

2024 Global Forecast: A World Dividing

PART III

Conflict Zones



EDITORS

Craig Cohen & Alexander Kisling

CSIS | CENTER FOR STRATEGIC & INTERNATIONAL STUDIES

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About the 2024 Global Forecast

The last two years have witnessed significant global developments that brought geopolitics back to center stage and exacerbated global divisions. The CSIS 2024 Global Forecast—*A World Dividing*—offers insights from dozens of our scholars on the most urgent questions in the year ahead around security, technology, geoeconomics, alliances, and regional influence.

This third installment of *A World Dividing* examines conflicts raging in two theaters: Ukraine and the Middle East. Two years into Russia's invasion of Ukraine, CSIS scholars analyze the battlefield outlook, whether Western support for Ukraine will hold, and how to begin rebuilding the Ukrainian economy. At the same time, experts forecast the possible long-term consequences of the Israel-Hamas conflict for Middle East geopolitics and security, as well as the regional economy.

This volume follows the first two installments of *A World Dividing*, which explore the myriad issues facing U.S.-China competition in 2024 and the rapidly shifting contours of global economic and technology competition. The issues examined in the next installment are of equal importance, with expert insights on the defining factors in the battle for influence in the Global South.

We invite you to explore the diverse perspectives shared in our 2024 Global Forecast to deepen your thinking on these key issues.

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The Outlook for Ukraine

Three Futures for the War in Ukraine: The Good, the Bad, and the Ugly

Mark F. Cancian

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Ukrainian and Russian commanders face the problem of World War I on the Western front. To achieve victory, they need to break through the defensive zone and get “to the green fields beyond,” but that may be out of reach with existing capabilities.



Last year, the path forward in Ukraine was clear: train Ukrainian forces, equip them with highly effective Western weapons, and unleash them in a counteroffensive that would push Russian forces back. Unfortunately, Ukraine got hung up in the Russian defensive zone and liberated little territory. Now, stalemate has settled in. What lies ahead for 2024? Here are three scenarios: the good—Ukraine rebuilds for another offensive and regains some lost territory; the bad—Western aid declines, leading to Ukrainian military deterioration and eventual collapse; and the ugly—a continuing stalemate on the current front lines.

SCENARIO 1

The Good—Continued Aid and Renewed Military Operations

As the war enters its third year, Ukrainian officials are pleading for continued support. President Volodymyr Zelensky recently came to Washington in person to argue his case, and Ukrainian domestic

support for the war continues to be strong.¹ The Ukrainian people are committed to liberating their territory.

In the United States, despite opposition from elements in Congress, aid for Ukraine continues to have strong bipartisan support in Congress and with the American people, though both are getting discouraged.² There is guarded optimism about a deal that includes increased border security for the Republicans and aid to Ukraine for the Democrats.

Militarily, Ukrainian forces have learned a lot about the Russian defensive system and now know what to expect. In a scenario in which Ukraine is able to continue fighting effectively, it will need weapons to replace losses, which continued military aid will provide. Most of all, its forces will need training. Last year, the North Atlantic Treaty Organization (NATO) established training programs from basic skills to battalion-level maneuvers to meet this need. Re-equipped and better-trained Ukrainian forces might crack the Russian lines. Ukrainian troops have

beaten Russian forces before and retaken half of the territory they lost since February 2022.

For this approach to be viable, Ukraine needs a theory of victory to guide its military operations and counter rising war fatigue among its supporters. How does it plan to win? This theory of victory could take many forms: a series of limited counterattacks against Russian weak points that collectively regain the lost territory, a battle of attrition that wears Russia down, or a focus on long-range strikes that squeeze Russia, particularly Crimea. Whatever the theory, Ukraine needs to lay it out convincingly.

SCENARIO 2

The Bad—Aid Reductions and Military Decline

U.S. aid to Ukraine is in the balance. A strong contingent in Congress, backed by former president Donald Trump and some think tanks, seeks to end aid.³ So far, they have succeeded.

In a scenario where U.S. support dramatically diminishes or ends altogether, Ukraine's future looks bleak, as laid out in a recent CSIS commentary.⁴ Ukrainian military capabilities will decline gradually. Over time, Ukraine will face increasing difficulty making local attacks to capitalize on Russian vulnerabilities, and eventually, it will struggle to contain Russian advances. Collapse would be inevitable. Before then, Ukraine would likely agree to a Russian-dictated peace to prevent catastrophic losses of territory.

SCENARIO 3

The Ugly—Continued Stalemate

The front lines have changed little in the past 14 months despite hundreds of thousands of casualties. A continued stalemate on the ground is a highly likely scenario. Stalemate does not mean nothing happens; local ground assaults, long-range strikes, air attacks on infrastructure, and Ukraine's dominance in the Black Sea will continue. Stalemate does mean that the front lines will not move much. Both sides have created formidable defensive zones with mines, trenches, strong points, and anti-tank obstacles. Ukrainian and

Russian commanders face the problem of World War I on the Western front. To achieve victory, they need to break through the defensive zone and get “to the green fields beyond,” but that may be out of reach with existing capabilities.⁵

Ukraine and its supporters have continually hoped for a game-changing weapon that would break the stalemate. Javelin missiles, the High Mobility Artillery Rocket System (HIMARS), the Patriot missile defense system, M1 tanks, and Leopard tanks have all been touted as game changers, but none have brought victory even as each has added to Ukraine's overall military capabilities.

The next highly anticipated weapon is the F-16 fighter jet.⁶ Indeed, Ukraine has pointed to a lack of air support as a key reason for the counteroffensive's lack of success.⁷ Although F-16s might arrive before the end of the year, their numbers will be small (maybe 24), and the vast supporting capabilities available to NATO air forces—airborne early warning, electronic countermeasures aircraft, joint command and control—will be unavailable to the Ukrainians. The F-16s will not do for Ukraine what U.S. airpower did against Iraq, Serbia, Afghanistan, and Libya. Success, if it comes, will result from a combination of weapons and munitions, training of forces, and the people's determination.

Looking Ahead

The optimism of 2023 has faded. There is always hope that negotiations will achieve what military forces could not, but the brutal truth is that facts on the ground drive peace settlements. Two of the three scenarios outlined here are Russian victories. A reduction in military aid (the bad scenario) would bring a clear Russian victory. Any peace Russia negotiates while its military power is ascendent would inevitably be unfavorable. Russia would demand not just holding on to the territory it currently occupies but also, possibly, other concessions like amnesty for war crimes and renunciation of reparations.

Europe's Surprisingly Resilient Support for Ukraine Will Be Tested in 2024

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Thus, while Europe is stepping up, it will need to do considerably more for both Ukraine and its own defense forces in 2024. That will require Europe taking extraordinary measures at the EU and national levels to ensure Ukraine is able to hold back Russian forces.



Europe's fierce response to Russia's aggression in Ukraine surprised many. As Russian tanks rolled into Ukraine, Europeans were shocked to see one of their capitals under attack. This prompted an unprecedented response, with Europe providing substantial military aid, welcoming millions of Ukrainian refugees, and establishing a robust sanctions regime. Perhaps just as remarkable, today, after nearly two years of war and a major energy shock, European support for Ukraine remains robust. Yet signs of strain are emerging that may prevent Europe from living up to its rhetoric to support Ukraine "as long as it takes."¹

With the war becoming a protracted conflict and Russia looking to go back on the offensive, Europe will need to create new instruments and funding mechanisms to support Ukraine, especially if the United States stops sending aid. The sense of political urgency that existed in 2022 has faded. Now with Prime Minister Viktor Orbán's Hungary becoming a major difficulty, along with German-led demands for a European-wide return to tight fiscal policy,

European support for Ukraine may be far below what is needed.

