

On May 5, 2022, the Cascade Institute reconvened its Ukraine-Russia War Expert Panel to extend its analysis of the war’s implications for geopolitics, international security, ideological polarization, food systems, global finance, and climate policy. Members of the URW Expert Panel include:

**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.

**Thomas Homer-Dixon**, Director, Cascade Institute, Royal Roads University.

**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 (absent from meeting #2).

**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 elaborated on the trends, risks, and stresses they identified during their [first meeting](#) on April 4 and discussed the “elephant in the room”: the possibility of Russian use of tactical nuclear weapons.

At a number of points in the discussion, panelists referenced a recent Cascade Institute technical paper entitled [A call for an international research program on the risk of a global polycrisis](#), as well as a [causal loop diagram](#) illustrating a polycrisis scenario incorporating the Ukraine-Russia war.

The panel’s observations can be grouped under four main headings.

## 1. Use of tactical nuclear weapons

Panelists addressed the increasingly plausible scenario that the current stalemate in eastern Ukraine will evolve into an outright battlefield defeat for Russia, in turn raising the likelihood that President Putin will order the use of one or more tactical nuclear weapons. According to its military doctrine, Russia may launch a tactical nuclear strike if nuclear weapons or other weapons of mass destruction are used against it, or if it faces an existential threat from conventional weapons.

Whether Russia will use a tactical nuclear weapon depends on Putin’s psychology, his evolving assessment of his own capabilities, and what he considers to be an acceptable outcome (i.e., whether he can extract a result that he can spin as a victory). Putin appears to be locked into an ideological frame that views defeat in Ukraine as an existential threat to the Russian state. The most likely target of a tactical nuclear strike would be a significant Ukrainian city, although panelists noted that it is unlikely to

be Kyiv. The success of Ukrainian counteroffensives could therefore have dire consequences, if they compel Putin to escalate. All members of the Expert Panel agreed that mainstream commentators are greatly underestimating this scenario's likelihood.

The possibility that Putin will order a nuclear strike on a Ukrainian city raises two important questions: Will his order be followed by the Russian military? And how would the US and NATO respond? While the panelists did not have any definitive answers, they noted that the present situation is radically different from the Cold War. Although Putin frequently evokes the past glory of the Soviet Union, his Russia has very different ideological and geopolitical orientations. The Soviet Union sought global leadership by presenting itself on the world stage as a peace-loving state resisting Western imperialism. It thus publicly emphasized its unwillingness to strike first with nuclear weapons. Putin's Russia is driven by hyper-nationalism, has an unabashedly expansionist agenda, and seeks a regional sphere of influence. The country also appears to care very little about its reputation among other states—with the possible exception of China.

China will play a critical role in determining whether or not Putin ultimately uses nuclear weapons. The Russian war effort depends significantly on Chinese support or, at least, non-interference. Russia can withstand Western pressure but would suffer considerably from a Chinese rebuke. And with a nuclear arsenal vastly inferior to those of Russia and the US, China has a distinct interest in maintaining the nuclear taboo. Panelists therefore suggested that the route to Russian nuclear moderation is through Chinese influence.

Outside of Russia, the incentives for states to develop their own nuclear weapons programs are mounting—particularly for unaligned and authoritarian states who increasingly see nuclear weapons as the only effective defense against great power interference and coordinated economic attacks from the West.

## 2. Hunger, anger, and political instability

Panelists discussed three trends that pose significant threats to the global food system in 2022 and 2023. First, the world has seen a 25 percent increase in hungry people over the last 12 months—a trend that was substantially visible *before* the Russian invasion of Ukraine. The war will put an even greater strain on the global food system.

Second, food prices are the highest they have been in modern history. This trend is partially driven by a spike in fertilizer prices. The cost of ammonia, for example, has nearly quadrupled in the past year—a jump that will be devastating for farmers in both 2022 and 2023.

And third, states are starting to implement protectionist policies designed to address domestic food insecurity, thereby placing further pressure on the global food supply chain. For example, Indonesia, the

world's largest exporter of palm oil, recently banned Indonesian companies and farmers from selling palm oil on international markets; and India has just banned the export of wheat.

Panelists also highlighted three glimmers of hope for the global food system. First, we have not seen the level of rioting that was widely expected in food-insecure countries despite sharply higher food prices. Second, the UN has raised its expectations for the Canadian wheat harvest, which could help offset the low wheat yields in India stemming from an unprecedented heatwave this spring and in China stemming from heavy rainfall and flooding last fall that delayed planting of its winter wheat crop.

