

## A (Somewhat) Contrarian Take on COVID and World Order

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Every crisis seems epochal in the moment, when normal patterns of behavior are profoundly disrupted and normal patterns of policy are profoundly inadequate. Yet determining, in real time, which crises will indeed have epochal effects—sweeping away one era and ushering in another—is inherently difficult. The tremendous flux that crises create can make it hard to remember that there is more inertia in the international system than we often realize. It also means that the most confident predictions can easily prove to be wrong.

So what effect will COVID-19 have on the international system? At this point, no one really knows, because no one knows how much damage, over how much time, the pandemic will inflict. It is possible to imagine a scenario in which nation-wide lockdowns are lifted, governments muddle through with basic precautionary measures, a vaccine quickly becomes available, and the existing system survives mostly intact. It is just as easy to imagine a scenario in which a far more lethal second wave hits, neither vaccines nor herd immunity save the day, and we come to think of COVID as a shock every bit as profound as World War I or World War II.

The bulk of informed opinion presently leans toward a maximalist—and deeply pessimistic—appraisal. COVID-19 is causing “the end of the liberal world order,” writes G. John Ikenberry. A recent Council on Foreign Relations report offers a similarly bleak assessment.<sup>1</sup> Other observers argue that the crisis may shift the global ideological balance toward autocracy; that it may be America’s “Suez moment” and accelerate China’s ascent; that it may end or dramatically roll back globalization; and that it will, or should, cause Washington to fundamentally reorder its approach to national security.<sup>2</sup> COVID-19, the early consensus holds, will be a hinge in history, akin to the assassination of Archduke Franz Ferdinand in 1914—or perhaps even the traumas of the 1930s and 1940s.<sup>3</sup>

Maybe, but maybe not. Precisely because there is so much uncertainty today, it is essential to consider a range of futures. To be clear, COVID-19 is *not* a geopolitical blip of little consequence. It has already taken a ghastly human toll and caused disastrous dislocations. It is

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<sup>1</sup> G. John Ikenberry, “The Next Liberal Order,” *Foreign Affairs*, July/August 2020; Robert Blackwill and Thomas Wright, “The Coronavirus, World Order, and the Future of American Foreign Policy,” CFR Special Report No. 86, June 2020.

<sup>2</sup> Anne Applebaum, “The People in Charge See an Opportunity,” *The Atlantic*, March 23, 2020; Kurt M. Campbell and Rush Doshi, “The Coronavirus Could Reshape Global Order,” *Foreign Affairs*, March 18, 2020; Kevin Rudd, “The Coming Post-COVID Anarchy,” *Foreign Affairs*, May 6, 2020; Richard Haass, “A Cold War with China Would Be a Mistake,” *Wall Street Journal*, May 7, 2020.

<sup>3</sup> Lawrence Summers, “COVID-19 Looks Like a Hinge in History,” *Financial Times*, May 14, 2020; Colin H. Kahl and Ariana Berengaut, “Aftershocks: The Coronavirus Pandemic and The New World Order,” *War on the Rocks*, April 10, 2020.

sharpening the key rivalry of the 21<sup>st</sup> century and highlighting strains that were already bringing about a more disordered world. The post-COVID landscape will surely be much different than the landscape of December 2019.

But it will not necessarily be a dramatically more menacing landscape. Yes, there is one scenario in which COVID ends the U.S.-led international system. There is also another scenario in which the pandemic weakens autocracy and populism more than democracy, underscores America's structural power even as it damages the country's soft power, catalyzes a more formidable balancing coalition against China, and leads to a more geopolitically savvy form of globalization as well as renewed cooperation between the world's democratic states. In this essay, we lay out both scenarios, and make a cautiously optimistic case that the brighter one could still materialize.

So much depends, however, on what choices America makes in a post-COVID world. The current crisis reminds us that "American leadership" is not a cliché or a euphemism. It is arguably the single most important factor in determining whether the arc of history bends toward something better or something worse. And for the more hopeful scenario we outline to materialize, America must soon recover the tradition of enlightened global leadership that it presently seems to have abandoned.

### ***The World That Made the Pandemic***

Whatever its long-term effects, COVID-19 qualifies as the greatest shock to the international system since the 2008-09 financial crisis, and perhaps since September 11, 2001. Yet there is something puzzling about the way COVID has upended societies around the globe.

So far, the novel coronavirus that causes COVID appears to be significantly less lethal than the virus that caused the Spanish Flu pandemic of 1918-1919. Most of the world's population has access to vastly better medical care than it did 100 years ago. But that pandemic did not shut down societies for months or threaten to destroy previously thriving national economies.<sup>4</sup> No one thinks of the 20<sup>th</sup> century as being broken into pre-Spanish Flu and post-Spanish Flu eras. In some ways, the fact that COVID has been both less lethal and more disruptive may reflect the fact that many countries are now better able—thanks to remote work and the availability of countercyclical fiscal policies—to survive national shutdowns. Perhaps we are worse off today because we are better off today. In other ways, this puzzle may simply show that societies place a higher value on saving human lives than they once did.