It is easy to forget how surprisingly strong Europe's response to the war has been. Prior to the invasion, U.S. officials working on sanctions policy believed they would have to pull Europe along, as they did in response to Russia's seizure of Crimea in 2014. Yet the EU sanctions response, such as pushing for an oil embargo and adopting sanctions against Russia's central bank, often caught Washington by surprise. European countries, including the European Union itself, also took unprecedented steps to provide military support to Ukraine. Countries like Germany and Sweden provided lethal aid to a country in conflict for the first time, and the European Union used its European Peace Facility fund to provide Ukraine with lethal assistance. Europe is now collectively providing more support than the United States to Ukraine.² The clear threat posed by Russia prompted historic steps from Sweden and Finland to join the NATO alliance. Defense spending also dramatically increased across

the continent, with Germany leading the way with the announcement of a new €100 billion Zeitenwende defense fund.

European support for Ukraine remains high despite the war causing significant economic hardship in Europe. Russian president Vladimir Putin's throttling of gas deliveries into Europe and the destruction of the Nord Stream pipelines caused an energy crisis with Europeans seeing a dramatic increase in prices. The situation led to significant inflation and undermined European economic competitiveness. Yet European leaders reacted with remarkable speed, such as by buying liquefied natural gas and rapidly building new infrastructure. Remarkably, European citizens also responded by cutting their energy demand by 15-20 percent, turning down the thermostat and putting on sweaters.³ There is no clearer example of steadfast European support than in Germany, where in the wake of a German constitutional court ruling that prompted German leaders to cut €17 billion from its budget, funding for Ukraine was protected.⁴

But there are challenges ahead. First, the dynamic of the war in Ukraine has changed. In 2022 and 2023, European militaries were providing Ukraine with older equipment from their militaries, but now that equipment is mostly gone. Europe has little equipment on hand to give, which is problematic because it means if the United States stops providing military aid, Europe will be unable to fill the gap. It also means that for Europe to maintain support to Ukraine, it will have to buy new equipment from its defense industries. Not only will this be more expensive, but it also requires Europeans do more to coordinate their efforts, something European defense ministries struggle to do. As a result, production lines to aid Ukraine and refill European warehouses are not yet running at full speed.

Second, Prime Minister Orbán has demonstrated a willingness to block EU support for Ukraine. At the European Council summit in December 2023, Orbán agreed to abstain on the decision to begin ascension negotiations with Ukraine, the next step on Ukraine's road to EU membership.⁵ The European Union had just released more than €10 billion in funds for Hun-

gary that it was holding for rule-of-law violations.⁶ However, despite receiving the funds, Orbán noted that he still opposed Ukraine moving toward membership and that there would be many opportunities to block Ukraine's membership in the future.⁷ The next day, Orbán blocked the European Union from providing €50 billion in support for Ukraine.⁸ EU leaders were ultimately successful in pressuring Orbán to sign on to the €50 billion financial support to Ukraine at a special February 1 European Council summit. But with Ukraine still needing more military support from the European Union, the European Union and Ukraine's Hungary problem has not gone away. The need for unanimity for major policy and funding decisions will continue to give Orbán significant leverage and ability to hold Ukrainian funding hostage.

Third, and perhaps an even more acute challenge, is the return of austerity economics to the European Union. Last year's ruling of the German constitutional court that the German government was violating its constitutional requirement to have a balanced budget has led to immediate budget cuts, despite Germany suffering from a major deficit of infrastructure investment.⁹ Moreover, the EU Stability and Growth Pact, which sets rules for the national budgets of eurozone countries, returned on January 1, 2024, after being suspended in response to the pandemic. While the pact was amended to give governments more flexibility, the reinstatement of the pact will still put pressure on European governments to cut spending, making additional outlays for defense of Ukraine more difficult. Germany, for instance, has kept its funding for Ukraine at the national level but is now opposing increases to the European Peace Facility, which is used to support Ukraine.

Thus, while Europe is stepping up, it will need to do considerably more for both Ukraine and its own defense forces in 2024. That will require Europe taking extraordinary measures at the EU and national levels to ensure Ukraine is able to hold back Russian forces.

Putin's Efforts to Divide the West

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The ongoing political polarization preventing the Western political mainstream from reaching consensus on essential questions, diffuse power structures, and multiple political chokepoints provide a favorable dynamic for the Kremlin to achieve its goals, especially if its propagandist campaigns are successful in convincing Western audiences the war is too costly for them domestically.



The most recent Ukrainian counteroffensive in the second half of 2023 has exposed Ukraine's military vulnerabilities on the one hand and Russia's strengthened defense capabilities on the other. Among the top challenges facing Ukraine is speedy and uninterrupted access to Western military equipment and technology. Ukrainians also require reconstruction support from the West, which is vital to shore up their morale and bring back some of the millions of exiled citizens.¹ Russia, on the contrary, has ramped up domestic arms production, increased the number of volunteers to fight in the war, and successfully continued its sanctions circumvention efforts.² Absent consistent large-scale economic and military assistance from the West, Russia might gain a significant military advantage over Ukraine in 2024.³

Provision of support to Ukraine depends on Western ability to maintain unity. However, by late 2023 this unity had started to crumble. In total, newly committed aid by allies dropped by almost 90 percent between August and October 2023 compared to the same period in 2022.⁴ Of the 42 previous Ukrainian

country donors, only 20 committed new aid packages between October and December 2023, the lowest number since the start of the war. Ukraine is also becoming hostage to partisan battles in the West, as its support has increasingly been contested in both the European Union and the United States.⁵

The Kremlin is hoping to exploit these partisan dynamics and further undermine support for Ukraine in the West by using tools such as gas dependencies, investments and oligarchs, disinformation, intelligence and spies, and support for populist parties.⁶ Some of these tools are analyzed below.

Energy Leverage

Since the start of the war, the Kremlin has attempted to undermine Western unity through its energy tools. In preparation for the war, Russian state-controlled energy giant Gazprom gradually reduced gas supplies to Europe. By mid-2022, the European Union was experiencing a 60 percent drop in Russian gas deliveries compared to mid-2021.⁷ Russia coupled

gas supply reductions with high-volume information campaigns as its state-linked media broadcasted fights and protests breaking out in Europe due to high energy prices. Gazprom also released ads threatening to freeze Europe.⁸

To replace Russian gas, Europe hiked imports of liquefied natural gas from other countries while slashing gas use. The loss of Russia's cheap natural gas was particularly consequential for Germany, one of its main consumers. Supply disruptions pushed up electricity prices, forcing Berlin to spend billions of euros to ease the burden of rising bills and deepening Germany's budget crisis. High costs of hydrocarbons prompted German chemical giant BASF to cut jobs and stop its share buybacks.⁹ As a result, Germany experienced a minor recession in 2023, becoming the world's worst-performing major developed economy and the only G7 economy to contract.¹⁰

However, besides Germany, the drag on EU economic activity was not as deep as expected when Russia's invasion of Ukraine began and the first comprehensive sanctions took place. Moreover, gas prices returned to prewar levels in 2023. At least in the short term, the European Union has successfully adapted and accumulated substantial natural gas inventories sufficient to survive winter 2023. It seems Gazprom, rather than the European Union, took the greatest blow from its own actions by losing much of the European markets and undermining its own geopolitical relevance.