And third, these disruptions could serve as a potential “transformational moment” for the global food system. Some researchers argue that a sustainable food system requires just one-fifth of the grain the world currently produces, because a significant amount of grain is inefficiently used to feed livestock on a scale that is incommensurate with healthy, low-carbon diets. Today's acute food supply issues exacerbated by the Ukraine-Russia war, while extremely harmful in the short term, could spur a closer alignment of the global food system with human dietary needs and greenhouse-gas reduction targets.

### 3. Deglobalization and the reconstitution of world order

Panelists proposed that the Ukraine-Russia war can be seen as one strand of a larger challenge to the Western-dominated global order by an “axis” of countries led by China, not Russia. China's challenge to the West could culminate in the next five years in an invasion of Taiwan—a scenario that US strategists increasingly view as plausible. Panelists argued that the highly coordinated Western response to Russia's invasion of Ukraine would not have occurred had Donald Trump been re-elected, to the detriment of world order. But somewhat paradoxically, should Trump regain the Presidency in 2024, his deep antipathy towards the Chinese regime may motivate a strong US response to an invasion of Taiwan.

The decision of states like India and South Africa to remain non-aligned is beginning to have repercussions in other domains. For example, South Africa, which has taken a leadership role in the global governance of pandemic preparedness and response, has faced new resistance from other countries due to its ambiguous stance on the war. Meanwhile, India's decision to begin weaning itself off Russian armaments suggests it is leaning towards greater alignment with the West. To pull these non-aligned states further away from the emerging authoritarian axis, panelists argued that Western states should pursue policies such as debt relief and public-health investment in these countries. As a first step, we need to understand better the complex and often country-specific economic and ideological dynamics underpinning these states' decisions to remain unaligned.

The Ukraine-Russia war has strengthened recent trends towards economic deglobalization (arising from geopolitical competition between established and aspiring hegemonies), but supply chains are more likely to be rearranged within economic blocs than fully disaggregated and “re-shored.” The conflict has great implications for institutions of international cooperation: the UN Security Council is currently paralyzed

but could still serve as a forum for diffusing great power tensions, as it did during the Cold War; NATO and the G7 are becoming more central to world order, while the G20 appears less relevant. The future of international coordination in support of Ukraine remains uncertain; but, overall, prospects for the coordination needed to effectively respond to critical challenges like climate change and rising economic inequality seem to be dwindling. Indeed, Western efforts to limit purchases of Russian coal, oil, and gas are encouraging both Western and non-aligned countries to double-down on fossil fuel use, with, for instance, President Biden releasing oil from the US strategic reserve, and India buying huge quantities of cheap Russian oil.

## 4. A tightening of ideological competition

Over the last several weeks, the emerging alliance between authoritarian-friendly regimes has solidified, with post-election Hungary returning to its pro-Russia stance and China continuing its quiet support of Putin. The war has helped Putin strengthen his authoritarian control over Russia, even as the country's international position has worsened. It is unlikely that Putin will fall, as his government escalates its radical rhetoric and domestic intimidation.

Meanwhile, the current dominance of anti-populist ideological coalitions in many Western countries is "fragile." Last month's reelection of Emmanuel Macron in France, along with recent elections of center-left governments in Canada, the US, Germany, and New Zealand, show that most supporters of left and center-right parties are willing to band together, if only tacitly, to block far-right candidates and parties. But panelists noted that rising inflation and sharply slower economic growth—or even recession, as Western central banks raise interest rates—gravely threaten these alliances.

Lastly, panelists distinguished between the populist dynamics in the US and those operating in other liberal democratic states. While center-right elites in countries such as Germany, Canada, and France have so far mostly refused to support far-right political parties, in the US these elites have substantially defected to populist-authoritarian candidates. Recent achievements of centrist leaders—especially their unity in opposition to Russia's invasion—may have reduced the populists' appeal in the short term; but longer-term success will hinge on offering credible alternatives to neoliberal globalization while genuinely addressing climate change and economic insecurity and inequality.

## Next steps

The Cascade Institute will synthesize the Expert Panel's key findings and identify policy recommendations in a briefing document for commentators, analysts, and policymakers.