In addition, the effect of COVID has been so outsized because it broke loose in a world that was already riven by serious great power conflicts and cleavages, and because the virus from the outset hit particularly hard most of the world's leading powers. Five key trends—the pre-existing conditions—combined to increase the damage caused by the pandemic, while reducing the chances of a more effective response.

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<sup>4</sup> Walter Scheidel, "The Spanish Flu Didn't Wreck the Global Economy," *Foreign Affairs*, May 28, 2020.

First, *the paradoxical state of globalization*. Pandemics have happened in eras of far less globalization than our own. Yet one reason this disease went from being a “problem for China” to a global mega-crisis in weeks is the intensely interconnected nature of the modern world. The ease of global travel permitted the disease to hop from China to nearly every other continent before the nature or even the existence of the outbreak was widely understood. Extremely high levels of economic integration accelerated and magnified the economic pain. Just-in-time supply chains and integrated financial markets are boons to efficiency and prosperity in good times; they become transmission belts for disruption when things go bad.

Yet the trajectory of COVID-19 was also influenced by a seemingly contrasting factor—the high level of populism and anti-globalization sentiment among key policy elites. That sentiment is a response to the insecurities globalization brings. But it had the perverse effect of slowing and hampering the coordinated response that would have been necessary to impede an aggressive disease from spreading in a highly globalized world. Leaders in the United States initially relied on border closures and travel restrictions as substitutes for, rather than elements of, a comprehensive national and international response; some officials welcomed COVID-19 as a spur to economic decoupling between America and China.<sup>5</sup> In a number of countries, populist sentiment—stoked by anti-globalization leaders—encouraged the downplaying of warnings from public health experts. Finally, anti-globalization sentiment in high-places undermined efforts to mount an early, multilateral economic or fiscal response.<sup>6</sup> In early 2020, the world was characterized by the *reality* of interdependence without the *mindset* of interdependence necessary to manage it wisely.

Second, *a combination of Chinese hyper-assertiveness and Chinese hyper-insecurity*. The best chance to prevent a pandemic would have been to limit the initial epidemic at its source. Yet doing so requires high levels of trust, transparency, and accountability within a political system. Most authoritarian polities would fall short in these areas; a Chinese system that has become increasingly personalized and neo-totalitarian failed miserably. Local officials squelched whistleblowers and suppressed news of the disease for crucial weeks in December and early January. Central officials and Xi Jinping himself then did likewise. Much of the pandemic’s virulence and spread can be traced to this Chinese information blackout; that blackout, in turn, reflected the deep insecurity of a regime obsessed with potential threats to its rule.<sup>7</sup>

To prevent international embarrassment and isolation, China then threw its weight around in ways that made the underlying global public health problem worse. Beijing employed economic and diplomatic pressure—whether explicitly or implicitly—to prevent countries such as Cambodia from shutting their borders to Chinese travelers or otherwise limiting their

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<sup>5</sup> See “Wilbur Ross Says Coronavirus Could Boost U.S. Jobs,” *BBC*, January 31, 2020.

<sup>6</sup> Stewart Patrick, “The Multilateral System Still Cannot Get Its Act Together on COVID-19,” *CFR.org*, March 26, 2020.

<sup>7</sup> See “China Didn’t Warn Public of Likely Pandemic for 6 Key Days,” *Associated Press*, April 15, 2020; Shawn Yuan, “Inside the Early Days of China’s Coronavirus Coverup,” *Wired*, May 1, 2020.

exposure.<sup>8</sup> Xi successfully coerced the World Health Organization to delay reporting human-to-human transmission and otherwise refrain from sounding the alarm while there was still time for stronger preventive action.<sup>9</sup> China then responded to the inevitable international criticism with a diplomatic offensive meant to obscure its early mistakes. All of these actions were consistent with the long-term growth of Chinese assertiveness dating back to 2008-2009, and all reduced the chances of containing the outbreak.

Third, *surging great-power competition*. All things equal, we would expect a better global response to transnational threats in periods of low international tensions—when patterns of cooperation between leading powers are well-established, positive-sum dynamics are prominent, and policymakers are not tempted to hope that a common danger will inflict asymmetric harm on a rival. When power and influence are more contested, however, mistrust impedes cooperation and zero-sum concerns come to the fore.<sup>10</sup>

By early 2020, this statement described U.S.-China relations well. Despite a temporary truce in the post-2017 trade war, each side was deeply suspicious of the other's motives and actions; each viewed the other as an increasingly dangerous rival. Put simply, the fact that the COVID-19 crisis erupted amid widespread speculation about a “new Cold War” ensured that the crisis was viewed through the lens of the competition.

