

## Impacts of Russia-Ukraine War on East Asian Regional Order

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The outbreak of ‘the war in Ukraine’ in 2022 has had impacts well beyond Europe, spreading throughout international society. This study reviewed the structural impact of the war on the global order, as well as on the regional order in East Asia. As a result, the study came to the following conclusions: First, rigidity in the international system is increasing, and regional blocs are gaining strength. Second, the U.S., having previously maintained regional security in Europe and Asia separately, is now seeking strategic change as Russia and China working closely together. Third, the U.S. is courting cooperation with its allies and partners by cementing stronger than-ever economic and military ties in East Asia. Simultaneously, South Korea faces both structural changes in the international order and North Korea’s nuclear threats. Against this backdrop, South Korea needs to pursue a principled and integrated security strategy, along with a flexible strategy compartmentalized into sectors to promote its security. Above all, South Korea needs internal balancing—including the strengthening of its security capabilities—while pursuing the development of innovative organizations. In external balancing, South Korea needs to make bold decisions and greater efforts by pursuing a global comprehensive strategic alliance with the U.S.

**Keywords:** Russia-Ukraine war, economic security, supply chain decoupling, East Asian regional order, nuclear security

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## I. Introduction

The war in Ukraine that began with Russia's invasion in February 2022 has commanded security researchers' attention for many reasons. First, the global impact of the war spread rapidly, not only due to the belligerents themselves but also due to the involvement of many other international actors. As a result, the global economy underwent shocks, while energy security came under threat in many countries. Second, the introduction of new technologies, including communications tools, has shifted the paradigm of the war. As a war resulting in tens of thousands of casualties—itself unusual in the 21st century—the Russia-Ukraine war is characterized by the use of novel weapons and technologies (including low-Earth-orbit satellites, and multipurpose drones), and information warfare tactics (particularly over social networks). Third, the war may lead to serious consequences for global nuclear security, as the aggressor is a nuclear power and a permanent member of the UN Security Council, while the defender is a relatively small, non-nuclear state.

In recognition of this situation, this study analyzes the structural impacts of the Russia-Ukraine war on the East Asian regional order. The Russia-Ukraine war is bringing about a new world order, leaving the East Asian region to face completely different challenges due to its geopolitical environment. Notably, East Asia is an environment where some of the major powers directly or indirectly involved in the war, particularly Russia, are located. Security competition between alliance blocks is emerging beyond the phase of bilateral competition among great powers. At the same time, North Korea's nuclear and missile provocations are escalating to unprecedented levels in both frequency and seriousness. These circumstances are forcing South Korea, a nation in the center of the region, to become more sensitive to the potential consequences of the war. Accordingly, this study focuses on analyzing the factors of the war that will impact the East Asian regional order and then prospect the future from South Korea's perspective.

This study proceeds in the following sequence. The second chapter

reviews recent literature on the impacts of the Russia-Ukraine war and introduces our framework for analyzing the integrated security environment for more effective analysis. The analysis period is from the start of the war in February 2022 to October when Russia declared martial law in the occupied Ukrainian regions. The third chapter explores the impact of the war on the great power politics and the East Asian regional order from the macro level. Specifically, authors evaluate the changes in energy supply chains, alliance systems, and the Treaty on The Non-Proliferation of Nuclear Weapons (NPT) regime in their economic, diplomatic, and military aspects. The fourth chapter discusses the responses of major East Asian countries to the war and changes in US strategy on Russia and China. Finally, the last chapter examines the implications of the shift in the East Asian regional order and great power competition on South Korean security.

## **II. Conceptual Discussions**

### **1. Literature Review: Impacts of the Russia-Ukraine War**

Rather than being a conflict between only Russia and Ukraine, the Russia-Ukraine war is a conflict where the world has become deeply politically engaged. This is because the longstanding conflict between the East and West lies at the root of the war, with the worsening U.S.-China relations, and movements by external actors all functioning as variables. The West, especially the U.S., has continued to impose sanctions against Russia while providing aid to Ukraine from the war's onset. Russia, for its part, insists that its military action is a "special military operation" and that the West is engaged in a de facto "proxy war" with Russia.<sup>1</sup> Accordingly, the view that this is a geopolitical or geoeconomic conflict between Russia and the West is well-founded. Likewise, the results of the war also need to be analyzed on the level of international systems, without being limited

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<sup>1</sup> Charles Maynes, "Russia sharpens warnings as the U.S. and Europe send more weapons to Ukraine," *NPR*, April 29, 2022.

to the bilateral relationship between Russia and Ukraine.

Although relatively little research has thus far been conducted on the impact of the Russia-Ukraine war, slow progress is emerging from various perspectives. The main trends are as follows<sup>2</sup>: Since the war broke out in Europe, many researchers have sought to discover the political and economic impacts on a regional level<sup>3</sup>; with some studies focusing on the impact on other regions and international society<sup>4</sup>; while others focus on the impact on individual states from various perspectives.<sup>5</sup>

However, few studies have examined the impact of the war on the East Asian region. The researchers are paying attention to the possibility that the war will promote political blocks in East Asia, called the New Cold War.<sup>6</sup> In particular, South Korea, faced with U.S.-China competition and North Korea's nuclear threat, is making attempts on its own to determine the

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2 Note that we focus on research published in 2022 in English and Korean language outlets.