Information Leverage

In early 2022, the Kremlin's disinformation strategy failed to sell its pro-war narratives in the West. The U.S. administration's strategy of disclosing classified intel contributed to exposing Russia's propagandist efforts.¹¹ Western public opinion almost uniformly sided with Ukraine.¹²

Russia subsequently adapted its information strategy to emphasize domestic costs of the war for the West. Thus, comparing to the early months of war, later in 2022, Russia-linked accounts on Twitter had reduced mentions of Nazis and NATO, replacing them with complaints about energy and cost of living.

In France, the Kremlin-backed disinformation effort pushed the talking points that Western sanctions against Russia have damaged the economy through a decline in trade and left the country at risk of falling into the deepest social and economic crisis, and that the supply of arms to Ukraine has undermined the country's ability to defend itself.¹³ This approach has worked much better for Russia. As measured by the popularity of those narratives in Western domestic debates, claims that the West's support for Ukraine is too costly or too risky have found much more fertile ground with Western audiences by playing to pocket-book concerns and war fatigue rather than historical or geopolitical grievances.¹⁴

Another disinformation effort is aimed at presenting Western support for Ukraine as futile or hypocritical. A recent BBC study found thousands of fake accounts on TikTok spreading false claims about senior Ukrainian officials and their relatives, presenting them as obsessed with money and uncaring about the war effort.¹⁵ Russian diplomats and Kremlin-linked media platforms are also spreading accusations that the West has a double standard about civilian casualties when it comes to Ukraine and Gaza.¹⁶

Political Leverage

For years, Russia's influence in Europe and the United States has relied on its links to non-mainstream populist political actors.¹⁷ At the start of the 2022 war, this leverage seemed to have disappeared when many European populists shifted their stances following their voters' uniform condemnation of Putin and embrace of Ukraine.¹⁸ Most notably, Matteo Salvini's Lega and Giorgia Meloni's Fratelli d'Italia parties both flipped their stances to adopt more pro-Europe, pro-U.S., and anti-Russia positions.¹⁹ The intensity of condemnation, however, varied, with some parties presenting others as being at least partially responsible for the war along with Russia.

In recent months, however, old and new populist parties have become more critical of support for Ukraine. On the left, the newly elected Slovakian government led by Prime Minister Robert Fico in early November 2023 rejected a draft plan to donate rockets and ammunition to Kyiv, while prominent German

politician Sahra Wagenknecht announced plans to launch a new party opposing sanctions against Russia and arms supplies to Ukraine.²⁰

On the right, former U.S. president Donald Trump, who leads in the 2024 Republican primaries, has offered more scrutiny on military budgets, as his supporters in Congress blocked funding to the bill that included aid for Ukraine. France's National Rally and Germany's Alternative for Germany are growing in popularity, presenting the war in Ukraine as a waste of European resources.²¹ In the Netherlands, the recent victory of the far-right Party for Freedom (PVV), which offered to halt military and financial support for Ukraine, threatens the assistance of the fifth-largest EU aid provider to Ukraine.²² But the main proponent of lifting Western sanctions against Russia and blocking aid for Ukraine is Hungary's far-right prime minister Viktor Orbán. He has adopted a successful strategy of threatening to block European financial aid for Ukraine and Ukraine's EU accession unless the European Commission unblocks frozen funds for Hungary.²³ The commission's recent caving into his blackmail sets a dangerous precedent, which other actors might soon pick up.²⁴

Will the Western Coalition Stick Together?

In the coming months, the Kremlin is likely to continue using energy, political, and informational tools along the lines discussed here. At the core of Putin's strategy is identifying the points of discord in the West and amplifying them with a goal of complicating Western ability to sustain consistent support for Ukraine. The ongoing political polarization preventing the Western political mainstream from reaching consensus on essential questions, diffuse power structures, and multiple political chokepoints provide a favorable dynamic for the Kremlin to achieve its goals, especially if its propagandist campaigns are successful in convincing Western audiences the war is too costly for them domestically.

It appears the Western tide is turning for Ukraine. But the problem goes beyond the Kremlin's aptitude to exploit Western divisions. Broadly speak-

ing, Ukraine is suffering from the West's inability to understand the existential importance of the war for its own survival and its policymakers' continued lack of strategy for ensuring victory. Since early 2022, the West has offered Ukraine just enough military aid to survive but not enough to threaten Russia with defeat, which has allowed the Kremlin time to improve its military positions and undermine popular support for Ukraine in the West. The current situation generates multiple fissures in the West, which—if the past is any indication—the Kremlin will prove very apt at exploiting.

Ukraine's Future Depends on a Vibrant Private Sector

Romina Bandura

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Ukraine's future depends on the outcomes on the battlefield as much as on the economic front.



The private sector is the main motor of growth of any functioning market economy, creating jobs; introducing new products, services, and processes; and transferring technology and know-how.¹ In particular, small and medium-sized enterprises (SMEs) represent 90 percent of all business activity worldwide and contribute over 50 percent of global employment.² Companies are also major sources of tax revenue for governments, helping fund public services. This is the case in Ukraine, where the private sector—comprising approximately 1.6 million individual entrepreneurs, 400,000 SMEs, and 500 large enterprises—contributes significantly to the economy and society at large.³

Unfortunately, the war has affected businesses across sectors of the Ukrainian economy, damaging facilities and logistics routes and disrupting supply chains, leading to sales losses and unemployment. Ukraine is fighting as much a military war against Russia as an economic war. The enemy is trying not only to occupy land, wipe out physical infrastructure, and inflict mass civilian casualties but also to cripple

the economy, targeting critical industries including transport and logistics, agriculture, energy, digital, and the defense industrial base. Ukraine's future depends on the outcomes on the battlefield as much as on the economic front.

Despite the war, the private sector has exhibited remarkable resilience. According to the American Chamber of Commerce's September 2023 Ukraine survey, even one and a half years into the conflict, 98 percent of its member companies were still operational in Ukraine.⁴ Although GDP fell by nearly 30 percent in 2022, it is forecast to grow by 3.5 percent in 2023, partly due to the resilient information technology (IT) sector and the rerouting of exports.⁵ Since the war started, Ukraine attracted more than \$500 million in new investments, according to data by UkraineInvest, the country's investment promotion agency.⁶ These new investments are taking place in regions that are not under active combat, such as the western and central parts of the country. A large portion of Ukraine—close to 85 percent of its territory—is

unoccupied, where businesses can operate and grow. The Global Business for Ukraine’s investment map showcases 146 investment-ready projects totaling \$4.9 billion.⁷ On the other hand, large reconstruction projects in the east and southeast of Ukraine (regions that have been heavily destroyed) will probably have to wait until the war is over.

Ukraine’s allies and partners are supporting Ukraine’s right to defend itself by providing military aid. Through humanitarian and budgetary assistance—which pays the salaries of soldiers, pensioners, and teachers and finances essential public services—they are also helping the economy stay afloat. However, only a small part of this aid is being directed to help current businesses and attract new investors. Moreover, the war continues, and a political settlement is unlikely anytime soon. This complicates the situation of the private sector. Donor countries will continue supporting Ukraine, but these amounts will likely decline over time and fulfill only part of the country’s financial needs. The international community needs to work with the government of Ukraine to spur business and attract new investments into the country so they can create jobs and generate tax revenues. International financial institutions (IFIs) and development finance institutions (DFIs) could do more in this area, even amid the war.

Ukrainian businesses have many financing needs at the moment, in particular equity investments. The capital needs are immense. The destruction of manufacturing facilities, logistical lines, and supply chains has forced some companies to rebuild their business models from scratch. Some companies were able to adapt to the war, but in many cases they require capital. The impact that new capital can produce in this environment is enormous.

