

ARGUMENT

Vaccines Will Shape the New Geopolitical Order

The gulf between haves and have-nots is only growing.

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The pandemic has vastly exacerbated the global north-south divide, with wealthy Western states moving steadily toward herd immunity while a majority of Africa, Asia, and Latin America wait for vaccines to trickle down. Only a small number of countries produce their own coronavirus vaccines, but the rest of the world depends on them for their immunizations. This raises the specter of a new geopolitical arrangement—one in which patron-client relationships are determined by the asymmetry in vaccine supply versus demand.

Already, there are strong indications that vaccine have-nots are vulnerable to diplomatic coercion and enticement. Russia and China have begun supplying vaccines in exchange for favorable foreign-policy concessions, as has Israel. Western countries, meanwhile, are focused on their own domestic vaccination programs—although the United States has recently declared its intention to offer vaccine aid to hard-hit countries, especially India.

For the non-vaccine producers, there's always the market—and at first glance, that has worked out for some. The European Union has begun to round the corner, administering millions of doses among its 27 member states. Israel continues to be an early success story; rather than employing its own considerable pharmaceutical base, it has imported millions of Pfizer-BioNTech doses and administered them rapidly and efficiently. And, despite having no domestic production capacity, Canada is now third for vaccination rates for the top 34 largest countries, behind the United Kingdom and the United States. Its tens of millions of doses have all been imported from Europe and the United States. Similar success stories can be found in Qatar, the United Arab Emirates, and Bahrain.

~~However, these market success stories are largely confined to preexisting and intense~~

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vaccinations in most other countries continue to be very low, and notwithstanding the U.S. pile of AstraZeneca doses, this is a result of supply limits. Intellectual property laws and infrastructure constraints mean a near-total monopolization of production capacities in a small handful of countries and a hierarchy of trade advantages and preferences in which a handful of non-producing countries receive priority while others are left wanting.

To overcome these challenges, the World Health Organization set up COVAX, an initiative to coordinate vaccine research and license production in order to guarantee fair and equitable distribution worldwide. To date, however, these efforts have fallen desperately short. Few vaccines have been distributed through this collaborative effort. Instead, facing domestic shortages, the EU and the United States have imposed restrictions on vaccine exports, limiting supply.

But while the United States, Canada, and Europe are still focusing on their own domestic vaccination drives, other vaccine producers are willing to exploit global demand and use their own supplies as a diplomatic instrument.

China and Russia have both actively engaged in vaccine diplomacy, linking vaccine exports to policy concessions and favorable geopolitical reconfigurations. In February, Russia brokered the release of an Israeli citizen held in Syria in exchange for Israel financing Sputnik V vaccines to be sent to Syria. Russia has similarly supplied vaccines to Central and Eastern European countries, drawing them closer to its orbit.

China has declared that its Sinovac and Sinopharm vaccines are a “global public good” and has begun supplying them to nearly 100 countries, in many cases at no cost. Some of this seems intended to rapidly undercut and abort deals that states have made with Pfizer through earlier shipments and, potentially, bribery of local officials. Meanwhile, new leaks indicate that China demanded changes to Paraguay’s position on Taiwan and successfully pressured Brazil to open its 5G market to Huawei as preconditions for receiving vaccine shipments.

If this is a seize-the-moment, one-time thing, then Russia and China will likely come out ahead. India, too, once it has confronted the rapidly escalating second wave. If boosters or regular vaccinations are not needed more than once every several years, then the world is unlikely to see a significant geopolitical reorientation. But if a yearly shot is needed, as leading epidemiologists have warned may be necessary, it could be another story.

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One of the main hegemonic goods that aspiring powers provide is national security. Geopolitical dependencies have typically manifested from the provision of military instruments through arms deals, bases, and collective security commitments. During the Cold War, for example, vast quantities of weapons, training, and troops flowed into the global south as the United States and the Soviet Union competed for client states and as those client states opportunistically sought the most generous patron. While these flows have since diminished, they do still continue. In the current market for this good, the United States sits at the top, supported by a few allies. Russia dominates within a small region of satellites, and China seeks the same, with mixed success but obvious aspirations.

In the global pharmaceutical market, things look different. While still a major player, the United States faces stiff competition from several potential rivals. In Western Europe, Germany and the U.K. enjoy disproportionate influence, as does Russia in its former spheres of influence, Central and Eastern Europe. China and India both have massive production capacity and, most importantly, dominate export markets for generics outside the West. And, despite being a relatively small regional power, Israel also has vastly more significance than its size would indicate as another leading supplier of generics.

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While home to vaccines produced by the likes of Pfizer, Moderna, AstraZeneca, and Johnson & Johnson—all now household names and whose vaccines are considered more efficacious—governments of these states have demonstrated a reluctance to supply doses to much of the rest of the world at the expense of domestic vaccination rates. The United States and the U.K. have exported almost none, and the EU is clamping down. They have similarly been unwilling to waive patents, allowing for production of these vaccines where they are most needed. This suggests that the United

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diplomacy or at least are not willing to do so with the same alacrity and enthusiasm as other states. That may change as time goes on, however, and the result will be worsened inequities within already inequitable trade relationships between these countries and the global south.

When it comes to Asia, the focus may be mostly on Taiwan, where pandemic diplomacy has been particularly intense. China has attempted to exploit the pandemic to isolate the island, and Taiwan has moved to thwart those attempts through its own diplomatic initiatives—including promoting its coronavirus successes. In particular, China unsuccessfully sought to link vaccine provision to cooler relations with Taipei, in the case of Paraguay. Instead, India stepped in to provide vaccines—at the request of Taiwan. While China might repeat such moves in the future, India's influence will rise if vaccine provision becomes an essential and long-term geopolitical good. It also shows that Taiwan is not without powerful patrons and that the ongoing regional competition between China and India may offer protection.

But perhaps surprisingly, the greatest beneficiary may be Israel. Teva Pharmaceuticals, the world's single-largest producer of generic drugs, is already poised to begin manufacturing licensed doses of the vaccines. Headquartered in the Israeli city of Petah Tikva, the company may not be the dominant supplier for the rich markets of Europe and the United States, but it is an essential source of affordable medicine for much of the global south and would massively boost Israel's geopolitical influence as well should ongoing SARS-CoV-2 vaccine provision become essential to the world's health. Israel has reportedly offered doses to Honduras, the Czech Republic, and Guatemala in exchange for moving their embassies to Jerusalem.

The global north has begun to crawl out of the crisis with the machinery needed to provide boosters as necessary—while the global south continues to battle an increasingly ferocious plague. Nevertheless, the pandemic may prove geopolitically costly even for these wealthy countries as former allies or clients realign with current adversaries and as previous partners rise in power and assertiveness.

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