3 Jan Osicka and Filip Cernoch, "European Energy Politics after Ukraine: The Road Ahead," *Energy Research & Social Science* 91 (2022): 1-6; Mario Arturo Ruiz Estrada and Evangelos Koutronas, "The Impact of the Russian Aggression against Ukraine on the Russia-EU Trade," *Journal of Policy Modeling* 44, no. 3 (2022): 599-616; Chul-Min Kim, "The Ukraine War and Eastern Europe, the Rise of the 'New Cold War Stage' and its Response Status," [In Korean] *Journal of European Union Studies*, no. 63 (2022): 207-246.

4 Alexander K. Bollfrass and Stephen Herzog, "The War in Ukraine and Global Nuclear Order," *Survival* 64, no. 4 (2022): 7-32; Syed Nouman Ali Shah et. al., "The Russia-Ukraine Crisis and Its Impact on South Asia," *Review of Applied Management and Social Sciences* 5, no. 2 (2022): 141-148; Daniel Markey and Jacob Larsen, "From Bad to Worse: Russia's Invasion of Ukraine and China-India Relations," *Asian Survey* (2022): 1-29; Spenser A. Warren and Sumit Ganguly, "India-Russia Relations after Ukraine," *Asian Survey* (2022): 1-27.

5 Ruth Endam Mbah and Forcha Wasum, "Russian-Ukraine 2022 War: A Review of the Economic Impact of the Russian-Ukraine Crisis on the USA," *Advances in Social Sciences Research Journal* 9 (2022): 144-153; Sharinee L. Jagtiani and Sophia Wellek, "In the Shadow of Ukraine: India's Choices and Challenges," *Survival* (London) 64, no. 3 (2022): 29-48.

6 Tom Sauer, "U.S. Extended Nuclear Deterrence in Europe and East Asia: A Comparative Analysis," *Asian affairs* 53, no. 3 (2022): 500-519.

meaning and impact of the war.<sup>7</sup> What changes will the war bring to the East Asian regional order? What are the implications of these changes for South Korea's security? To answer these questions, this study analyzes changes in the international system and the regional order following the outbreak of the war and then reviews the impact of these changes on the security strategies of the major countries in the region.

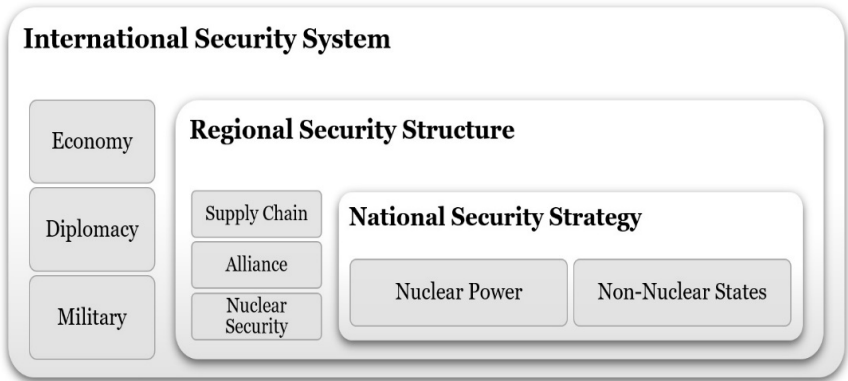
## **2. Analytic Framework: Integrated Security Environment**

To effectively analyze the impact of the Russia-Ukraine war on the international system and the regional order, this study focuses on three sectors required for national survival and prosperity: the economy, diplomatic relations, and the military. To assess changes in each sector, three variables: supply chains, alliances, and nuclear security, were examined for their critical role in national security and their importance to the war. Thereafter, this study conducted a review of the security strategies of major states in the region as they relate to the foregoing variables. In doing so, this study considered the increasingly prominent trend toward an integrated security strategy devised as a comprehensive response to the aforementioned interacting sectors within the context of the diversifying security threats of the 21st century. The foregoing sectors and variables are depicted as a framework in the following <Figure 1>.

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7 Seung-wook Baek, "War in Ukraine and Challenge for East Asian Geopolitics," [In Korean] *Economy and society*, no. 135 (2022): 198-229; Jaewoo Choo, "Ukrainian war and the post-war international order : US-China relations and Korea's response," [In Korean] *Strategy Studies* 29, no. 2 (2022): 119-154; Dongwoo Nam and Dukki Kim, "A Study on the Historical Origins of Russia-Ukraine Conflict and Strategic Implications of Russia's Invasion of Ukraine for Security on the Korean Peninsula," [In Korean] *The Journal of Humanities and Social Science* 13, no. 2 (2022): 1063-1074.

〈Figure 1〉 Analysis Framework: Integrated Security Environment



In analyzing the integrated security environment, global supply chain issues were first examined as the main issue in the economic sector. The global supply chain encompasses procurement of raw materials, a transformation of those materials into intermediate and end goods, and finally consumption of products. A stable and efficient global supply chain has a crucial impact on not only the growth of an individual company but the development of a nation. Accordingly, whether the West can form an alternative ‘Russia-free supply chain’ after having suffered supply chain instability since the war began is a subject of increasing attention.

Second, the diplomatic sector was addressed by focusing on the potential for rearrangement of the conventional alliance system. Alliances are such a crucial element in the international security order that some even argue that you cannot discuss modern international relations without mentioning alliances.<sup>8</sup> The Russia-Ukraine war highlights the importance of informal alliances as well as formal alliances because the need for partnership-based security cooperation is growing. Informal alliances have not been considered crucial among scholars but seem to have substantially influenced the course of the war.