IFIs and donors are exploring new finance mechanisms to support the private sector in Ukraine.⁸ They are also providing technical and legal advice on how to reform laws (e.g., the public-private partnership law) and important institutions so Ukraine can become “investor-ready.” However, as they approach operations in Ukraine, they need to be more creative, coordinated, and willing to take risks. They must devise new instruments to leverage private capital for

smaller projects that could provide demonstration effects for other investors. Although these institutions are doing incredible work to support the economy, they have not adapted their business model to operate more creatively in a war zone.

IFIs and DFIs could set up new finance vehicles, such as investment funds where donors would provide a first-loss tranche to attract other investors. These funds could potentially be funded by using frozen Russian central bank assets worth \$300 billion, or the interest proceeds, which in Europe amount to \$3 billion a year. In addition, DFIs could ramp up existing risk mitigation mechanisms such as loan portfolio guarantees, which would help existing businesses access finance at reasonable rates. One example is the support that the U.S. International Development Finance Corporation (DFC) is lending to the Bank Lviv. Although these amounts are small, this instrument could be expanded. Additionally, a more coordinated and scalable political risk (or war risk) insurance mechanism may create the confidence needed for private sector investments to flow in Ukraine. The European Bank for Reconstruction and Development (EBRD) is working on such a scheme, but it is still not operational.

Investors also want to see more significant governance and economic reforms in Ukraine to improve the business climate in the country. This includes turbocharging anti-corruption efforts, devising a clear strategy to restructure state-owned enterprises and inefficient businesses, and de-oligarchizing the economy. This reform agenda must align with the conditions under Ukraine’s EU accession process to ensure harmonization with EU laws and standards.

Fighting corruption is paramount if Ukraine wants to attract investments and join the European family. Society at large considers corruption as the number two problem in the country after the war, according to a recent survey.⁹ The latest edition of Transparency International’s Corruption Perception Index shows that Ukraine still scores poorly at 36 points out of 100 (half of France’s score and 18 points behind Poland).¹⁰ However, Ukraine has made strong inroads in the fight against corruption, including increased criminal proceedings against suspected

perpetrators, judiciary reforms, a competitive selection process for the heads of the main anti-corruption agencies, and improvements in public procurement. This is an area where the international community can play a critical role, providing both advice and pressure for reforms. Ukrainian civil society and independent journalists are important allies in this fight. Ukraine still has a long road ahead but must keep this momentum.

Ukraine's future membership in the European Union is also a big incentive for investors. Ukraine's entry into the European Union will provide companies with enough confidence that there is a level playing field for doing business in the country. Moreover, it will give companies access to more than 40 million consumers in Ukraine, with an added 450 million consumers in the European Union. Recent investor surveys point out that access to the EU market and EU product quality and standards are key to future business opportunities in Ukraine.¹¹

Ukraine has huge investment potential given its low-cost skilled labor, a market size of more than 40 million consumers, and proximity to the EU market. There are many business opportunities in sectors such as oil and gas, strategic minerals, IT, and agriculture.¹² Ukraine also has the potential to become a manufacturing hub for its neighborhood, reaching more than 800 million consumers.

As Ukraine moves away from its Soviet past and looks toward a bright economic future, developing a strong and vibrant private sector will provide tax revenues, jobs, and economic security. The international community can help provide more predictability and stability for companies operating in Ukraine and create innovative mechanisms to attract private capital. It might be risky to invest in Ukraine during wartime, but not investing is a larger missed opportunity. Ukrainians cannot wait until a peace settlement is reached. With the prospect that economic assistance will not last forever, the international community needs to find ways to make the economy more self-sufficient. The time to act is now.

A Bumpy Road on Burden Sharing: NATO and Ukraine in 2024

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It is hard to overstate how important a Ukrainian victory—or, at the very least, a Russian loss—is for U.S. and Western interests, broadly defined. Yet it is also hard to overstate how important the issue of allied spending on defense and security (or lack thereof) is to Washington policymakers, some of whom now question why the United States—rather than Europe—must continue supporting Ukraine.



The North Atlantic Treaty Organization (NATO) turns 75 in 2024, and the allies will meet in the summer in Washington, D.C., to mark the occasion. A key question on many observers' minds is, How will NATO manage what is arguably one of the biggest crises in European security in the alliance's history—the Russian war against Ukraine? The answer to that question will, for many, inform perceptions of the utility and purpose of the alliance for both current and emerging threats to the Euro-Atlantic region. Of course, crystal balls are inherently foggy; rather than predict a specific answer, it is far better to think about what factors are likely to inform such allied decisions at NATO's 75th anniversary summit.

First of all, despite the fact that the war in Ukraine is affecting all NATO members, Ukraine itself is not a NATO member state. This is a point of frustration for several central and eastern European countries in particular, many of which waged an intense but ultimately unsuccessful diplomatic campaign for Ukraine to be invited to join the alliance in the run-up to the 2023 NATO Vilnius summit. As the logic went,

inviting Ukraine to join NATO would be a way to force a cessation of hostilities, as many observers believe that Putin's Russia does not want to wage war against NATO itself. The counterargument to Ukrainian NATO membership was that it would have immediately committed NATO and its member states to a major war with Russia. A half measure was instead agreed at Vilnius; among other things, Ukraine was promised membership in the future, as conditions allow, but without all the strings normally attached to the membership accession processes.¹ But the bottom line remains that Ukraine is not a NATO ally.

As a consequence, NATO's responses to the Ukraine crisis are primarily inwardly focused. One major area of work addresses preparing the alliance to deter and defend against a Russian attack on NATO territories (among other threats) through a series of reorganized war plans.² Another key area focuses on encouraging members to spend at least 2 percent of their GDP on defense programs. And still another addresses reexamining the NATO defense industrial

base after shortfalls in basic areas like ammunition have become apparent. As for Ukraine, NATO will continue to aid the war-torn country through humanitarian assistance, nonlethal aid, and capacity-building measures. Allies will continue providing both lethal and nonlethal aid, assuming their domestic politics allow for it.³

As for domestic politics, therein lies the rub. It is hard to overstate how important a Ukrainian victory—or, at the very least, a Russian loss—is for U.S. and Western interests, broadly defined. Yet it is also hard to overstate how important the issue of allied spending on defense and security (or lack thereof) is to Washington policymakers, some of whom now question why the United States—rather than Europe—must continue supporting Ukraine.⁴

Concerns about “burden sharing” are as old as the alliance itself. The need for Europe to spend more on defense has been routinely expressed across U.S. administrations for decades. Prior to departing the Pentagon, Secretary of Defense Robert Gates argued to the allies that if they did not spend more on defense, future presidents would have a hard time making the case to continue investing in NATO.⁵ At the NATO summit in Vilnius in 2023, U.S. senator Ashley Tillis argued that burden sharing is the most critical issue before the alliance today.⁶ Yet, as of 2022, only seven European NATO states had spent 2 percent or more of their GDP on defense.⁷ It is hardly surprising, therefore, that the world is where it is: the United States is frustrated that Europe does not put its money where its mouth is, and Europe is frustrated with being repeatedly browbeaten over the subject and with a U.S. presidential contender who, if elected, might attempt to pull the United States out of NATO altogether.⁸

The debate and related concerns about defense spending have been—and are—grounded in real concerns about what it takes to meaningfully defend allied territory and interests, especially as the alliance faces a Russian bear with a growing geopolitical appetite. But the problem with evaluating burden sharing against defense spending is that it turns what should be a strategic-level discussion among allies about what they can and should do to meet shared

challenges into a transactional, nickel-and-dime issue of cost sharing. Because the value of NATO is being reduced to a discussion over dollars and euros, the broader strategic utility of the NATO alliance for U.S. interests is being lost. And Ukraine now hangs in the balance.