This trend almost certainly compounded Beijing's unwillingness to share information about the virus and its origins. Doing so would have seemed particularly dangerous for a regime locked in a spiraling competition with the United States. It meant that the early weeks of the crisis were characterized by escalating propaganda warfare and a dearth of meaningful high-level coordination. Most broadly, it ensured that the international dimensions of the U.S. and Chinese responses to the crisis took on a mutually antagonistic rather than mutually supportive quality—much the opposite of the concerted stimulus that the two countries took in 2008-2009.

Fourth, *deep strains in the liberal order*. A liberal international order is characterized by a dense web of international institutions and deep cooperation among like-minded states. The primary reason for having a liberal international order is to facilitate the response to common challenges that emerge from interdependence. If any crisis would be tailor-made for an interdependent, cooperative response, it would be a viral pandemic that does not respect borders and reaches every continent. But such a response did not happen. The liberal international order did not produce the concerted action one might have expected, because that order was beset by internal divisions, suspicions, and distractions.<sup>11</sup>

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<sup>8</sup> For example, Shannon Tiezzi, “China and Cambodia: Love in the Time of Coronavirus,” *The Diplomat*, February 6, 2020.

<sup>9</sup> Dave Makichuk, “German Intelligence Says Xi ‘Pressured’ WHO,” *Asia Times*, May 20, 2020.

<sup>10</sup> Hal Brands, “The Environment and Economy Have Become Great-Power Pawns,” *Bloomberg Opinion*, November 18, 2018.

<sup>11</sup> See Edward Fishman, “The World Order is Dead. Here's How to Build a New One for a Post-Coronavirus Era,” *Politico*, May 3, 2020.

The cohesion of the order's core—the developed, democratic world—had been weakened by resurgent illiberalism. The European Union was plagued by persistent internal tensions, strong populist movements, and the distraction caused by Brexit. Political relationships between the United States and other key democracies were more strained than at any time since the 1970s; commercial and diplomatic disputes had depleted mutual trust and sympathy. Finally, the crisis revealed alarmingly high levels of institutional rot within key bodies such as the WHO, thanks to pressure exerted by authoritarian powers—namely, China—that had become enmeshed in the order without accepting its underlying values.<sup>12</sup>

In fairness, aspects of international cooperation—within Europe, for instance—did improve as the crisis progressed. The Federal Reserve saved the global economy afloat by stabilizing a wobbling financial system.<sup>13</sup> But if crises expose the underlying strength or weakness of everything they touch, COVID-19 showed that the liberal order was struggling.

Fifth, *a leadership vacuum*. The liberal order does not function on its own; it requires a hegemonic power to catalyze collective action. Yet the United States struggled to play that role. Extreme political polarization, probably heightened by the presidential impeachment saga and election-year timing of the crisis, rendered Americans unable to reach even a common understanding of the threat.<sup>14</sup> Key aspects of contemporary American governance—denigration of expertise, a penchant for trafficking in untrue or misleading information, a resistance to systematic planning or preparation, a hyper-transactionalist foreign policy—left the United States particularly ill-placed to exercise global leadership and lent a lurching, unilateral quality to its response.<sup>15</sup> Other democratic countries were not capable of filling the resulting vacuum.

These five trends interacted in potent ways. Rising great-power competition fueled Chinese hyper-insecurity and hyper-assertiveness. Weak leadership at the top and high levels of anti-globalization sentiment exacerbated strains within the liberal order. Deep interdependence and the rot within international institutions were a recipe for trouble. Pandemics do not arise in a vacuum, nor is their trajectory determined entirely by the laws of science. Rather, intertwined geopolitical and geo-economic factors did much to determine the progress of the disease.

### ***The World after COVID, Take 1***

So what sort of world will COVID leave behind? The negative scenario is not hard to envision; it seems that almost every analyst of global politics has described some variation of this outcome. Even assuming that the pandemic does go away—that we are in a world after COVID-19 rather

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<sup>12</sup> Hal Brands, “China’s Influence Operation Goes Way Beyond the WHO,” *Bloomberg Opinion*, March 31, 2020.

<sup>13</sup> For example, Justin Baer, “The Day Coronavirus Nearly Broke the Financial Markets,” *Wall Street Journal*, May 20, 2020.

<sup>14</sup> Frank Newport, “The Partisan Gap in Views of the Coronavirus,” *Gallup*, May 15, 2020.

<sup>15</sup> Karen Donfried and Wolfgang Ischinger, “The Pandemic and the Toll of Transatlantic Discord,” *Foreign Affairs*, April 18, 2020; Katrin Bennhold, ‘Sadness’ and Disbelief from a World Missing American Leadership,” *New York Times*, April 23, 2020.

than a world of COVID-19—this scenario generally involves dramatic regression along four key axes.