8 George Liska, *Nations in Alliance: The Limits of Interdependence* (Baltimore: Johns Hopkins Press, 1962).

Third, the examination of the military sector focused on the prospects for maintenance of the current nuclear non-proliferation system. The NPT has served as a relatively strong norm for global nuclear security since the Cold War. However, a different level of security instability is emerging in that nuclear power has invaded a non-nuclear state in the 21st century. Worse, Russian President Vladimir Putin has himself threatened the use of nuclear weapons, suggesting that the war in Ukraine may escalate into a different war far beyond conventional ones. Even if the war ends without any nuclear attacks, the current NPT system will meet serious challenges because the world has witnessed the consequences of renouncing nuclear weapons voluntarily.

### **III. The Russia–Ukraine War and Changes in the East Asian Regional Order**

#### **1. Economy: Accelerating Selective Decoupling**

There is an argument that the world order based on liberal internationalism is deteriorating in the 21st century due to competition among the great powers, Trumpism, dictatorship, climate change, the coronavirus pandemic, and nuclear proliferation.<sup>9</sup> The U.S., the traditional home of liberalism, has shifted toward an emphasis on economic security and “Made in America” policies beginning with “America First.” In particular, the U.S. has passed new laws, including the CHIPS Act in August 2022, that is paving the way for supply-chain decoupling from foreign entities of concern in state-of-the-art technology industries like semiconductors and batteries.<sup>10</sup> In China, Xi Jinping secured a third term at the country’s 20th Communist Party Congress in

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9 G. John. Ikenberry, *A World Safe for Democracy* (New Haven: Yale University Press, 2020).

10 “China’s chip industry set for deep pain from US export controls,” *Financial Times*, October 9, 2022, <https://www.ft.com/content/e950f58c-0d8f-4121-b4f2-ece71d2cb267>.

October 2022, and the country is now preparing itself with a dual-circulation strategy against the recent US measures. As such, a breakup of the global supply chain has already begun, although the extent and speed of this will vary by sector.

The war in Ukraine matters in that it has prompted an expansion of decoupling to include new areas. Unlike weapons or state-of-the-art technologies, natural resources like energy have been traditionally traded relatively freely according to market mechanisms. However, the war has turned natural resources into a critical means for protecting national security. Resource-producing nations are controlling the production and export of resources for their interest. In other cases, they are suspending or denying the supply of resources to specific nations. Russian natural gas, on which Europe heavily depends, offers a good example of the “weaponization of energy” as Russia shifts its stance.

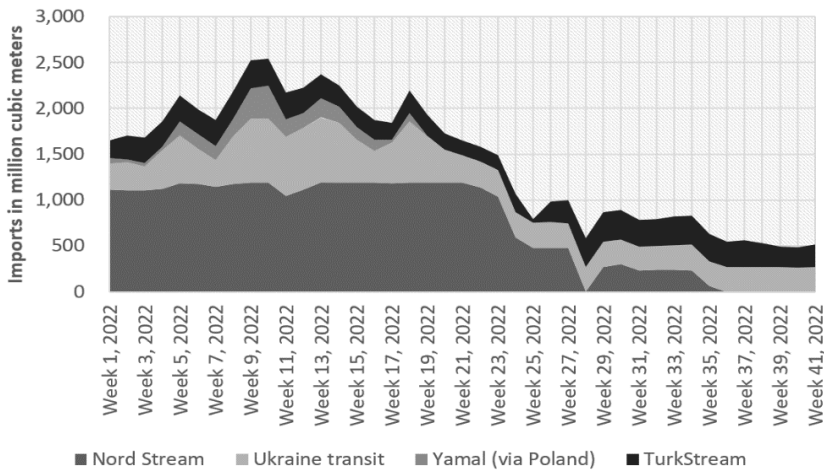
The West imposed sanctions after the beginning of the war, as it had warned, and Russia responded by cutting off natural gas deliveries to Europe. Russia has since supplied energy to nations that are favorable or neutral to it (like China and India) while shutting off energy to those it considers hostile. As a result, the European Union’s natural gas imports from Russia have plummeted, as shown in <Figure 2>. The Nord Stream pipelines had been the largest route for Russian energy supplies to Germany until 2021 but saw a sharp fall in transport since June and were completely closed in September. Global energy prices of 2022 soared up to 100% from a year earlier.<sup>11</sup>

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11 World Bank, *Commodity Markets Outlook–October 2022* (World Bank Group: Washington, DC, 2022).



〈Figure-2〉 EU natural gas import volumes from Russia (from week 1, 2022 to week 41, 2022, by exporting route)<sup>12</sup>



The countries affected negatively by the Russia-Ukraine war are mostly U.S. allies in the E.U. They have joined in U.S.-led sanctions, and have exposed themselves to significant risks and losses.<sup>13</sup> The E.U. is itself going further in moving away from the Russian energy supply chain. As of October 2022, the G7 countries and the E.U. were pushing for a price cap on purchases of Russian crude oil, while Russia declared it would not export energy to countries that join such sanctions.<sup>14</sup> Unless there is dramatic progress in Western-Russia relations, Russia-produced energy may disappear in the West over the long term. The U.S. is responding by releasing a large quantity of its Strategic Petroleum Reserve to dampen global gasoline prices in cooperation with major OECD economies. Even

12 B. McWilliams, G. Sgaravatti, and G. Zachmann, "European natural gas imports," Bruegel Datasets, <https://www.bruegel.org/publications/datasets/european-natural-gas-imports>. This graph was created using data from the above site.

