



Editorial

POLITICAL ANALYSIS AND CORPORATE SECURITY UNIT

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Analysis of the current global, regional, and local situation

This document seeks to briefly analyze three situations on a global, regional and local level: The ongoing diplomatic and security crisis between Russia and Ukraine, the electoral panorama for Latin America in 2022 and the future government transitions it would imply, and the escalation of violence and terrorism by Organized Armed Groups (GAOs) such as the ELN and FARC dissident groups.

The Russian Military Buildup in the Russo-Ukrainian Border

The ongoing diplomatic and security crisis between Russia and Ukraine, along with other actors such as Belarus and OTAN, is a part of the greater Russo-Ukrainian conflict, that started in 2014 with the Russian invasion of Crimea. This invasion occurred amid a period of political instability and protests against former president Viktor Yanukovich, who sought to stop Ukraine's increasing rapprochement with the European Union, in support of Vladimir Putin's government and Russia. Taking advantage of months of protests, social unrest, and the appearance of armed secessionist groups in Ukraine, Putin ordered the invasion and capture of the Crimean Peninsula. To accomplish this without unleashing a larger-scale war in Europe, elite "Spetsnaz" forces without badges or Russian insignias were deployed, initially suggesting that these were "simply local residents in arms", and weeks later (after the invasion of Crimea), admitting that these were effectively Russian soldiers ([Washington Post, 2014](#)). It is important to highlight the advantages of this war tactic, as by 'unofficially' invading Ukraine with unidentified troops, it obstructed the reaction time and possible legal consequences of other actors, such as NATO. In other words, it was extremely difficult for the international community to establish adequate military and legal consequences, as it was not even initially possible to identify the enemy. In this sense, forecasting a renewed use of these unconventional tactics is entirely possible in the event of a new invasion of Ukraine. Thus, since 2014, Russia has assumed *de facto* control of the Crimean Peninsula, as well as areas near the border like Donetsk and Luhansk that, according to international law, are Ukrainian territory.

The current security crisis started in December 2021 when Ukraine identified a sudden buildup of troops from the Russian Armed Forces near the border, on scale comparable to that of the incursion in Crimea, suggesting the possibility of a renewed invasion. The mobilization has been interpreted as a warning or reaction to the possible inclusion of Ukraine into OTAN, which Russia considers to be a serious threat to its security interests. Although the Russian government denies it is planning an invasion, there is widespread evidence for this unusual large-scale mobilization, such as satellite images of infantry vehicles, tanks, artillery, and medical supplies ([Reuters, 2022](#)). Other indicators include Russia's "silent" evacuation of non-essential personnel from its embassy in Kiev, Ukraine, ([New York Times, 2022](#)), or reported sudden shipments of blood supplies to Russian towns near the border with Ukraine. Several Russian cyberattacks in Ukraine have also been reported, such as that in 14 January 2022 which penetrated "dozens of government websites" and displayed a message that warned to "prepare for the worst" ([MIT Technology Review, 2022](#)). Considering these patterns, it is valid for political analysts to foresee a high probability of a future military incursion.

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Under the threat of an invasion, the United States, Europe, NATO, and Ukraine have demonstrated their staunch opposition to Russia's expansionist actions, in two different ways: diplomatically and militarily. In a diplomatic sense, Putin and Biden have held talks and negotiations since January, where the United States has sought specific security conditions, such as Ukraine's freedom to determine its membership status in NATO and the European Union without any "external pressures" (that is, a Russian military threat). On the other hand, Russia has demanded that Ukraine "never join these organizations", as it would interfere with their economic and security interests. To this day, negotiations are still ongoing, and it is uncertain whether the crisis will collapse into an armed conflict, or if it will be solved diplomatically.

As for military reactions, Russia has not guaranteed to halt maneuvers on its border with Ukraine ([Reuters, 2022](#)), and by February 5th 2022 it was estimated that the mobilization of troops had been completed up to 70%. ([Politico, 2022](#)) Once this figure is complete, it would reduce Russia's incentives to continue talks and negotiations, and it would increase the possibility for the invasion to occur. US officials estimate that the invasion's 'perfect' window of opportunity would be from mid-February to March, and because of this it is urgent that the talks are completed before then. On the other hand, the west's military response has been a tactical mobilization of troops, supplies, missiles and weapons to neighboring countries like Norway and Poland. It is expected that US military personnel will stay in Europe for about two months, or until the crisis is solved.