The Future of Congressional Support for Ukraine

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A decisive defeat of the Russian military is in the interest of the United States. Therefore, Congress should act quickly to provide Ukraine with the needed support to accomplish this goal. The longer assistance is delayed, the harder it will be to secure a Ukrainian victory and the more money and lives will be lost in the long run.



On February 24, 2022, millions watched in disbelief as Russia launched a full-scale invasion of Ukraine.¹ Within two weeks, the U.S. Congress passed legislation allocating nearly \$14 billion in support of Ukraine.² Nearly two years later, the urgency in Washington seems to have evaporated. Meanwhile, Ukrainians continue to die on the front lines. Sirens continue to wail, warning citizens of incoming missiles, and mothers continue to search for their children abducted by Russian forces. Ukrainians are left to wonder, Will the world's most powerful democracy abandon us in our darkest hour? Each passing day that Congress fails to approve additional assistance weakens the position of the Ukrainians, both militarily and politically.

Despite waning urgency, bipartisan support in Congress for continued U.S. assistance to Ukraine remains strong. Looking at the voting patterns in the House of Representatives, where support for assistance to Ukraine is more fragile, opposition has grown slightly, but not significantly, over the past two years. Parsing out members' positions on Ukraine can be

challenging since aid has often been part of broader packages. However, three key votes can help inform the trends on support for Ukraine.

The first stand-alone vote on assistance to Ukraine occurred in May 2022 when Congress took up a \$39.4 billion package. Prior votes on assistance were part of larger legislative packages that garnered opposition for reasons notwithstanding assistance to Ukraine. This bill passed the House overwhelmingly by a vote of 368-57 and the Senate by a vote of 86-11.³ The next stand-alone votes on assistance to Ukraine did not occur until the House took up the fiscal year 2024 National Defense Authorization Act (NDAA).⁴ During consideration of the NDAA, Representative Marjorie Taylor Greene offered an amendment to eliminate \$300 million in assistance to Ukraine. The amendment failed by a vote of 341-89. Representative Matt Gaetz offered an amendment to prohibit all U.S. security assistance to Ukraine, which failed by an even wider margin, 358-70. Using the Greene and Gaetz amendment votes as a marker, a solid majority

of the 221 members that make up the House Republican Conference continue to support U.S. assistance to Ukraine.

While these vote trends tell a more positive story than what is often portrayed in the media, worries over declining support are not misplaced, particularly as the United States embarks on a hotly contested and emotionally fraught presidential campaign cycle. While U.S. president Joseph Biden is a strong supporter of continued assistance to Ukraine, many congressional Republicans feel the administration has failed to lay out a clear strategy to support victory. According to a November 2023 Gallup poll, a plurality—41 percent—of Americans feel the United States is doing too much to support Ukraine, with 33 percent saying the United States is doing the right amount and 25 percent stating the United States is not doing enough.⁵ After February 24, 2022, President Biden did not formally address the nation again on the full-scale Russian invasion of Ukraine until October 2023. The president and other supporters of continued assistance to Ukraine should continue to make the case to voters about why supporting a decisive Ukrainian victory is in the interest of the United States.

Their argument should be one of principles and self-interest. On principles, the case is straightforward: Russian president Vladimir Putin—an unelected dictator—invaded a sovereign nation in an attempt to overthrow Ukrainian president Volodymyr Zelensky, who was elected by the citizens of Ukraine in a free and fair election. During the course of this invasion, Russian soldiers brutally and systematically massacred noncombatant civilians. One need only stand in front of the memorial marking the mass grave in Bucha to learn of children as young as four years old being killed by the Russians.⁶ Ukrainian authorities have identified at least 16,000 children abducted by Russia since the start of the war, though they worry the true number may be far greater.⁷ The extensive documentation leaves little room to doubt Russia has committed and continues to commit crimes against humanity. Furthermore, should Putin seize control of broad swaths of Ukrainian territory, this sends the message to other dictators with expansionist ideations—such as Xi Jinping in China—that one need

only to outlast the short attention span of the world's democracies to achieve their goals.

However, the reasons to support Ukraine go beyond the moral imperative of the conflict. Analysis of the \$113 billion appropriated to support Ukraine shows much of that money has gone to modernize U.S. weapons stockpiles, reinvigorate the U.S. defense industrial base, and invest in U.S. military personnel.⁸ Aid appropriated in the supplemental spending bills for Ukraine provided nearly half a billion dollars for Lockheed Martin to surge production of the High-Mobility Artillery Rocket System (HIMARS) in the town of Camden, Arkansas—a welcome economic boost.⁹ Similar infusions of spending have benefited towns across the United States, including Lima, Ohio, where Abrams tanks are produced, and Ocala, Florida, and Troy, Alabama, which are home to Javelin missile factories.¹⁰

In addition to the economic boon for the defense industrial base, U.S. business stands to benefit from the transformation and reconstruction of Ukraine. A World Bank estimate from March 2023 places the cost of rebuilding Ukraine at \$411 billion.¹¹ Continued U.S. support for Ukraine will ensure U.S. companies and businesses are welcomed to participate in the effort. Emphasizing pocketbook issues such as job creation and economic growth potential is especially important in a consequential election year.

Absent leadership in the White House, it is up to members of Congress to clearly articulate to their constituents why it is imperative to continue to support Ukraine's victory. The moral argument is clear. However, politicians need to appeal to the self-interest of the American public as well. A decisive defeat of the Russian military is in the interest of the United States. Therefore, Congress should act quickly to provide Ukraine with the needed support to accomplish this goal. The longer assistance is delayed, the harder it will be to secure a Ukrainian victory and the more money and lives will be lost in the long run.

Assessing the Fallout: Consequences of the Israel-Hamas War

Long-Term Implications of the Israel-Hamas War

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For Israel, in the years ahead, every day will be October 8 but with the fear that it is October 6. Israel's sense of security after decades of limited conflict with its neighbors has been shattered.



Earthquakes have aftershocks,” a veteran Israeli intelligence officer told a CSIS delegation on a recent visit to that country, “and sometimes the aftershocks are more important than the earthquake.” He spoke wisely.

For Israel, this was a transformative event, every bit as much as the Six-Day War in 1967 or the 1973 Yom Kippur War. On October 7, 2023, Israel suffered an attack of unparalleled barbarity as thousands of Hamas fighters, led by the elite Nukhba forces and followed by the less disciplined Qassam Brigades and finally mobs of Gazans, attacked at over two dozen points along the frontier. During the initial fighting, 1,200 Israelis, 900 of them civilians, including children and invalids, were slaughtered; men and women were raped and mutilated; and hundreds were taken hostage.

For Israel, in the years ahead, every day will be October 8 but with the fear that it is October 6. Israel's sense of security after decades of limited conflict with its neighbors has been shattered. The existential ques-

tion is on the table because Israel soon entered a war on multiple fronts including on its northern border, as Hezbollah joined in the fight in a limited way; on the West Bank; and even further afield.

Israel will now no longer trust in its ability to detect and preempt threats; instead it will seek to prevent them. Israeli political and military leaders will be much more ready than in the past to initiate conflict if they think that by doing so they can reduce the possibility of another day like that one, or worse. It will arm itself more intensively and wage war with a kind of disciplined aggression it has not shown in some time. It will not crumble or weaken because it has shown itself to be a resilient society; it is wounded, enraged, and determined.

One of the most interesting features of this war has been the muted public reactions of many governments around the world, even in the face of protests and demonstrations in the streets. Israel's Arab partners, including Egypt, Jordan, the United Arab Emirates, and Saudi Arabia, quietly share their

fears and hatred of Hamas, itself an outgrowth of the Muslim Brotherhood. They will not openly support Israel's actions, though they will do so quietly. The global war against extreme versions of Islamism never really ended, but it has now come back and with a vengeance. Moderate Muslim states are also going to find themselves on the front line.