First, *the rollback of globalization*. If a world crisis were to be designed with deliberate intent to undermine globalization, it would look much like COVID-19. The pandemic spread so rapidly because of globalization, and the immediate public health response entailed the suspension of the most visible forms of globalization. Nations closed their borders, curtailed information flows, decoupled from global supply chains, and increased their distrust of other nations. These actions, moreover, seemed to vindicate preexisting discontent. While the young had grown disenchanted with globalization's market features, many older citizens in the United States and Europe had become disillusioned with globalization's permeable borders and high levels of immigration. As Francis Fukuyama observed shortly before the COVID outbreak, "every generation's mental framework is shaped by the collective experiences that mark its members' formative years...For people born after 1990, it is neoliberalism and its associated policies of fiscal austerity, privatization, and free trade that have taken on a negative valence."<sup>16</sup>

So far, there is little grounds for optimism that the logic of globalization will quickly reassert itself. Much international travel remains suspended or suppressed; many firms are operating on the assumption that preexisting supply chains, particularly those involving China, will not be quickly put back together. The increasingly zero-sum climate of U.S.-China relations will not abate anytime soon, and will further accelerate the unwinding of globalization as it existed in December 2019. Finally, the crisis seems to have caused the Trump administration to double down on the narrowly nationalistic elements of its policies, another ominous sign.

Second, *decisive and adverse shifts in the balance of power*. Analysts have long been predicting the decline of the United States and the rise or resurgence of its challenges. Some of this has been driven by structural and secular trends, some of it by policy choices in numerous capitals. At first glance, COVID-19 certainly appears to have hastened these shifts.

The stumbling response to the pandemic in Europe and especially the United States seem to have crippled the coalition that dominated global affairs since World War II. The damaged economies and diminished assets of the US and Europe have reduced their economic resources, while the global perception of American power in particular has diminished. Nothing exemplified this more than the pathetic spectacle of the aircraft carrier *USS Theodore Roosevelt*. The world watched as this former avatar of American power projection limped into port at Guam, with its crew waylaid by widespread infections, and its captain humiliatingly relieved from command because of a dysfunctional political dispute in Washington DC.

Meanwhile the apparent success of China in containing the pandemic, coupled with Beijing's aggressive diplomatic offensive combining economic aid and political warfare, has lifted China's global standing even higher. Typical is the argument of the Singaporean scholar and diplomat

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<sup>16</sup> Francis Fukuyama, "30 Years of World Politics: What Has Changed?", *Journal of Democracy*, vol. 31, no. 1 January 2020.

Kishore Mahbubani that the geopolitical effects of the pandemic have “created a massive opening that China has taken full advantage of, on its way to victory over the post COVID-19 world.”<sup>17</sup> The psychological balance of power has certainly shifted a great deal as a result of COVID, even if the effects on the material balance of power are less certain. Perhaps this time the prophets of American demise will finally be vindicated and a new imbalance of power will take root.

Third, *the erosion and perhaps collapse of the liberal order*. The key institutions and relationships on which the world has traditionally depended in prior crises have been absent or deficient in this one. The UNSC and United Nations itself have been non-entities, the World Trade Organization and International Monetary Fund have foundered in halting the spiral of protectionism and economic decline; the G-7 cannot even agree to meet; the European Union initially did little to assist hard-hit member states (although plans for doing so have now been mooted); and the WHO has been discredited by its vulnerability to Chinese pressure and now, potentially, abandoned by the United States. Much of this dysfunction stems from the U.S.-China competition and how it spills over into international institutions.<sup>18</sup> Yet frictions between the leading countries of the order—the United States and its democratic allies—have also increased rather than decreased. Countries around the world now presumably have less confidence in the ability of the liberal order to solve pressing international problems; the United States, under the Trump administration, is reacting to the crisis by increasing its estrangement from the relationships and institutions that make the order function. If American policy in particular continues in this direction for much longer, the strains on the liberal order could well become unbearable.

Fourth, *the decline of democracy and the ascent of illiberalism and populism*. Democracy has suffered twin blows to its global standing. First, the public health response of many democracies to the pandemic has been weak. Democracies such as Italy, Spain, France, the United Kingdom, Brazil, India, and—most obviously—the United States, have endured some of COVID-19’s worst effects, whether measured in infection rates or deaths, and these harms have been compounded by governance failures. The slow and vacillating responses by many of these nations’ leaders, the deficiencies in testing, tracing, and provision of medical supplies, and the overwhelmed hospital systems have all displayed democratic shortcomings to the world.

The second blow has come from authoritarians and their aspiring imitators. Many autocrats have used the crisis to consolidate power and squelch dissent. From Belarus to Beijing to Brazil (the latter still a democracy, but increasingly fragile), journalists have been jailed in growing numbers, and other dissidents targeted for state repression.<sup>19</sup> Other leaders such as Hungary’s

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<sup>17</sup> Kishore Mahbubani, “How China Could Win Over the post-Coronavirus World and Leave the U.S. Behind,” *Marketwatch*, April 18 2020. Available at: <https://www.marketwatch.com/story/how-china-could-win-over-the-post-coronavirus-world-and-leave-the-us-behind-2020-04-14>

<sup>18</sup> Thomas Pickering and Atman Trivedi, “The International Order Didn’t Fail the Pandemic Alone,” *Foreign Affairs*, May 14 2020.