This crisis highlights the grown relevance of cyberwarfare as a new method of combat, and demonstrates how urgent it is for governments, both in Europe and North America, as in the rest of the world, to prioritize their cyber defenses. Dozens of Russian cyberattacks in Ukraine and the United States have been reported for years now, targeting critical infrastructure like the 'Colonial Pipeline', an oil and gasoline pipeline of which 45% of the South East depends on. The attack was traced to Russia, as its code was written in the same language. In 2015, a cyberattack was also reported in Ukraine's power grid, causing a 6-hour nationwide shutdown. For this reason, it's important to consider the possibility that an invasion of Ukraine may start with a wave of cyberattacks to critical infrastructure like its power grid, instead of a conventional military deployment.

2022's Presidential Elections in Latin America

Latin America's political panorama for 2022 shows a clear tendency towards the left. Today, three of its five largest economies function under leftist or center-left governments (Manuel López Obrador in México, Alberto Fernández in Argentina and Gabriel Boric in Chile), and the other two, Colombia and Brazil, will hold presidential elections this year. If both leftist candidates win, it would imply a sudden change in the political, economic and security panorama of the region, as its five most important actors would be functioning under similar ideologies. This phenomenon would be comparable to 2005's 'Pink Wave', where most Latin American countries, except for Colombia, Mexico and Chile, were governed by leftist leaders. Besides being a political phenomenon, it was also dominated by the 'commodities boom', where high prices of raw materials allowed a sudden influx of capital into the region. It's possible that this pattern will repeat itself in the coming years, considering oil has almost hit \$100 USD for the first time since 2014, along with the sudden price

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surge of other raw materials. ([Reuters, 2022](#)). Just like with the ‘Pink Tide’ phenomenon, a sudden influx of capital could strengthen the Latin American economies, possibly guaranteeing the re-election of leftist leaders in 2025-2026.

According to Colombian media, if the elections were held today, Gustavo Petro would be president. A 77% favorability index is reported within his coalition, which guarantees his nomination as candidate. Petro’s ‘Pacto Histórico’ coalition has 30% favorability index, eight points above ‘Centro Esperanza’, the second most popular one. Among candidates, voting preferences are spread out, and nationwide, the “black vote” option is the second most popular at 19% ([Semana, 2022](#)). In this sense, it’s possible to predict several economic and security implications that may take place under a Petro government.

Within Petro’s list of proposals, one would bring important economic and security consequences on a regional level. The candidate has promised to cease all new oil and gas exploration projects on his first day of tenure ([El Tiempo, 2021](#)). If consumption remains stable, this would mean that the Colombian economy has around seven years for it to adapt completely to a hydrocarbon-free future.

This proposal has been widely criticized for the impact it would have on industries on which the economy hinges on, not just oil giants like Ecopetrol but also smaller businesses that depend on petrochemicals. It should also be considered that more than half of Colombia’s exports in 2021 were hydrocarbons (and its derivatives), for which seven years to solve a 50% export deficit seems like an excessively short time margin.

This proposal would also demand closer political and economic ties to neighboring countries like Ecuador and Venezuela. Under a Petro presidency with intentions to halt local oil production, it would be necessary to supply a growing demand for oil and gasoline, for which Venezuela would be the most likely candidate. Once Colombia is unable to extract oil from its own soil, it would be forced to forge closer relations, not just to purchase hydrocarbons but also to negotiate fair prices for them. Today, Germany faces a similar energy security issue with Russia, where closer ties between the Merkel and Putin governments have been necessary, as most of Germany’s fuel and natural gas comes from Russia. These projects have been widely criticized for increasing Germany’s economic and energy security dependence on a country that has historically been hostile towards other European countries, as evidenced by the 2014 Invasion of Crimea.