For Iran, the war has been a huge, if perilous, success. Its strategy of building a ring of enemies around Israel—to include Hamas (which it helped arm and train), Hezbollah in Lebanon (far more heavily equipped than Hamas), various Shiite militias in Syria that can attack Israel on the Golan Heights, and the Houthis in Yemen—seems to be working. The purpose may not be to destroy Israel in one blow but rather to weaken it in a series of wars, as Iran itself is protected by the nuclear deterrent it seeks to acquire.

There is, however, considerable danger of overreach. The Houthi attacks on Red Sea shipping invite a U.S.-led response. Whether through tit-for-tat escalation or because of a decision to make a larger point, the day may well come when the United States, with or without its allies, attacks not only the Houthis but their Iranian advisers and logistics as well. Neighbors probably fear Iran more than ever and will be willing to be quiet partners in counterstrikes against it.

The possibility, therefore, exists for a substantial regional war in the near future. It could come about because of an Israeli preventive war against Hezbollah or merely escalation of the fighting along the current border. It might begin in an attempt by Hezbollah to emulate Hamas with a similar strategy of building up its forces along the Israeli frontier and striking suddenly. Or it could come about through an escalation of U.S. strikes on Iranian targets in Yemen and retaliation by Iran against Persian Gulf shipping, creating a broader conflict.

Finally, the alignment of states on the Israel-Hamas war is revealing. Russia and China are more or less openly supporting Hamas and Iran; the United States and its allies are supporting Israel. It is the same set of opposing coalitions as in the Russia-Ukraine war and, with some adjustments, the increasing tensions in the South China Sea.

The upshot is that when Hamas terrorists stormed across the fence dividing them from Israel and began the slaughter of civilians, they accelerated the division of the world into opposing blocs. They brought to the fore the challenges posed to liberal democracies in confronting enemies who openly embrace extreme brutality directed against civilians, as Russia has in Ukraine. This war is not entirely separable from other conflicts in which the United States is an interested and committed party, and it may turn out to be a trigger for other, even more devastating conflicts in the Levant, the Persian Gulf, and beyond.

Can Israel Learn from U.S. Wars in Iraq and Afghanistan?

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Israel, however, faces a different challenge in Gaza than the United States did in Iraq or Afghanistan—in many ways, a much harder one.



As a shocked Israel prepared to respond to the October 7, 2023, Hamas terrorist attack, the most devastating in Israel’s history, U.S. president Joe Biden offered some sober advice: “After 9/11, we were enraged in the United States. And while we sought justice and got justice, we also made mistakes.”¹ Looking back at the U.S. wars on terrorism in Afghanistan and Iraq, Biden, along with many American strategists, urged Israel to heed the lessons the United States won so dearly and avoid the many mistakes made along the way.²

Lessons from Afghanistan and Iraq are extensive and still being compiled, but how relevant are they to Israel’s situation with Hamas?³ As might be expected, some apply more than others, and a few do not apply at all.

The U.S. counterinsurgency model, as embodied in documents like Joint Publication 3-24, *Counterinsurgency*, stresses the political side of counterinsurgency.⁴ In both Iraq and Afghanistan, the United States focused largely on defeating Saddam Hussein’s regime

and the Taliban but less on what should replace them, resulting in sustained—and, in the case of the Taliban in Afghanistan, successful—insurgencies. Establishing a legitimate and competent government after military victory is vital, as this ensures support from the people and allows law enforcement and social services to function.⁵ All this requires empowering local partners, who will bear the brunt of the fighting. In Afghanistan, the United States lost 2,443 troops, while the Afghan military lost at least 66,000, to say nothing of the tens of thousands of Afghan civilian casualties.⁶ Strong local partners and successful governance, in turn, ensure popular support. As Chinese leader Mao Zedong famously argued, the guerrillas must swim in the sea of the people, and if the people are against the guerrillas, then their end is certain.⁷

In the aftermath of the wars in Afghanistan and Iraq, the United States now prefers to avoid long wars and accept that some level of risk is inevitable.⁸ The U.S. preference is to conduct shorter counterterrorism-focused efforts rather than grinding occupations

that require decades of effort. When sustained insurgencies must be fought, the United States seeks to work with local governments, warlords, or other partners, supporting them with training and, at times, airstrikes or other limited military support.⁹

Some of these lessons are applicable to Israel's current war with Hamas. Most importantly, Israel must develop a long-term political strategy for Gaza. As Raphael Cohen has argued, the current situation has grown, in part, out of

Israel's decades-long failed strategy of "mowing the grass" in Gaza—which attempted to both contain and deter Hamas in Gaza, while simultaneously not addressing any of the underlying economic and political conditions that had helped bring Hamas into power and keep it there.¹⁰

Israel, however, faces a different challenge in Gaza than the United States did in Iraq or Afghanistan—in many ways, a much harder one. Geography poses the first problem. Gaza is on Israel's doorstep, while the United States has the luxury of distance. What happened in Baghdad or Kabul did not pose an immediate threat to the U.S. homeland. Israel cannot wash its hands of Gaza as the United States eventually did with Afghanistan.

Historically, Israel has had a less solutionist approach than the United States. It sees Palestinian hatred as almost inevitable, and the Second Intifada and the 2005 Gaza withdrawal proved to many Israelis that concessions to Palestinian leaders would be met with violence (though the truth is far more complex).¹¹ The latest Hamas attack, made in the aftermath of what Israel saw as an accommodating approach to Hamas in Gaza, will reinforce this view. Thus, Israelis believe a political approach designed to win over the Palestinian people is doomed to fail.¹²

Israel also lacks local partners who might govern Gaza and serve Israeli interests. In Afghanistan and Iraq, numerous local leaders sought to work with the United States against the insurgents (even as they were often critical of U.S. policies), and they had genuine support among many communities in these countries.¹³ Israel will find few, if any, Palestinians

willing to work with it, in part because its policies have steadily undermined the more pro-peace Palestinian Authority, convincing many Palestinians that Israel will respond only to force.

Finally, Israel must engage in military operations in a saturated media environment, with widespread transparency regarding civilian casualties, destruction of infrastructure in Gaza, and other horrors of war. In Iraq and Afghanistan, the battlefields were remote, and much of the fighting occurred when social media was in its infancy. Now the genuine destructiveness of the Israeli response (worsened by widespread misinformation) is there for all to see, eroding international support for Israel, including in the United States.¹⁴

Biden and other U.S. leaders are right to urge caution on Israel and to encourage Israeli security officials to understand what the United States has learned in its various wars on terrorism. But the Israeli war on Hamas has its own characteristics, many of which are far more difficult than what the United States faced in Afghanistan or Iraq. As a result, Israel will learn its own lessons—and make its own mistakes.

A Different Two- State Solution

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Israelis may fantasize about a divorce from Palestinians, but their actions for three-quarters of a century have made that increasingly impossible.



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With violence between Palestinians and Israelis at its highest levels in decades, voices again have risen in favor of a two-state solution. The idea—a Jewish homeland and an Arab one carved out of Mandatory Palestine—dates back to the United Nations’ 1947 partition plan, but it has seemed increasingly remote. In the weeks before October 7, the growing consensus was that the window for a two-state solution had closed.¹ The current violence has persuaded many that the idea needs to be revived.

Indeed it does, but doing so will require the redefinition of some terms—for starters, “two,” and “state,” and “solution.”