<sup>19</sup> Judith Miller, “The Virus, the Riots, and the Press,” *City Journal*, June 10 2020.

Viktor Orban have imposed emergency laws and suspended civil liberties.<sup>20</sup> Dictators and would-be dictators are not letting this crisis go to waste, and their opportunism recalls the way in which other global crises—such as the Great Depression—led to global recessions of democracy.

If the Cold War ended with the triumph of democracies over authoritarian systems, perhaps the pandemic marks the end of the post-Cold War era, and the surprising reversal -- the triumph of the authoritarian/populist model over democracy. And if the world order we have come to know features American dominance, deep globalization, an expanding liberal order, and the ascent of liberal political values, then perhaps COVID is pushing us into an entirely new era.

### ***The World after COVID, Take 2***

This pessimistic scenario is plausible, especially if one simply extrapolates from certainly early responses to and effects of the crisis. But it is hardly foreordained. For one thing, the fact that American dominance, the liberal order, and other aspects of the pre-COVID status quo have continued for decades suggests that they possess a higher degree of resilience than many observers might realize. Just as important, a closer look at some of the dynamics unleashed or highlighted by the crisis points to a somewhat more optimistic scenario which includes a variety of opportunities for Washington and its allies. That scenario is, in many ways, the mirror image of the one previously described. We outline it here not because we believe it is certain to materialize but because we believe its plausibility indicates that the outlines of the post-COVID world are still very much up for grabs. In this scenario:

*First, the pandemic leads not to de-globalization but to re-globalization along geopolitical lines.* While trade, finance, and people flows all dropped markedly at the height of the pandemic, the fundamental drivers of long-term globalization -- technology that shrinks distances, the quest for economic growth that spurs trade, and the recognition that global problems do not recognize national borders -- have not been undone. If anything, they are underscored. For example, the quest for economic growth to reduce the crushing debt burden created by the pandemic-generated depression will, we believe, eventually lead to renewed growth in trade.

In some ways, the crisis may actually create opportunities for deeper globalization. As individual nations and leaders wrestle with the next phases of the COVID response, particularly antiviral therapies, vaccine development, contact tracing, and mass immunity, it will become clear that no one nation-state will be able to develop those responses alone. The resulting networks, some of which will evolve organically and others of which will be reinforced by institutional mandates and incentives, will create connective tissue binding nation-states together rather than furthering their distance—even if some of them are bound by geopolitical divisions rather than transcending them. Similarly, the continuing decline in birthrates among industrialized nations, coupled with aging populations and increasing entitlement payments,

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<sup>20</sup> Michael Abramowitz and Arch Puddington, "Poland and Hungary Must Not Be Ignored," *Freedom House Perspectives*, May 26 2020. Available at: <https://freedomhouse.org/article/poland-and-hungary-must-not-be-ignored>

will increasingly confront governments with unpalatable choices, the least unattractive of which will likely be increasing immigration to replenish the workforce.

The medium-term outlook could well be managed globalization, managed along two discernible directions. First, supply chains will likely diversify, with the risk premium justifying the inefficiencies of redundancy. In most cases, the costs of entirely on-shoring production back to the United States will be prohibitive. But savvy firms should be able to generate more resilient production chains without complete on-shoring, and those firms will have a competitive edge over others chasing the unicorn of autarky.

Second, globalization will increasingly occur within rather than across geopolitical lines. The quest for diversification and modest U.S.-China decoupling will likely result in a diversion of trade and investment flows to other countries, particularly historic allies like Europe and Japan and other regions, like South and Southeast Asia, where the states have their own incentives to minimize their vulnerabilities to Chinese coercion. Geopolitical logic will reinforce and accelerate this trend, since such deeper trade and economic integration could strengthen the 'free world' economy for a competition with Beijing.<sup>21</sup>

Second, *the pandemic does not result in dramatic, adverse shifts in the balance of power*. Even optimists would concede that America's geopolitical position has worsened somewhat as a result of the crisis. The fact that China seemed to gain the upper hand in its fight against the spread of COVID-19 just as the United States and its major allies were slogging through the toughest phase of the lockdown reinforced the impression of waning Western and especially American power, and created a perception that Beijing now enjoyed a window of opportunity to pursue its aims while Washington and its democratic allies were laid low.

If the psychological balance shifted rapidly, however, the material balance did not shift in a decisive or enduring way. The pandemic adversely affected *every* major economy and market: Almost every geopolitical unit that has been touted at one time or another as a possible emerging disrupter of U.S. primacy -- the European Union, Russia, India, or Brazil -- suffered a grievous economic wound. If anything, the flight of international investors *towards* the United States in the middle of the crisis underscored the fundamental sources of U.S. structural strength.