Similarly, in Brazil’s 2022 presidential election polls, the highest-ranking candidates are Jair Bolsonaro and Luis Inácio Lula da Silva. However, Lula, who represents the largest left-wing party in Brazil (Worker’s Party) has registered almost ten points above Bolsonaro’s favorability index. His government’s pandemic policies have been cited as one of the major causes behind his low approval index, that reached less than 20% in November 2021. For this reason, political analysts predict his failure in October’s elections ([Brasil de Fato, 2021](#)). Additionally, Brazil’s Supreme Federal Court permitted his participation electoral processes again, after a corruption scandal that was eventually ruled out. With the Supreme Court’s approval, and lacking any legal obstructions, Lula now is a viable candidate for many Brazilians.

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In economic terms, it's possible to forecast certain economic implications that would occur under Lula's government. Inevitably, closer ties with China would be sought, both economically and diplomatically. It's important to note that Brazil is already a part of the 'BRICS' economic bloc, along with China, Russia, India and South Africa, and the Brazilian foreign minister has already declared that a future Lula government "would undoubtedly sway closer towards the Asian giant" ([El Economista, 2022](#)). Considering that during the last decade China has positioned itself as the number one trade partner of several Latin American countries, it's possible to say that both the United States and Europe's sphere of influence in the region is now growing weaker.

However, there is no reason to predict a military rapprochement between China and Brazil under a Lula presidency. On one hand, the military industry giants Embraer and SAAB Group have had close ties for several years now, under agreements that were even signed during Lula's first government. This isn't only evidenced by the purchase of 36 Gripen fighter jets in 2008, but also Embraer's pitch to manufacture planes locally, in other to export them to other Latin American countries. The only possible rapprochement between China and Colombia and/or Brazil would be technological; through the purchase of devices such as Huawei's 5G antennas. These purchases would even still be subject to pressure or to be blocked from the US.

Violence escalates for ELN and FARC dissidences

The year started with a series of ELN and FARC-sponsored terrorist attacks in different regions of Colombia, involving kidnappings, explosives, murders and threats. These attacks represent an escalation of violence that had not been seen throughout 2021, as 68 casualties were reported in Arauca just in January. These events are considered as the ELN's reactions to "recent apprehensions by law enforcement of high-value targets and the destruction of cocaine processing laboratories", according to official sources of the Colombian Armed Forces ([El Espectador, 2022](#)). However, according to military intelligence documents, a surge of ELN terrorist attacks is expected during the first semester of 2022. ([RCN, 2022](#)) These attacks would occur under a "Duque's Farewell Campaign", covering the electoral months of May and June. During these months, a higher number of kidnappings and Improvised Explosive Device (IED), known as "elenitas" attacks are expected. The campaign's targets would be public servants, businesses, military and police units, strategic infrastructure, as well as specific institutions like the INPEC and ESMAD.

Engagements between both GAOs have been identified, specifically between the 'Manuel Vásquez Castaño Eastern War Front'

Conclusions

1. To this date, it is uncertain whether the crisis between Russia and Ukraine will transform into an armed conflict and/or a nation-wide invasion; this will depend entirely on development of OTAN-Russia negotiations during the coming weeks. However, there is a limited 'window' of opportunity for negotiations to conclude before Russia is able to complete its military mobilization, as when this occurs there will be less incentives for the Russian government to remain in talks.

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2. It is likely that the leftist candidates Gustavo Petro and Luis Inácio Lula da Silva will win the 2022 presidential elections in Colombia and Brazil. This means that, by the end of the year, Latin America's five largest economies will be functioning under leftist governments, which may bring significant shifts in economic policies, and possibly closer ties between these countries. This would be the first time since 2005's 'Pink Tide' phenomenon that Latin America's most powerful countries will be governed by leftist leaders.
3. 2022 will undoubtedly be a year of escalated activities and violence by Organized Armed Groups (GAOs) such as the ELN and FARC dissidents. According to military intelligence sources, the number of terrorist attacks will increase significantly from February to March, during the election months, as part of a 'Duque's Farewell' campaign. It is expected that this terrorist campaign will engage in a continued use of Improvised Explosive Devices (IEDs), kidnappings, and attacks against public servants. Armed conflicts between the Venezuelan Armed Forces and Colombian GAOs are also expected.

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