Two

Let’s start with “two.” Seventy-five years of history have intertwined the fates of Arabs and Jews far more than had ever been contemplated. Not only has Jewish settle-

ment extended deep into formerly Arab areas, but the 20 percent of Israeli citizens who are non-Jewish Arabs have come to think of their Palestinian-ness (and Israeli-ness) in complex and connected ways. Resources, not least water, are inextricably linked, but even things as mundane as wireless spectrum are completely intertwined. Israelis may fantasize about a divorce from Palestinians, but their actions for three-quarters of a century have made that increasingly impossible.

Palestinians have been enveloped in that process, too. The Palestinian economy has become deeply integrated with the Israeli economy, even as permission to work in Israel is unreliable. Just last summer, Israel was the destination for 90 percent of Palestinian exports and the source of 58 percent of its imports.² While Palestine certainly needs a more diversified economy and set of trade ties, building it all from scratch without taking advantage of Israeli infrastructure and ports, not to mention the technical skills for things like managing the money supply and credit markets, will make the task infinitely harder.

Each side has ample evidence from the past 30 years of how hard arm's length cooperation is. Palestinians note that Israeli security forces not only have continually burst into areas of supposed Palestinian self-rule but also have been lax on vigilante settlers who seek to be a law unto themselves. Not unreasonably, they see Israeli businesspeople taking advantage of Palestine as a captive market to their own advantage and at the expense of Palestinian interests.

Israelis have complained that Palestinian security cooperation has always been grudging and incomplete, and they blame poor Palestinian economic performance on corruption and incompetence rather than Israeli exploitation.

Rather than more separation, however, the antidote to these complaints is greater integration, albeit with outside enforcement. A multinational endeavor with Israelis and Palestinians at its core, with the active participation of Americans, Europeans, regional governments, and others, will be awkward at first. But giving Palestinians and Israelis greater visibility into each other's actions will give greater confidence. Equally important will be noting when cooperation is not forthcoming, also giving greater confidence that agreements cannot be ignored without consequence.

State

This is where "state" needs to be redefined. What will emerge is something less than a Westphalian state with complete control over what happens within its borders, and not just for Palestinians. Israel will also need to open its decisionmaking to justify some of its actions to others, and to consider the broader implications of actions it principally targets at its own citizens. The European Union has shown much of this is possible, but what will be required here will be more intrusive and less consensual.

Solution

All of this will be messy, which brings us to the last problem in this trilogy: the "solution." One might object that what is described here is not a solution at

all, because it will require sustained engagement and struggle from two parties who were largely estranged before the massacres of October 7, and are even more estranged in their aftermath.

Adding to the challenge, each side is convinced that sizeable constituencies on the other side ultimately seek domination and not coexistence. While this reality cannot be willed away, much less ignored, one thing is especially encouraging. That is, through more than three decades of polling, it is clear how dynamic the support for coexistence has been, and therefore how dynamic the support can be. It responds to conditions, and it responds to actions. There is little question that, right now, it is close to bottom, and there is tremendous upward potential.

A strategy of this sort will be unacceptable to both sides, at least initially. It is not what they have been fighting for over the last 75 years, and it feels inadequate. Even so, it gives us a new construct to work from, and a new construct is necessary. For decades, most of Israel's peace negotiations were built around the idea of "land for peace." But what was successful with Egypt did not work with Syria, and it certainly did not work with Palestine. Israel has both political and security reasons to move away from that formula. Prime Minister Benjamin Netanyahu is determined to preserve Israeli communities scattered throughout historic Judea and Samaria, in areas designated for a future Palestinian state. He speaks derisively of the potential emergence of "Hamastan" and "Fatahstan" on Israel's borders, and he vows to block it. On these issues, there is a fair amount of Israeli unity.³

And at the same time, Palestinians look at the fragmented ink blots of "Area A" on the West Bank, supposedly under full Palestinian control yet largely at the mercy of Israeli decisions. Palestinians have come to regard the Oslo agreement of 1993 as a ruse that left them powerless, dominated, and immiserated. Israel's cordon around Gaza, and its actions over the last three months inside of it, reinforces Palestinians' despair.

Rethinking the terms of what a two-state solution might look like will not be satisfying. Each side feels it gave the other a chance through the Oslo Accords,

only to see the depth of its adversary's hostility. Events of the last three months have convinced even more that the other side has no respect for human life. This is no basis on which to build a partnership.

But the two sides surely have shared interests, not least the desire to create a future of greater security, prosperity, and freedom for their children. Seventy-five years of fighting has not gotten either side what it wanted. Thinking through ways to enlarge definitions and introduce outside monitors will not end conflict, but it could go a long way to end bloodshed.

The New Forever Wars

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Unless the United States commits to rigorous diplomacy to resolve conflicts and properly manage crises, especially those like the Israeli-Palestinian conflict, where the United States has unique leverage, these forever wars will spiral.



The world is awash with seemingly endless conflicts. The Israeli-Palestinian conflict exemplifies the most common variety: a local conflict that simmers with sporadic, unpredictable, and devastating surges in violence. Despite this growing trend, the United States has tried to narrowly focus on great power competition, particularly with China. But just as in the Cold War, those local conflicts are where global competition is most likely to play out.

Since the U.S. invasions of Afghanistan and Iraq, the left and right in the United States have advocated for an end to “forever wars.”¹ But in the sunset of unsuccessful U.S. forays in the Middle East, another kind of forever war is emerging and threatens to affect U.S. interests for the next two decades. Local and civil wars, like the Israeli-Palestinian conflict, are dramatically increasing in number, intensity, and length around the world. While 2023 saw the highest number of violent conflicts since World War II, 2022 saw more battlefield deaths than any year since 1994.² These crises have nearly tripled in duration since 2005.³

U.S. foreign policy tends to sidestep the drivers of these conflicts and their discontents. In an effort to downsize its approach to peripheral regions like the Middle East, the United States has instead focused on encouraging deals between strongmen and dealing with crises through increasingly anemic humanitarian aid. Even in the Israeli-Palestinian conflict, where the United States has been an integral actor for decades, the U.S. government has sidelined Palestinians in favor of elite bargains with Arab states, otherwise known as the Abraham Accords. The United States and its Western allies have then dealt with the Palestinians through aid. As seen in the October 7 Hamas attack on Israel and the subsequent Israeli offensive on Gaza, the strategy is not working.

While Gaza is the most dramatic example of this failure in 2023, it is hardly the only one. From Yemen and Syria to East Africa, protracted conflicts and fragile states have become vectors for instability. The United States deals with all these protracted crises in a similar way but with even less interest, seeing

them as more peripheral or even irrelevant to great power competition. Nevertheless, in many ways these conflicts will challenge the narrow U.S. response to great power competition. The instability they create spills across borders and distracts the United States. The vulnerability inherent in protracted crises allows others to take advantage, and the U.S. response or lack of response provides an avenue for enemies to criticize U.S. hypocrisy or ineptitude.

Reignited conflicts have the power to quickly inflame an unstable region. The escalation in Gaza exemplifies the potential ripple effect of localized violence. As the war in Gaza escalated, the regime under Syrian president Bashar al-Assad stepped up attacks in northwestern Syria, and Iranian-backed militants launched attacks on bases and facilities housing U.S. personnel in Iraq and Syria—130 attacks in under three months—injuring dozens of service members.⁴ In a globalized world, local events can quickly have global consequences. Houthi attacks on shipping vessels forced several major shipping lines—representing 60 percent of global trade—and oil giants like BP to suspend their services through the Red Sea.⁵ The attacks eventually forced the United States to strike targets in Yemen.⁶ Each of these events has its own destabilizing consequences, and all of them are distracting from the issues the U.S. government wants to focus on.