It has also underscored some fundamental Chinese problems. In sharp contrast to the Great Recession of 2008-2009, which largely exposed American financial weakness while foregrounding Chinese rising economic power, COVID has drawn attention to Chinese economic and political fragility.<sup>22</sup> "Wolf warriors" have not been able to obscure the reality that China

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<sup>21</sup> Hal Brands, "Grand Strategy for a New Twilight Struggle," *Center for a New American Security*, April 11, 2019.

<sup>22</sup> "Jonathan Holslag, "The Rise of the Beijing Consensus," *The Guardian*, April 19, 2009; John Williamson, "Is the 'Beijing Consensus' Now Dominant?" *Asia Policy*, No. 13 (2012): 1-16, [www.jstor.org/stable/24905162](http://www.jstor.org/stable/24905162).

botched its initial response to the spread of the virus and then botched its attempt to cover up this fact with crude propaganda and gifts of defective PPE.<sup>23</sup>

From the CCP's point of view, the most promising indicator is the fact that the pandemic shook global and American domestic confidence in the United States. Over the medium- and long-term, however, it is not clear that even this issue will redound to China's advantage. While American soft power and diplomatic prestige often attach in the short-term to the successes and failures of a particular leader, they tend to reset fairly quickly after the next electoral cycle. If, a year from now, the United States is seen to be acting more competently at home and abroad, the deeper sources of American soft power and prestige may reassert themselves.

For China, by contrast, the long-term diplomatic trends seem more troubling. The fact that dozens of countries called for an international inquiry into the pandemic's origins, that international anger at China rose considerably on multiple continents, and that a number of countries that had previously taken a softer line toward China swung toward a harder line all indicated that Beijing may confront a more formidable balancing coalition in the years to come. Admittedly, forging an effective balancing coalition will require more skillful U.S. diplomacy than has been evident to date. But it is entirely possible that this pandemic will end up hurting China more than the United States.

Third, *the liberal order holds and is, perhaps, revitalized*. As poorly as the institutions of the liberal order performed during the initial stages of the pandemic, they still command more legitimacy in the rest of the world than any plausible alternative. And unless the United States reacts to the crisis by simply abandoning the institutions and relationships it created—a prospect that doesn't seem as outlandish as it once might have—the more likely scenario could be reform rather than collapse.

Lamentations over the weaknesses of international institutions often go in tandem with expressions of nostalgia for a past golden era of multilateral cooperation. But such an era never existed. International institutions have always faced geopolitical challenges and criticism for their failings. Yet they adapted and endured -- and that could happen again. What may emerge is a shift to a two-tiered order: One level involves the world's democracies, and has a higher level of cohesion and ambition, and the second level is a broader order that involves a larger number of countries and a lower level of cohesion and ambition (e.g., deals with pandemics, climate change, and other transnational issues but little else).<sup>24</sup>

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<sup>23</sup> See "China Didn't Warn Public of Likely Pandemic for 6 Key Days," *Associated Press*, April 15, 2020; Shawn Yuan, "Inside the Early Days of China's Coronavirus Coverup," *Wired*, May 1, 2020; Dave Makichuk, "German Intelligence Says Xi 'Pressured' WHO," *Asia Times*, May 20, 2020. Laura Rosenberger, "China's Coronavirus Information Offensive," *Foreign Affairs*, April 22, 2020; David Gitter, Sandy Lu, and Brock Erdahl, "China Will Do Anything to Deflect Coronavirus Blame," *Foreign Policy*, March 30, 2020. "Coronavirus: Countries reject Chinese-made equipment," *BBC News*, March 30, 2020; Gerry Shih, "China's bid to repair its coronavirus-hit image is backfiring in the West," *The Washington Post*, April 14, 2020.

<sup>24</sup> Edward Fishman, "The World Order Is Dead. Here's How to Build a New One for a Post-Coronavirus Era," *Politico*, May 3, 2020.

For example, the G-7 could reform itself by expanding into a D-10 that includes the leading democracies committed to developing alternatives to technological dependence on China: The United Kingdom has already proposed such a reform. The EU is considering plans to deepen fiscal integration by making additional funds available to COVID-stricken economies. U.S. military alliances are likely to prove even more relevant in the more competitive world that is now emerging. And if the United States commits to fighting harder for influence in obscure but important institutions that China has sought to corrupt, the result could be (over time) to increase the effectiveness of those institutions.

Admittedly, the U.S. suspension of participation in the WHO does not fit well with this assessment. So the crucial caveat here, and across all dimensions of the more optimistic scenario, is that this all largely depends on whether the United States plays the role of leader or spoiler in the years ahead.