13 Martine Wolf, "Europe can and must win the energy war," *Financial Times* (London), September 7, 2022.

14 Julian Lee, "The G-7 Just Agreed to Cap Russian Oil Price. What Does The Mean?," *The Washington Post*, October 5, 2022.

if relations between the West and Russia improve, returning to the pre-war state does not seem likely, due to issues like the bankruptcy of the Nord Stream 2 pipeline owner. Energy security has now become a top-priority item around the world.

However, the rupture in a specific sector's supply chain will not spread to all sectors instantly. Despite the argument over China's threats, there have been no outstanding changes in the overall global supply chain (excluding the sectors mentioned earlier). This is because decoupling generally shrinks overseas markets on the supply side, causing demand issues and inefficiency in the value chain. Policies built to prioritize national security can backfire, leading to a decrease in industrial competitiveness, inflation, economic downturns, and leakage of national wealth. Furthermore, there are limits for any particular nation in regulating the global infrastructure of multinational companies. For example, China's electric vehicle sales are expected to reach 6 million in 2022, doubling from a year ago. Although Tesla currently holds the largest market share there with a huge plant in Shanghai, competition is intensifying.<sup>15</sup> If Tesla loses its status in China, the world's largest EV market, and suffers a stock plunge and a decline in new R&D investment, this will benefit China and its companies.<sup>16</sup> Accordingly, the U.S. will likely want to act discreetly on global supply chain issues by weighing the potential pros and cons across various sectors.

High tech and energy are at the center of the ruptures in the global supply chain. The resultant political and economic blocs will remain at least as long as Presidents Putin and Xi stay in power. Many East Asian countries are not self-sufficient in energy and rely substantially on technology for their economy. They have no option other than

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15 "China Electric Car Sales Forecast to Hit Record 6 Million," *Bloomberg News*, August 9, 2022, <https://www.bloomberg.com/news/articles/2022-08-09/china-s-july-car-sales-rise-20-on-demand-for-electric-vehicles#xj4y7vzkg?leadSource=verify%20wall?leadSource=verify%20wall>.

16 Edward White and Gloria Li, "Tesla hits China sales record as Beijing praises Musk's Taiwan proposal," *Financial Times*, October 10, 2022.

strengthening political cooperation with favorable powers for their economic security as the supply chain reshuffles and as markets shrink. Korea, Japan, and Australia, all allies of the U.S., have aligned themselves with the West by supporting and providing aid to Ukraine. China, for its part, did not participate in the war, but still supports Russia by staying politically neutral and cooperating with Russia economically. The Russia-Ukraine war will accelerate the strengthening of political and economic blocs in the region.

## 2. Diplomacy: Rise of Informal Alliances

Previously, interest was highest regarding formalized treaty-based alliances like NATO, the ROK-US alliance, and the US-Japan alliance. However, the Russia-Ukraine war has underscored the importance of informal alliances. While a formal alliance is built when the party nations sign an agreement for a defense treaty, an informal alliance means the party nations agree on military cooperation without a formal treaty. Informal alliances can be classified into more passive “détente” alliances and more proactive “entente” alliances. In détente alliances, when one party enters into a war, its allies either refrain from joint action or maintain neutrality, while in entente alliances allies are expected to provide active support.<sup>17</sup> A prime example of informal alliances is the military cooperation between the U.S. and Taiwan.<sup>18</sup>

Informal alliances do not require ratification and can be entered relatively quickly, with comparative freedom from domestic constraints. In the maintenance stage, pledges can be easily adjusted and allies are less likely to become entrapped in an undesired war. In the operation stage, however, the risk of abandonment is high because no treaty has been signed, with the alliance failing to deliver the anticipated effects during

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17 Jinhwan Hwang et. al., *Theories of National Security*, [In Korean] (Seoul, Korea: Pybook, 2014), 90.

18 Edward I. Chen, “The Security Dilemma in US-Taiwan Informal Alliance Politics,” *Issues & Studies* 48, no. 1 (2012): 1-50.

contingencies.<sup>19</sup> The effectiveness of an informal alliance is determined more by the situation in international relations during the actual fulfillment of its obligations, rather than by pledges made at the outset. In other words, an informal alliance may or may not be a useful means for promoting security depending on how the alliance relates to the politics of major powers. Other things being equal, informal alliances can be flexible and draw various levels of support from non-allies depending on the allies' diplomatic activities.

In the Russia-Ukraine war, informal alliances look to have played an essential role in shifting the war situation. Russia's forced annexation of the Crimean Peninsula in 2014 led the West and Ukraine to forge a cooperative relationship that enabled early military support from the West for Ukraine. In early 2022, the U.S. and NATO mounted further political and economic pressure to deter Russia's invasion of Ukraine, and some countries, including the U.K., sent defense weapons to Ukraine. After the outbreak of the war, many Western countries joined in economic sanctions against Russia and have continued to deliver economic and military aid needed for the war to Ukraine. Such support has contributed to Ukraine's ability to both thwart Russia's early operational plans and to strike back to undermine Russia's war operations.

Realistically, informal alliances may not have worked if the U.S., E.U., and NATO had not considered their security interest and geopolitical situation in the Russia-Ukraine war. However, Ukraine's diplomatic activities also played a key role in making the West keep its pledges. Ukraine gained an edge in justifying its measures as a victim of the war by engaging in public diplomacy via social media, even before the war began. After the war broke out, Ukraine was able to shorten the time it took to receive aid and broadened the range of the aid it received through summit diplomacy with the West. Currently, international society can see that forming informal alliances in peacetime and deploying them during

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19 Charles Lipson, "Why Are Some International Agreements Informal?," *International Organization* 45, no. 4 (1991): 495–538.

contingencies is useful for diplomacy. Accordingly, interest in and discussion of informal alliances in international relations is expected to rise in the wake of the war.