The United States' great power competitors also gain from these protracted crises in different ways. Both Russia and China gain from U.S. distraction and redirection of U.S. resources. Russia will gain directly from U.S. efforts to provide military support to Israel as it diverts attention and resources from Ukraine. Putin also gains by directly intervening in many of these local conflicts, which the United States considers less strategic. In Sudan, Russia reaps the benefits of the country's gold and continues to push for a naval base in the Red Sea.⁷ In Syria, Putin's support for a struggling Assad won Russia an air base and warm-water port to expand its influence in the Middle East, Africa, and Europe.

China and Russia are also able to manipulate the United States' chosen path for managing these crises: aid. For aid workers, China's support of North Korea

and Russia's support of Syria have made principled and adequate humanitarian responses nearly impossible. As aid workers struggling with aid diversion in North Korea said in 2018, "If China and Russia were not supporting the Kim regime behind the scenes, then . . . foreign aid groups would have much more bargaining power."⁸ In Syria, the Assad regime egregiously diverts aid with little to no accountability as a result of Russia's protection.⁹ China and Russia have since expanded these protections to other states in Africa, making conflict management through humanitarian aid even less feasible.¹⁰

Indirectly, Russia and China gain from arguing the United States is hypocritical and ineffective on the world stage. For many countries in the Global South, support for Ukraine waned because of U.S. double standards in Iraq and Israel. For these countries, the United States' inconsistent application of norms in the name of national interests excuses them from violating those same rules occasionally. While China and Russia may protect a state's ability to impede aid and commit violence, for 153 countries at the UN General Assembly, the United States is doing the same for Israel at the UN Security Council.¹¹

Unless the United States commits to rigorous diplomacy to resolve conflicts and properly manage crises, especially those like the Israeli-Palestinian conflict, where the United States has unique leverage, these forever wars will spiral. The compounding damage to U.S. interests is likely to be long lasting. To combat it, the U.S. government would do well to view the challenge as Franklin D. Roosevelt saw it in 1941:

We must recognize that the hostilities in Europe, in Africa, and in Asia are all parts of a single world conflict. . . . Our strategy of self-defense must be a global strategy which takes account of every front and takes advantage of every opportunity to contribute to our total security.¹²

How Will Israeli Tech Emerge from the Gaza Conflict?

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War is by its nature disruptive—to life, business, and society. The longer the war, the greater the economic hit. Israel’s tech sector must once again prove resilient enough to recover and reengage with the global economy.



The tragic toll of Hamas’s October 7 attacks can be counted in lives lost and homes destroyed, but a second-order effect lurks on the horizon: a damaged Israeli economy and a potentially massive disruption to Israel’s tech sector. That tech sector has served as an economic engine for Israel and an innovation engine for the globe. While Israeli tech has weathered recent conflicts well, the extent of this mobilization and a weaker economic context are likely to significantly delay, if not disrupt, Israeli tech.

Workforce disruptions are the main driver of potential economic impact. In response to the October 7 attack, the Israel Defense Forces mobilized 360,000 reservists, approximately 4 percent of Israel’s total population.¹ This marks one of the largest mobilizations in Israel’s history, eclipsed only by the 400,000 reservists called up during the 1973 Yom Kippur War.² In contrast, Israel’s most significant recent mobilizations were the 2014 Gaza War, with 75,000 reservists, and the 2006 Second Lebanon War, with 89,000 reservists.³

The dent in the workforce is far greater than the call-up of reserves: at the height of the disruption, this conflict removed an estimated 764,000 Israelis, or 18 percent of the total workforce, between reserve mobilization, evacuations near the Gazan and Lebanese borders, and school closures requiring parental care at home.⁴ Recent estimates suggest that as of December, an estimated 500,000 Israelis, or 12 percent of the workforce, are still not working.⁵

The mobilization has likely hit tech start-ups harder than average, given staff at start-ups skew young and much of Israel’s tech sector sprang out of skills gained in service with the IDF. According to a survey conducted by Start-Up Nation Policy Institute (SNPI), an estimated 15-20 percent of tech sector employees were mobilized, and 25 percent of company respondents reported experiencing a shortage of personnel.⁶ According to Avi Eyal of Entrée Capital, 10-30 percent of start-up employees mobilized, representing a substantial reduction in staff and a prolonged break in innovation, project development,

and client servicing.⁷ Start-ups tend to operate on a skeleton staff, making them less resilient to prolonged staff disruption.

Tech disruption will have an outsized impact on Israel's economy. Israel's tech sector represents around 18-20 percent of GDP in contrast to 9.3 percent in the United States and 6 percent in the European Union.⁸ High-tech products constitute around 50 percent of Israel's exports.⁹ Further, foreign direct investment in the Israeli tech sector is critical, and much of that funding may be in peril. As of late October, approximately 40 percent of surveyed tech firms experienced disruptions in their financing efforts, with many investment agreements either canceled or placed on hold.¹⁰

Even if the labor gap is temporary and the reservists demobilize in weeks rather than months, some disruptions may be irreparable. A recent Israel Innovation Authority and SNPI survey revealed more than 70 percent of start-ups surveyed delayed or abandoned new orders and projects.¹¹ This was primarily due to challenges in conducting pilots and clinical trials, progressing research and development initiatives, and exporting and importing essential products. Those disruptions are on top of signs the sector was already weakening following Israel's domestic political unrest. Reports from December indicate Israeli start-ups only raised \$1.3 billion between October and December, a 46 percent drop from the same time the year before, marking a new six-year low in Israeli start-up funding.¹²

The overall economic impact could be double that of previous conflicts. The Bank of Israel has determined the 2014 Gaza War reduced Israel's GDP by 0.4 percent, and the Second Lebanon War by 0.5 percent.¹³ The estimate for the current conflict is 0.7 percent for 2023.¹⁴ In December, the Bank of Israel once again revised downward the growth projections for 2024, from 3 percent before October 7 to 2 percent.¹⁵

On the positive side, advances like using the cloud to deliver products have made Israeli tech more resilient, and recent history suggests a bounce back is possible.¹⁶ In 2014 tech bounced back robustly as

venture capital investments steadily increased from \$2.9 billion in 2014 to \$5.6 billion in 2016. But just as the conflict in 2014 was different from that in 2023, the world economy has also changed. Bloomberg predicted an escalation in the conflict—like recent Houthi attacks on ships in the Red Sea—could send global oil prices soaring. Global growth could drop to 1.7 percent, an estimated \$1 trillion off global output.¹⁷ The global economy is still feeling the effects of a war in Ukraine, monetary policy is tighter, and there is continuing uncertainty surrounding the multitude of elections in 2024. Conditions will be more challenging for a quick bounce back this time around.

Israel is wisely acting fast to bolster the tech sector. As of early January, the Israel Innovation Authority (IIA) had begun to deploy \$100 million in emergency aid for start-ups.¹⁸ The *New York Times* reported that chip giant Intel announced it would proceed with a planned \$25 billion investment to expand a factory in southern Israel, having received a \$3.2 billion grant from the government.¹⁹ For the economy more broadly, Israel has slowly tried to fill the labor gap by increasing the number of foreign workers in the country, with more than 12,000 foreign workers arriving as of December.²⁰

War is by its nature disruptive—to life, business, and society. The longer the war, the greater the economic hit. Israel's tech sector must once again prove resilient enough to recover and reengage with the global economy. It is telling the world it is ready to do just that. Early in the conflict, the IIA started a new campaign with this tag line: "Israeli tech delivers. NO MATTER WHAT."²¹

Contributors

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THREE FUTURES FOR THE WAR IN UKRAINE: THE GOOD, THE BAD, AND THE UGLY

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