*Fourth, the pandemic proves deadlier for autocrats and populists than democrats.*

Authoritarians and populists have short-term advantages in confronting a pandemic -- for example, in implementing draconian public health measures and exploiting the demagoguery that goes along with suffering. But several months into the pandemic, there did not seem to be much of a lasting dictator's dividend. The nations that displayed the most effective responses are mostly counted among the ranks of liberal democracies, including South Korea, Japan, Taiwan, Denmark, New Zealand, and Germany. Singapore, a soft-authoritarian city-state, is the main example of a non-democracy that marshaled an effective response, and is almost the exception that proves the rule.

The performance of the world's foremost authoritarian regimes was somewhere between mediocre and catastrophic. China's delayed response to the COVID-19 outbreak, once galvanized, drew on the advantages that authoritarianism offers, including mass lockdowns and mass surveillance.<sup>25</sup> Yet that response was necessary because the authoritarian system had prevented a more effective earlier response, and we still don't know how hard the pandemic hit China because its government has systematically lied about the number of cases and deaths.<sup>26</sup> Iran, Russia, and North Korea also seem to have been hit very hard, with the damage obscured only by their lack of transparency. To be sure, many democratic nations have also under-performed: Italy, Spain, the United Kingdom, and Brazil, to name a few. But the point is that neither type of political system has a monopoly on ineptitude of initial response--and that democracies are still well positioned to win the governance challenge over the long term.

From a free press, to an independent judiciary, to opposition parties, to decentralized governance, to elections, democracies possess an ecosystem of self-correction that provide warnings when policies aren't working, information channels for suggesting new approaches,

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<sup>25</sup> Jessica Wang, Ellie Zhu, and Taylor Umlauf, "How China Built Two Coronavirus Hospitals in Just Over a Week," *Wall Street Journal*, February 6, 2020.

<sup>26</sup> Derek Scissors, "China's COVID Story: The Nonsense Continues," *AEI.org*, May 13, 2020.

policy laboratories for experimenting with different responses, and accountability channels for citizens to either reward or punish their elected leaders and the administrators who serve under them. Authoritarian systems, in contrast, do not have these ecosystems of self-correction. In the near-term, admittedly, such crises can provide political cover for leaders to consolidate control; they can also create the anger and resentment on which populist leaders thrive.<sup>27</sup> But authoritarians cannot indefinitely hide from the convergent pressures of disaffected citizens, dysfunctional health systems, eroding control, and economic stresses accentuated by the crisis, and their political systems tend to be more brittle than democracies when confronted by such challenges.

The greater challenge for democracies may be shaping the global narrative about which system is performing better. The fact that authoritarian information campaigns are often unconstrained by truth also creates propaganda advantages for autocratic regimes, at least in the short-term. But one of the lessons of the Cold War is that authoritarian information campaigns trade short-run effectiveness for long-run persuasiveness, because they rely on a gap between truth and propaganda that becomes hard to sustain over time.<sup>28</sup> Shaping the global narrative will thus require better policy efforts than have been evident to date on the part of the democracies, but there is no inherent reason they cannot compete.

### ***Conclusion: From Crisis to Opportunity***

Both the pessimistic and the optimistic scenarios are realistic enough to be plausible, but only one is attractive from the point of view of a U.S. policymaker. Most of the national interest goals that have driven American foreign policy since the end of World War II would be harder to secure if the pessimistic vision proves true. Even critics from the so-called “restraint” school who say those goals were overly ambitious would likely prefer retrenchment from within the optimistic world rather than have such changes imposed by the harsh realities of the pessimistic world. The real debate among analysts is not whether the optimistic scenario is desirable, but whether it is realistically achievable.

If the pessimistic scenario is inevitable, U.S. grand strategy must change profoundly. If globalization, the liberal order and democracy itself are in an unstoppable decline, the United States must retreat. If the balance of power has shifted inexorably, concessions to allies and rivals alike are unavoidable. If pandemics are the greatest threats facing U.S. policymakers, “hard security” issues must be downgraded.<sup>29</sup>

It is obviously true that global public health will receive more attention as a geopolitical security problem going forward than it did in the past several decades. For the foreseeable future, warnings about the next pandemic will have greater traction, and policy measures designed to

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<sup>27</sup> Selam Gebrekidan, “For Autocrats, and Others, Coronavirus Is a Chance to Grab Even More Power,” *The New York Times*, March 30, 2020.

<sup>28</sup> See, for instance, Alina Polyakova and Daniel Fried, “How Democracies Can Defend Against Disinformation,” *War on the Rocks*, May 30, 2018.

<sup>29</sup> Ilan Goldenberg, “9-11 Swallowed U.S. Foreign Policy. Don’t Let the Coronavirus Do the Same Thing,” *WashingtonPost.com*, March 19, 2020.

better prepare for and head off the next pandemic will almost surely be taken more seriously -- and funded more generously -- than they were over the last decade. This makes sense: If more Americans have already died from COVID-19 than all of America's wars since World War II, then national security priorities should be adjusted accordingly.