Notable informal alliances in the East Asian region include the China-Russia and Japan-Australia security alliances, as well as the one between the U.S. and Taiwan. Among these, all security alliances are between the U.S. and its partners—except the one between China and Russia. This can therefore be viewed as security competition between the U.S. and its partners against China and Russia. At present, the U.S. is seeking passage of the Taiwan Policy Act that includes defense aid for Taiwan, while Japan and Australia have declared a “Japan-Australia Joint Declaration on Security Cooperation”<sup>20</sup> for cooperation and joint response to contingencies affecting national security and sovereignty in October 2022. As the world has learned of the capabilities of informal alliances through the war, maintaining cooperative relationships that can induce détente or entente with neighboring countries will be stressed in diplomacy in the East Asian region.

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20 Ministry of Foreign Affairs of Japan, “Japan-Australia Joint Declaration on Security Cooperation,” Published October 22, 2022, <https://www.mofa.go.jp/mofaj/files/100410297.pdf>.

### 3. Military: Rearmament and Ruptures in the NPT System

〈Table 1〉 Defense Expenditures of Major European NATO Members as a Share of GDP (since 1990)<sup>21</sup>

	1990	2000	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.K.	4.0	2.4	2.4	2.3	2.2	2.0	2.0	1.9	1.9	2.0	2.2
Norway	2.9	1.7	1.4	1.4	1.5	1.5	1.6	1.7	1.7	1.9	1.9
France	2.8	2.1	1.9	1.8	1.9	1.9	1.9	1.9	1.8	1.8	2.1
Poland	2.6	1.8	1.8	1.8	1.9	2.1	1.9	1.9	2.0	2.0	2.2
Sweden	2.6	1.8	1.1	1.1	1.1	1.1	1.1	1.0	1.0	1.1	1.2
Germany	2.5	1.4	1.2	1.2	1.1	1.1	1.1	1.2	1.2	1.3	1.4
Netherlands	2.4	1.4	1.2	1.2	1.2	1.1	1.2	1.2	1.2	1.3	1.4
Spain	2.3	1.7	1.4	1.3	1.3	1.3	1.1	1.2	1.3	1.2	1.4
Italy	1.9	1.7	1.4	1.4	1.3	1.2	1.3	1.4	1.4	1.3	1.6

The NPT has grown as the U.S. emerged as the victor of the Cold War. Most countries became signatories to the treaty and declared that they would follow its objectives of preventing the spread of nuclear weapons. Europe was relatively peaceful and regionalism and consolidation became noticeable. European countries that are NATO members in particular seldom experienced large-scale wars or damage after the Cold War. As a result, Europe became overly dependent on U.S.-led collective defense rather than learning to defend itself with its capabilities. Many European countries spent over 2% of their GDP on defense until 1990 as illustrated in <Table 1>. However, few did so in the 21<sup>st</sup> century. The trend did not change even after Russia annexed Crimea in 2014.

Stockpiling conventional weapons and a focus on nuclear security took on renewed interest after Russia, a nuclear power, invaded Ukraine, a non-nuclear state, in 2022. Rearmament among countries that lost in World War II has been particularly pronounced. In Europe, the German

21 SIPRI, “SIPRI Military Expenditure Database,” <https://milex.sipri.org/sipri>. This chart was created using data from the above site.

chancellor announced that a fund of €100 billion would be set up to boost the strength of the country's armed forces and that long-term defense spending would be increased year on year to more than 2% of GDP just 3 days into the war.<sup>22</sup> In the East Asian region, the Japanese Ministry of Defense said "What happened in Europe can happen in the Indo-Pacific region" and that Japan would fundamentally strengthen its defense capabilities, including stand-off defenses, missiles, and unmanned defense capabilities within 5 years.<sup>23</sup> The spending plan was supported by 55% of the Japanese public compared to 29% who opposed it.<sup>24</sup> As such, the Russia-Ukraine war has provided an excuse for governments to justify a rapid arms buildup.

Global trust in the NPT was undermined after the outbreak of the Russia-Ukraine war. Vladimir Putin, as the president of a major nuclear power, has made open threats about using nuclear weapons, increasing the potential for the war to escalate to the nuclear level. This would be a serious violation of the Budapest Memorandum on Security Assurances signed in 1994, and the international principle of not using nuclear weapons against non-nuclear states. Ukraine has been left without a nuclear umbrella since it abandoned nuclear weapons in 1994 and has no other option but to plead to international society about how unjustifiable and dangerous the nuclear threat is. Ukraine's neighboring non-nuclear states in turn must now seriously consider nuclear security. If Russia uses nuclear weapons, countries across the world will feel pressure to go nuclear themselves. Even if Russia does not use nuclear weapons, major powers that want to maintain the non-proliferation system will have to decisively resolve nuclear concerns. Otherwise, the system may be

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22 Kate Connolly, "Germany to set up €100bn fund to boost its military strength," *The Guardian*, February 27, 2022.

23 Ministry of Defense, "2023 Defense Programs and Budget of Japan," [In Japanese] Published August 2022, [https://www.mod.go.jp/j/yosan/yosan\\_gaiyo/2023/yosan\\_20220831.pdf](https://www.mod.go.jp/j/yosan/yosan_gaiyo/2023/yosan_20220831.pdf).

