APEC summit in California. This might help establish some guardrails so that competition in the Sino-US relationship does not veer towards conflict. That said, China will continue to be a pacing threat for the US.

India has done an excellent job so far of navigating this treacherous strategic landscape. India did well in confronting the challenges posed by the pandemic and carried out a difficult balancing act in the case of the war in Ukraine. So far, we have extended enthusiastic support to Israel in the wake of terrorist attacks by Hamas, even while lending our muted support to the Palestinian cause and to the two-state solution. It is hard to speculate what will eventually happen in Ukraine and Gaza, but India's strategic space may well shrink if these two conflicts continue indefinitely. This will have serious implications for our ties with Russia and perhaps more importantly, with China. India also needs to preserve the recent gains made in its ties with both UAE and Saudi Arabia. All this will need deft handling.

What of the global problems such as climate change, public health, food security and terrorism? The sad truth is that these may take a back seat in the wake of rising geopolitical tensions. With US-China ties at its worst, it would be naïve to expect China to help meet the Western goal of dramatic reduction in Greenhouse gas emissions to combat climate change. It is equally clear that China is least interested in an impartial investigation into the origins of the Covid virus which led to the global pandemic. Similarly, Russia with implicit support from China, may not be inclined to a diplomatic solution especially now that the much-vaunted Ukrainian counter-offensive has failed to take off. The UN's ambitious Agenda 2030 is in trouble and the achievement of sustainable development goals will need massive financing and extension of deadlines.

In sum, geopolitics will continue to reign supreme. One should expect more strategic turbulence. Conducting diplomacy and executing foreign policy will require agility and skill like never before for states such as India.

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