It does not necessarily follow, however, that there should be a fundamental reorienting of national security away from traditional state-based issues and towards the human security concerns of development and public health. When 9/11 vaulted terrorism to the top of America's national security agenda it did not, in fact, make the other concerns -- what might be called the September 10<sup>th</sup> agenda -- moot. In the same way, the pandemic, and the social disruption it threatens, will interact with pre-existing national security concerns in ways that make them even more pressing, not less. Put simply, it is hard to think of a single significant national security challenge that has more than temporarily abated as a result of COVID. And rather than tempering existing patterns of conflict, or making irrelevant the clashes of interest and ideology that provoke them, in many cases the pandemic seems to be making these issues—from U.S.-Russia tensions to the threat of an ISIS resurgence in the Middle East—worse.<sup>30</sup>

Most notably, if the Sino-American rivalry helped make the pandemic, then the pandemic is making a sharper Sino-American rivalry. As one of us has written elsewhere, COVID-19 appears to have convinced a large number of Americans what a long series of Chinese provocations in the South China Sea and other areas could not—that the regime in Beijing represents a significant threat to their physical wellbeing and livelihood. The crisis has also produced greater support in the United States for a deepening of relations with Taiwan, while perhaps tempting China to expand its claims in areas from South Asia to the South China Sea while much of the world seems distracted.<sup>31</sup> Not least, the pandemic has revealed how much is at stake in the Sino-American competition for influence in international organizations and countries around the world.<sup>32</sup> In short, the pandemic has made great power competition more important, not less important. COVID has surely proven that Americans are as likely to die as a result of the “soft” threats of the human security agenda as they are from the “hard” threats of the traditional security agenda. Yet it has also created near-term windows of opportunity for actors posing “hard” threats that will require the traditional toolkit and deep engagement to suppress.

The case for adapting U.S. grand strategy on the margins, rather than radically restructuring it, is even more compelling if the optimistic scenario is within reach. And here the role for U.S. policy is even more critical. On every dimension, the question of whether the pessimistic or the optimistic scenario materializes hinges to a great extent on U.S. choices. If the United States commits its vast power and prestige to deepening cooperation and economic integration with the democracies, to promoting a geopolitically informed globalization rather than a wholesale

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<sup>30</sup> “NATO is Facing Up to Russia in the Arctic Circle,” *The Economist*, May 14, 2020; Lara Seligman, “U.S. military fears pandemic could lead to ISIS resurgence in Syria,” *Politico*, April 2, 2020.

<sup>31</sup> Joshua Kurlantzick, “COVID-19 and the South China Sea,” *Council on Foreign Relations*, April 22, 2020.

<sup>32</sup> See for example David Ignatius, “Trump’s Pushback on China Results in an Important Win,” *Washington Post*, March 10, 2020.

retreat from globalization, to reforming and competing for influence within the institutions of the liberal order that underperformed or were corrupt by authoritarian influence, and to developing the policies—not simply the rhetoric—of responsible competition with China, then the fluidity that the crisis has created may well redound to the advantage of America and the “free world.” If the United States chooses a course of narrow economic nationalism, gratuitous provocation of its closest allies, retreat from institutions in which it does not get its way, and continued downgrading of efforts to promote democracy and human rights, then the balance of possibilities may well tip in favor of the darker scenario.

Which brings us to the elephant in the room. The quality of U.S. global leadership is inextricably a function of the quality of U.S. political leaders -- above all, the caliber of the president. And here we have been sorely lacking. As the USMCA case shows, the Trump administration can stumble its way to satisfactory policy outcomes, albeit at great cost. But this is the exception, rather than the rule. At almost every turn in the COVID crisis, the Trump administration has lurched in the direction of choices that would make the pessimistic scenario more likely.

When China was hiding the true nature of the pandemic, the Trump administration was praising Beijing. By the time the pandemic was an undeniable global crisis demanding coordinated response, the Trump administration acted alone through contradictory edicts rather than in close coordination with others. When the inherent unknowns of the science and public health response demanded caution, the president offered reckless and blithe nostrums. When more a more aggressive response might have better prepared us, the Trump administration did less; when a more cautious response might have eased the pain, the Trump administration did more. Throughout, the common thread was not what would best enable the country to overcome the crisis but what would best position the president to overcome a negative headline in the media. And when trouble does materialize, the president’s instinct in this crisis and throughout his presidency has been to lash out—sometimes against allies, sometimes against rivals, but in ways that are more often destructive than helpful.

In short, the optimistic scenario depends to a great extent on a change in behavior of U.S. leaders, and that may only be possible with a change in the identity of U.S. leaders. Whether or not the pandemic catalyzed or merely accelerated pre-existing trends, we seem to be on an inertial trajectory towards a world in which the United States has a much-diminished role and a much-bleaker future. In such a world, U.S. grand strategy may be unavoidably constrained. But such a world itself may yet be avoidable, if U.S. leaders play their cards right. Whether they are well-positioned to do so may be in the hands of the individuals whose daily lives were most impacted by the pandemic, U.S. voters.