24 "Analysis: Japan rushes to rearm with eye on 2027 - and China's Taiwan ambitions," <https://www.reuters.com/world/japan-rushes-rearm-with-eye-2027-chinas-taiwan-ambitions-2022-10-18/>.

dismantled, sparking a nuclear domino effect.

Unfortunately, the nuclear threat is ongoing in the East Asian region as well. North Korea recently passed a law authorizing preemptive nuclear strikes when needed. The regional order has thus become unstable, and non-nuclear states are faced with grave security challenges. In particular, South Korea, the most directly threatened target of North Korea's nuclear weapons, has experienced a rise in public discussions regarding nuclear armament. Advocates for going nuclear will be further supported if the North launches a seventh nuclear test. At the same time, Putin's nuclear threat and the likelihood of a conflict in Taiwan are intensifying fears of war among South Koreans.<sup>25</sup>

#### **IV. Outlook for the East Asian Regional Order after the Russia–Ukraine War**

##### **1. Higher Regional Instability and the Advent of a New Cold War**

Providing a clear rationale for reason for Russia's invasion of Ukraine is not easy. John Mearsheimer has argued that U.S. and NATO military aid for Ukraine following Russia's annexation of Crimea and its dispute over the Donbas region increased Russia's perception of threats. Mearsheimer has asserted that unprecedented Western military cooperation with Ukraine, including arms support, joint military exercises, support for joining NATO, and the dispatch and training of military instructors (particularly by the Biden administration), practically invited backlash from Russia and presented an excuse for the invasion.<sup>26</sup> Other analyses

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25 According to a survey by Kyung Suk Lee, almost 50% of the South Korean public supported nuclear armament, even considering potential economic sanctions and preemptive North Korean attacks to prevent armament. Kyung Suk Lee, "Political Elites, Mass Publics, and Nuclear Proliferation," [in press] PhD dissertation of Texas A&M University (2022): 29.

26 John J. Mearsheimer, "The Causes and Consequences of the Ukraine Crisis," <https://nationalinterest.org/feature/causes-and-consequences-ukraine-crisis>



have concluded that the primary motivation for the war lay in Putin's ambition to expand Russian territory or in China-US conflict and confrontation.<sup>27</sup> As the war drags on, a growing number of analyses and perspectives are being presented.

However, speculating on Russia's motivations solely from the perspective of international relations can be limiting. Many factors, including changes in Russia's domestic politics and Russia's increased prominence in international society following the invasion, are intertwined in complex ways. In line with this, the effects of the Russia-Ukraine war are now manifesting themselves in many areas. What is clear is that a sense of security instability is rising around the globe, including in the Indo-Pacific region, as well as in Europe. A reshuffling of the international order is widely expected. Countries are also proactively strengthening their security, supporting the prediction that security competition may increase further. Moreover, concerns that the Ukraine war may drag on even longer than experts' expectations are now becoming a reality.

As the war extended on into November after commencing in February 2022, and as Ukraine came to hold an advantageous position in some areas while problems among Russian troops became increasingly evident, skepticism has grown about Russia's military power. Although Russia maintains enormous resources and the world's most powerful nuclear capabilities, its weakness in waging and supporting a conventional war has become increasingly visible. With its vulnerability in conventional military power evident, Russia has had to shift its strategies in dealing with Europe. Moscow is now openly posing nuclear threats and repeatedly making threatening remarks about disrupting energy supplies, food

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27 Peter Dickinson, "Putin's new Ukraine essay reveals imperial ambitions," *Atlantic Council*, July 15, 2021, <https://www.atlanticcouncil.org/blogs/ukrainealert/putins-new-ukraine-essay-reflects-imperial-ambitions/>; Junggi Kim, "U.S.-China Strategic Competition and Ukraine's Response Strategy," [In Korean] *Sino-Soviet Studies* 46, no. 2 (2022): 229-230.

security, and supply chains during the war.

Amidst this worsening situation, Russia is consolidating ties with opponents of the U.S. It has made special efforts to bolster its relationship with China, and has also allied with North Korea and Iran. This is not a new move for Russia, as it has maintained longstanding ties with those nations. However, Russia's outreach on this occasion is notable in that it is seeking cooperation in multiple areas, including weapons, energy, and food in an attempt to deter the U.S. Accordingly, competitive conflicts between the U.S. and its allies and Russia and its allies are expected to continue and grow, if at relatively low levels.

The Russia-Ukraine war is prompting widespread transformations. The overall atmosphere of international society is shifting from cooperation to competition; the global political and economic structure is shifting from a multipolar system to a bipolar system, and the East Asia region is becoming the most unstable region in the world. Russia is likely to continue to try to establish a self-sufficient system and pursue cooperation with nations that are not participating in Western-led sanctions while strengthening cooperation with China to replace Europe as its main partner for key technologies and production.<sup>28</sup>

For the U.S., separately setting global strategies for Europe and Asia in the wake of the Ukraine war is becoming increasingly meaningless. This may in turn promote increased European interest in Asian issues. More powers will likely support the U.S. in the East Asian region. Simultaneously, concerns that competition will deepen between the U.S.-led global alliance and its challengers—including Russia and China—will soon become reality. The world is now the closest it has ever been to a transformation of the international order into a new Cold War.

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28 Tae Rim Lee, "Russian Domestic Trends and Political Outlook on the Ukraine Crisis," [In Korean] *Institute of Foreign Affairs and National Security*, 2022-11, (2022): 23.

## 2. Deepening Complex Security Competition and the Growing Nuclear Threat

For the time being, a realistic forecast would posit that Russia-China ties will deepen and that U.S. efforts to restrain this development will grow more serious. Russia has practically no choice but to further improve its relationship with China, while China will want to protect its interests by establishing relationships with Russia. China competes with the U.S. across the board and knows that fostering a robust coalition with Russia will benefit China the most. This understanding has led China to pursue its practical interests in Russia's nuclear capabilities and natural resources, rather than maintaining neutrality.

Judging from the remarks of the Biden administration and Congressional leaders, the U.S. still regards China as its greatest threat even after the outbreak of the Ukraine war. Some speculate that the U.S. is almost forcing China to consolidate its ties with Russia rather than distancing itself from the country.<sup>29</sup> Russia and China's increasing cooperation based on the "unlimited friendship" they jointly declared at the Russia-China summit in February 2022 was reaffirmed during bilateral talks at the Shanghai Cooperation Organization (SCO) Summit in September 2022.

In October 2022, the U.S. announced its National Security Strategy (NSS), followed immediately by its National Defense Strategy (NDS), Nuclear Posture Review (NPR), and the Ballistic Missile Defense Review (BMDR), which reflect the main principles of the NSS. The reports stated that China and Russia are two ongoing threats, and depicted China as "the only competitor with both the intent to reshape the international order and, increasingly, the economic, diplomatic, military, and technological power to do it." Russia was depicted as "posing an immediate and persistent threat to international peace and stability."<sup>30</sup> Notably, the U.S. proclaimed

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29 Antony J. Blinken, "The Administration's Approach to the People's Republic of China," May 26, 2022, George Washington University, WASHINGTON, D.C., May 26, 2022, <https://www.state.gov/the-administrations-approach-to-the-peoples-republic-of-china/>.

it would not tolerate Russian attempts to use or threaten to use nuclear weapons as a means of promoting its interests, and that the U.S. would modernize its nuclear weapons to counter the Russian threat. In addition, the U.S. demonstrated its strong commitment to national security by taking an “integrated deterrence” approach that harnesses its military power, including nuclear capabilities, along with diplomacy, economic power, and cooperation with allies and partners.

Above all, the U.S. recognizes Russia as an enemy.<sup>31</sup> The U.S. response to Russia, moreover, is unusual in that it simultaneously pursues the resolution of the nuclear threat. The war in Ukraine has also ignited controversy over nuclear threats toward non-nuclear states. Security treaties the U.S. made during the Cold War have deterred allies’ attempts to go nuclear, with allies considering nuclear weaponry as unnecessary. Recently, however, Russia and China have continued to try to strengthen their nuclear capabilities, while so-called rogue nations like North Korea and Iran have sought nuclear weapons, creating insecurity among non-nuclear states. It is time for the U.S. to resolve its nuclear concerns decisively.

The U.S. has recognized the need for a phased approach to ensure that its efforts for strategic deterrence are effectively maintained and, in particular, that its extended deterrence commitments are reliable. The U.S. has maintained the prospect of stable talks for strategic arms reduction with Russia, reaching a dramatic agreement to extend the New Strategic Arms Reduction Treaty (START) in February 2021 ahead of the end of the treaty. Accordingly, both the U.S. and Russia are obliged to

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30 The White House, *National Security Strategy* (Washington, D.C.: The White House, 2022), 23.

31 According to a Pew Research survey, 70% of Americans viewed Russia as an enemy in March after the onset of the Ukraine war, while 41% of them did so before the war. The NATO 2022 Strategic Concept adopted at the NATO summit in Madrid, Spain on June 29 and 30 in 2022 described Russia as “the most significant and direct threat.” Pew Research Center, “International Attitudes Toward The U.S., NATO and Russia in a Time of Crisis,” <https://www.pewresearch.org/global/2022/06/22/ratings-for-russia-drop-to-record-lows/>.

reduce their number of nuclear warheads to 1,500 units and limit the number of deployed and non-deployed ICBM launchers to 800.

Although the sudden U.S. withdrawal from the Intermediate-Range Nuclear Forces (INF) Treaty invited backlash from Russia as the counterparty to the treaty, the U.S. has at least tried to avoid raising unnecessary issues in its nuclear arms race with Russia. Furthermore, President Biden has repeatedly stated that the U.S. would never tolerate Russian use of nuclear weapons, and has continued attempts to ease the nuclear threat. Nevertheless, the nuclear threat will remain the gravest concern until the Russia-Ukraine war ends completely.

As for the U.S.-China security competition, competition between the U.S. Indo-Pacific Strategy and China's Belt and Road Initiative, as well as the nuclear arms race, and the Taiwan issue are all deeply entangled. The U.S. has taken note of China's missile capabilities, which include the entire South China Sea within its range. In August 2019, the U.S. noted that Russia was not observing the INF treaty, and officially withdrew from the treaty it had ratified with Russia in 1987.<sup>32</sup> Although the apparent reason for the withdrawal was Russian non-compliance, the move was in practice a response to China's nuclear arms buildup.

The number of Chinese mid to long-range missiles and launchers recognized by the U.S. Department of Defense in 2021 is shown in <Table 2>. China is achieving its Anti-Access/Area Denial (A2/AD) strategic goal of blocking U.S. access to the Indo-Pacific region. With most of China's mid to long-range missiles violating the INF treaty, the U.S. needed a plan for a missile arrangement on equal terms with that of China.

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32 C. Todd Lopez, "U.S. Withdraws From Intermediate-Range Nuclear Forces Treaty," August 2, 2019, <https://www.defense.gov/News/News-Stories/Article/Article/1924779/us-withdraws-from-intermediate-range-nuclear-forces-treaty/>.

〈Table 2〉 China's Rocket Force

System	Launchers	Missiles	Estimated Range
ICBM	100	150	At least 5,500km
IRBM	200	300	3,000-5,500km
MRBM	250	600	1,000-3,000km
SRBM	250	1000	300-1,000km
GLCM	100	300	At least 1,500km

Source: U.S. Department of Defense (2021), 163.

Another area of fierce competition between the U.S. and China is the conflict over the Taiwan Strait. China's actions before and after the visit by U.S. House Speaker Nancy Pelosi to Taiwan in August amounted to a fourth Taiwan Strait crisis. This event was a real-world manifestation of longstanding concerns between China and Taiwan. China strongly protested Pelosi's visit, claiming it amounted to internal interference and a breach of the "one-China policy." China announced military exercises in the waters surrounding Taiwan and did not restrain itself from threatening Taiwanese vessels and aircraft as well as those of other nationalities passing through the area.

China demonstrated an unprecedentedly strong response, test-launching missiles to fly over Taiwan that fell in the waters east of Taiwan, and extending exercises for three more days. The U.S. in turn sent an aircraft carrier and an amphibious assault ship to waters near Taiwan to prepare for contingencies. Such moves raised concerns, not only in Taiwan but also in neighboring countries. The U.S. acts to restrain China following China's strengthening of military force during the war in Ukraine suggest that security competition between the two superpowers will increase further.

## V. Conclusion and Implications

The Russia-Ukraine war is becoming prolonged, defying the forecasts of many experts that Russia would rapidly attain an overwhelming victory and then force a treaty. The Russia-Ukraine war has taught us that war can last longer than expected and destroy global supply chains even when it is limited to two nations. Above all, the war has vividly reminded us of the nuclear threat entailed by a war between a nuclear power and a non-nuclear state. As discussed previously, the Russia-Ukraine war is exerting economic, diplomatic, and military effects across the world, while the negative effect on East Asia in particular has raised security instability in the region. Under these circumstances, cooperation between alliances and partners through regional blocs will breed further competition among major powers, creating a vicious circle that spurs an adverse security environment.

Although a prolonged war is not normally desirable for any country, each country will have different preferences for the time a war ends as well as preferences for the order that ensues after a war. The West will seek to strengthen solidarity among nations through a prolonged war and expect a weakening of Russian influence over the long term. Henry Kissinger insisted that returning to the “status quo ante” through talks with Russia was ideal for Western countries.<sup>33</sup> The U.S. has traditionally maintained security through the collective defense on a regional basis and through bilateral alliances that treat Europe and Asia separately. However, the Russia-Ukraine war has increased the possibility that Russia, a Eurasian country, and China will collaborate more closely and work together to counter the U.S. Kissinger argued that the U.S. should resolve the conflict through compromise and “should not lump Russia and China together.”<sup>34</sup>

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<sup>33</sup> Timothy Bella, “Kissinger says Ukraine should cede territory to Russia to end war,” *The Washington Post*, May 24, 2022.

<sup>34</sup> “The edited transcript of a discussion between Henry Kissinger and Financial Times,” *Financial Times*, May 7, 2022, <https://www.ft.com/content/cd88912d-506a-41d4-b38f-0c37cb7f0e2f>.

However, in reality, any coalition—whether a U.S.-led one or a China- or Russia-led one—will likely worsen competition and conflicts between them.

We often talk about security instability but do not believe that a war can happen to us. The unstable global situation created by Russia's invasion of Ukraine in February is a wake-up call to a complacent world. Even security experts believed that Russia was merely making threats and that if a conflict broke out, it would be a short-lived and relatively minor security issue. At the same time, the U.S. accurately predicted Russia's invasion, with only slight errors regarding its time, and imposed various sanctions on Russia immediately after the onset of the war. With these thoroughly planned moves, the U.S. was able to attract quick and proactive participation from its major allies and partners.

The U.S. recently announced another forecast regarding the war, this time about China. U.S. CIA Director William Burns said that Chinese President Xi Jinping instructed his military “to be prepared no later than 2027 to conduct a successful invasion of Taiwan” in a CBS interview. That year is meaningful because it will be the last year of Xi's third term and marks the 100th anniversary of the foundation of China's People's Liberation Army. Importantly, from the U.S. perspective, Taiwan's security, economic and diplomatic status in international society is incomparably higher than Ukraine's geopolitical value. Since the U.S. recognizes China as its “only competitor,” the effects of a China-Taiwan conflict will dwarf all other issues. On the other hand, simply forecasting that Russia's invasion of Ukraine will lead to a Chinese invasion of Taiwan is premature because there are too many possible combinations of variables in the equation. One clear thing is that U.S.-China competition will become more serious than ever.

What we can learn from the Russia-Ukraine war is that we must accurately understand the security situation on and around the Korean Peninsula and monitor for contingencies, particularly concerning the maritime security situation near the peninsula. We must also study trends



in the international order regarding the economy, diplomatic relations, and the military before and after the war in Ukraine, and then establish strategies for national security. To this end, “internal balancing,” including enhancing our security capabilities and developing innovative organizations, should be a high priority. We must also make bold decisions and enact greater efforts for external balancing, including pursuing a global comprehensive strategic alliance with the U.S. Now is the time to gain knowledge that promotes Korea’s national interest by expanding beyond military matters and seeking ways for Korea to play a more critical role in the reshuffling of the global supply chain.

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